

Greenbelt Farmers' Market Network

2010 Research Report

April 2010



INFORMA

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Executive Overview

Introduction

The following is based on indepth research (four focus groups and 12 individual interviews) and a telephone measurement survey conducted among a cross section of market managers and farmer vendors who participate in farmers' markets in and around the Greenbelt. The sample for the structured telephone interview consisted of 60 Greenbelt-based farmers and 40 market managers. This research was conducted between November 2009 and February 2010.

Key Findings

- Farmers' markets have common elements but also exhibit great diversity. The number of Greenbelt farmers' markets has surged ahead in the past five years following a slow growth period.
- Markets are dynamic retail venues providing farmers with direct access to customers. They are also vibrant hubs for farmer to customer information sharing, where many farmers are trying new crops and value-added items. Greenbelt farmers' markets are attracting shoppers in search of not only produce from local farms but organic and natural/low pesticide food, and a significant number of farms are responding to this demand in the process inspiring the majority of vendors to adapt their farm operations.
- Most managers and vendors report that 2009 sales either increased or were stable; only a minority experienced sales slumps. Although most markets are succeeding, one in three markets need funding to continue operating and the remainder require support to improve their operations. Funding is critical for salaries, advertising/promoting the markets, onsite signage, entertainment/events, customer education/food preparation and cooking demonstrations, etc.
- Revenue from this direct to customer distribution channel represents a significant and in some cases an increasing portion of total farm sales. Most vendors plan to continue participating in the same number of markets or more in 2010.
- Market managers are encouraged to keep records in order to build on experience and possibly to attract sponsorship and grants. This could include an estimate of sales (provided anonymously by vendors), a customer traffic count, market events/attractions, competing local events/occasions, weather conditions, etc. The farmers' market segment can accrue many benefits by establishing tracking systems: planning the future should be based on past accomplishments.

- Vendors and market managers are optimistic for the future and concur on many points including the goal of ensuring that markets sell primarily items from the vendors' own farms. Local food from local farms is the guiding principle with strong support for some leeway for selling items from other sources, and including some non-farm products in the market's mix. Flexibility is critical allowing vendors to adjust to seasonal changes, fill in gaps and expand the array beyond simply what they can produce. The goal is to satisfy more shoppers' needs and in the process earn a bigger share of the food dollar with an array food beyond fresh produce, meat, eggs and dairy products including bread and baked goods, coffee and ready-to-eat snacks, etc.
- Markets have the opportunity to capture more sales by a variety of strategies: increasing customer access by extending the season one month in the fall, and where facilities allow becoming a year round market; enhancing the market dynamic and customer benefit with onsite product promotion and mini cooking demonstrations to reinforce the positive impact of markets as go-to places for healthy, locally based diets. Farmers' markets go well beyond simply retailing; they providing a family-friendly environment for meeting people, sharing ideas and learning more about local food and how it differs from 'industrial food'.
- Market success is based on a combination of factors: a good balance of vendors selling local fresh food and value-added items, a multi-tasking manager and a food-engaged local community. While the primary relationship is between farmers/vendors and their customers, the role that managers play in facilitating and supporting it is central to the success of markets. Managers are required to play many roles in their oftentimes part-time job, including: organizing and administering behind the scenes, interacting with property owners and local government, fundraising and promotions, problem solving on market day, sourcing and retaining a good balance of vendors, etc. In addition to needing training, they should be receiving a living wage in order to continue their commitment to the job.
- Managers and vendors support training, skill development and best practices information sharing to continue building on the growing farmers' market sector.

Recommended Next Steps

Market Planning: Customer Feedback and Price Tracking

- This study focused on the health of farmers' markets from the perspective of vendors and market managers. The next logical step is to examine the impact that the markets are having on their customers, i.e. impact on their consumption of fresh fruit and vegetables, shifts in eating habits, perception of local food (price, taste, quality, environmental impact), identify market strengths and gaps/weaknesses, track satisfaction rating with amenities (parking, washrooms, ATM access) and test new ideas.

- Conduct periodic price scans based on a seasonal basket to assist in analysis of pricing trends in a variety of retail venues. Provide price comparisons for vendors, possibly to assist in setting price ranges and also use to inform customers including why prices differ than those at supermarkets. This data could be a useful component in market network discussions and end of season analyses.
- Market vendors have a rich opportunity to tell the local food story. The people who flock to the markets are hungry for connection with their food and with the farmers who are responsible for providing it.
- Profiling the surrounding community using available census data (age, size and composition of households, household income, ethnicity etc.) will assist in defining the market customer base. This information will be useful in shaping outreach initiatives to connecting organizations and potentially help vendors shape their offerings in terms of portion sizes and selection.

Market Infrastructure and Funding

- Strengthen connections – to local food industry sector distribution, information sharing and learning opportunities, best practices, staff recruitment, sales techniques, provide access to consumer education/promotional resources. Market manager training and skills sharing can be achieved through existing support organizations and farmer market networks and possibly expanding access using interactive electronic tools.
- Markets also provide opportunities for like minded non-profit organizations and government health, agricultural and environmental displays and community education initiatives. And, for shoppers and visitors it expands the reasons to visit their local farmers' market.
- Farmers' markets have triple bottom line benefits. Make the connection to local health and environmental organizations and to government, positioning farmers' markets as an increasingly significant channel for distributing healthy, fresh, local food. Markets are a win-win-win for the Ontario agricultural sector, people's health and community sustainability. Not only is there potential to do onsite events, information exchanges/public education outreach but to capture government health promotion and environmental grants.
- Farmers' markets practice zero or minimal waste behaviour substantially reducing the amount of packaging waste that shoppers carry home compared to supermarkets. As Ontario moves ahead on zero waste and extended producer responsibility, possibly farmers' markets might be eligible for grants.

Background and Aims

Greenbelt Farmers' Market Network (GFMN) is a new initiative to strengthen the network of nearly 100 farmer's markets that operate in and around the Greenbelt. The number of markets has grown rapidly to meet the galloping growth in consumer demand for fresh, local food. Farmers' markets provide people with direct access to growers and an opportunity to establish friendly exchanges with those who are growing their food. This interaction provides shoppers with sought-after authenticity and in the process can bolster the income of growers by providing direct access to their market. It also resolves the problem of reaching buyers via large retail chains with centralized buying practices.

Extensive market research has recently been conducted providing both national and provincial data of farmers' markets based on interviews with market managers, vendors, market shoppers and food buyers who do not shop at markets. This study, specifically *Farmers' Market Ontario Impact Study 2009 Report*, provides a wealth of information about markets from a province-wide perspective. The following study was conducted to build on this learning by providing an additional layer of indepth information and factual data that applies specifically to the Greenbelt Farmers' Markets. The focus is strictly on managers and vendors.

The Network's intent for conducting this study was to learn what market managers and farmer/vendors could need to strengthen their offering and to contribute to information sharing and knowledge transfer. Specifically, here is a partial list of information topics covered in the study:

- More detailed profile of the GFMN markets in terms of size (number of vendors), product scope/range, specialty versus quantity sales, hours of operation, location, seasonal versus year round opportunities, etc.
- Size of market and number of vendors: do fewer vendors capture more market share than large markets with many vendors?
- Reaching out to shoppers– explore strategies employed by markets and individual growers
- Market structure and decision-making models – what operational structures are most positive for producers?
- Capture some of the recent changes that have occurred in the realm of farmers' markets
- Reaching beyond the markets – probe impact of market exposure on farm operations, including additional sales channels (CSA's. etc.) and value added products (extending the season)
- Vendor operations including number and range of offerings, size and location of farm, travel distance to markets, number of markets engaged in, etc.

- Explore issue of attending more than one market and time pressures: only farmer grown versus representing other local growers, formal co-op sales and informal collaborations – pros and cons of different approaches`
- Market managers – job description/tasks, experience levels, interest in training and job development opportunities, sharing and consultation with other market managers.
- Market promotions and marketing initiatives – steps taken and perceived impact, openness to new options, methods of reaching out to the local market
- Shopper concerns, what questions are they asking? Onsite and offsite communication/ education
- Innovations of interest for markets, market managers and vendors

Study Methods – Indepth and Measurement Research

The range of information sought from this project includes a combination of indepth feedback from market managers and vendors and quantification of key variables (i.e. market size and vendor travel distance) and issues (such as, operation rules and decision-making processes). Hence, the following steps:

Individual Interviews – Market Managers and Vendors

Twelve individual interviews were conducted consisting of six each with market managers and vendors. The project team (GFMN and Informa) made contact with a range of potential participants to book a convenient time for a telephone interview. The major points that were covered during the course of the interviews varied depending on the respondent's role, but included:

1. Details about their role as manager or vendor
2. Specific facts about their market and length of history at the market and/or farmer's markets
3. What works for them – benefits and challenges of participation
4. Financial investment and rewards. Is there long term growth?
5. Perceived strengths and weaknesses of participating in a farmer's market
6. Product presentation/merchandising and packaging issues based on shopper responses
7. Degree of interest in further committing to enhancing their local market
8. Role of promotions and marketing onsite and through other channels
9. Ideas for extending the range of offerings and market season
10. Potential skill-enhancing workshops/aids
11. Services and support desired from GFMN

Two semi-structured questionnaires were then prepared in conjunction with GNFM (one for market managers and one for vendors); there was some overlap in questions in order to obtain different

perspectives on an issue based on their role. Responses were manually recorded and input. Transcripts of interviews were prepared: respondents agreed to being taped and confidentiality of responses was assured. Learning from the interviews was then used to develop both focus group Discussion Guides and the questionnaires for the Measurement Surveys. Also, a range of verbatim comments from the interviews have been incorporated into this report in order to illustrate the range and tone of responses.

Focus Groups – Market Managers and Vendors

A total of four focus groups were conducted, two with market managers and two with a selection of vendors. Half of the sessions (one with vendors and one with market managers) took place in the western region (Hamilton) of the Greenbelt and the other half in the eastern region (Stouffville, York Region). Each group consisted of six to eight participants and had an equal mix of women and men for a total of 28 participants.

The participants were recruited by GFMN, guided by a script developed by Informa. The sessions were scheduled to accommodate participants, on a Saturday after the market season, in November. Respondents received a small honorarium (\$50) and refreshments appropriate to the time of the session.

The focus groups took place at a venue such as a centrally located community centre that is conveniently located, given that respondents would be required to travel from a number of different locations. The proceedings were video-taped, with the approval of participants. Transcripts were then prepared.

The project lead, H  l  ne St.Jacques conducted all of the sessions in order to assure for consistency and to maximize learning. Two Discussion Guides were used - one for vendors and one for market managers, however there would be overlapping issues that apply to both segments (See Appendix 1).

Measurement Survey - Market Managers and Vendors

The consultant distilled learning from the indepth interviews and focus groups and developed two structured questionnaires, one for vendors and one for market managers, in conjunction with GFMN (See Appendix 2). The estimated completion time was approximately 25 minutes.

A total of 100 interviews were conducted, 60 with vendors and 40 market managers. This split is advised to ensure that the size of each segment has statistical validity. GFMN provided an electronic data base that was used for this survey. The interviews were conducted by an experienced business-to-business survey interviewer. The data was then input and computer tables were generated to form the analytic base for this report.

DETAILED FINDINGS – TELEPHONE INTERVIEWS

Introduction

The report is based on 60 structured telephone interviews conducted among a sample of 60 farmers and 40 market managers who participate in farmers' markets located in and around the Greenbelt. The average length of interview was approximately 25 minutes.

The findings of this research segment are summarized below and then followed by the details accompanied by charts and tables.

MEASUREMENT SURVEY HIGHLIGHTS

FARMERS' MARKETS

- Most markets represented in this study are seasonal (80%); seasonal markets tend to have fewer vendors than those operating year round. Just under half (46%) of markets have been in operation for up to five years. It is noteworthy that almost all of the remainder (50%) are more than 10 years old while there was very little growth during the intervening five years.
- About two thirds of the markets were described as having a "good balance of products" but one third identified gaps which seem to be primarily related to dairy, eggs and meat. About half of the markets offer a mix of produce and value-added items (i.e. baked goods) while about four in ten also have craft vendors.
- A small majority of markets (58%) are located on publicly owned property (parks, community centres, etc.) while the remainder are on private property such as a mall parking lot. Regardless of ownership in a slight majority of instances the property owner has some to a lot of influence on the market's operations. However, the health department tends to work closely with markets; relationships were characterized as supportive in most cases.
- Most markets are not charged for water, energy, parking or other services but more than half pay rental. It is worth noting that in two thirds of instances the local government is not involved in either the operations or funding, yet 75% of market managers report that the market has received either monetary or other kinds of support (advertising, training, etc.) from a program or organization. Many sources were cited including the Greenbelt Foundation.
- The majority of markets (75%) belong to Farmers' Market Ontario with just over half having FMO insurance coverage.

VENDOR PROFILE

- The majority of vendors have farm acreages of less than 69 acres, with about half indicating that less than 10 acres are used to grow items for the markets. About six in ten respondents practice integrated pest management and a remarkable 20% are either certified organic or in transition
- Most vendors require staff for both farm operations and the market(s). Generally, it appears that seasonal vendors tend to hire more help for both sides of their business.
- On average the vendors who took part in the telephone survey participate in 2.2 markets – the majority attend two or more markets while smaller numbers either attend one market (23%) or four or more markets (20%). The majority report that they have not increased the number of markets they are attending since 2007, while most of the remainder are branching out to more markets.
- Choosing which farmers markets to attend involves weighing a number of factors lead by minimizing transportation time by selecting a market that is in close proximity to their farm. But they also want to allocate time to markets that have strong customer support for locally grown food and are well managed.
- Vendors face a wide variety of challenges/problems attending markets including staff shortages, low customer traffic, inclement weather, hassles parking and setting up, traffic jams and lack of parking, bringing the right amount and mix of products, making up for time away from the farm, etc.
- Participating in farmers' markets can have a minor or major impact on farm operations. Two thirds of vendors report that as a result of this experience they have tried growing different crops or raising different livestock or added new products and almost an equal number have created value-added items. Half of vendors indicated that it has been instrumental in leading them to new revenue sources – chefs, CSA's, local stores, etc.

MARKET MANAGERS

- Most market managers tend to have experience in one or more of these areas: community leadership, retailing and farming. Six in ten managers have been in their position five years or less. Most spend over 10 hours per week at this position. And, a slight majority are paid for their time, usually from market revenue.
- The job of a market manager involves a wide variety of tasks including organizing events, advertising/promotions, vendor selection and communications, onsite problem solving, setup/cleanup, budgeting/finance, interacting with local government and public health department, customer relations etc. In addition, one of the leading attributes of a successful market manager is “a good people person”.
- Vendors place considerable emphasis on not only the manager's people skills but also on their ability to advertise/promote the market, survey customers, hold regular meetings with vendors,

establish a market board with vendor representatives, have a knowledge of local crops and vet the source of items sold at the market to ensure that they are locally grown.

EDUCATION & TRAINING

- Almost all managers are interested in sharing knowledge with other managers and attending professional development events. The most appealing topics include, listed in order of interest: connecting your market with the community, grants/accessing financial support, enhancing your market's atmosphere and mediation and conflict resolution.
- According to market managers vendors would find the following most valuable: ways of promoting your farm, followed at some distance by new product ideas, and season extension techniques. Vendors reactions to these training modules was quite positive with most interest directed to display/sales techniques and lower interest in season extension techniques, nonetheless 42% were very interested in this topic.

MARKET POLICIES & DECISION MAKING

- Almost all markets have formal rules/policies which are shared with vendors; most are based on input from vendors. The majority of markets hold regular formal meetings with vendors and half of vendors either are currently on a market board or have been in the past. The measured feedback from vendors and managers on these points are very similar – there are no major gaps between these two groups.
- Declines tend to be linked mainly with uncontrollable factors such as adverse weather conditions or the economic slump while growth is seen as a function of effective advertising and community outreach plus the ability to attract customers who are able and willing to opt for locally grown food and value-added goods. Also, competition from major supermarkets that are open 24/7 and stock low priced export produce represents an on-going challenge to weekly farmers' markets selling seasonal and fresh.
- Six in ten vendors support both the concept of expanding the season by one month in the fall and increasing the number of year round markets.

SOURCES OF MARKET ITEMS

- Most (at least 8 in 10) markets permit farmer vendors to sell produce/items that do not come from their farm. However both a large minority of managers (43%) and vendors (48%) report that the origin of items is a "challenge" affecting relationships with vendors, management or customers.
- Most vendors and managers are closely aligned on two key points:

farmers who are selling what they grow on their farm should have priority over those selling items from other farms, and farmers' markets should be flexible, permitting vendors to supplement what they grow with other products.

- There is some difference however on the issue of 'farmers markets are for farmers only'. Half of farmers think this is right, while only one quarter of managers support this exclusive policy. Yet oddly vendors are more supportive of the notion that some limits should be placed on what vendors sell than are market managers. However, it must be noted that the majority in both sectors agree that some limits are necessary.
- The recent growth in the number of farmers' market is viewed positively by most managers and vendors. Further, three quarters of vendors think that 'markets are here to stay'; most of the remainder are uncertain of the future of markets.

SALES & REVENUE

- Although the majority of markets do not keep sales records, managers and vendor's views on the sales results are remarkably similar. To illustrate, four in ten vendors report that their sales increased in 2009 while just over one quarter (28%) say they were flat. Another 22% indicated their sales declined. Compare this with four in ten managers believe that sales have increased in the past few years, about one in three think they are stable and only a minority indicated a decline.
- One third of managers keep a record of market sales and activities for each market day, yet most managers (76%) believe that gathering sales estimates from vendors anonymously could be helpful. The potential benefits of keeping records includes helping them manage and plan, make the case for grants/sponsors, 'data mining' and backup for establishing rates/commissions and attracting new vendors. However, some managers are conflicted on the issue of requesting sales estimates from vendors. While they agree that this information would be useful the majority (58%) of managers believe that vendors should not be required to provide it.
- One in four vendors indicate that they are providing sales estimates on an anonymous basis and overall four in ten indicate that they would be willing to do so, if asked.
- Just under half of vendors (45%) derive more than half of their total revenue from farmers' markets, while the remainder indicate it represents either less than one quarter or up to half of their total income. Over the last five year period market sales represent a larger share of revenue for 37% of vendors; the remainder report that it is either the same or less than in the past.
- Seven in ten managers report that the number of people who shop at their market has grown in the last year. About eight in ten say their market is "thriving" yet the majority (63%) need

financial support to fund improvements. Fortunately only about three in ten report that they need funding to continue operating.

CUSTOMERS

- Both vendors and managers have very similar views on customer's needs. The majority concur that people who shop at their markets are interested in learning more about the farms, how the produce is grown, the benefits of buying local, and how to prepare meals with market ingredients. Six in ten agree that "more shoppers are asking for organic produce/items". However they hold differing views on the popularity of the market – 70% of managers believe the number of people who shop at the market has grown in the past year, while only 53% of vendors hold this view.
- About four in ten vendors and markets agree that shoppers are either complaining about the prices or that their customers expect market prices to be equivalent to those at supermarkets.

ADVERTISING/PROMOTIONS

- While market managers and vendors agree that markets need to be promoted in order to prosper the budget or ability to do so may fall short of the ideal.
- Almost all managers are promoting or advertising their market using a myriad of channels. Newspaper ads/articles are the leading method. And near half or more use websites, sandwich boards, or radio ads. Only one in four markets have an e-newsletter.
- About half of markets spend over \$2,000 per annum on these efforts, while most of the remainder have less money to reach out to customers. And, about one in five are unable to assign a dollar value to their ad budget.
- Most managers indicate at least one quarter or more of the ad budget is free, donated or generated by staff.
- Vendors strongly endorse using signs/posters outside and in the market area, onsite promotions featuring pictures of farms and attractive signage and onsite education about local and seasonal food. However, only six in ten are active in promoting their farms aside from signage at the market. Those who are reaching out to customers as part of marketing their farms and value-added items use a wide variety of mediums including ads in local papers and websites. A minority also have installed road signs and encourage farm tours.
- **GROWING MARKETS**
Useful tools for growing farmers' markets, listed in order of appeal: provide a wider range of products, onsite education about local and seasonal food, onsite cooking classes and food demonstrations, merchandising (displays, pictures of farms, etc.), and market website with information about the farms.

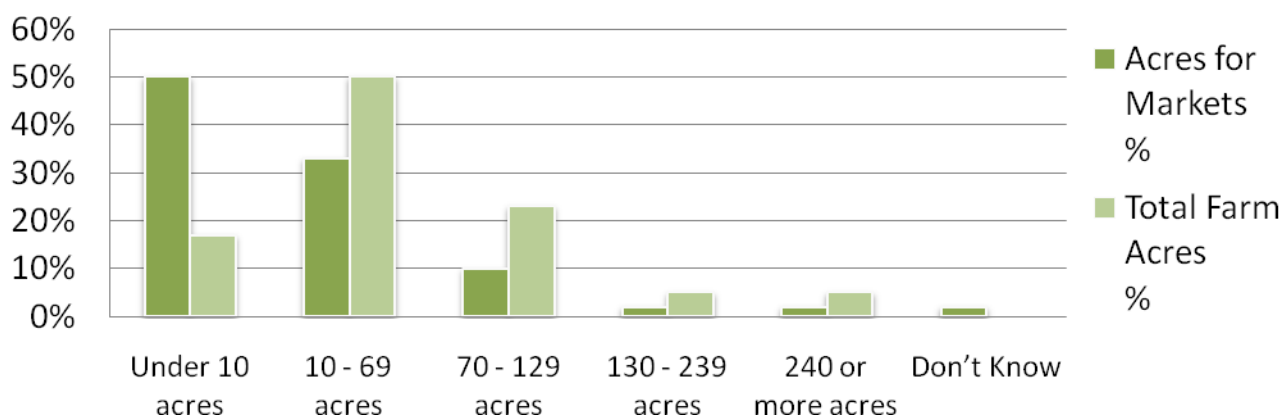
- While perspectives vary on the local farm sector's ability to continue expanding to meet potential growth in farmers' markets, the same proportion of vendors and managers agree that there could be challenges in doing so. Four in ten (42%) vendors agree that there is a shortage of farmers who are willing/able to participate in markets and about half of managers (48%) report that they are having currently difficulty in locating more vendors for their markets.
- Market managers ideas for growth include expanding both advertising/promotion (on and offsite) initiatives and enhancing the onsite entertainment and events that help animate the market. Some managers would also like to increase the number of vendors or have more farmers selling produce. Other growth promotion tactics include sourcing financial support, expanding parking, expanding the site or moving to a new site.

Telephone Interview Study Details

VENDORS

Farm Background

- Just under two thirds (63%) of the farmers present at Greenbelt farmers' markets have relatively small farms – less than 69 acres. Most of the remainder (23%) indicate their farms are in the 70 to 129 acre range.
- Half (50%) of these producers are using less than 10 acres to grow products sold at the farmers' markets, proving the point that an abundance of produce can be generated on modest sizes of land.
- Another one in three producers (33%) indicate they use between 10 and 69 acres of land to generate products that are sold at the market. This could include a combination of mixed farms with livestock, grain crops and produce and those who are growing large volumes of a few items, such as orchards or commodities (potatoes, onions, cabbage, etc.).



The vendors' farming practices indicate that generally Greenbelt Farmers' Market producers are likely somewhat atypical as regards their adoption of Local Food Plus (50%) and organic certification (12%). It is also noteworthy that an additional 8% of vendors are in transition. Other practices and trends were provided including grass fed, chemical avoidance, and use of greenhouses.

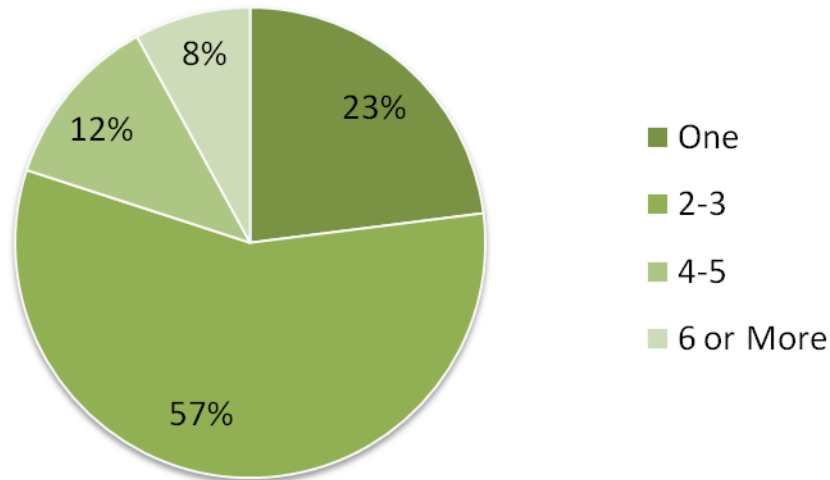
Terms used to describe your farming practices:	Total %
Practicing Integrated Pest Management	67%
LFP certified	50%
Conventional	45%
Certified Organic	12%
In transition	8%
None	3%
Other	22%

- Given the wide range of farm sizes and types of operations, the number of on-farm and market employees varies considerably. The average number of full- and part-time jobs is larger on the production side than for their market operation.

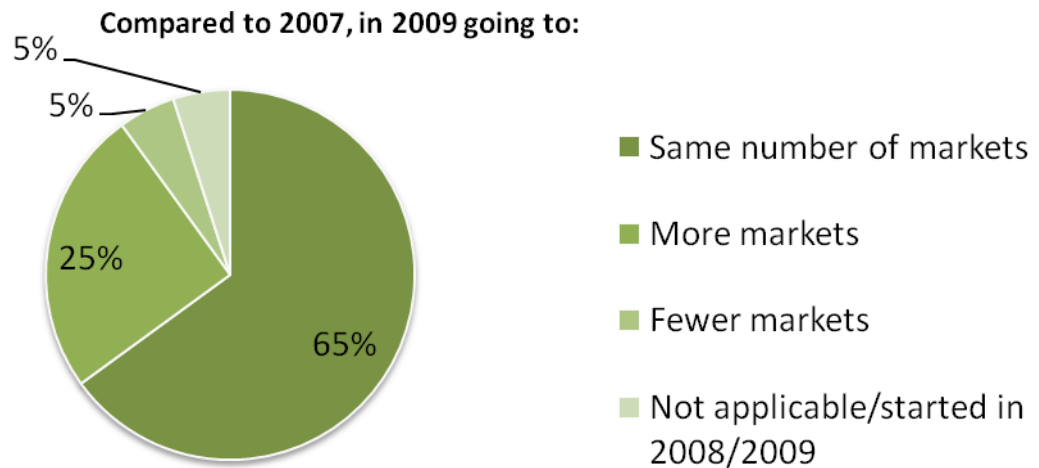
Number of people employed for the farm operation and market staff, including paid and unpaid assistance:	<u>Farm Operations:</u>		<u>Market Staff:</u>	
	Full Time %	Seasonal %	Full Time %	Seasonal %
None/no employees	18%	22%	42%	28%
1	28%	8%	25%	10%
2	33%	12%	20%	13%
3-4	10%	20%	13%	25%
5 or more	10%	38%	-	23%
AVERAGE	3.8	6.6	1.1	4.3

- On average vendors are involved in selling at 2.2 markets, but this varies considerably. About one in four (23%) indicate they sell at one market only, while another 57% are present at two to three markets. And about one in five vendors rotate between four or more markets.

Number of farmers' markets participated in in 2009:

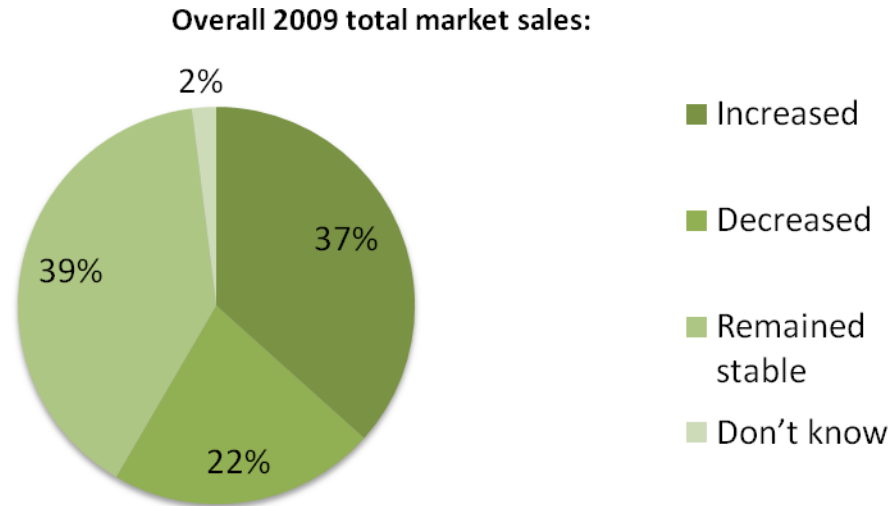


- While two-thirds of vendors say they have not increased the number of markets they are attending since 2007, one in four have added more markets. It is noteworthy that most vendors are not scaling back – only 5% are attending few markets in 2009. Further, most (70%) indicate they plan to attend the same number of markets in 2010 as they did in 2009.



Sales Totals and Related Factors

At least three-quarters (77%) of vendors have either increased sales or kept them at the same level as previously. The remaining 22% indicate their revenues declined in 2009.



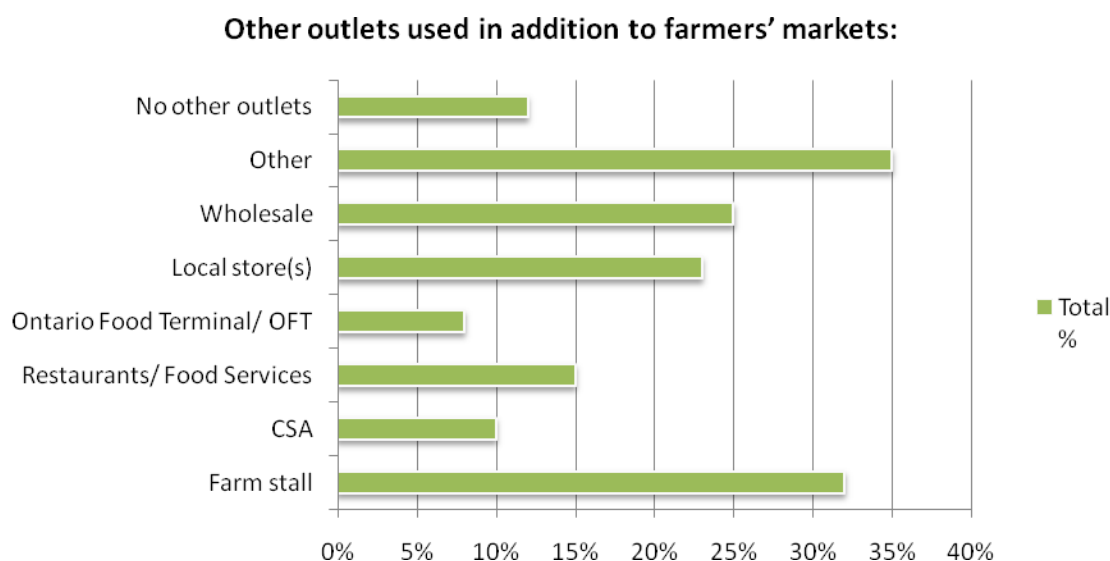
- A variety of reasons were attributed to the 2009 sales results. The improved sales picture is linked with increasing interest in local food (15%), higher market attendance (10%), and more advertising/promotions (8%). Whereas flat or declining revenues are attributed to weather (13%), the economy/recession (10%), competition from other markets (5%), going to less/fewer markets (2%), fewer vendors (2%) and less/no advertising/promotion (2%).

Factors related to the changes:	Total %
More people interested in local food	15
Weather	13
Going to more markets	10
The economy/ recession	10
More advertising/ promotions	8
Farm Production - e.g., crop failure or bumper crop	7
Competition from other markets	5
More vendors	3
New location	3
Going to less/fewer markets.	2
Fewer vendors	2
Less/ no advertising/ promotions	2
Other	50
No Factors	18

- Projection for 2010 – most (70%) farmer vendors intend to attend the same number of markets as in 2009. The remaining 30% are divided between reducing and increasing their commitment to selling via farmers' markets.

Number of markets planning to attend in 2010:	Total %
Adding more markets	15
Reducing the number of markets	15
Attending the same number as 2009	70

- Most vendors (88%) appear to have at least one or two other sales outlets in addition to farmers' markets. As the chart below indicates, farmgate/direct from the farm sales is one of the other major sales channels.



- Vendors are selling a wide variety of items, dominated by vegetables, berries, apples, tender fruit and herbs. A much lower incidence of vendors are bringing horticultural products (cut flowers and bedding plants), honey, maple syrup, meat (beef, pork, lamb and chicken) and eggs. They are much less likely to be providing value-added items and baked goods/bread. On average, vendors indicated that they are selling 3.38 items which could be interpreted in a number of ways, i.e. the number of types of vegetables or the number of categories including fruit, vegetables and value-added items.

Now think about farmers' markets, what kinds of items do you usually sell there?	Total %
Vegetables	63
Berries/ strawberries/ blackberries	52
Apples and pears	45
Tender fruits/ peaches/ plums	38
Herbs	28
Cut Flowers	20
Bedding Plants	18
Plants and seeds	18
Honey	15
Maple Syrup	10
Meat, beef, lamb, pork	8
Eggs	7
Bread, baking	7
Prepared food	7
Chicken	5
Specialty meat (elk, boar, goat)	2
Cheese	2
Crafts	2
Other	10
Average	3.38

Source of Market Items

- Over eight out of ten vendors (83%) indicate that the markets they participate in permit items to be sold that do not come from their farm. Only about one in ten (12%) say this is not permitted at their markets. This is in line with market manager feedback – 90% indicated that their market allows vendors to sell produce/items that do not come from their farms.

Do any of the markets you attend permit farmer vendors to sell produce/ items that does not come from their farm?	Total %
Yes	83
No	12
Don't know	5

- The issue of the origin of items sold at farmers' markets affects about half (48%) of vendors – it crops up in their relations with other vendors, market management and/or customers.

Are there challenges among vendors, market management or with customers regarding the source of products at the market?	Total %
Yes	48
No	45
Don't know	7

Selecting a Farmers' Market – Factors that Influence Choice

- A number of variables come into play in the selection of which farmers' markets vendors will invest their time in, as the table below indicates. At the top of the list is the distance from their farm – the ideal is to minimize travel time and related costs. Secondly is the popularity of the market and whether it has established a strong franchise in the local community. Thirdly is the market's management including the manager, treatment of vendors and cost of participation.

Now, thinking about the farmers' markets that you have chosen to attend, what are the main factors that you consider when choosing a market? Are there any others?	Total %
Close to the farm/ short travel distance	53
Many/ lots of shoppers	13
In my community	12
Good market/ strong market	8
Established market	8
Good management/ manager	8
Reasonable rates/ cheap rates	7
Finding customers who want my product	7
Fair treatment/ farmer friendly	3
Flexible market/ can come and go	2
Other	67
Don't know	2

- Participating in farmers' markets presents many possible challenges to grower/producers that may touch on both the farm operation and what occurs at the market. It is a complicated dynamic which requires vendors to stretch valuable time and resources. In addition to practical matters such as traffic to and from the market and vehicle access at the market, there are the problems that some vendors are encountering with other vendors. There can be competition among vendors and issues crop up such as authenticity, pricing and sourcing.

Three major challenges or problems encountered attending markets:	Total %
Shortage of staff	8
Parking/ vehicle access	8
Too few/ not enough customers	7
Time away from the farm	7
Traffic/ Transportation time	5
Market hours	2
Other	82
None	17

Market Management

The personality and skills of the market manager have considerable impact on vendors and on the overall smooth running of their market. It is important to have a calm, mature and friendly person at the helm of the market who can deal fairly with people and handle complex situations as/when they arise. This is more valued than their knowledge of farming. Nevertheless it is critical that managers appreciate local food and the people who produce it. This is not to discount the need for managers to be competent administrators, marketers and event planners but possibly these tasks are less visible.

Vendors rated the relative importance of eight different manager functions using a four point scale (four is the highest rating and one is the lowest rating).

- Managers are expected to be informed and active on several different fronts. Leading the way are advertising/promotions and obtaining formal feedback (survey) from customers.
- The organization should hold regular vendor meetings and engages vendors in the market's board.
- Market managers should be conversant with what is grown locally and when it is in season.
- Managers should also monitor the origin of market offerings – 80% of vendors agree that it should be entirely or mainly what vendors are producing. More than half (58%) think that farm tours/inspections are necessary/important.

Now thinking about market managers, based on your experience at farmers' markets, what skills should an effective market manager have?	Total %
A good "people" person	43
Knowledge of farming/ agriculture	35
Organizing	23
Local food awareness/ knowledge	20
Administrative/ administration	13
Management	13
Event planning	13
Advertising/ promotions	13
Other	73
Refused	3
Don't know	2

Based on what Market Managers should be doing, please tell me if it is:	Very & Somewhat Important %	Mean Summary
Advertise and promote the market	100	3.9
Survey customers for feedback	93	3.4
Hold regular meetings with market vendors	93	3.4
Establish a market board that has farmer representatives.	90	3.5
Market managers need to be educated – what's local and when the crop is ready.	85	3.5
Ensure that vendors are selling only or mainly what they grow.	80	3.1
Do farm inspections	58	2.7
Gather sales data anonymously and share it regularly	43	2.2

Policies & Decision Making

- The majority of markets have policies and processes in place. Looking more closely, most (95%) of the farmers' markets represented in this survey have a formal list of policies or rules that govern their operation. And, further, in the majority (70%) of instances they have been formulated with the input of vendors.

- Eight in ten vendors (83%) indicate that the markets they attend periodically hold formal meetings with vendors.
- Local public health authorities are twice as likely to have a role in shaping market policies as the local government – 85% versus 45%. This is understandable given that X% of markets are located on privately owned property, such as malls.
- One half (50%) of vendors have been active in a market organization (board or committee participation).

Statements about market policies and the decision making processes.	Yes %	No %	Don't Know %
Does the market have a formal list of rules/ policies that is handed out to vendors?	95	3	2
As far as you know, is the public health department involved in shaping the market policies?	85	12	3
Are formal meetings held from time to time with the market vendors?	83	13	3
Are the market rules derived using a shared decision making process that invites input from vendors?	70	27	3
Does the local government play a role in shaping the market policies?	45	38	17

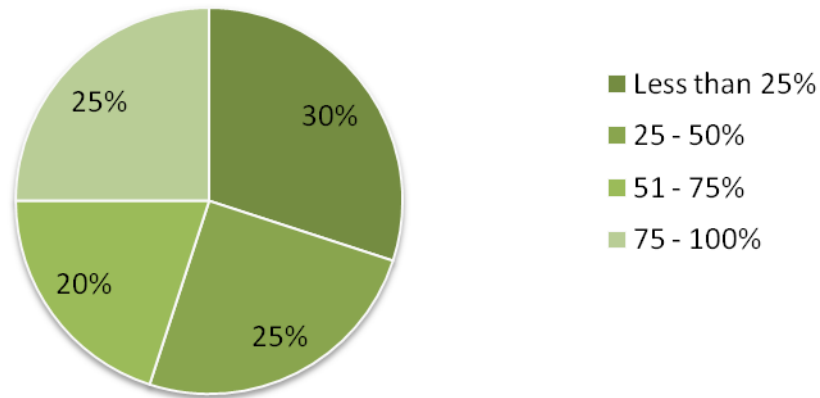
Are you currently or have you ever been on a market board/ committee?	Total %
Yes	50
No	50

Tracking Market Sales

- About one in four vendors (23%) are providing sales data/estimates to market management, although more than half (55%) do keep a record of sales.
- About four in ten (39%) express a willingness to regularly provide sales estimates “in order to track market success or overall economic impact of the market.” This indicates that more vendors are receptive to helping assess the impact of their market than are being asked to do so.
- The amount that farmers’ markets contribute to a vendor farm’s total revenue varies significantly. At the top end, just under half (45%) of vendors report that farmers’ markets

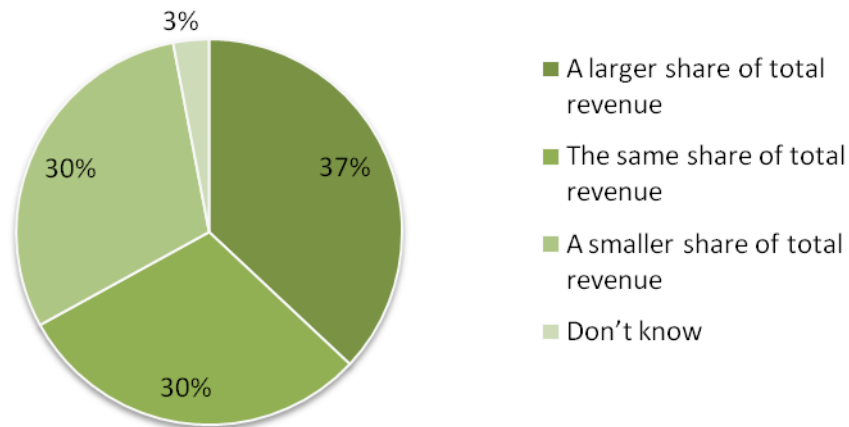
provide between 50 to 100% of their revenue. In fact one in four (25%) rely solely on the markets' for their livelihood. On the other hand, a slight majority (55%) of vendors derive no more than half of their farm sale revenue from farmers' markets, with 30% indicating that it represents less than one-quarter of total annual sales.

Approximate percent of your total farm sales comes from farmers' markets:



- The relative impact of market sales on revenue has changed for the majority (67%) of vendors over the past five years. Just under four in ten (37%) say that it now represents a larger share, while another 30% find it has contracted – it's a smaller share now in 2009. The remaining 30% find that there is no movement during this period.

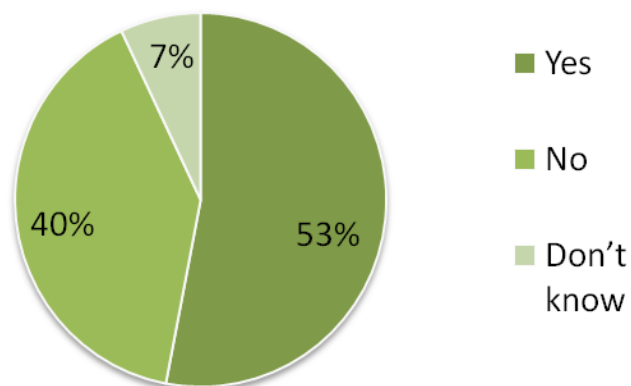
Looking over the past 5 years, sales at farmers' markets represent:



Impact on Sales and Production

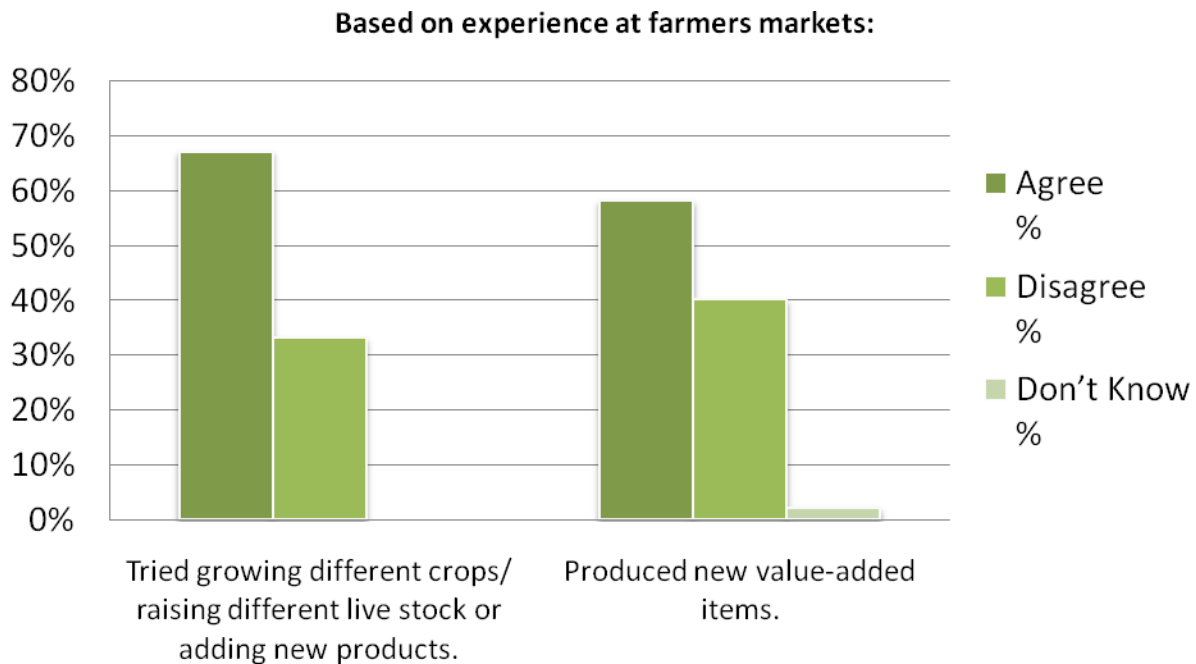
Aside from revenue, participation in farmers' markets has yielded a positive dividend for at least half (53%) of vendors – it has resulted in networking with a broader client base which could include chefs, local stores and CSA customers. On the other hand, four in ten vendors conclude that their presence at markets has not helped expand their customer base.

Has attending markets led to increased contacts with other sales channels such as chefs, stores near the market, CSA customers?



- Two thirds (67%) of vendors have responded to market demand for new things – they have either changed what they are growing or the animals they are raising or have added new

products, indicating that markets are an active place for innovation and feedback. Another six in ten (58%) has seen demand for value-added items and acted on this opportunity to expand sales and build customer loyalty. It is interesting though that at least one in three vendors either have not been challenged to alter the mix of offerings or have not responded to market demand.



Farmers' Market Shoppers

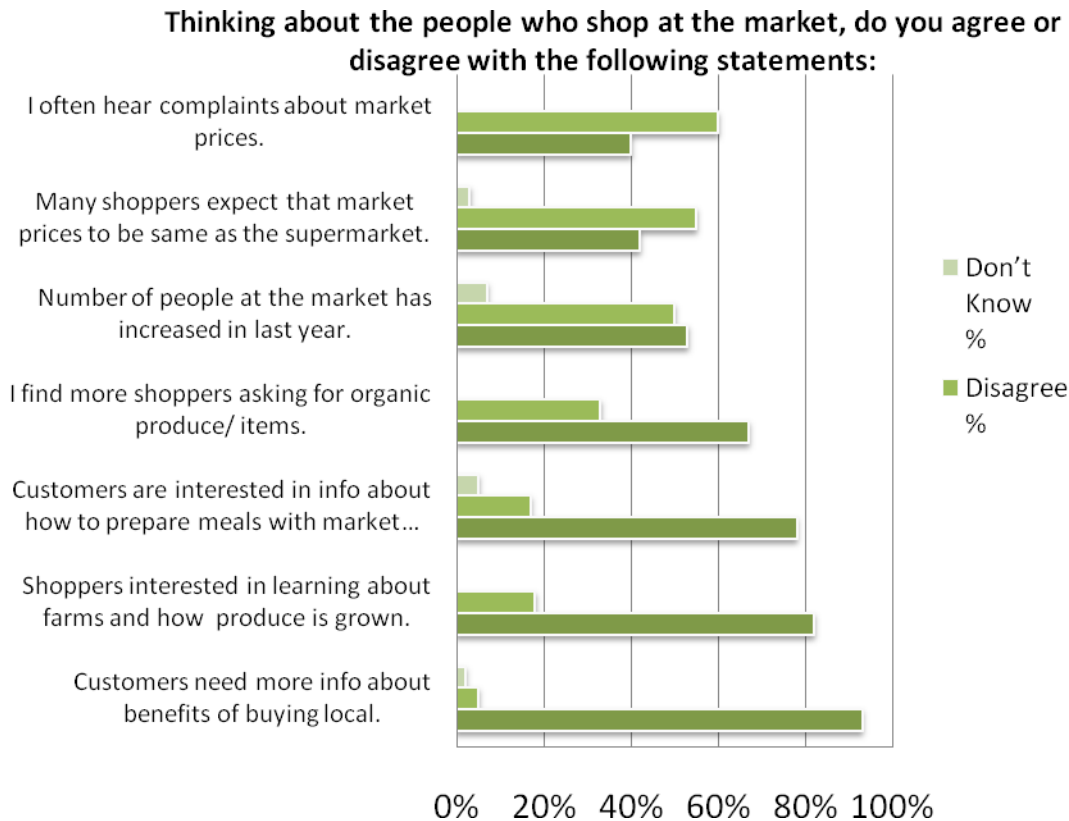
Vendors were invited to provide their insights into the interests of people who shop at farmers' markets.

Top Tier Issues

- need for more information outlining benefits of buying local (93% agreed)
- shoppers' interest in the source of their food and how it is grown (82% agreed)
- guidance in meal/food preparation using market ingredients (78% agreed)
- organic demand is growing (67% agreed)

Mid to Lower Tier Issues

- the volume of shoppers at farmers' markets has increased in the past year (only 53% agreed)
- grocery store prices set the benchmark for shoppers' price expectations at markets (55% disagreed)
- shoppers are vocalizing price resistance (60% disagree)



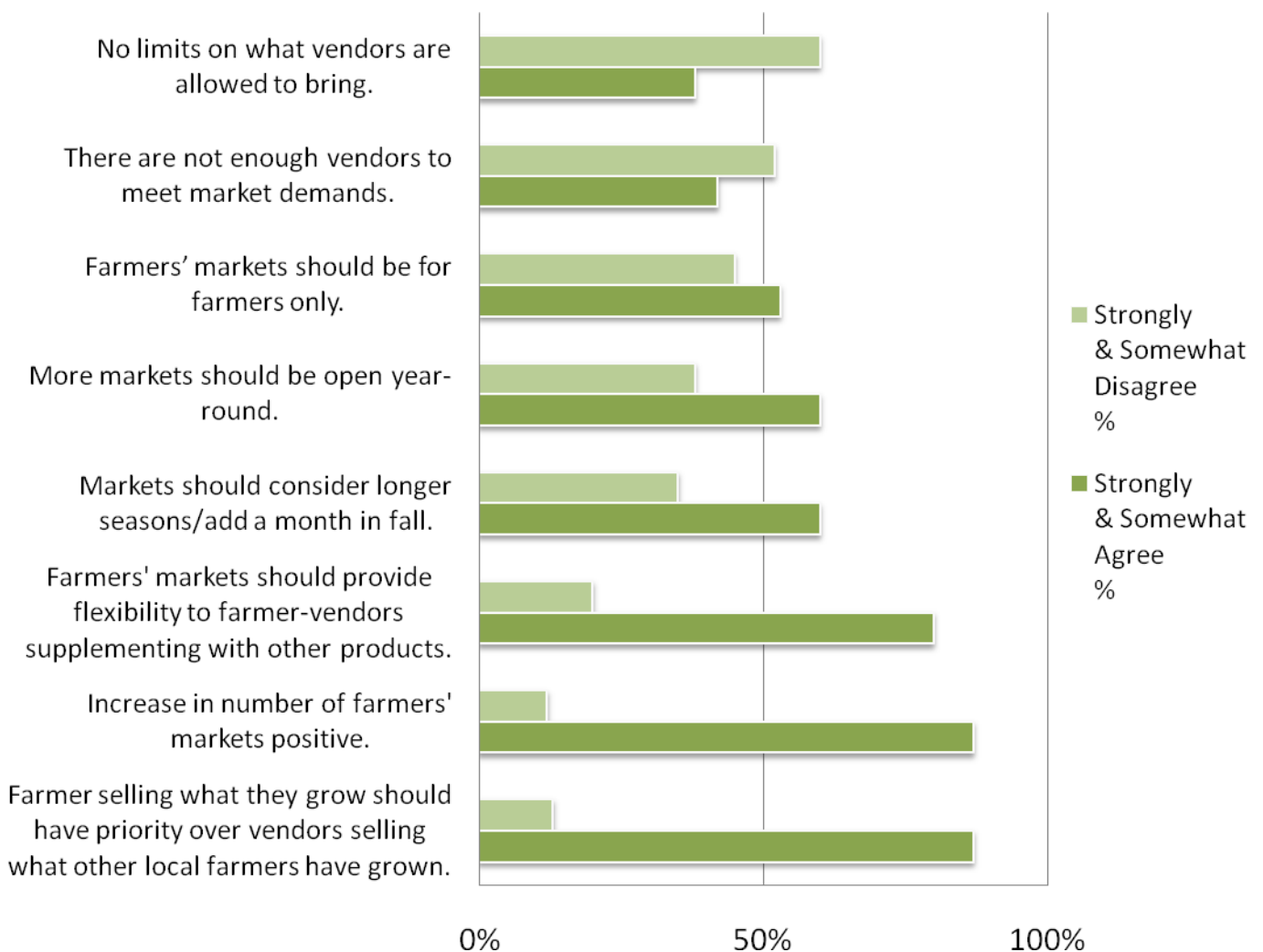
Measuring Opinion of Market Policy Items

Some critical market policy issues were explored as follows:

- Vendors agree strongly that their home-grown products should have priority but also want flexibility. Almost nine in ten (87%) believe that vendor growers deserve priority over those who source from other farms or augment their offerings with items grown beyond their farm. However, almost the same number (80%) agree that this policy should be pragmatic, allowing vendors to supplement their own production with items from other sources.
- 87% of vendors agree that the expansion of the farmers' market sector is a positive trend.
- The majority of markets are seasonal, operating between May or June into October. Six in ten vendors agreed that adding another month in the fall, when many crops are harvested, makes good sense. Only 35% disagreed that the season should be extended. What's more, the same slight majority (60%) endorse year-round markets.
- The cry 'farmers' markets for farmers only' draws mixed response. A slight majority (53%) agreed with it, while a solid minority (45%) do not support this exclusive policy.

- The availability of vendor farmers to meet the growing consumer demand for local food and contact with the people who produce their food is a much discussed topic. Farmer vendors are somewhat divided on this issue – 42% believe that there are not enough vendors to meet demand, while 52% think that there is sufficient supply.
- Limiting vendor offerings is a contentious topic. On one hand, as is noted above, the main emphasis should be on items grown/produced on the vendor farms, but six in ten (60%) agree that limits should not be placed on what vendors are allowed to bring.

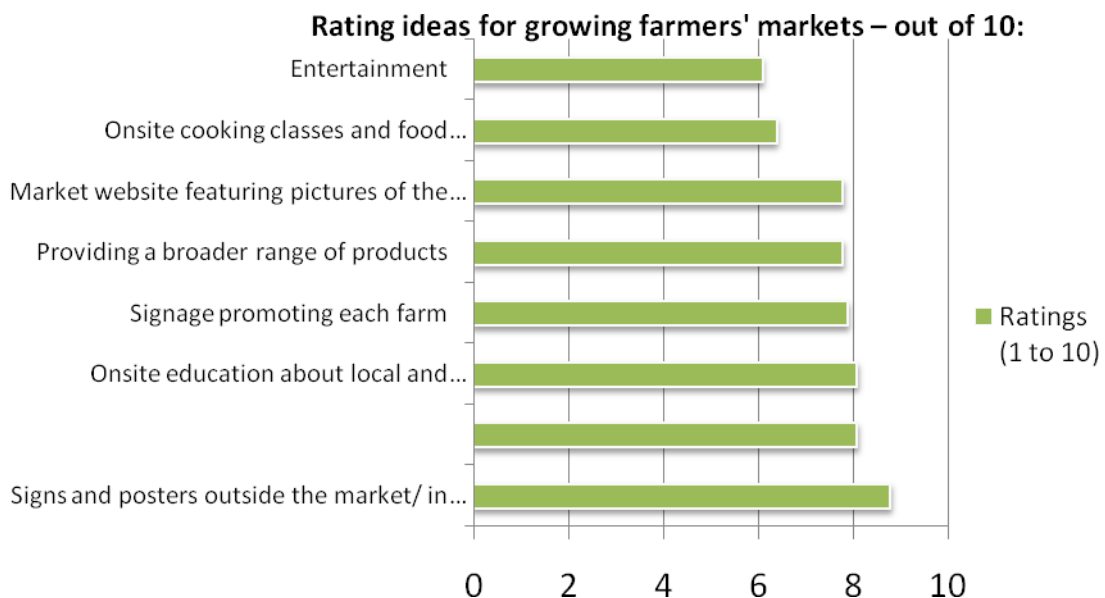
Here is a list of statements, specify if you:



Ideas for 'Growing' Farmers' Markets

Vendors rated eight potential market growth elements using a 10-point scale (1 to 10 where 1 is the lowest score and 10 is the highest score). Here is the response listed in order of the strength of the individual ratings:

- Onsite/Market Area Promotions – there is a very strong belief in signs, posters and onsite promotions of farms in and around the market. Branding the farms won support.
- Onsite Consumer Education –teach visitors about local foods and the seasonality of Ontario agriculture.
- There is strong support for expanding the array of products.
- Create a website presence for the market and the vendors' farms – “pictures and a story about the farms.”
- Augmenting the onsite food education with cooking classes and food demonstrations and entertainment.

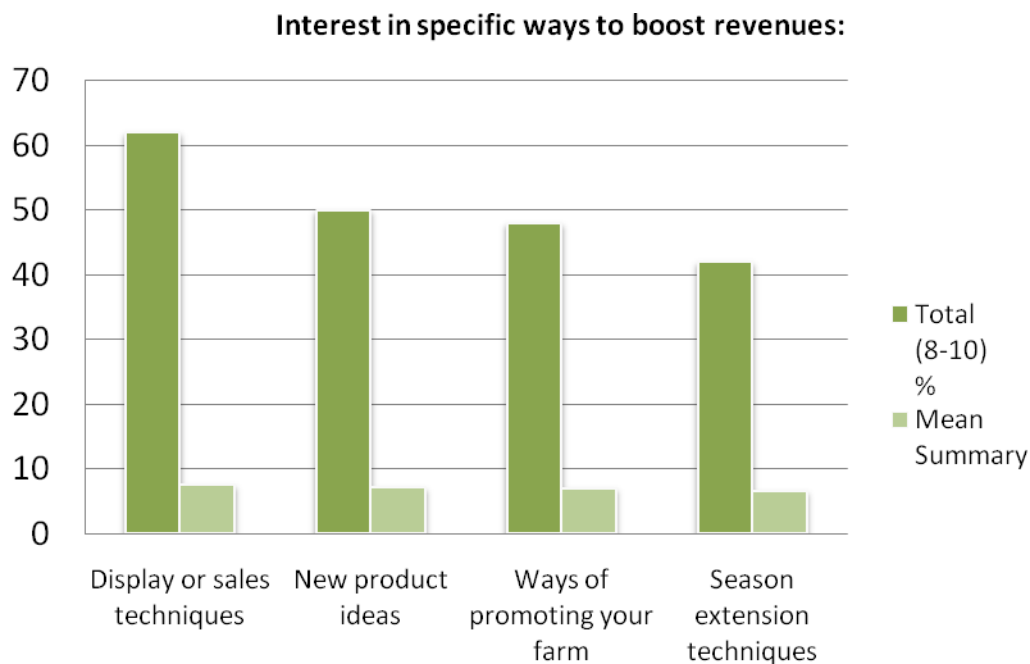


Reaction to Training Modules

Vendors' interest in four training modules/subjects was measured, again using a 10-point rating scale.

Generally, reactions to the ideas for growth listed above were very strong; however, the apparent interest in becoming skilled in some of these areas was somewhat weaker.

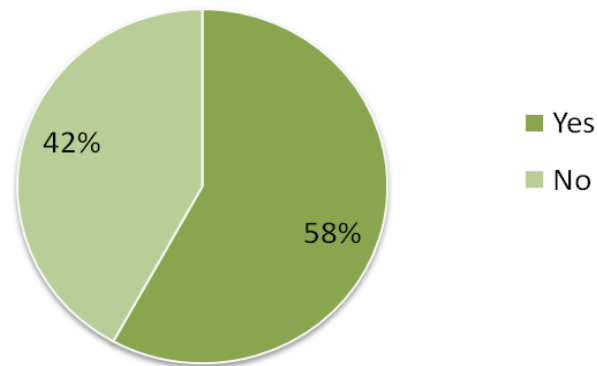
- Interest was highest in training for display or sales techniques – 62% of vendors assigned a rating of between 8 and 10.
- Half of vendors indicated interest in learning more about developing new products and learning about ways that they could promote their farm.
- Participants were less enthusiastic about the appeal of training in season extension techniques – 42% assigned the highest ratings to this opportunity. However, it could be a reflection of the nature of their operation.



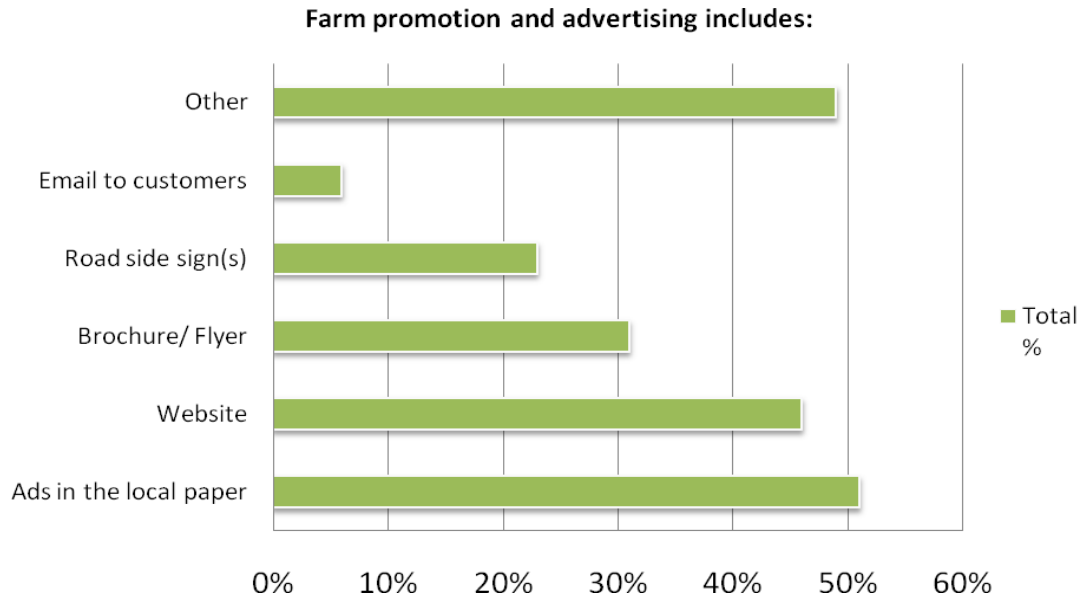
Promoting their Farm

- While almost all vendors endorse and understand the important role that advertising and promotions plays in the success of farmers' markets only six in ten (58%) advertise or promote their farm beyond the farmers' markets.

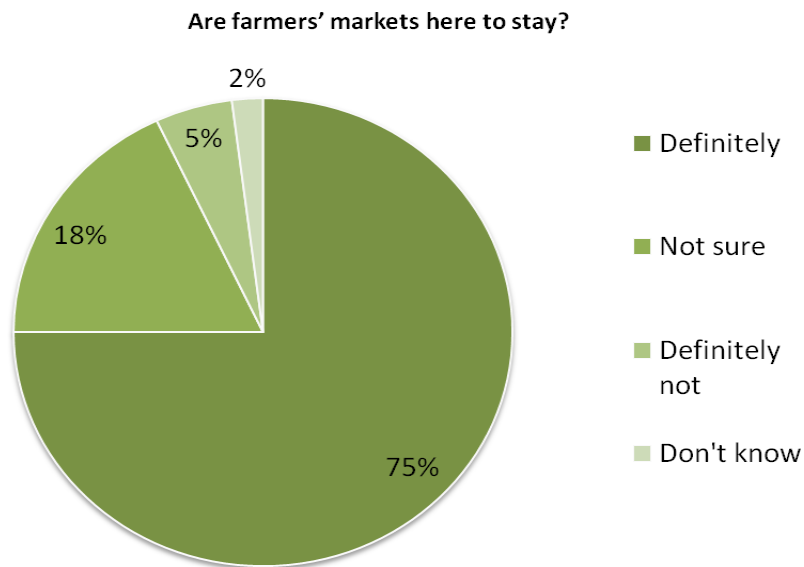
Advertise or promote farm in any way, aside from onsite at the farmers' market(s)?



- The vendors who do reach out to customers use a wide variety of strategies including signage at the farmgate, paid print advertising (local newspaper ads and brochures/flyers) and electronic (mainly a farm website, with a few sending customers emails). A small number of vendors are transforming their farms into destinations by providing farm tours, while a few others are reaching out via speaking engagements. Many rely on word of mouth and small steps such as wearing special 'branding' shirts at the markets and handing out brochures, business cards and recipes.



- A strong majority of vendors – three in four – believe that farmers’ markets are here to stay, the same proportion who indicate that sales have either grown or remained stable in the past few years. Conversely, about one in five (18%) are uncertain about the future of the markets. A very small minority (one in twenty) are convinced that there is no future for this channel of food sales.



Vendors: Thoughts for the future.....

Please see Appendix X for a complete list of verbatim responses to the question: *Now in closing what are the key issues or factors for farmers who are selling at farmers’ markets now and in the near future?*

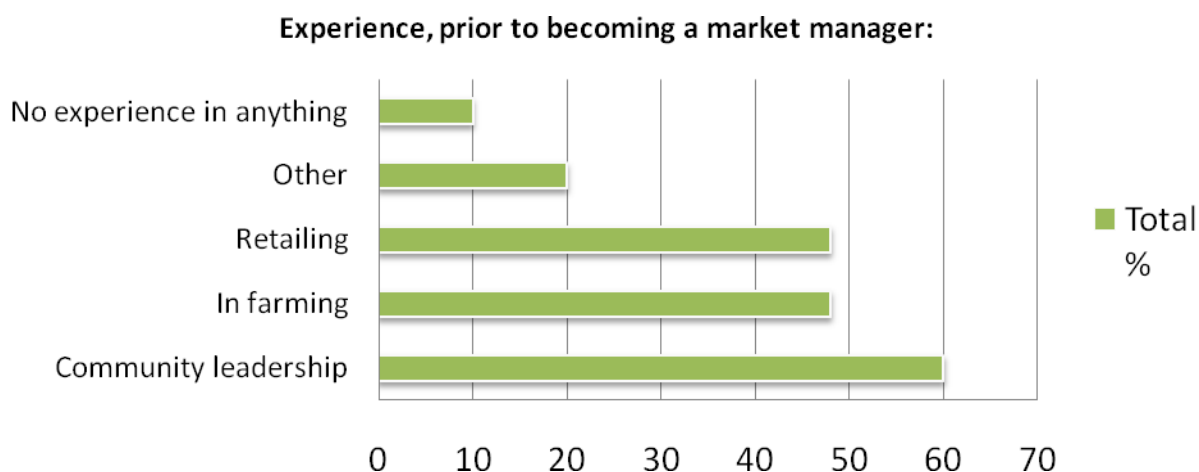
MARKET MANAGERS

Manager Background

- About six in ten market managers (61%) have been in this role five years or less. The remainder have longer experience – about one in five (18%) for six to 10 years and about one in four (23%) for more than 10 years.

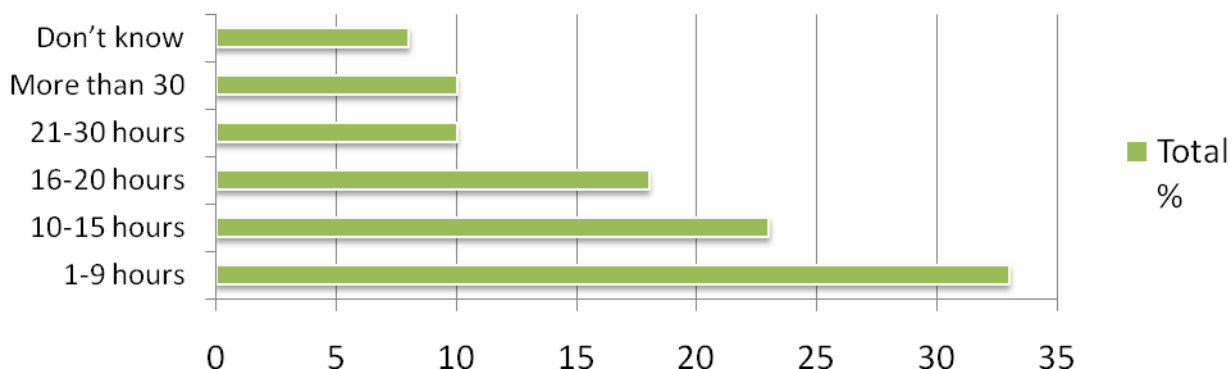
Number of years managing farmers' markets:	Total %
Less than 1 year	8
1 to 2 years	23
3 to 5 years	30
6 to 10 years	18
More than 10 years	23

- Market managers come from a variety of related backgrounds, most likely community leadership (60%), farming (48%) and retailing (48%).



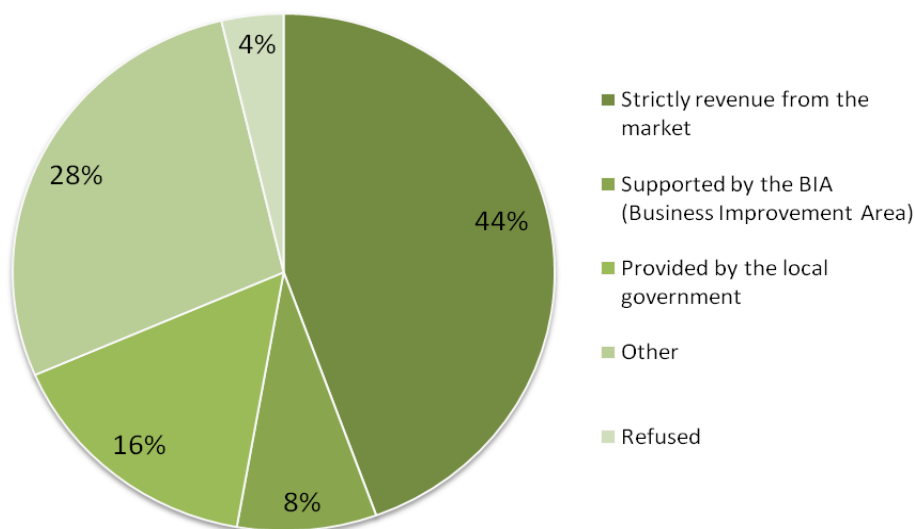
- The time required to fulfill the duties of a market manager vary considerably, likely dependant on a number of factors. On average, managers spend 14.5 hours per week on market tasks. However, one-third report that they need less than 10 hours per week while four in ten (41%) spend 10 to 20 hours and 20% spend more than 20 hours each week.

Approximate hours per week do you work as market manager:

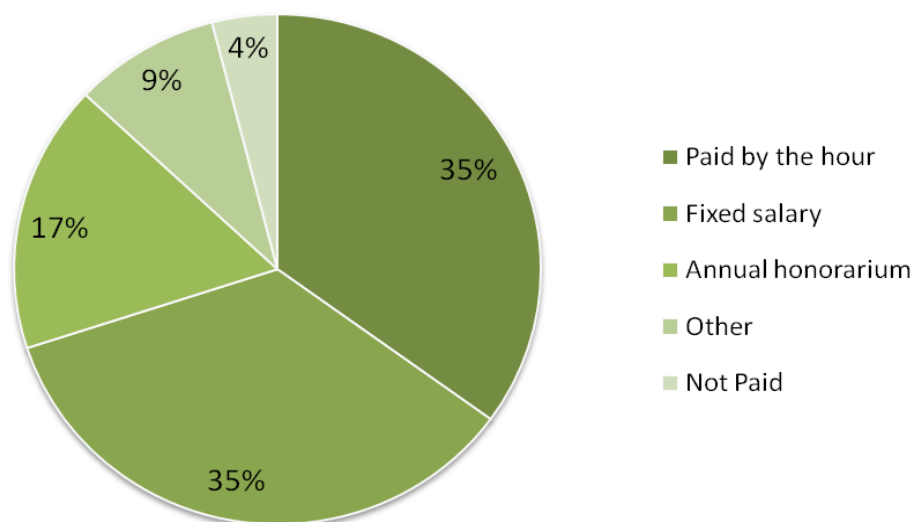


- While about six in ten Greenbelt farmers' market managers (58%) are paid for their work, a large minority (43%) do it on a volunteer basis.
- About half of the paid market managers indicated that their salary is funded from market revenue with very few receiving monetary assistance from local government or their Business Improvement Area Association (BIA).
- Salaries are based on a number of approaches: an equal number (35%) are either based on a per-hour calculation or receive a fixed salary, while about half that number (15%) are given an honorarium.

Market Manager salary source:



Salary source:

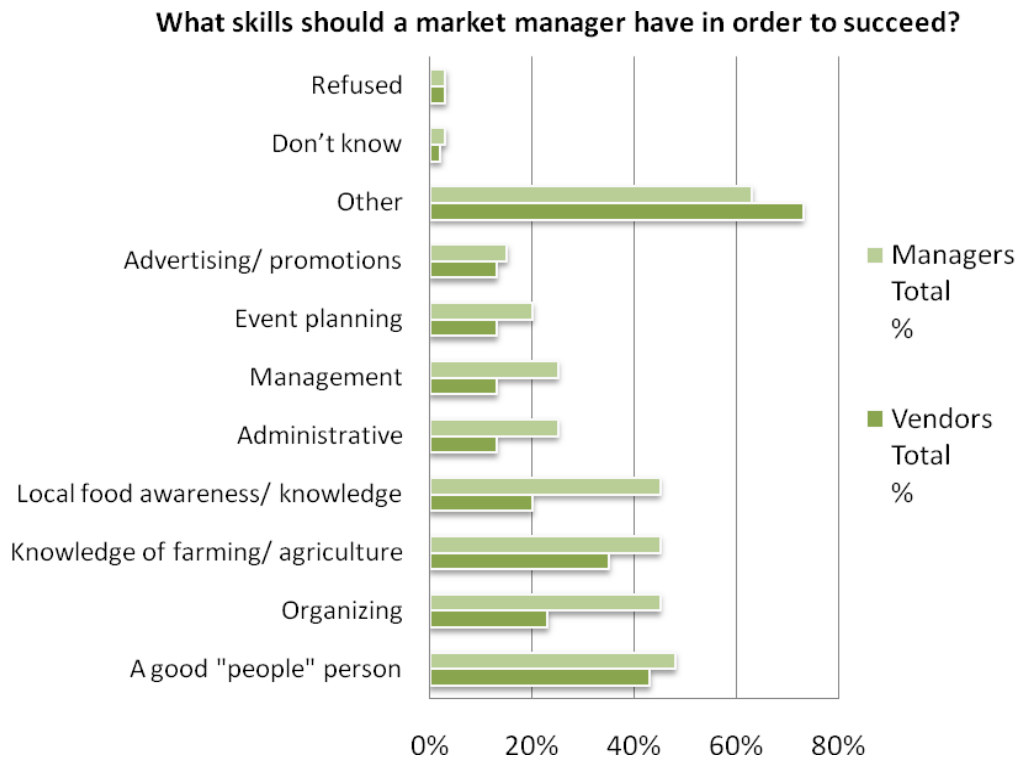


- Market managers are engaged in a wide range of activities, some more than others depending on the individual. At least half are busy with marketing/promotions and event management. Next in line come tasks related to selecting and communicating with vendors. It is noteworthy that only one-third or less actually are involved in collecting vendor fees or budgeting. Likewise, one in four or less handle budgeting, interaction with the health department or market shoppers or setting up.

Major job tasks:	Total %
Marketing/ promoting/ advertising	55
Organizing events/ event management	53
Vendor selection	40
Vendor communications	38
Onsite problem solving	35
Collecting vendor fees	33
Budgeting/ finances	25
Setup and cleanup	25
Dealing with local health department	23
Customer relations/ shopper contact	20
Meeting with local government/ local BIA	15
Other	50

- Market managers' diverse tasks call for a wide skill set. The four major areas: human interaction/a good "people" person, organizing, and knowledge about farming and local food.

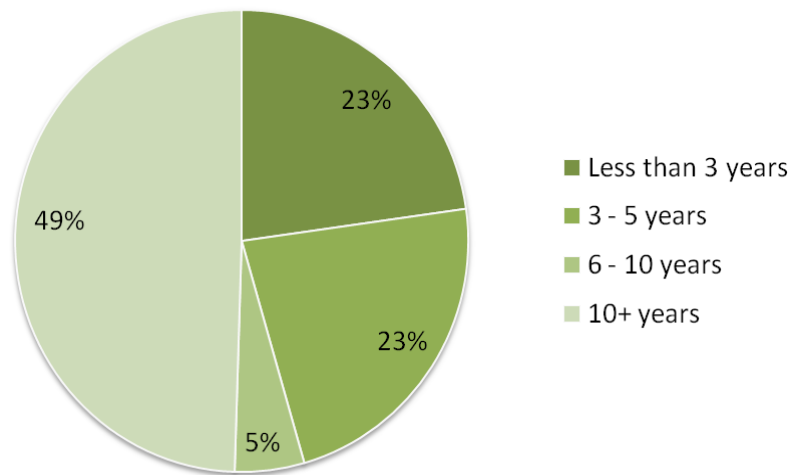
Second tier skills include (one in four or less mentioned them) – administrative, management, event planning or advertising.



Information about the Market

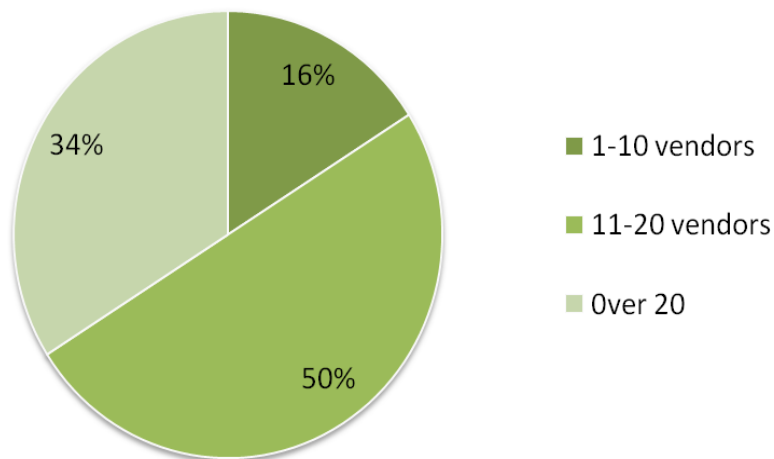
- The farmers' market sector has been rapidly expanding throughout the Greenbelt, building from a strong, established base – 50% have been operating for more than a decade. Most of the remainder of markets emerged in the last five years (46%), while only 5% were created in the five years prior to that.

Number of years market in operation:

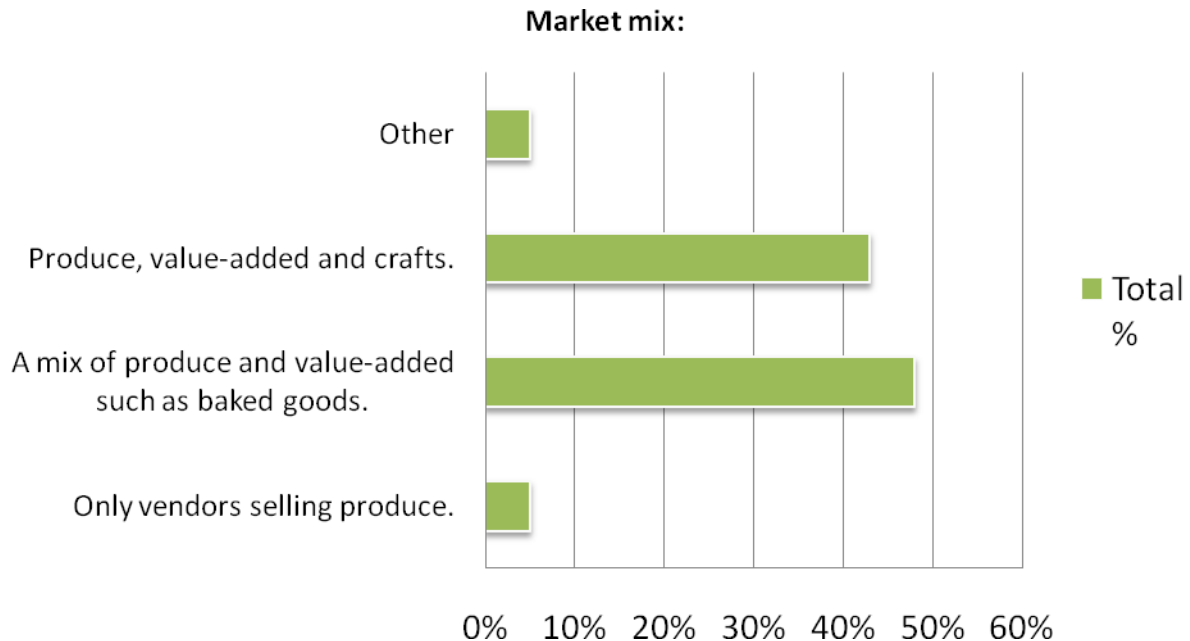


- Most (80%) of the Greenbelt farmers' markets are seasonal.
- The seasonal markets tend to be on the small size – two-thirds (66%) have no more than 20 vendors, although most of these are in the 11 to 20 vendor range, while only one-third are larger – more than 20 vendors.
- Year-round markets differ substantially from seasonal market – they tend to have many more vendors particularly in the high season, but this number shrinks substantially during the winter period.

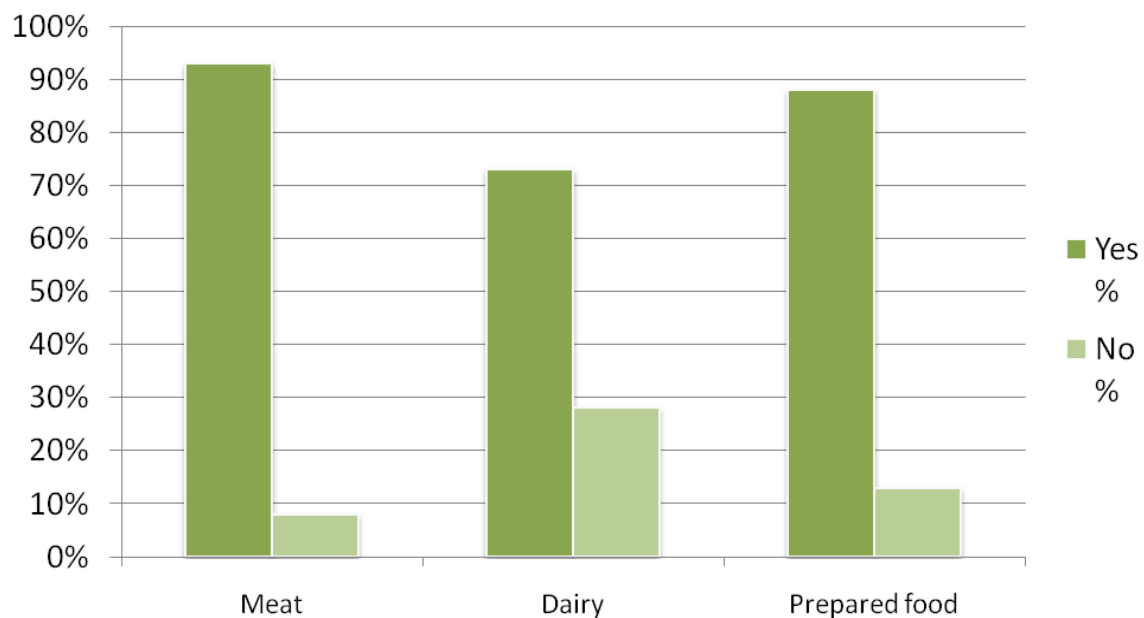
Approximate number of vendors:
Base: Seasonal markets



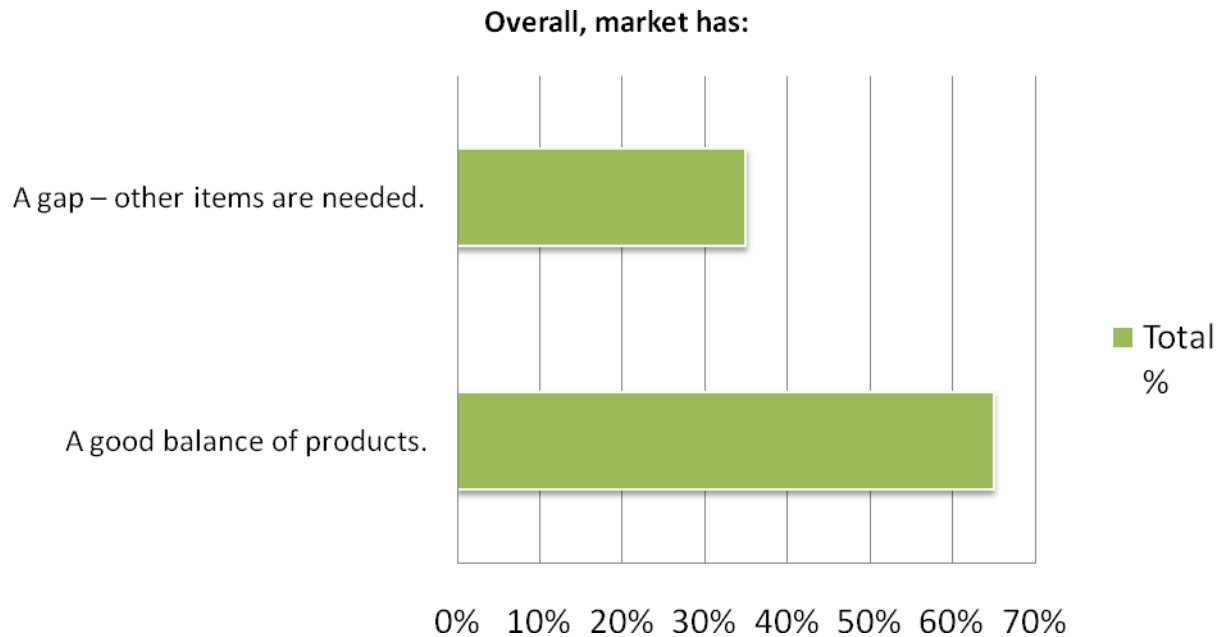
- Most Greenbelt farmers' markets (at least 91%) aim to provide shoppers with choice – about half (48%) feature both produce and value-added goods, and almost the same proportion (43%) augment this combination with crafts. Only 5% focus strictly on produce.



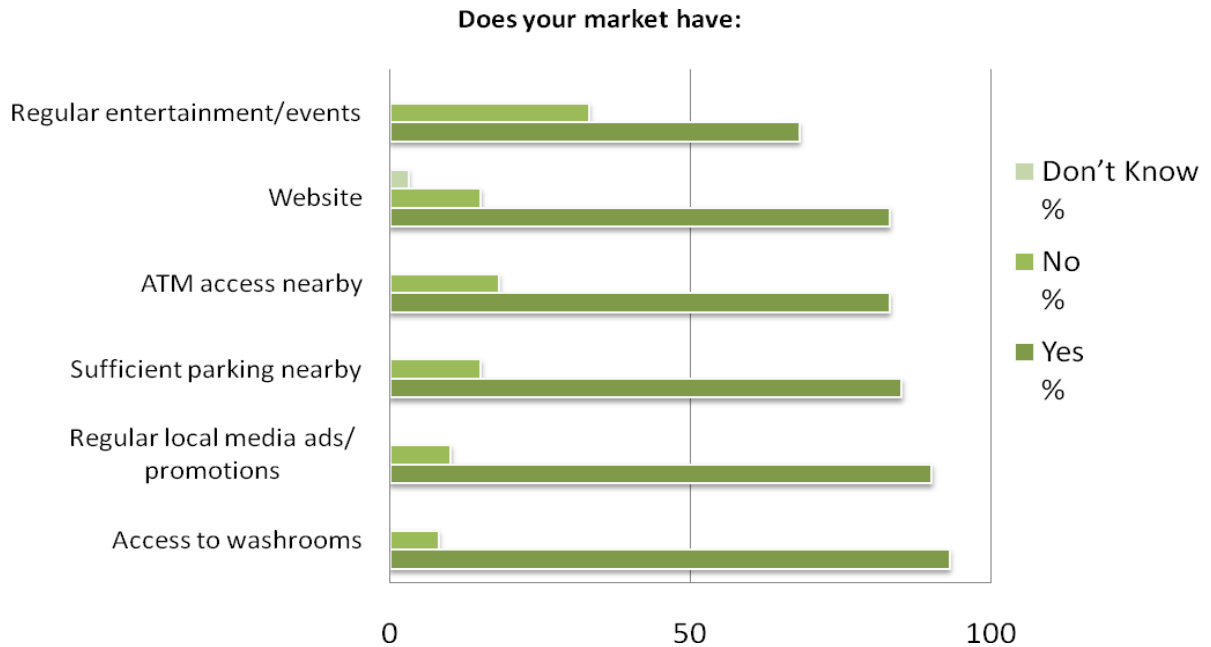
Most of the markets cater to shoppers' needs for meat (93%), prepared foods (88%) and dairy (73%).



- While two-thirds (65%) of market managers feel that their markets are providing a good balance of items, one-third note there are gaps that need to be filled. The 'in demand' areas include, in order of mention, cheese, eggs, meat (beef, pork and chicken equally), prepared food and crafts.



- Most markets are able to meet shoppers' amenity needs. At least eight in ten have access to washrooms and parking, with ATM close at hand. The same high proportion is also geared to reaching out to shoppers by advertising in the local media and via a website. However, the one soft spot is onsite entertainment – only two-thirds have regular events/entertainment.



- Three-quarters (75%) of Greenbelt farmers' markets surveyed are members of Farmers Markets Ontario; only two-thirds of the members are covered by FMO's insurance.
- A slight majority (58%) of Greenbelt farmers' markets are located on publically owned land, while the remainder are sited on privately owned spots likely mall parking lots.

Member of FMO/Farmers Market Ontario?	Total %
Yes	75
No	23
Don't Know	3

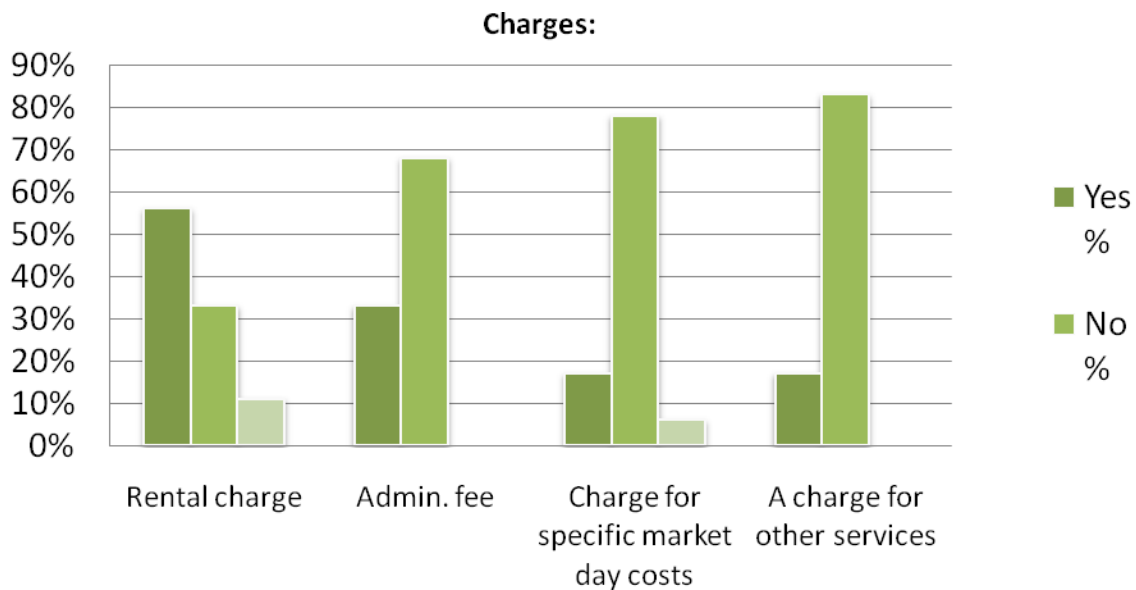
Market located on:	Total %
Privately owned property, such as a mall parking lot	40
A publicly owned property, such as a community park	58
Don't know	3

- Property owners tend to impact on the operations of the markets – 60% of managers indicate owners have some to a lot of influence.

Amount of influence property owner has on the market operations:	Total %
Little to no influence.	38
Medium influence.	25
A lot of influence.	35
Don't know.	3

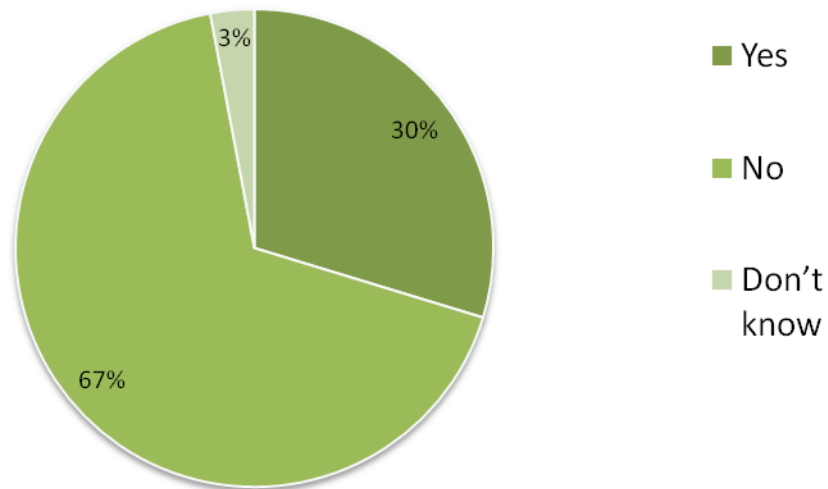
- While most property owners do not charge for water and energy, more than four in ten (45%) pay a fee for site use. The fee covers a combination of factors, and the majority (56%) indicate that it is a rental charge while a smaller number say it covers an administrative fee or to a lesser extent other factors (parking monitoring or advertising). See table on following page.

Property owner charge the market for:	Yes %	No %	Don't Know %
Water	8	93	-
Power/Energy	23	75	3
Site Use	45	53	3



- Only three in ten Greenbelt farmers' markets (30%) are influenced or funded by their local government.

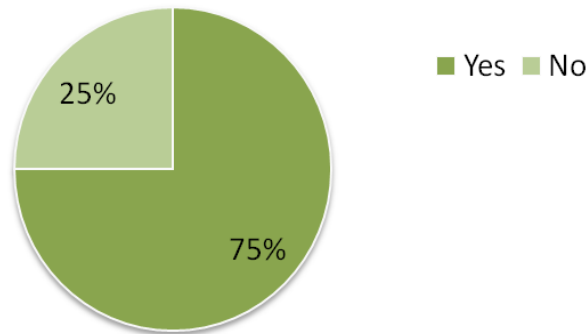
Local government involved in any way in the operations or funding of the market?



Support and Assistance

- The majority of the one-third of Greenbelt farmers' markets who receive some sort of support from their local government indicate it spans a number of things, listed in order of significance: supportive attitude, advertising/promotions, guidance and moral support, washroom facilities, site management, storage space. This can also cover funding for staff or promotions, permanent signs or banners, free/subsidized parking, paid staff, economic assessments, free market "rent" and office space.

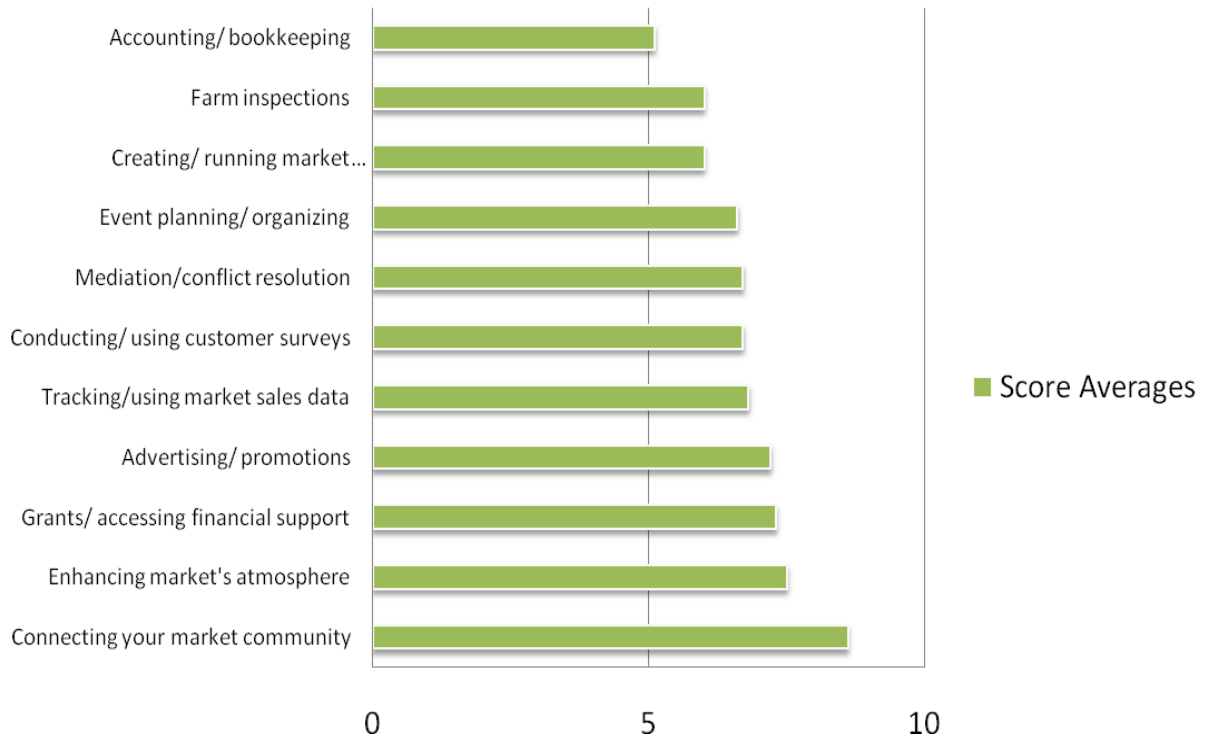
Any programs/organizations helped market in past three years - includes promotion, financial support, or training for vendors or managers?



Educational Support

- Market managers rated a series of possible subject areas for professional development using a 10-point scale, as follows
- “Connecting with the community” – reaching out and building links with the local target audiences led the way. It should be noted too that other related topics including ‘enhancing your market’s atmosphere’ and ‘advertising and promotions’ received strong endorsement.
- Skill building was also needed to access grants and financial support and for tracking market sales performance.

Interest in professional development/ educational support for market managers using a 10-point scale (10 is Very Interested and 1 is Not at all Interested)



Other topics that would enhance their skills and their markets:

Knowing what products are grown in Ontario and their value. Ways of inspecting farms.

*Market money, (i.e., food stamps, vouchers)
to allow those in the community who need the help to have access to fresh foods.*

To teach market managers to cooperate with other market managers.

Taking courses, taking computer courses

Relationship building between the vendor and the market itself

Easy access to funding and how to get help for funding without paying

How to approach new vendors and bring them in

Connecting with the community. Connecting with the restaurants in the community.

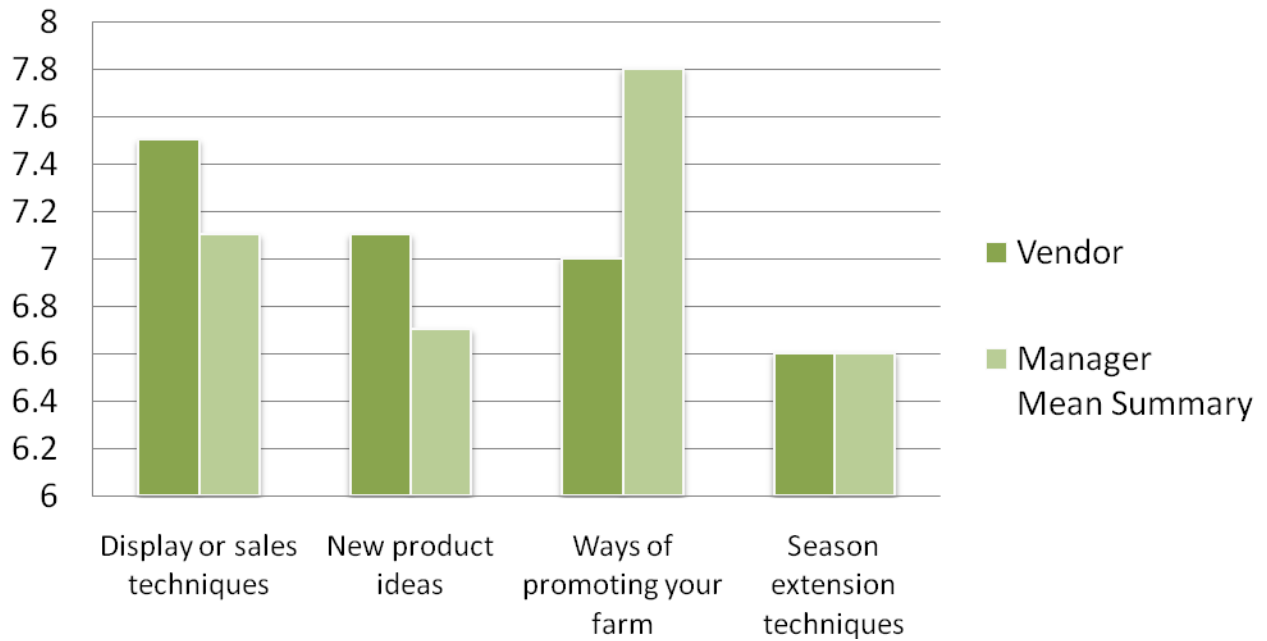
Helping out the farmers, business associations

Crisis management,

Conducting interviews with the media.

- Almost all market managers expressed an interest in not only sharing knowledge but in attending professional development opportunities geared to their needs.
- Market managers rated the potential appeal of resource materials or learning points for vendors using a 10-point scale. All four items scored quite well (in the range of 6 to 7) topped by ways of farm promotion followed by sales/display techniques. Also, it is noteworthy that vendors registered very similar reactions to these options.

Interest in specific ways to boost revenues:
Rating between 1 and 10 (10 is the highest, 1 is the lowest)

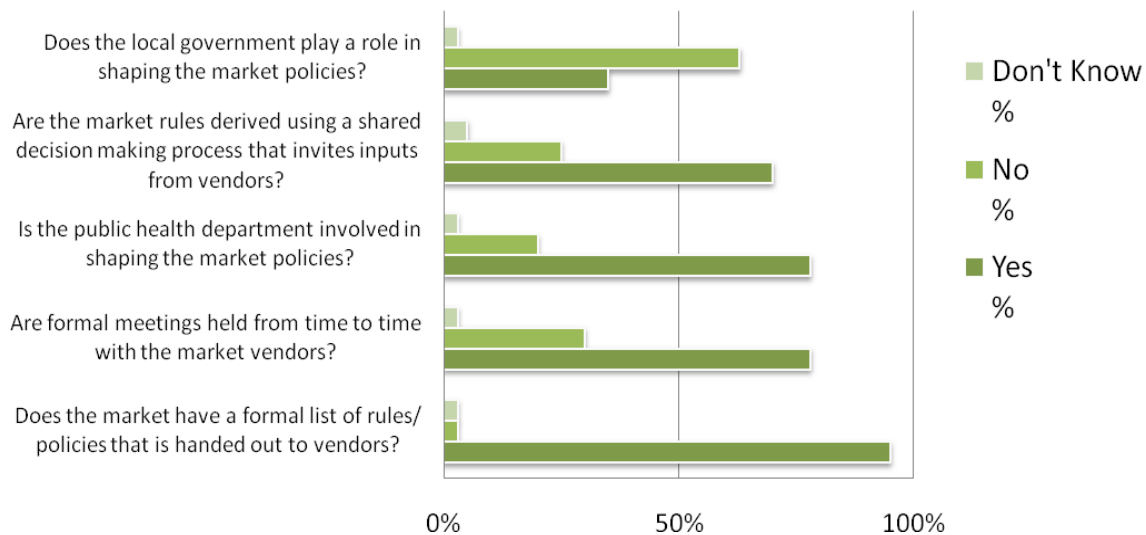


Market Policies & Decision making

- Most (95%) of Greenbelt farmers' markets have a formal list of policies which is circulated to vendors.
- Eight in ten (78%) markets hold formal meetings on occasion.
- While the local public health department helps shape the policies in the majority of instances (75%), local government is much less likely to be involved (35%).
- Seven in ten (70%) of the farmers' markets' rules are created with the input of vendors.

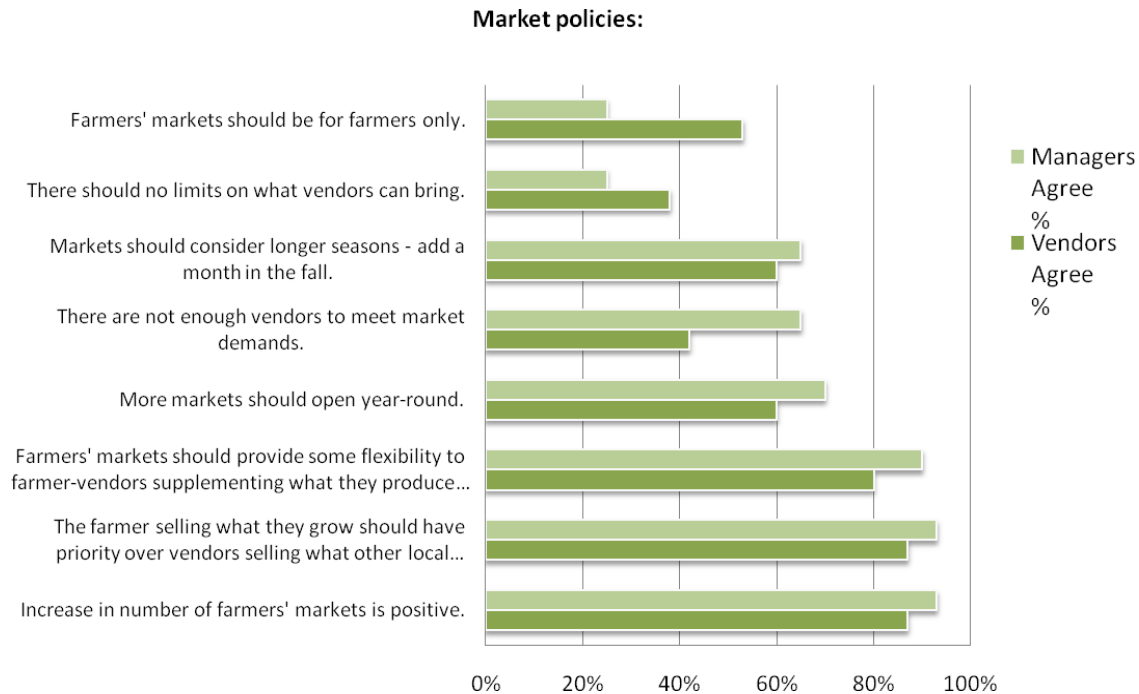
The following chart presents responses of market managers and vendors, illustrating fairly similar results except that vendors assign local government having more impact than market managers.

Now thinking about Market Policies and the decision making process:



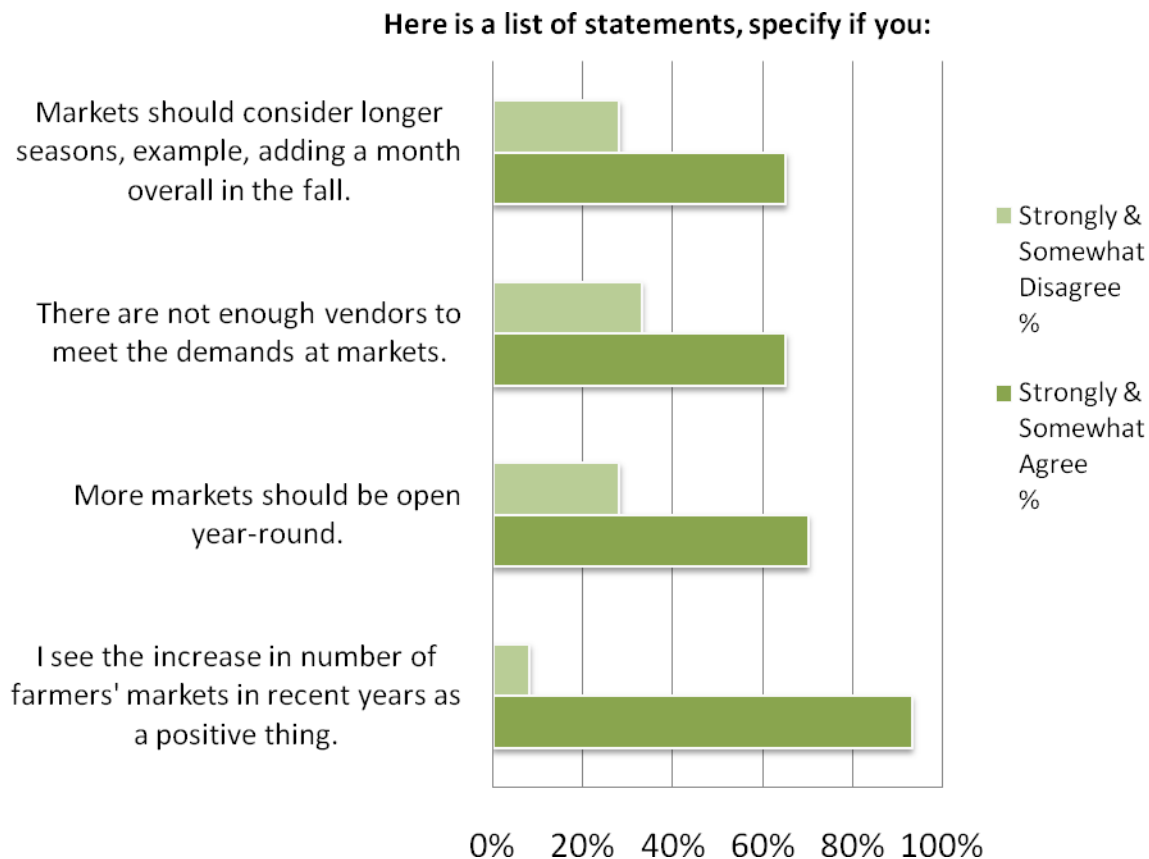
Sourcing Items Sold at Markets

- The issue of the source of items/produce sold by vendors was examined. A surprising nine in ten market managers (90%) report that vendors at their market are permitted to sell items that come from sources other than their farm. 83% of vendors indicated that this is the case at the markets they attend.
- This matter has complexities – over four in ten (43%) managers say there are “challenges” either among vendors or with customers. Almost half (48%) of vendors agree that there are challenges.
- Nonetheless, to add to the complexity, most (93%) market managers agreed that priority should be given to farmers selling items from their own farms. Almost the same proportion (87%) of vendors agreed with this policy.
- Three in four market managers (75%) do not believe that markets should be strictly for farmers to the exclusion of other vendors, however just left than half of vendors (45%) agree with this.
- Most market managers (75%) do not agree that no limits should be placed on what vendors are allowed to bring, while only 60% of farmers would go along with this stance.



Other factors were measured using statements – did managers Agree or Disagree?

- Almost all market managers (93%) agreed that the growth in farmers’ markets is a positive trend. Vendors have a similar opinion (87% agreed).
- Two thirds of managers (65%) believe there is a shortage of farmers/vendors to support those that are currently operating. Only 42% of vendors agree that this is the case.
- At least two in three (65%) support both extending the season by adding one month in the fall and increasing the number of markets that are open year round. Six in ten (60%) of vendors agree.
- Seven in ten managers agree that markets should be open year round – 60% of vendors endorse this proposition.



Sales & Records

A mixed sales picture for the past few years emerged that tilts in a positive direction. .

- Four in ten managers (40%) reported that sales have increased, very similar to vendors with 37% reporting increases.
- Almost three in ten (28%) market managers say they have remained stable, while 40% of vendors say this is the case.
- Only one in five (20%) managers indicated that sales have dropped, almost identical to drops reported by vendors (22%).
- While 13% of managers admitted that they are unaware of exactly what happened in this regard, only 2% of vendors are unaware.

Managers reporting increased sales attribute this to a variety of factors including more vendors, more advertising and the following verbatim comments:

Management

Family meeting area

A greater knowledge of local food trends. The provincial marketing for buying local foods has trickled down.

Consumer support

Better knowledge of the market, the value of the farmers market

Economy.

It is getting know better and more people coming to the market

Product availability

Young families

Staffing I would say. I was hired as coordinator for 2009 and before that there was just a clerk

Recession

The public know that they exist.

People wanting to shop local

More people coming to the market

More entertainment and buskers

Consistent marketing, knowing what people want; and when they want it.

A good combination of mostly farmers and a few crafts make it a really interesting place to come to

Public awareness

Years in operation

Educated public and the value of nutrition

Tourism. Currency as compared to the U.S.

- On the other hand, the minority who reported a decline in sales link it with the economy, a new location for the market, weather, competition from Mexican imports, shrinking the site of the market, and construction next to the market.

From what can you tell, have sales at the market:	Total %
Increased	40
Decreased	20
Remained Stable	28
Don't know	13

- The ability to provide feedback on sales is puzzling, given that most managers are not collecting sales figures/estimates from vendors. In fact only 7 out of the 40 market managers who participated in this study gathered this information from vendors. In addition, most (at least six in ten) are not keeping records about the market's activities and factors that could affect the outcome of each market day. The results below indicate that vendors are more likely to be keeping sales records with over half (55%) doing so.

Is a market record kept of market activities and sales for each market day?	Total %
Yes	33
No	60
Don't know	8

Three in four market managers (76%) agree that obtaining sales estimates on an anonymous basis could be helpful. However, about half this number (39%) of vendors indicate a willingness to provide sales estimates.

Market managers noted a variety of potential applications on how they would use this information – grant applications, feedback for supporters/funders and the following verbatim suggestions:

Basically in managing the market

New policy; will be used to track sales and analysis and improvement.

To use trends month over month and year over year

Gage the success of our markets to see if it's going up or down

To see if customer base has increased - has it been a good year even if weather is bad

Help with the rates we charge

It would be used to compare. To increase if we happened to go backwards instead of forwards.

Attract additional vendors

Data mining

If we knew if someone wasn't doing well perhaps we need to replace them with another vendor

Just put numbers not names

To monitor the success of the market

Allow me to determine if more patrons were coming in I suppose

Used as a basis for commission fees. Fees to vendors are somewhat based on sales so that is why

I have pretty accurate sales figures

Good for bringing new vendors in good to take the information to the town for more funding

Appeal of products to customers

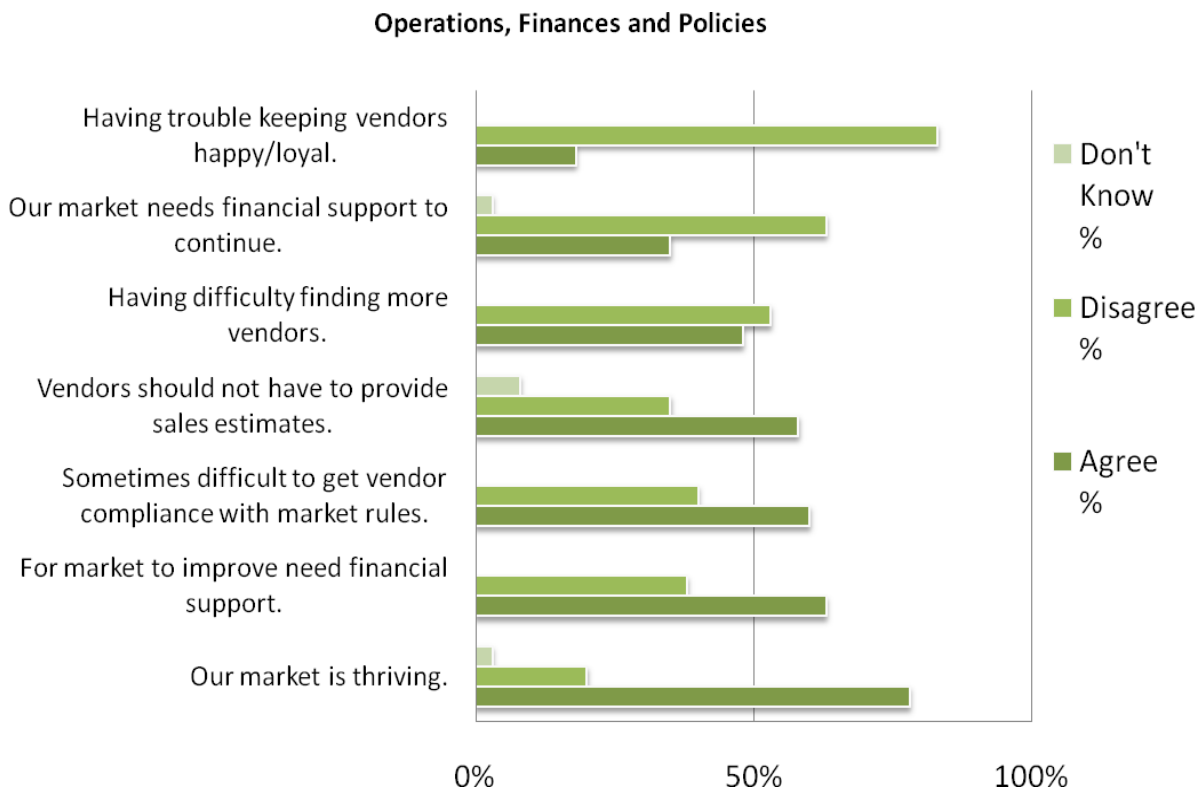
If vendors were willing to provide sales estimates on an anonymous basis, do you think that this information would be helpful?	Total %
Yes	76
No	24
Don't know	-

How is this information used?	Total %
Keeps track of sales	31
Grants/ funding	25
I want to know/ need to know what's happening	16
Need for planning	6
Good for supporters	6
BIA/ Chamber of Commerce/ local government wants it	6
Other	66

If vendors were willing to provide sales estimates on an anonymous basis, do you think that this information would be helpful?	Total %
Yes	76
No	24
Don't know	-

Operations, Finances and Policies

- Almost four out of five market vendors agree that their market is ‘thriving.’
- Yet, more than six in ten (63%) agreed that their market requires financial support in order to fund improvements and one in three admitted that funding is needed in order to keep their market open.
- Six in ten market managers agreed that maintaining adherence to market policies can be a challenge.
- More than half (58%) of market managers agreed that vendors should not be required to provide sales estimates.
- About half (48%) of managers report encountering difficulties in locating more vendors. Fortunately only one in five (18%) indicated that they are having trouble keeping their vendors happy and loyal.



Market Customers

Managers were invited to provide feedback about the people that visit/shop at their markets.

At least four in five managers agreed that customers require/need information related to these points:

- ✓ benefits of buying local
- ✓ farm profiles
- ✓ facts about how produce is grown
- ✓ usage assistance – preparing meals with market ingredients.

Seven in ten (70%) report that the number of people shopping at their market has grown in the past year.

The call for organic is quite strong, with 63% of managers agreeing that more shoppers are requesting it.

Price complaints (40%) and feedback about price differences between markets and supermarkets (45%) were noted.



Advertising and Promotions

As the table below indicates, market managers are employing a wide spectrum of formal and informal, conventional and social media to reach prospective buyers and loyal followers.

Promoting and advertising the market:	Total %
Newspaper ads/ articles	85
Signs/ sandwich boards	55
Website	53
Radio ads	43
E-newsletter	23
Banners/ Posters	20
Television ads	18
Twitter, Facebook or related	5
Other	58

Other methods of accessing the community include:

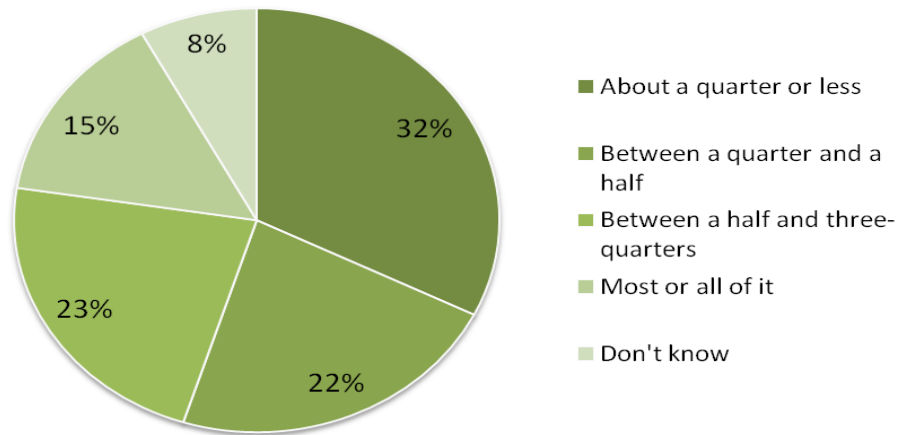
- ✓ Weekly events in the summer
- ✓ Flyers being distributed at some of the local businesses
- ✓ Local advertising (a map)
- ✓ Farmers' market magazine
- ✓ Town signs
- ✓ Regular ad in a Health magazine
- ✓ Postcards handed out by vendors, posters
- ✓ Sponsor local and international groups give aways and sponsor local events
- ✓ Word of mouth
- ✓ Local magazine inserts, pamphlets
- ✓ Flyers around town bookmarks at library
- ✓ Hand out flyers
- ✓ Newsletters
- ✓ Community tent
- ✓ Posters to merchant to merchant
- ✓ Events
- ✓ GO station
- ✓ Flyers
- ✓ E mail
- ✓ By word of mouth
- ✓ Local businesses put us on their website (i.e. the Town of Whitby)
- ✓ Direct flyers.
- ✓ Word of mouth and some flyers

- ✓ Flyers to library community centres and schools
 - ✓ City of Toronto brochures on television in a news stories and releases in local TV
 - ✓ Farmers Market Ontario brochures
 - ✓ special invite to politicians and councillors.
 - ✓ Word of mouth, support the Canadian cattlemen.
 - ✓ Fall fairs. It's very expensive, so we try to help the farmers and those who are supporting away, and don't believe in giving advertising dollars away.
 - ✓ Signs
- Advertising budgets also vary considerably, from very modest expenditures of less than \$1,000 (19% of the sample) to over \$10,000 per annum (10% of markets). About one in five managers (18%) were not able to assign a figure for this important element of their market's activities.

Estimate amount spent on advertising/promoting market in 2009:	Total %
None	3
Under \$200	8
\$200-499	3
\$500-999	8
\$1,000-1,999	15
\$2,000-2,999	8
\$3,000-3,999	5
\$4,000-4,999	8
\$5,000-5,999	18
\$10,000 or more	10
Don't know	18

- Looking at market promotional budgets more closely revealed that pro bono advertising/promotional support is an important factor in making it possible for markets to get their message out to would-be shoppers and maintain a link with supporters. Almost all of the markets are reliant on cost-free promotional support. Indeed, almost four in ten (38%) obtain more than half of their communication budget/means at no cost to the market.

Portion of ad/promotion free, donated or generated by staff:



'Wish List' for Building the Market

Market managers were invited to share the changes or new things they would like to make that would enhance their market.

Thinking about ways in which to build upon the current market, what are the main changes that you would make if you could?	Total %
NET – Increase Vendors	28
More vendors	20
More farmers selling their produce	8
NET – Market Experience and Promotion	43
Advertising/ promotion/ more promotion	18
Entertainment/ more entertainment	15
Events/ more events	10
Financial/ economic support	10
Parking/ more parking	10
Better location	8
Bigger location	8
Broadening the customer base/ more customers	8
Indoor location	5
Café/ value-added food	3
Crafts/ more crafts	3
Year round location	3
Other	65
Nothing	10
Don't know	3

Here are other amendments/additions that market managers cited:

- *When we do have some space we try to choose something different but still from the farm, something a little bit different. We try to make the mix a really good mix with add-ons like honey.*
- *We are making a demonstration kitchen in the next few months*
- *Signage*
- *Relocate vendors*
- *Pick another day to open the market. Instead of Saturday, maybe open on a Friday*
- *More volunteers*
- *More tents local business, craft corner.*
- *More space*
- *More money funding, funding, funding*
- *More interest from the mall*
- *Make an area that would concentrate on farm based. Anything grown by the farmer and to make organic available.*
- *Increased visual, locally*
- *Electronic, digital advertising*
- *Clean*
- *Bigger advertising budget*
- *better signage*
- *Better facility. Improvements to the actual facility*
- *Access to indoor building when the weather is not good and no fees for it.*
- *A volunteer force in place, a community volunteer staff.*
- *A permanent market manager*
- *A permanent awning. I know other markets that have that and it looks attractive.*

COMPARING MARKET MANAGERS AND VENDORS

The two questionnaires that were developed to measure the different vendor and market manager experiences and perceptions, a small number of identical questions were used for comparison purposes. Here are the findings:

Skills Required for Market Managers

Market managers and vendors concur on some points and differ greatly on others. Both agree that an effective manager must have strong interpersonal skills but are less likely to place the same degree of emphasis on other factors. For instance, managers believe that a plethora of other skills are required to do a good job, lead by organizing ability, knowledge of farming/agriculture and local food awareness. Whereas vendors tend to place less emphasis on these points. Many more personal opinions on the skills of effective market managers were noted– see the Detailed Findings for the complete lists.

What skills should a market manager have in order to succeed?	Vendors Total %	Managers Total %
A good "people" person	43	48
Organizing	23	45
Knowledge of farming/ agriculture	35	45
Local food awareness/ knowledge	20	45
Administrative/ administration	13	25
Management	13	25
Event planning	13	20
Advertising/ promotions	13	15
Other	73	63

Training/Revenue Boosting Tools

The need for training and resource materials was explored among both sectors. The summary table below provides two ways to evaluate responses – the percentage of vendors and managers who assigned a rating of between 8 and 10 (the highest possible rating was 10) and the mean rating for each item.

Overall, both market managers and vendors exhibited fairly positive reactions to two items in particular: tools or training regarding display or sales techniques and ways of promoting vendor farms. Also, this difference was notable for farm promotion. In this instance market managers were more enthusiastic

about it than were vendors – 70% of market managers compared to 48% of vendors gave it a rating of 8 to 10.

Interest in specific ways to boost revenues: Rating between 1 and 10 (10 is the highest, 1 is the lowest)	Vendor Total (8-10) %	Mean Summary	Manager Total (8-10) %	Mean Summary
Display or sales techniques	62	7.5	45	7.1
New product ideas	50	7.1	43	6.7
Ways of promoting your farm	48	7.0	70	7.8
Season extension techniques	42	6.6	48	6.6

Customer Interests & Needs

Generally, vendors and managers have high levels of agreement on a number of critical customer related issues. They agree that customers need more information on the benefits of buying local, the farms that are represented at the market and food/meal preparation tips. Further, at least six in ten in both sectors agree that customers are expressing a desire for organic items. They also share perspectives on the issue of shopper's price perceptions - at least four in ten concur that customers are confused by the markets' higher market price points compared to those at supermarkets. Four in ten agree that they frequently hear complaints about it.

They disagree on one point, the popularity of farmers' markets - seven in ten managers believe that the number of shoppers attending their market has grown, while just over half (53%) of vendors agree.

Thinking about the people who shop at your market, please specify if you:	Vendors Agree %	Managers Agree %
Customers need more information about the benefits of buying local.	78	88
Our shoppers are interested learning more about farms and how the produce is grown.	82	80
Customers are interested in information about how to prepare meals with market ingredients.	78	80
As far as I can tell, the number of people who shop at the market has increased in the last year.	53	70
I am finding that more shoppers are asking for organic produce/items.	67	63
Many of the shoppers expect that the market prices should be the same as those at the supermarket.	42	45
I often hear complaints about prices at the market.	40	40

Market Policies & Practices

There are high levels of convergence on applauding the growth in the farmers' market sector and giving priority to farmers who sell their own items over those handling items accessed from other farms. They also agree that vendors should be flexible to sell beyond simply what they are growing. However, the majority of vendors and managers reject the notion that no limits should be placed on what vendors can bring to the market. Nonetheless, vendors are more supportive of this proposition than managers, 38% versus 25%.

Year round markets and extending the fall season one more month received considerable support; at least six in ten agreed.

There are two major points of difference – about two thirds (65%) of managers agree that there is a shortage of vendors while only 42% of vendors believe that this is the case. Over half of vendors (53%) agree that farmers' market should strictly represent local growers/producers, while only one in four managers agree with this singular focus.

Here is a list of statements, specify if you:	Vendors Agree %	Managers Agree %
I see the increase in number of farmers' markets in recent years as a positive thing.	87	93
The farmer who is selling what they grow on their farm should have priority over vendors selling what other local farmers have grown.	87	93
Farmers' markets should provide some flexibility to farmer-vendors supplementing what they produce with other products for sale.	80	90
More markets should be open year-round.	60	70
There are not enough vendors to meet the demands at markets.	42	65
Markets should consider longer seasons, example, adding a month overall in the fall.	60	65
There should not be limits on what vendors are allowed to bring.	38	25
Farmers' markets should be for farmers only.	53	25

Indepth (Focus Group) Findings

Introduction:

The following section provides a detailed overview of the reactions, beliefs and experiences of Greenbelt vendor/farmers and market managers expressed in the course of the focus groups and preliminary, semi-structured telephone interviews. Throughout this section many verbatim quotations have been inserted to illustrate the tone and different perspectives provided by the respondents in the course of the group discussion and interviews. This section is not intended to present the opinions of the consultant; it is a summation of the study's indepth learning.

Role of Farmers' Markets – Why create a market?

The objectives that drove the creation of markets included creating awareness and access for local eaters to local food supply and simultaneously providing opportunities for farmers to sell direct to buyers.

Charitable organizations and churches may introduce farmers' markets to aid access to locally grown, healthy food where the surrounding community has limited access to a wide range of items. Monetary goals can drive the creation of a farmers' market. Service organizations use fees collected (x such as the X Club's (mall location in the GTA) for charitable work in the community.

Our main aim is to raise funds and then put it back into the community, and so far we've raised around \$5 million which has all gone back into the community, so many different things

Business Improvement Associations (BIAs) and local economic development departments can be motivated by the bigger goal of bringing new vigour to a declining business community. Traditional downtown 'high streets' in towns and small cities are suffering under the 'Wal-Martization' of retailing. Farmers' markets can also provide a much needed touch of authenticity and people energy to venues that are trying to attract more local traffic, and can build community by providing a weekly opportunity for people to interact with other residents. This may be particularly significant in the sprawling GTA.

Community based environmental groups, as in the case of X (GTA location), created a farmers' market to bring residents in touch with local growers in order to meet sustainability goals.

From the perspective of vendors, markets provide direct access to shoppers and both benefit in the process.

I like marketing my own stuff, because if you're going to survive on a farm – I've been on this one 23 years – you have to sell your own stuff retail, at least the way I do it. I used to ship off my beef and we got whatever we got, but you have no control. With this you have some control.

Markets can help offset the loss of access to larger distribution/sales channels such as supermarkets.

Market Management & Organizing

- Some markets are structured to formally represent the interests of vendors who may participate in decision-making via a market board or advisory committee. This structure usually includes farmers/vendors and other significant market players and funders in the case of a BIA or a church supported organization, while other markets concentrate management and policymaking among a smaller scope of players.

Small City Farmers' Market Committee:; so we review as we go along through the season, make some changes, make some adjustments, and it's all for the better of course for the market, and if it's good for the market, it's good for the vendors.

We have an advisory committee, and there's farmers that sit on the advisory committee, as well as people from the community area, BIA and people at large from the community... Everything that we've come up with has been a consensus-building process.

This past year, it was the Chamber of Commerce and the Agricultural Society. It's on Agricultural Society property, and the two of them work together, and there was a committee. There was no vendor involvement at all, but there was a committee. And there are vendors who are registered and taking part next year.

The first year, I appointed a steering committee, so that's how we vote, on a steering committee. The steering committee is made up of four vendors from the market and one community member, so it's somebody that we pick at random. So we have a little bit of community involvement, but it's the vendors – but I have the final say.

- Based on the limited input provided by a small number of respondents, markets operated by community service organizations may be structured in a way that does not provide decision-making opportunities for their vendors.

Our club runs the market basically, but I'm the chairman of the farmers' market as well as the manager of the farmers' market, and I'm boss of everything, but I don't portray myself as that. I'm really interested in having the market run in a way that induces people to come so there's no fighting or there's no arguments going on in the market, and I try to keep everything at an even keel for that reason.

Challenges: Market Managers

Managers face a number of challenges in creating and operating a successful market. And while the significance of the various factors varies considerably from market to market, there tend to be common difficulties or hurdles. These include:

- Finding and maintaining a good balance of vendors with a range of essential items that are prepared to commit to coming to the market on a regular basis, regardless of weather conditions and dips in customer traffic. This problem may apply even with established markets

Market managers in established markets reported that they have encouraged vendors to expand what initially may have been a narrow array of items to meet consumer demand. A successful market/vendor must provide choice and ideally capture as much as the food dollar as possible, facilitating 'one stop shopping.' Managers are very conscious that shoppers' diverse needs can be satisfied in supermarkets.

So they may have a variety, and many of them were encouraged this past season to also include vegetables, because the first year we had very few vegetables. So a couple of our bigger farms have now put in fairly substantial lots of vegetables. So some of our bigger vendors have pretty much all of it covered, but you're right, there are some vendors that have two or three products.

- New markets' biggest challenge is locating farmer-growers, usually regardless of whether they are organic or conventional producers. The availability and range of items available vary depending on where the market is located in the Greenbelt. For instance, vendors who are at markets in large urban centres such as Toronto and Mississauga have to drive in from as far afield as Niagara Region. Mississauga's market started in 1974 when the area had farms which have now been turned over to housing and commercial usages. Some market managers thought that the location of their markets which were in areas with little or no nearby farms presented a challenge given the distance potential vendors would have to travel.

So we have difficulty in getting farmers, and since ours is a fund-raising project, we allow vendors (as we call them, resellers; I know some people call them hucksters), but they are the backbone of our market. They're there from the beginning to the end. They make sure that they know how to follow the rules. The rules have been there all along... We have approximately over 25 participants. A few of them are farmers who only are genuine farmers, and I know them as genuine farmers. The others, they're partially farmers, because a big problem is that most farms grow one or two products.

While some market managers are finding that they have to reach out to growers who are comparatively distant, others report that there are many willing producers located in close proximity. In fact, some of them had waiting lists for local would-be vendors seeking a spot.

The very first year we had 25 vendors and 22 on a waiting list. Last year we had 25 vendors and I think there were maybe 12 on the waiting list...It's done tremendously well, and I think part of the reason is X Niagara Region location used to be a farming community... We are 100% home grown, which maybe I should step back and say our rule right now is you have to grow 75% of the product you sell, and the other 25% has to come from your own farm (clarified to mean from a local farm). But in reality, the vast majority of our farmers bring 100% of what they grow themselves.

- Accessing a large pool of shoppers who will become market supporters and attend on a regular basis. Markets just as any other business have to build a core of loyal customers who are prepared to commit to shopping at the market on a regular basis. Ideally, these customers 'bond' with the vendors and their offerings, turning to the market first for supplies of fresh, in season fruit, vegetables and other staples, including value-added items such as bread, preserves, etc.
- Learning how to be a market manager and develop the skills to run a successful market is no small feat for some managers. Market managers come from a wide range of backgrounds and may bring many skills to the job. Nonetheless, the farmers' market sector is a unique type of business that combines retail, entertainment/event management, community building and local economic development. It requires diverse skills, some of which may be beyond the scope of new managers. Generally, the challenge is to develop an economically viable market that can support the salary of a market manager in addition to funding the necessary advertising and promotional efforts. In some cases the market managers who participated in the focus groups are volunteers who receive no compensation. Others were hired by the BIA, Chamber of Commerce or Economic Development Department – the market inceptors. Yet others were volunteers who were trying to create an operation that's sufficiently viable to provide compensation to the manager.

Types of Markets

Markets vary in terms of history, operating seasons and hours/days of operation, as follows:

- Established markets that have become entrenched in a community and new ones that are working to create a link with local shoppers.
- Week day and weekend markets and timing of the market day vary; some markets offer shoppers the convenience of two different days (weekday and weekend) while most are one day a week.
- Seasonal and year round markets, with the majority running seasonal operations.

- Hours vary – some start early, as early as 6am while others find that their weekend customers may prefer to shop later, starting at 8 or 9pm and closing early to mid afternoon. Whereas weekday markets tend to operate during the afternoon to early evening hours providing after-work access.

Established, community based markets with history that are part of the fabric of the community (tend to be to be successful, assuming that the community has developed effective promotional and communication vehicles.

But it's more than that. It goes beyond that. Some markets spring out of a community and are part of a community and they're embedded in a community, and some are just parachuted in and all of a sudden, "Okay, now we're going to have a market here," so they have to build it in different ways.

Been going to farmers' markets for 20 years and eight different markets: the last eight years in Port Hope and five in Uxbridge. They're small markets. We've gone to some larger ones, but we tend to seek out the small ones.

XMarket stands out for several reasons. It has been in operation for many years and has a large of number of vendors selling a variety of fruit and vegetables with a small number of prepared food/value added including a chip truck and a strudel vendor. Some vendors operate as many as five stalls; there is considerable competition among fruit and vegetable sellers. The produce comes from local growers but also the OFT; the volunteer manager recently learned that vendors arrive at 2am with tractor trailer loads of produce. The one stipulation they have is that vendors can only sell items that could be grown locally, but monitoring poses a major challenge.

We do try. We do try, but we try to control what they bring in. We say at the beginning, "You can bring the stuff, but as soon as local produce is available, you're not allowed to bring imported stuff."

The customer base is primarily immigrants from Europe, India and other countries who tend to buy in bulk. Bushel baskets of tomatoes, onions, etc. are common in this market. As the market manager was learning the issues surrounding local sourcing versus imports, he was trying to ensure that customers were being sold Ontario only and that it was Grade A. Some vendors in other established markets noted that the profile of their shoppers is changing with the influx of new Canadians – they have different produce demands and may not be prepared to pay more than low supermarket prices for produce. Bargain hunters can mean serious sales and revenue erosion.

Market Operating Models

- New Model – One market sees their model as new and somewhat unique. All local farmers are welcome – organic and conventional growers, and organizers are prepared to play an active role in helping farmers to the point of going to the farms and picking the produce so that they can offer shoppers a variety of locally grown items.

- It's a "Co-operative" market meaning that growers provide produce on the day of the market (delivered to a spot, not the market, and collected by market management) and hired staff are responsible for setting up the displays and dealing with customers. Staff and stall costs are divided among the farmers who participate in this model, thus allowing growers to focus on producing the crops and preparing them for market. A trust relationship has been established. This market also takes orders from customers and is working on developing relationships with local restaurants so that they can expand their access to local food beyond the typical large-scale foodservice providers.

The co-operative model's interesting, and I think what we're looking for is to see what funding might be available to develop that, because the farmers just don't have the staff to come in. So this co-operative model, they love it. Once they trust you...

- There was some confusion among participants about how many markets were managed by Farmers' Markets Ontario. Opinions seem to vary about the benefits of participating in My Markets. Some vendors thought that My Markets started out or were linked with the Greenbelt initiative. Some knew that the vendors can sell only what they produce and cannot expand their array beyond that.

You have to be a 100% certified grower to get into My Markets. You cannot bring anything else.

I don't know why they did that, and I think that's not been thought through very well, plus it leaves out interesting products to make a market more full. You can't have a guy there with coffee, you can't have a guy there with tea, you can't have a guy there with anything except just the stuff from your farm. So really it's limiting. So that was one of the reasons we didn't go there. So that's one issue.

While the notion of putting the farmer first resonated positively with vendors, some participants thought that the My Markets formula was too rigid in banning the participation of value-added providers/vendors.

The most important thing in a farmers' market, people are there to see farmers, meet the farmers, see who's growing their stuff. And, yes, it's important to have the value added – the people who are baking, the people who have the juice, the jams, all that kind of stuff. So you've kind of almost got to put yourself in a conundrum saying these My Markets, guess what? They're totally behind the farmer. The farmer is number one. They do everything they can for you as long as you comply.

In my opinion, you could have that kind of priority at a market and still have other people there and have it all work if you have a good manager and you have a good management strategy.

- Flea Markets is another category mentioned by vendors. They vary considerably in terms of their composition. They may have a wide mix of farmers, crafts and other items including a smorgasbord of stalls with used, antique or bargain basement goods. Farmers' fresh, locally grown food may be the highlight or draw but might represent only a minor part of the larger offering; one rueful vendor mentioned X market in this regard. These markets usually feature

vendors/farmers only or primarily with some additional value-added items including crafts. Ideally the farmer stalls are in a row separate from the value-added/crafts. Most, but not all vendors agreed that those markets that are primarily 'flea markets' were the worst place to sell quality, locally grown product.

I always stay away from flea markets for the simple reason you've got somebody setting up with poor looking stuff right beside yours

I went to the X Flea Market years ago. X Flea Market people, the owners of it, were big, gung-ho on promotions, really good, and we made that into a really good market. It's taken us a long time to do it. But I will say they put lots of money in promotions. They actually hire me most of the time to do the promotions. We gave away a couple of thousand cobs of corn one day cooked, he had a pumpkin carving contest.

Distinguishing Characteristics of Markets

- Population size: big city, small city....While big city/suburban settings may provide access to many customers, the ability of translating that into a profitable, well supported market is a function of promotion combined with good siting. Smaller city venues can be very successful, drawing in the local traffic to the benefit of both the market vendors and other businesses in the adjacent area.

Well, any market is good for any existing area that it services. In Orangeville, it's great for downtown Orangeville. All the businesses support it, so it's all good stuff. But there is a definite difference between that type of location, if I can say, in a mall, as opposed to on a street that's set aside and it's well advertised, and advertising is done through the media as much as possible.

- Market Location – Markets located in parking lots of malls may or may not be successful depending on the profile of the mall customers, the siting (within view of the passing traffic), the signage and ease of access for drivers. Mall management can also help or hinder the farmers' market depending on their perceptions about the role of the market. Consequently, some markets struggle to survive while others prosper, as indicated below.

They put megabucks into advertising. Well, the Teachers' Pension Fund owns X Farmers' Market.

- A critical mass of vendors is essential to draw and create a loyal shopping base. Smaller size markets usually struggle because they lack offerings/variety, while larger ones tended to fare better. The sizes vary considerably from very small markets with five or less vendors on a bad day to those that consistently have 15 to 20 vendors or more.
- Some vendors opt mainly for markets that are in close proximity to their farm in an attempt to expand awareness of their farm and stimulate on-farm sales options. They may be building synergy between the market customers and those who shop/visit their farm operation (farmgate and CSA options).

Location. Location. That's a reason to go. Location is a very big reason, and that's one of the main reasons we pick the farmers' markets that we do. We want to bring people to our farm, so we go to farmers' markets that are within probably 20 kilometres.... Even if our hope is to get to 1,000 boxes (CSA) a week within five years, and even if we do get to be that size, we will still go to (mentioned three different markets), because that's our backyard and that's where our customers come from and that's where we're going to bring more customers to us.

- Market management – Rules and styles of management and focus of the market vary considerably, which could have considerable impact on the operations of a market.
- The market raison d'être is important. Is it created for the purpose of recreating the traditional market to spur awareness and consumption of local food and to complement or expand the power of the downtown core/business area? The intent may be to counteract the negative drawing power of big box stores and power centres located on the outskirts of the town/city. But is the goal to provide an economically viable retail channel for local farmers? Most managers understand that this is critical in order to continue attracting their vendors.

When the market was created, the idea was to create a European style market, and looking back since it first started, really I think that a lot of our markets are recreations of tradition.

- Market creators or inceptors can include diverse interests such as community based environmental groups (Woodbridge), BIA's (Orangeville), Chamber of Commerce (Hamilton's Binbrook), service organizations such as the Lion's Club (Mississauga's Square One), and local market advocates/local food supporters (Birchcliff). Regardless of who created the market, vendors were seeking opportunities to sell their goods at a fair price and to be treated with respect by market operators.

I also sit on the Grimsby Economic Development Committee, which is why I started. Now, if you're not familiar with Grimsby, as little as eight years ago Grimsby was a farming community. It was one of the nicest, prettiest towns. Tender fruit. You couldn't go 20 feet without a fruit stand. There's no agriculture in Grimsby below the escarpment any more... So during a committee meeting, I was challenged to bring agriculture back to Grimsby, and that's my job.

Other Sales Outlets

Most farmers' market vendors sell through a number of channels, usually trying to build direct-to-market opportunities to obtain a good return for their efforts. Some of the vendors have been forced by lack of access to supermarket chains to find other outlets, while others are geared to direct sales. Also, it appears that some vendors are looking to new avenues for sales beyond possibly on-farm sales and pick-your-owns to include CSAs, local restaurants, foodservice, schools, etc.

- Community Supported Agriculture (CSA) is a booming sector for some vendors. They are working to build this side of the business via the links they establish at the farmers' markets. Both channels work together, providing them with flexibility and market expanding opportunities.
- Restaurants may access locally grown through markets, but it takes considerable effort to connect individual restaurants with local growers. Some savvy market managers see them as a potential source of new business that has to be nurtured and requires dedicated staff and initiatives such as the Niagara Culinary Trail.

I'm also lucky enough that I'm part of the Niagara Culinary Trail...has done miraculous things about putting farmers together with consumers. So we try and have farmers hook up with this group, and then we will find restaurants and bring them in. It's a terrific web, and any restaurant in the area can literally look at the map and find everybody that grows local that's willing to sell to them.

I met this gentleman who publishes a restaurant magazine, and I think it goes across the country. I met him actually at a golf tournament, and what he said was, "What the farmers don't realize is that the restaurants are their market. That's where their market is. Regular market every day, every day, every day." And that's a whole area of creation and distribution and all that sort of stuff.mm

The reaction of some vendors to this potential market tended to be less enthusiastic due to the small size of the orders and the lack of distribution channels. It is not economically feasible to be delivering to a number of small restaurants.

- Foodservice buyers are seen as margin cutters, focused on buying imports. A few vendors had attempted to build a business relationship by selling fruit, for instance, but despite considerable efforts failed to gain orders. Apparently price was not the issue. There was considerable disappointment that local educational institutions shipped in imported apples and pears while local growers were unable to find outlets for their crops.
- Food Banks help reduce waste. Market day leftovers at one market are donated to the local food bank, as per an arrangement made by the operating organization, Lion's Club. While this method helps feed hungry people, it relies on the generosity of the farmers.

It's a voluntary thing. We call food banks in and they go around and ask anybody to donate what they like. And this year, one of the food banks kept a record and told us that we had donated about 22,000 lbs. of fresh food.

- Festivals, such as Feast of Fields, could be a way to showcase the farm and value-added items. This opportunity was mentioned by a few vendors.

Market Management

Market managers come to their position in a variety of ways. This position may be controlled by a board (may include vendors) or, in the case of a market linked with a BIA, the manager may be engaged by the BIA but works closely with a committee of vendors (farmers, craft and value-added representatives). In this instance the market manager usually operates within a formal structure and is involved in shaping a vision for the market within the context of urban and economic development:

It's the BIA that supports the farmers' market, so they deal with finances, and we have a meeting with them fairly regularly. I'm the chair of the market and I'm the market manager, and so I would be there almost every Saturday. And we were in development, so we're working hand in hand dealing with development issues in the market to create a vision for the market. And we make decisions ourselves and let the people at the BIA know what we were doing, and that's the way we functioned in this year of transition.

...so the market activity, the day-to-day activity, we have actually a music guy, we have a guy dealing with set-up, we have a market manager who deals virtually with all the food, and that market actually, everybody's type A personalities for the most part and they get their job and they just do it. You rely on that person to do it, and it's done, and that's the way that committee functions. But in the market on a day-to-day basis, it's myself and the manager who just flow with the function.

Managers' Skill Sets - Vendors

- What skills are necessary to be an effective market manager? People skills and diplomacy are primary, as well as organizational ability and willingness to follow directions set out by the market's governing body.

So market managers need to be tough...Mr. Nice Guy doesn't work.

Well, sometimes you have to be nice and sometimes you have to be a stickler.

However, it was pointed out that market managers can be naïve and are being lied to by vendors who say they are selling only what they grow. Other vendors knew what was going on; this situation puts the honest vendor in a tough position.

They have to understand merchandising, how to mix the vendors up so you've got the proper flow as people go around.

- Managers have to ensure that things run smoothly from parking and offloading to broader issues.

Logistics. Getting in, getting out, who gets to park where, who gets to stop their truck right in that really good spot and leave it there, all kinds of issues like just logistical issues of fairness.

- Managers have to be problem solvers, in some cases using an established path of filing a grievance to the governing committee or board. The filer is given the opportunity to present, but must accept the final decision. This process seems to work smoothly for groups that meet with some regularity. Some organizations meet both during the market season and before the start of the market to ensure proper organizing and planning.

A referee.

There is no rule – some markets were well organized structurally while others, characterized as urban by participants, have no vendor meetings. Holding meetings with vendors could be productive, depending on when they are scheduled and managed and who attends. On the other hand, some vendors complained that too often meetings can deteriorate into a prolonged “fight” – wasting time and inflaming participants.

There was one time I took a couple of my kids with me to the meeting (X Market), and they were really boring, and so the kids – just up the road there’s a Holiday Inn. Well, I have a membership at the gym at the Holiday Inn. So about 9:00 they had started arguing about something really insignificant, and I ducked out with the kids, went up, swam for an hour and a half, came back, and they’d finally decided how they were going to word it to vote on. I didn’t miss anything.

- Meeting management – Skills need to be developed to chair and manage meetings in order to avoid needless conflict and overlong, unproductive meetings.

FMO ran a workshop this March. We hosted one down in Elizabethville for Kingston to say Newcastle, and we got some people in from north Pembroke, and it was about how to run a meeting for dopes like myself, and just that sort of thing, how I had to take it over and ruin it on you. They laid it out to us, how to handle that, and it’s basically with an agenda. You need a big stick if you’re running the meeting. People who are not on the agenda, you don’t get to talk, period.

- Vendor perspectives vary considerably on this point. One vendor who was active on a market committee comprising representatives of the different sectors of vendors (farmers, value-added and crafts) insisted that management must be strong and decisive.

It is very critical that the manager has control of the market. There’s no arguments, there’s no beef. You take that up later if necessary, but it has to be at their discretion. Committee members – having a committee is good, because the market manager doesn’t always see what’s going on, and it gives an opportunity for the committee members, who are actual vendors, who have a vested interest in being there and getting that organized for her or him, whatever the case may be.

Managers' Skill Sets – Market Managers

- Market managers require knowledge of health and safety regulations governing food. For instance, a new manager indicated her ignorance of rules pertaining to eggs; other managers in the group advised that the egg vendor was not in compliance. One market managers ensures that her market's customers have government inspected eggs by taking them to the grading station herself.

People want farm-fresh eggs, but I'm not sure about the regulation. They're not washed, they're not graded. I shouldn't say they're not washed. I'm not sure whether she washes them, but they're certainly not graded.

We have four of the (egg vendors). We get them graded out in Dunnville. There's an egg grading station in Dunnville. I'm a very hands-on market...You would take them yourself. .. Yeah, and you'd get a slip of paper from the egg grader. The Health Department checks.

- Here is a list of traits that market managers suggested are essential for being a manager:

You've got to love food. You've got to love food, love looking at it.

I'm having a lot of fun. You have to believe in what you're doing.

I like to be friendly. I don't pressure the people who are selling in the market. I keep them within their grades. They know what they have to do. They know the rules, and if they're a bit off the rules, I wouldn't go yelling at them. I like to do it in a very polite manner, and I've had no problem with that.

You've got to have thick skin. You've got to be able to deal with the issue when it comes up, because nobody knows what the issue will be the next week. There could be something totally different.

Farm Market Organizations

Umbrella groups such as Farmers' Markets Ontario (FMO) were mentioned for the variety of supports and services they could provide. FMO stood out as the best known and was primarily linked with low cost insurance. Experiences with FMO varied considerably. Here is an example of an unproductive relationship with a member market – FMO rules and failure to fulfill promotional subsidization agreements:

They promised us all this money for advertising. If we spent a lot more money, they were going to give two-thirds of the advertising money back. They came up with nothing. So instead of spending the \$6,000 we usually do on advertisement, we spent like \$15,000, and it put us way back financially, and it happened two years in a row. So last year, the secretary got up and he said, "You know, FMO is a really, really good organization in theory, but it don't work."

FMO membership also provided members with a free listing on their organization's website and assistance in designing the market's own website; however, these features had low mention.

Supporting Market Managers

While the issue of training did not come up spontaneously when it was introduced by the facilitator, response was generally very positive. Market managers are drawn from many backgrounds, often not connected with agriculture or retailing, and hence may be lacking some essential skills.

I think it's all helpful. We're all sort of flying by the seat of our pants, I think. When I came on board, I had to learn my job and found out where I was most needed and valuable, and I'm learning all the time. Every time I go to something I learn something. I don't have a farming background, so I find it all valuable.

A variety of potential market manager development areas included identifying funding opportunities and assistance in writing grant applications.

it would be nice if the Greenbelt, Foodland Ontario, Eat Local groups, whatever, would be able to tap us into or find the places we can go to to get funding, to apply for various funding, have people there that would help people write those funding applications, find the resources potentially (for funding promotions and a salary for the market manager)...

Market Offerings/Sources

The source of vendors' offerings be it from other local growers or the Ontario Food Terminal (OFT), can be a significant issue uniting them or driving a wedge between managers and farmers/sellers, as detailed below:

- Vendors sell only what they grow – It would be called a “true” farmers’ market. Should vendors sell only what they grow if they can source a superior, locally grown item? For instance, a local grower/processor is known for his Nantes carrots which are very tasty, fetch top dollar and are processed to be market-ready. Why is it an issue to access supply from that grower and resell it at the market? Some vendors and market managers would agree that this is acceptable while others believe that only what is grown by the vendor or possibly by a neighbouring farmer should be on their table.

His are perfect. Every one is washed perfect; they're in a brand-new bushel. You pay top dollar and you sell them for top dollar. I pay about \$18, \$20 a bushel. You put a handful in a 1 ½ litre basket, it's \$3... I don't have a \$200,000 digger. I don't have a \$100,000 washing machine, and I don't want to get one.

- The practice of sourcing from the Ontario Food Terminal is very controversial. Some market vendors source a variety of produce from the OFT; the Ontario grown items may include heirloom crops to appeal to innovation seeking customers. While it may be convenient and make sense since they are buying from small vendors who are located in their area, they may also be obtaining items from as far away as Leamington. This means that vendors have the advantage of providing earlier crops to their customers. But is this fair for other vendors who are selling only what they can grow and when items are ready for picking? Or should vendors have the option of extending the season at both ends? Some vendors agreed that this issue has to be dealt with by the individual markets and the policies they establish to address this.

If you're getting carrots from Leamington, you've got a three-week jump on us. That's why we do not allow guys like you in the markets that I run—

We stay away from that. We want the stuff locally grown, so all of our farmers are within the area.. We want to keep it as a farmers' market, and one of the big problems we find is people who want to be resellers. I've had tons of requests for people who want to come into the market. They may have a small farm, but they want to bring in other products as well, and we're just saying no to that. (Market manager)

- Many participants agreed that offering shoppers variety is the key to a successful, vibrant market. This could mean allowing vendors to sell items for a neighbouring farmer who is unable to attend due to staff shortages or lack of time. In one case, a farmer/vendor swapped the regular sized apples grown on his land for giant sized apples grown by another local farmer in order to meet market demand. He had found that “people like big anything.”

They may be under-staffed in the fact that they couldn't attend a market, but they would have products that would bring a vibrancy to your market to get that variety up there and to fill it up and get more products, as opposed to having (no disrespect to anybody) six vegetable people, that's it, that's all. You want some variety. People are coming down. If they're going to come down there, they've only got so many dollars to spend. You want as much of that being passed around at the market as possible. So the more variety of vendors you have, absolutely, it's going to make for a better market.

In order for markets to be successful, you have to have many different products with many different people producing them, many different items.

- The Ontario Food Terminal also acts as an outlet for some larger scale vendors/farmers. They both buy and sell there. But it also is a major hub for imported produce which dominates how it is perceived. Thus it may well provide local items for some market vendors, but it is also the source of all or most of the items sold by ‘token farmers’ markets’ in the GTA. It is particularly stinging to see some vendors selling imported items when they are in season locally.

Some study participants also questioned the quality of OFT sourced produce as they suspect that unscrupulous vendors buy C grade and charge customers for or present it as A Grade. This provides unfair competition for vendors selling local grade A items at a higher but true price.

Well, that becomes an issue, but people – sometimes it's not necessarily taste. They're thinking they're buying the local, they're doing the right thing, but they're being sort of snookered by somebody who's selling commercial grade rather than top quality.

OFT year round produce availability poses particular challenges to local growers/vendors at year round markets who are constrained by limitations posed by the short growing season and consumer desire to have 365 day access to all types of produce. Vendors agreed that resellers are perpetuating the inequities that keep small local growers out of the major supermarket chains; thus imported competes now both in supermarkets and at the supposed solution – farmers' markets.

I also sell stuff in the Food Terminal. We sell lots of strawberries at the food terminal. I've taken apples in there. It's a tough sell to guys like this. You have to have an amazing product to sell at the food terminal.

I don't know why they use the term farmers' market, because there's only about three farmers in the whole market. It's all resellers, and that's part of the problem, because everybody talks about the whole issue of eat local, buying the products locally. Many of those products aren't. A farmers' market should be a farmers' market. It should not be resellers, hucksters. The term "hucksters" was years and years ago; now they call it "resellers," but that's the issue. There's nothing that burns me more than that.

In contrasting remarks, vendors who access supply from the OFT noted that this practice not only allows them to feature a wider array of items, but to respond to the unpredictable shifts in customer buying trends. In their way of thinking, it is impossible to adjust what they grow with the fluid demands of the marketplace. Also, now that there are very high barriers for local growers to sell through the major supermarket chains, the OFT acts as both a sales outlet and food source.

Like a friend of mine says, "You've got the same wife and kids, but you don't have the same food." This is running hot, and then all of a sudden it stops...]. And if you've got it in the field, what do you do with it? You can't take it anywhere, because if you don't have a regular customer –

- Fair disclosure of where the item is grown and truthful responses to consumers' inquiries is a key issue, given that shoppers ask. According to some vendors, resellers may or may not be truthful; the worst are those who claim that everything on their table comes from their farm. One grower/reseller addressed this issue by posting the name of the farm next to the item. But this apparently is not common practice. Market managers can help to ensure that resellers are handling locally grown items by requiring receipts that indicate where items come from.

That's where we have a huge discrepancy, because nobody knows who's telling the truth and who's lying, and that's why I left. I went [there] for years. Yeah, there's the people, yeah, there's the marketing, they do a great job, but I can't stand the people who lie to the customers.

They've got to provide us with documentation of the name of the farm, the products they're bringing in, contact information of that farm so we can check that stuff out.mm

- Authentication of the origin of items made sense to overcome questions about the source. The requirement to sign a declaration and/or to provide receipts made sense. Some vendors and more likely managers believe that farm tours/inspections are key in coming to terms with this important issue. Nonetheless, the bigger issue is should vendors be permitted to resell items from other local producers?

But you sell your neighbour's honey. All their bees died one winter. That's a huge part of your income, the upsell on their honey. What are you going to do?

- Policy regarding reselling is important but sensitive because it must be based to some extent on trust between the manager and the vendor. Some markets stipulate a 70/30 mix, but how is that tracked? Should it apply on each and every market day, or can it be averaged over the entire market season, which allows for swings of availability? While the 70/30 rule seemed to make sense, vendors wondered how it could be enforced. This example combines the challenges of meeting 70/30 and policing it. Respondents agreed that while rules were necessary, they must be enforceable.

And 30%, yeah. And I told them right from the beginning, "Seven out of 10 items won't be mine" – I wrote it right on my application – "but by the end of the season, 70% of the dollar sales will be mine." So half-way through, the economic advisor comes up with the CEO and some other lady from the thing and they go, "Oh, we decided now it's got to be seven out of 10 items." I said, "Okay. The blueberries are mine. So that means if I have 70 pints of blueberries the way I can sell them, I can have 30 pieces of something else. I can have 30 peppers, 30 baskets of apples, 30 heads of cabbage and that's it." And he goes, "Yup." "So how am I supposed to make any money that way?" and the CEO's "Well, that's your problem."

So I got up early in the morning and I'm thinking I could go to Canadian Tire and get a big Tupperware container, put 5,000 blueberries in it, put a big sign up: "Get a brain blaster: 1¢ each, 6 for 5¢." I'm selling 5,000 blueberries 1¢ at a time. I've got my 70/30 split."

He comes – oh, god, he was mad. I guess he figures he makes \$300,000 a year and the dumb-ass farmer's supposed to bend over and kiss his ass. I said, "Look, I know I'm not meeting your intent, but you changed the rules. I met the rules. See ya."

- A market policy that stipulates items must be grown within a 100 mile radius poses a challenge for managers' need to access a wide variety of items. Some areas for instance are not able to

grow greens and vendors/farmers cannot provide shoppers with the desired range of fresh items.

Pricing and Economic Issues

Tracking Market Sales

- Market managers indicated that sales records are not kept as a matter of course. Monitoring seems to be the exception rather than the rule. Reaction to this issue by market managers varied considerably from supporting and regularly tracking market sales to great tentativeness around treading into this controversial issue. The latter group viewed their vendors as independent business people who had the right to confidentiality; asking for even an approximate sales total was viewed as invasive. Even casual attempts to take the temperature of sales usually netted vague or even misleading feedback, as per this example:

None of mine will do it at all. They always say, "Oh, we didn't do too good today." So I say, "Well, listen. I think next year, since you're not doing very good here at this market, shouldn't you try another market?" "Oh, no, no, no, no. We want to come here. It's all right." I say, "If I raise the fees, will you come still?" "Oh, yes. It doesn't matter. Don't worry about price."

- Some market managers suggested that vendor reticence to provide sales estimates could be prompted by the fear of being taxed for this revenue stream. Also, this information could be used to leverage higher rental rates; it yields more funds for the market operation and promotion but it takes away from the income earned by vendors.
- Market managers' willingness and understanding of why it could be important to wade into the controversial issue of market sales varied. Those who were skilled and had established a strong relationship with their vendors might be more likely to believe that they could broach this topic. Others appeared to be on less of a sure footing with their vendors or viewed the data as unnecessary because of their confidence in their skills as market managers. Yet interest in the potential impacts of having data for funding proposals and the value of directing market related initiatives helped reposition potential value of accumulating sales estimates. Some market managers speculated that if they had valid reasons for keeping sales records along with other data, might vendors may be more willing to cooperate?

They're very business oriented, and if you have their trust and then have a reason for getting information from them, I think you can get it, but it's got to be personal, the trust.

I think farmers need to understand that we are there for them to make money. That's the whole reason that we're there, that we create the farmers' markets, so farmers make money. And some of the farmers go, "Oh, well, really?" They don't believe you at first. I mean, why would we do this, other than that?

- As a starting point to calculate sales, one market manager considered trying to track sales volumes by categories, e.g., X dozen corn. At the very least, this measure could provide benchmarking for assessment.
- The common tracking approach is to make a rough assessment of the traffic flow. Given the absence of turnstiles, it is the only way to measure the number of shoppers. However, this is very approximate at best and doesn't predict sales; some customers are making few purchases while others may be spending more. A few market managers had gone one better by conducting onsite interviews with shoppers to determine basic factors such as where they lived/distance travelled to the market.
- One market's system of tracking sales and recording other variables (weather, market events and entertainment, competing local events, etc.) appears to function effectively and was designed and approved by a vendor committee, led by a BIA appointed market manager. It is noteworthy that the monitoring information was effective in lobbying for continued local government support.

What our manager does is she'll go around and she'll hand out a little pink, orange or whatever colour slip it is of the day, and what we'll do is we'll give her a guestimate of our sales for that day. We don't sign it; we don't put our name on it. We fold it up and throw it in a box, and she takes it back. She realizes that all of those came from the producers' row, and the other ones are a different colour. They came from mixed market, per se, and she'll create a statistical each week of the sales so she can gauge how it's going, what events created that, what the weather was like, what the temperature was like, did it rain, was it beautiful and sunny, was there a festival going on in the area, these kinds of things, just to collect some data so we know what to expect in the future and what we can do to enhance it, what worked, what didn't work, that kind of thing.

- A few other vendors that participated in this focus group reacted to this practice of collecting sales estimates. One vocal seller/grower insisted that anonymity would not apply to him given his dominant sales position. However, another vendor saw the wisdom of gathering sales data to support funding and reinforce the economic power play by markets in attracting shoppers to the area. Farmers' markets can help expand the appeal and flow of traffic into the downtown cores that are in heavy competition with the pull of malls and power centres.

Three of the eight markets I've been in over the last 20 years, the downtown BIA was an adversary, and two of the three, they became an ally eventually. You've got to have these kind of records to prove that what you're doing is you're drawing business down for them, too.

- Some vendors did not trust that keeping track of sales could be helpful or suspected that it could be used against markets/vendors. In fact, a grower association has found that fabrication was more successful in generating government support.

Sometimes they have hard numbers that can be used against you. We got our hard numbers and we haven't got our share since...

Vendor Record Keeping

While there was little time to draw out vendors on their record keeping practices, a few participants offered insights into their practices. In this instance, the vendor indicated that it was useful for market planning:

We write down what we made that day, where we were, the date, the weather, how many buckets of corn, how many flats of strawberries, how many bins of this, how many containers of that. And we can go back – and my husband, every year he'll go back and say, "Oh, gees, this weekend is... I better go back and see what we did the last couple of years." Goes back, says, "Oh, yeah, I'm going to need a lot of that, a lot of that, a lot of that. Okay. Good. I'm on the right track." Or "Oh, my gosh. What was I thinking? Okay. I've got to do that."

That's really important, especially if you see something like weather or if it was an election day or some wild card thrown at you. Or on this particular day, they had the Strawberry Festival on at the market that day. We did X amount more than what we normally do. It's not this weekend this year; it's the next weekend, so we won't send that extra amount this weekend.

Yikes! You have to figure all that out. (Response of a vendor who did not keep detailed records.)

- Individual vendors have a variety of deep to shallow approaches to record keeping. Some keep records by market, by item and textural information in order to track sales using a number of influential factors (weather, promotions, etc.). Others do not keep track of sales beyond counting how much they earned for the day. The former segment may use this information to guide future decisions, such as what items will be most/least popular, predicting demand, etc.

Yeah, you count it, but it's another story whether you write it down so you can keep track of it. Do you do that?

What I found, and if they do the promotion – if they do the sweet corn promotion, we sold more corn than usual for three weeks.

- What was the benefit of tracking market sales? Record keeping could help to build a case for a farmers' market as in this situation. Although competing with supermarkets for a share of the food dollar could pit markets against established retailers, the Uxbridge Red and White store manager found that an adjacent farmers' market served to strengthen his retail business rather than erode it. However, Beaverton's downtown farmers' market was loaded down with the aim of drawing more customers into the declining core. The local merchants opposed the market and the bulk of shoppers continued to gravitate to new stores located on the outskirts.

Pricing Strategies

- Some vendors claimed that they strive to offer only the best, Grade A items, and charge accordingly. While they know that some shoppers are looking for the same bargains they find in supermarkets, these vendors will not compromise on either price or quality.

...want it cheap, you go to No Frills. You want good, you come to me.

- Farmers who sell wholesale and also become vendors/retailers have two different pricing structures and understand that these roles are different and dictate different pricing policies.

In my mind, my operation is two totally different things: one part's growing it and one part's selling it. And the part that grows it is only worth wholesale price. That's all it's worth. All my input costs, all my labour, all my stuff for growing has to come out of that, and then the money I get for retailing it, that's my retail sector. And these farmers' markets and independent stores, which are less and less, are the backbone and a driver for price to small producers in this country.

- Determining what to charge depends on the market's customers to some extent and growers' costs. Items may be 'priced to sell,' stimulating purchase, while at the same time providing a fair return for farmers. Some vendors noted that pricing slightly higher than the competition draws discerning buyers who are willing to pay more for the perceived best at the market. Others insisted that the option of aggressive pricing depends on the ability and willingness of shoppers to pay the prices.

Well, things sell better when you're charging more for them.

Financial Support for the Market

- Funding for market expenses including paying salaries, a wage or honorarium to the market manager and money for promotions may come solely from the revenue derived from stall rentals. In the instance, where markets are supported by the local BIA or Chamber of Commerce, more funds may be available to pay for essentials, including staff and promotions.

Our market's a non-profit corporation, so we actively look for funding....Wherever I can find it. The first year – last year we had some money from Greenbelt, some money from the city (because we pay a really large rental to the City to have our market there) and this year I didn't have any funding. I've been putting out applications or I won't have a job next year. The market will run without a manager.

- Local financial support and the type or extent of relations with the local government varies considerably. Some markets are completely autonomous from local economic development

departments and have to generate their revenue strictly through sales. Others are linked with charitable organizations such as churches that provide space for the market and some amenities. This appears to be a win-win situation for both the market and for the church in their efforts to support their local community and their congregation. It could be a vital strategy for addressing a 'food desert' community that lacked local access to fresh, healthy food. However, it could pose competition with local government initiatives as in the case of the Hamilton Mountain market. It has experienced considerable opposition from the City of Hamilton given the revenue generating power of the year round Hamilton Downtown Farmers' Market. This, however, was an unusual situation.

...the city was not in favour of us starting a market. They fought us. They fought against us to start it....Because they didn't want a market on the mountain because they were afraid it was going to take away from downtown development in the market down here, we were going to steal customers from them... Hamilton Downtown Farmers' Market, because that's bringing in \$4 million of revenue to the city of Hamilton: 85 stall holders at \$1,500 a month.

- Farmers' markets that are completely self-funded may be in the most financially precarious situation given their dependency on volunteers. A small number of market managers found themselves in this situation. They were struggling with few resources other than a strong drive to make it work. Their goal was to build a market that would generate sales for vendors so that they would return week after week and attract a healthy number of loyal shoppers who had the economic ability to pay fair prices for the goods. Lack of money to promote the market and to engage entertainment/stage events is a major barrier to establishing a viable market.

Customers

This section provides a number of insights into the relationships between vendors and their customers and the complexity of being both a grower and a marketer.

- Vendor perceptions of their customers revealed some possible contradictions and different experiences with farmers' market customers. Some vendors claimed that the profile of customers varies depending on the location, which makes good sense given the varying demography and population concentrations. In their view, some locations are dominated by bargain hunters in search of price deals typical of No Frills while others have discerning buyers who are quality rather than price oriented. These perceptions however could vary depending on experience.
- Vendors' opinions of the popularity of locally grown food swing between two positions. Some of the focus group participants viewed the locavore movement as a major driver fuelled by a genuine desire to eat local and to pay a fair price for it, whereas others thought it was a veneer-

thin interest which was pre-empted by demand for low prices and a demand for year round access to seasonal items such as strawberries or peaches.

- Vendors and market managers were unified on one point: the hypocrisy of major retailers who have hopped on the local bandwagon but continue to stock mainly imported produce even when it's in season here. It was particularly stinging to see that chains are willing to pay more for imports than for locally grown, yet sell the imports below the cost of local. Foodland Ontario and others who are widely promoting local produce are using this platform because it has traction with many people, but according to some research participants their commitment to local is questionable. Major retail chains pose as supporters of local farmers, but in reality do not buy locally, thus forcing growers to access shoppers via farmers' markets, farmgate sales, etc. This inequity has added to the burden of growers who cannot focus solely on what they are good at doing and it adds unwelcome layers of complexity in their interaction with shoppers. Several focus group participants were frustrated by efforts to make these complex issues clear to their customers. How can they engage in a helpful dialogue with customers on this institutional problem?

I know our market, your market probably, there's a dedicated group of people that go to those markets because they know they're getting fresh, local product. They understand the process. The majority of people don't understand that process. You see all the advertising, "Eat local, do this, do this..." Foodland Ontario signs and all that stuff, "Eat locally in Ontario" and all that stuff, the majority of people think that that's a true farmers' market. They don't understand what's gone in there. No different than if you walk through a Fortino's store and you see all these "Eat local" signs all over the place, and you walk down the aisle of the produce and maybe two products are actually from Ontario. Everything else is external to Ontario. You've got Washington cherries, and you've got great cherry producing in Niagara.

- Some farmers were particularly frustrated by the fact that markets have to compete with the convenience offered by supermarkets who offer 24/7 access sought by time-starved shoppers. When it comes down to it, markets are constantly competing for convenience-oriented buyers. Markets can never hope to compete with supermarkets when it comes to access; this frightens some vendors who perceive that convenience outweighs 'buy local' values.

There are a lot of young people, and most young people are busy, and even talking to the other gal from the Chamber of Commerce, she said, "I don't have time to shop at a market." She said, "I go to the grocery store, get what I need and go home, and that's all I have time for." She has a young family, she's busy running them all the time, and I think a lot of people are like that.

- Customers ask questions. Some of the vendors seem to have selling skills, insisting that their sales assistants must engage with customers. Others do not appear to be inclined towards starting conversations with market shoppers. Nonetheless, many growers noted that some customers like to engage with farmers, posing many questions. Is this organic or not? Typically they want to know about the provenance of what they are selling; this is further reinforcement

for requiring a considerable volume of items to be grown by the vendor) although some vendors indicated that they post pictures of other farms that they may represent.

Number one question is, “How did you grow it? Did you use this? Did you do that?” Consumers are becoming more aware, they’re becoming more educated, they’re putting farmers on the spot. They want to know how it’s grown.

I grow chicken and sell chicken. I do lamb as well. So you can bet that between chicken, eggs and lamb, you get a million and one questions about organic fed as opposed to free range fed as opposed to caged. People know the questions; they don’t really understand the answers. So we spend a lot of time educating the difference between what is organic and what is free range. But it’s good because people walk away first learning something, and, next of all, feeling very comfortable with who they’re dealing with. So you can look them in the eye and say, “No, there is no medication in any of the products that I grow.” They can come up to the farm. I live five minutes away. If they want to come and check, that’s fine by me. I’ve never had anybody, but the offer’s always out there. And it becomes a trust issue.

Market Amenities

- According to several respondents, both market managers and vendors, markets must have access to parking, the closer the better. Shoppers will not purchase more than they can carry and are not prepared to make more than one trip to their vehicle unless the parking is close at hand. Washroom facilities also should be available. While most participants are at outdoor markets, a few have access to a roofed-in area for rainy days.
- Access to an ATM was seen as a potential boon to sales, particularly if the market is not located close to the downtown. Some vendors indicated that they extend credit to some customers in order to build good will and capture sales.

We’ll just say, “Are you coming next week? Take it. See you next week,” and we’ve never been beat yet. We do it all the time.

They come back. Maybe they don’t come back the next week, but two weeks from now, they come back and apologize for not coming last week. And then they spend an extra \$10.

However, some vendors see the importance of keeping up to shoppers by providing credit access – ATM’s, debit and credit availability are normative. A few take credit cards and are willing to absorb the 5% surcharge for providing this convenience.

There’s very little cash business left.

Role of Advertising and Promotions

- Market managers tend to be focused on the necessity and challenges of funding advertising and promotional efforts and maintaining a lively media presence. This may indeed be a prime objective, particularly when a new market is being established or when established markets are forced to relocate to a new venue. Many market managers understand that advertising is critical to create awareness of the market, particularly new ones. In the case of established markets, advertising and promotions are also essential to remind local shoppers that they can access local farmers and produce.

I think the biggest challenge for most markets right now is advertising.

- Ads, notices and articles in local daily and community newspapers are the prime vehicles for reaching out to customers. Some market managers also have access to local radio stations; however, most GTA markets do not, given the reach and dominance of major radio stations. One ambitious market organization in Oakville had unwisely bought costly ads in the Toronto Star – an experience that will not be repeated. Another had a positive experience placing ads on the local cable TV channel (Mississauga). While most market managers see the need for using their local media, many lack the budget to do so.
- In reality, some markets simply do not have the funds to purchase advertising, so they do their best to piggyback on affordable community-based local food initiatives (such as Hamilton's Eat Local) that do advertise or rely on Farmers' Markets Ontario to help spread the word via their website.

There isn't much money for advertising. I don't think anybody will have that, because if you start getting into advertising, it's big bucks. That's reality. So you're basically going on a hope and a prayer. I think most of us are involved with Eat Local. We've got some advertising there. If you're involved in Farmers' Markets Ontario, you're getting advertising there, you're getting into a website.

- Another way of building a strong customer base is to reach out to community groups such as local clubs or diverse organizations, church-based organizations, etc. Encouraging these groups to hold an event or, where feasible, perform or do something to highlight their organization at the market also could be a win-win proposition. It provides entertainment for their loyal customers and brings in new shoppers.
- Market managers who came to their role with event management or promotional backgrounds used these skills to build an exciting and constantly changing series of events and happenings in the context of the market. The range of events might go well beyond food. Their goal was to build traffic and expand the focus beyond sales to make the market a 'happening place.' Visitors like the hum of these community-based settings and everyone benefits.

- Some managers put considerable effort into educating shoppers about local food options, staging food demonstrations and providing onsite workshops on making simple, healthy items using market provided ingredients. Visitors are initiated into the joys of cooking new things. The food tie-ins benefit shoppers and vendors alike – the aim is to make the market a go-to place for exciting, nutritious local food.
- Individual initiatives such as sampling and giveaways work to build links with market visitors. These seem to be undertaken by individual vendors rather than prompted by market managers. Some vendors had found giving away free items, such as roast corn, leads to increased sales.

My corn give-aways, the packing give-aways, anything, pie contests. There's a lot of different promotions. It's unbelievable the promotions you can do.

- Basic signage in proximity to the market site is essential and is viewed by vendors as being easy to do. Using sandwich boards to promote to passing traffic and posting market signs around the area on the day of the market might also help as reminders as long as the market provides adequate parking. Market managers have learned that shoppers come by car; people do not walk to the markets even in communities where it might seem the better way.
- Onsite market promotional items could include a list of vendors, identifying the farm name and location with an attached map showing where the produce is grown in proximity to shoppers' homes. It fits in with the 100 mile diet, the desire to eat local, and it helps authenticate the produce that is sold in the market.

Oshawa Centre farmers' market advertises huge in all the papers. They're amazing, and on the radio. They've got a huge budget. We've even made Oshawa farmers' market bags (bio bags).

- Providing shoppers (not clear if gratis) with pre-printed cloth bags or bio-bags is a strategy with some appeal.

The Ideal Market

Given that farmers' markets are in business to sell direct to shoppers and to increase returns to the farmers, what would the ideal market look like? Market managers and vendors were asked to think about the optimum market that could achieve these dual goals.

- First and foremost, the market focus should be on the care and nurturing of farmers and the food they are selling rather than the setting (attracting shoppers to shop at the local businesses or a historic district such as Toronto's Brickworks) and other vendors (crafts, value-added and prepared food). Prepared food that is sold at the market should be sourced from the vendors

whenever possible, lending support to farmers. It is a question of balance and who is best served.

I really think that the farmers need committees, and if it's a farmers' market, it should be very clear that that's a priority, and like having the staff and the market manager totally behind the farmers and ready to deal with all the farmers' issues.

- Offer shoppers a variety of items, facilitating 'one stop shopping' and thus adding to the overall appeal and success of the market. This includes seasonal offerings of fresh fruit and vegetables, fresh herbs, meat (chicken was particularly popular and beef, pork and other meat), eggs (very popular but limited availability), cheese (also popular but limited availability), baked goods including bread, fruit pies, cakes and other baked goods, honey, preserves, and flowers (cut and bedding plants).
- The key focus must be on linking farmers/growers with shoppers/eaters, providing a hospitable venue for interaction and purchasing which benefits both parties. Farmers selling their produce must have priority over other types of vendors, as in the mixed markets. Nonetheless, secondary producers such as people selling bread and baking can be a destination and major draw for shoppers, some vendors noted. In effect, this vendor could be called a producer because she/he makes the bread.

We have a bread person in Port Hope, and there's hundreds of people coming every Saturday morning to a little wee market like that and they line up for her bread, clean her out.

- The market could have a committee or market board populated by vendors. Participants mentioned a few instances where this was operating effectively (Market on Broadway). The board may have an appointed local official if it is receiving support from local government. However, in order to establish trust with vendors and create a productive working environment, transparency is critical. Managers, regardless of whether or not they are hired by the local economic division, must operate according to a set of established rules and make decisions in an open, transparent manner. This also includes opening the management books to vendors.

We have a board of directors at most of the markets, actually, a board of directors, and the market manager works for the board of directors. Meeting once a year, we give our new election, have everybody in. And then there's rules, of course. There's a lot of rules on these things.

- The market should have a mandate to hold periodic meetings with vendors. These meetings should be well organized with an agenda and chaired by a competent person who can keep order and maintain balance. The market should also have a set of policies that are known by all participants and enforced by a market manager who has strong interpersonal skills.

Well, there used to be a statement – maybe the market mission statement or something. Maybe a meeting every year or something like that for issues or a website where you can go...

- Communication between management and vendors is critical and could include a newsletter to vendors in addition to informal management 'walk around' interaction.

Something, some communication.

- The market should have policies and guidelines establishing rules for what can and cannot be sold at the market. Is reselling of local items permitted or not? Can OFT locally grown be sold or not? Although some vendors were sceptical that market managers could come up with a book of rules and regulations, others supported this option, provided the managers were seen as balanced in their approach.

Yeah, if something could be developed like that, and you say, "We're following these rules, and this is our deal here, and we're allowing this many of these type of vendors and so forth." But that's a job that's pretty – you have to be pretty diplomatic and you have to be astute, and some market managers are really very straightforward. They make contact with you on a regular basis. They're very fair. You feel they're fair, you know they're fair. And other market managers are a little more autocratic and you get the sense that they're not communicating sometimes properly.

I think there should be some sort of policy where they buy – where they have to buy stuff from the farmers at their market. (food prepared at the market should be sourced from the market)

- A level playing field and local/regional regulatory framework need to be developed for health and operational standards. The current patchwork of regulations can be a barrier to innovation and expanding the markets' offerings (market cafés, selling eggs, etc.). Also, there is the challenge of providing needed support through a networking approach. While there are networks they might not be working in a connected fashion. As one respondent pointed out, the networks don't link with each other.

So that people understand or get a better idea of what's going on so that we make sure. It would be nice if the governments would get their act together and make standardized rules. That would be nice. I mean, maybe I'm dreaming something, but the reality...

So, yeah, I can tell you 10 networks I'm a part of. I haven't met any of you through any of these networks, and I'll bet you're all involved in the same thing.

- Some market managers indicated that there needs to be a system for authenticating the actual status of vendors as farmers. While some market managers would like to conduct annual farm tours, few have the time or skills to evaluate claims. What can be done to ensure that vendor claims are truthful; are they selling their crops primarily or entirely or are they resellers? If they are buying supply at the Ontario Food Terminal, are they accessing only locally grown produce? And, how is 'local' defined in this context – is it Ontario wide, Canada or further afield? This issue is more critical in some markets than others. The MyPick program addresses this issue, but does not solve the concerns of all market organizers given that most support some flexibility for

farmers in bringing a percentage of items not from their own farms. And although the Ontario Ministry of Agriculture is believed to have this information, it is not available.

- More opportunities to sell year round in indoor facilities. Some vendors have had strong sales through the winter months at outdoor markets, although there is a good argument for having shelter during cold and inclement weather such as the rainy summer of 2009. The interest in participating in year round markets varies depending to a large degree on what the farmers are selling and also their time management. Some vendors in seasonal markets insisted that their customers are loyal, returning season after season; there is no need to try to meet customers' demands offseason. Their formula is to sell what they can direct to customers in season and sell the remainder wholesale. Time off during the winter was treasured. Others produce and sell on a year round basis – it suits their business model.

We don't have that experience at all. We're the exact opposite. People come all winter to Dufferin Grove, people come all winter to now Wychwood Barns, and we have a product that we grow all winter. So it depends what you've got.

- Markets need to be equipped with coolers for storing some highly perishable and fragile items.
- Opportunities to increase sales exist by extending the reach of farmers' markets beyond individual shoppers to include local restaurants. This potential stream of new business would require nurturing and service possibly could be handled by dedicated market management staff, as in the case of the Oakville Kerr Street Market. A small number of participants introduced the idea of reorienting the local agricultural community to the needs of local markets beyond individual shoppers to include the restaurant sector. In this instance, an experienced, ardent local food advocate and market manager talked about the oftentimes difficult transition from growing commodity crops for wholesalers and distant markets, to meeting specific needs of the diverse local market. In their estimation, some farmers have been quick to identify new opportunities while others are lagging behind.

I think you have to have a sense of future farming. I think that's really important, because you're dealing with farmers who really aren't used ...They've gone to this industrial farming/cannery kind of process, and it's like helplessness in the face of all the food that's come from out of the country. There's a whole big change-around happening right now in terms of food security of all of those issues. Some farmers get it and a lot of farmers don't about where they can bring their food and the markets that they can create. ...saying to farmers, "Can you grow this?" – like what you're doing. That's a huge thing. If you try to tell a farmer what to grow, "What? I grew this all of my life." Some are open to change, though. And somebody else mentioned earlier that farmers on a whole are responding to consumer demands and changing in what they do. So some products they can get off the ground earlier, some are more late, and I think some of the farmers are incorporating that now.

The Future of Farmers' Markets

What is the future of farmers' markets? This question generated a surprising range of qualified positives and expressions of concern about current trends and possibilities for the future.

- One vendor, for instance, who attends Toronto area markets exclusively concluded that the saturation point has been reached and that some markets are cannibalizing those that are close at hand. For instance, the Brickworks Saturday market has such a strong cachet that it appears to be drawing Riverdale's Tuesday customers.
- Another vendor noted that their area market is lagging because of the influx of cash-strapped immigrants who are forced to seek out cheap food. Also, there is the perception that this market sector may have less inclination to support local agriculture. This can be a major issue given the increasing numbers of immigrants to the Greater Toronto Area. Possibly the question is: are markets effectively reaching out to ethnic communities? Also, are growers providing or able to grow items that of particular appeal to these new population groups?

I think it's an issue everywhere, because this buy local movement isn't as big as people think it is and it isn't as big as the government's promoting.

- Market managers attending the Hamilton focus group tended to be positive – markets will continue to grow if they are strategically located as the customer base expands. It is essential to reach young families who have more mouths to feed, thus broadening their reach beyond older people who purchase smaller quantities.

I see them growing. I see them growing every year, and I don't think you can ever have too many – unless of course there's five in the same small town. But it's consumers that don't hold us back.

- Markets can grow by innovating. For instance, expanding the market beyond vendors to include an onsite café was seen as another tool in strengthening the market appeal and the overall experience. Oakville's Kerr Street Market has gradually moved in this direction with the co-operation of Halton Public Health, whereas Mississauga and other local jurisdictions have encountered difficulties with health, police and the fire department. The Halton suggested solution was to appoint a well versed market go-to person who interacts with local government on all these matters.

But that is a generator, and it gets people to stay and sit down and enjoy the environment of the market. It's a place for them to go, it's a social atmosphere. So selling cooked food is a really good idea. It does generate.

- The focus fell on pricing and perceived differences between farmers' markets and supermarkets and organic versus conventionally produced items. Pricing varies depending on the supermarket

(for instance, No Frills is noted for cheap prices) and market prices too vary depending on farming practices. Some vendors claimed that organic options are cheaper at markets than at mass retailers. Others did not agree.

We're in an economic time right now that I'm sure everybody's well aware of that people are really watching their money anyway, and a lot of these products, as David says, he's selling and we're all producing stuff and going to the markets and selling it. Sometimes our prices can be seen as higher than what they can get at the Sobey's and this, that and the other thing, so they have to juggle this themselves.

- Pricing policies and the competition have to be considered. Should vendors try to match supermarket prices? Some vendors insisted that their pricing policy was to charge more than supermarket price levels based on the superior quality of their produce. But it was not clear if this was common practice, although there were indications that some vendors attempted to hold prices down in order to stimulate sales and to meet price expectations set by supermarkets.

Yeah. The stuff they get from us, you can't even compare: the flavour, the nutritional value. Dollar for dollar nutritionally, our products are cheap. Really good value.

- Farmers' market sales and the economic climate – are they connected? The impact of the economic downturn was felt by some but not others. In fact, some registered strong growth in 2009 (31% at the Oshawa market). However, some vendors believe that the extensive promotion of local produce has had a positive impact on sales and to some extent helped offset the economic downturn.

I personally feel that all the advertisement for buy local has pushed the farmers' markets in general higher this year. There has been a lot of buy local.

You don't think it's just general economics that they don't go to the restaurant now to buy their meals, so they've got a few extra dollars so they come and buy quality stuff to cook at home? I know the last recession, friends of mine are in ornamentals, and they said they never had such good years in ornamentals in the recession because people didn't go on a holiday, they stayed home so they put more flowers in, they put more trees in, they did more gardening.

- Despite ups and downs, most vendors seem to believe that farmers' markets are here to stay and that they will prosper with the right mix of factors. They must be located in the right spot (including access to a supportive customer base), be well managed, have a good mix of vendors and be promoted locally. Market success is important because it gives farmers/vendors direct access to the retail market and they can sell at retail prices, not lower wholesale prices.
- Some market managers thought that the challenge was to reshape agriculture to serve local markets by growing a wider range of items to meet customers' needs and by extending the season for local produce.

I think there's a huge transition happening in the farming field right now, and there's not a larger vision for farming actually in Ontario or across the country, and it's having its [inaudible] right now. So more produce, I think, and more diversification amongst farmers and extending their seasons, those are big issues for them.

- In order to draw enough customers to prosper, markets have to offer a critical range of items. The continuing challenge for some market managers is to locate a range of farmers/vendors who have available days and the necessary range of items to fill in critical spots. A few wondered if some information sharing between managers could help alleviate this problem?

So it'd be nice to have sort a little bit more of a sharing between other markets, finding who's got vendors. We're trying to do that, but trying to get out there and connect with other markets and see who's got who to share and who's got...

APPENDICES

Appendix 1 – Discussion Guides

MARKET MANAGERS' Discussion Guide

Introduction:

Greenbelt Farmers' Market Network is conducting research with market managers and vendors for the purpose of learning what market managers and farmer/vendors could need to strengthen their farmers' markets and to contribute to information sharing and knowledge transfer. The study consists of indepth telephone interviews to help determine the key issues, followed by focus groups and then a telephone survey in order to provide a statistical base.

We will be doing four focus groups, two with market managers and two with vendors operating in the Greenbelt.

The discussion today is being recorded, with your permission. As the researcher, the recording of this session is my tool for gathering the information and preparing the report. All comments are confidential which means there will be no names linked with any quotes which will be used in the report.

I encourage everyone to take part. There are no right or wrong answers; each of you have your own experiences and opinions. All comments are welcome. I am not seeking consensus or agreement and it's important that everyone has an equally opportunity to express your opinions. Do you have any questions before we begin?

Warm-up

As an introduction, please provide a very brief description of the market(s) you manage. We will go into greater detail on your market later on in the discussion.

MORE ABOUT YOUR MARKET

Days and length of season or year round?

Number and type of vendors? Is it stable or fluctuates depending on the weather or time in season? Is there a good balance or is there a gap? Any value-added items? Any regular entertainment?

Visitor amenities: parking, washrooms, benches, ATM access nearby, other:

MARKET LOCATION

Type of location: private or public sector? Extent of property owner influences on market operations? Municipal relationship & influences. What if any charges? (Water, power, site use, Etc.)

Economic impact assessment conducted? Local support and perceptions about the market (funding, staffing, promotions). Role of local public health dept. – setting rules in addition provincial

ROLE & MARKET GOVERNANCE:

Describe the decision making process? Does it vary depending on the significance of the issue? Is there a rule book? Generally, there a formal process involving vendors or not? Regular meetings?

Communicating with Vendors: walk-by and formal methods.

MANAGER BACKGROUND, ROLE

What prompted you to become a market manager? Let's talk about being a market manager – what are the major tasks that managers do? Please describe your role as a market manager. What skills should a market manager have in order to succeed? What are your major responsibilities?

MANAGING BEING A MANAGER: PITFALLS AND REWARDS.

Attend workshops/conferences with other managers? Productive or not/allies, friction or support? Interested in transfer of knowledge and information sharing between managers? Is it mainly formal or informal?

Is there a need for professional development/support? IF YES: If so, which areas are key? Accounting, boards, marketing your market, Farm inspections, Others? Delivery method: face-to-face

MARKET IMPROVEMENTS:

Any notable changes in last year, such as new tents, signage? Any others? Any reference to aid/improvement programs?

FARMER/VENDOR ITEMS AND RESELLING:

Are vendors permitted to sell items from other (local) sources? Policy in place? Negatives and positives of reselling.....

YOUR MARKET CUSTOMERS: who shops?

Describe in terms of age, household size, etc. Does it skew in any particular direction? Is it primarily loyal shoppers or a mix of old and new?

CUSTOMER FEEDBACK:

Common questions and comments. Any complaints or suggestions? Is there a demand for

organic, for instance? Farm related information? Any formal way of accessing shopper opinions?

CUSTOMER OUTREACH:

Advertising and promotions? Describe. One-time and on-going initiatives initiated by the Market and other community groups (local government, tourism, FMO, Greenbelt, etc.). What type of media?

Successes and failures. Source of revenue to support promotions?
Over past year, has either content or scope changed?

MARKET SALES AND REVENUES

Are sales monitored for each market day? Per vendor? Other revenue sources and subsidies (money or items such as bags, tents, etc.)? Formal or informal record keeping?

Overall, have sales increased, decreased, remained stable? What factors related to sales?

M - VENDOR FEES:

Overall share that vendor fees constitute. Fee structure? Any changes in last year?
Means of deriving fee structure – arbitrary or based on consultation with vendors? What factors shape the fees?

CUSTOMERS AND PRICING:

Any feedback from customers (direct or via vendors) re price points?
Is price resistance across the board or directed to any particular item or vendor? Any method of relaying customer feedback to vendors? **YOUR MARKET AND THE FUTURE**

The Ideal Future for Your Market:

Is there a future for farmers' markets and what does it look like? Innovations that would increase sales and market popularity? Mix of vendors? Role for older and younger, new farmers? Re-selling?

Strategies for building on the current market. What are the main changes that you would make if you could?

IDEAL VENUE AND VENDOR MIX:

Is current location suitable? A better balance of vendors needed?
Behind the Scenes Support for Managers and Vendors: what non-economic supports would assist both parties to sustain the market and lift it beyond its current position?

Any final comments? Thank respondents and note that a report will be available early in the new year.

If any further thoughts please call or email Helene (provide card)

Vendor Discussion Guide

Introduction:

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We will be doing four focus groups, two with vendors and two with market managers operating in the Greenbelt.

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I encourage everyone to take part. There are no right or wrong answers; each of you have your own experiences and opinions. All comments are welcome. I am not seeking consensus or agreement and it's important that everyone has an equally opportunity to express your opinions. Do you have any questions before we begin?

Warm-up

As an introduction, please provide a very brief description of the market(s) you attend. We will go into greater detail on the market(s) later on in the discussion.

FARM BACKGROUND

Please give me brief description of your farm – main crops, size, labour component and location (municipality/region)

FARMER MARKET EXPERIENCE

2009 Market Participation: number of markets in 2009? No. of market compared to 2007?
When did you first start participating in farmers' markets?

Given our limited time, can we focus on 2 markets if you are attending more than 2 markets?

You may want to refer to the other ones too, on occasion.

What is the approximate distance to these markets? What is the total travelling time to and from the 2 markets?

What factors influence your choice of markets?

What are the main things you look for when you are considering whether you might participate in a particular market? Are there any 'signals of success'? And, are there signs that might suggest it wouldn't be a good market?

Focus on location: pros and cons of city versus town/country – any particular generalizations or are they all different?

MARKET ORGANIZATION

Do the markets you attend have period formal meetings? Shared decision-making process in place for setting rules?

Are there any other market influences that you come into contact with, say the local government or other players?

Market manager's – what do they do? What should they be doing?

Market Rules

Is there a rule book or bylaws that govern the markets? How are newly emerging issues handled?

Selling Items from Other Sources: Is this an option at your market? If so, do you expand your array in this manner? If Yes, where are the items usually sourced from?

Reselling: thoughts on this issue? Who benefits and who doesn't? Can it help fill gaps and extend the market season?

SALES, RECORDS & PRICING

Looking now at your paper trail, do you keep records: market sales (per occasion/per year)? Examine sales by season or simply over 12 months?

What are your different revenue sources: markets, farmgate, contract, local food box program, restaurants, wholesale to stores, and others? Overall, which ones hold most promise?

Approximately what % comes from farmers' markets: Less than 25%, 25-50%, 51 to 75% Has the balance changed at all in past 2 years? If Yes, please describe.

Looking at total sales for your crops in 2009 compared to 2008, are sales flat, decreased or increased?

Now thinking about farmers' market sales, what factors are tallied when you are calculating the impact of farmers' markets sales: cost of seeds and other inputs, transportation, market sales labour, table fees? Do you invest time in building a customer base at some of the markets you attend? Do you ever decide to stick with a particular market for a few years because it seems to hold potential?

Now looking at Compared to last 2008 total 2009 market revenues: increased, decreased, remained stable?

Market Pricing Strategy:

What are the main factors: fixed costs plus profit? Competition prices? Does it depend on the market or the season?

Market & Customer Profile:

Now thinking about people who shop at farmers' markets, briefly describe the markets and who shops there. Any notable changes in 2005 (or when they first started going to markets) in profile, attitudes, awareness, etc.?

What are the most common questions shoppers ask: (certification, pricing policies, farm details, etc.)

MARKET PROMOTIONS

Is the market manager totally responsible for promotions? Do you/your farm promote (hand-outs, website, signage, etc.)

Level of awareness of: FMO's MyPick. Farm Fresh promotions, Eat Local groups, Greenbelt bags and tents, tourism programs, local government?

Market Changes: Improvements and changes in last year or two?

Impact of Market Experience

Any changes in crop mix and acreage? New business opportunities? New pricing strategies?

New marketing/promotions, such as a farm website, point of sale materials, etc.?

Role of Customers: Have requests or feedback in any way changed what is being sold or how it is sold?

Product preparation and presentation? Selling any value-added products?

The Ideal Market

Based on your experience, what market features work best for you?

Create a checklist of factors that define a successful market what would it contain?

How would it be managed? By whom? Co-operative model?

Focus on Key Issues Going Forward

What are the key issues and factors for farmers who are selling at farmers' markets now and in the near future? From what you can tell now, are markets here to stay? Can farmers' market potentially capture more of the fresh produce sales?

Thank you! Distribute cards and invite respondents to get in touch via phone or email with any suggestions or further thoughts. Indicate that copies of the report will be available early 2010.

Appendix 2 – Telephone Interviews

MARKET MANAGERS: Telephone Interview

Hello I am calling on behalf of Informa Market Research. Today we are conducting a telephone study among market managers and vendors for the Greenbelt Farmers' Market Network.

READER: PLEASE NOTE THAT INTERVIEWER INSTRUCTIONS IN CAPITALS

As a starting point, please tell me the name of the market that you manage.

1a. How long have you been managing farmers' markets, including the one you are currently managing? DO NOT READ/RECORD BELOW

- | | |
|--------------------|---|
| Less than 1 year | 1 |
| 1 to 2 years | 2 |
| 3 to 5 years | 3 |
| 6 to 10 years | 4 |
| More than 10 years | 5 |

1b. Prior to becoming a market manager, did you have experience: READ BELOW

- | | |
|-----------------------|----------|
| In farming | 1 |
| Retailing | 2 |
| Community leadership. | 3 |
| OTHER | 4 ASK 1C |

1c. What would that be? _____

2a. Now, I am going to ask you some questions about your Market.

How long has the market been in operation? DO NOT READ/SELECT ONE

- | | |
|--------------------|---|
| Less than 1 year | 1 |
| 1 to 2 years | 2 |
| 3 to 5 years | 3 |
| 6 to 10 years | 4 |
| More than 10 years | 5 |

2b. Is it a: READ BELOW

- | | |
|-----------------|-----------|
| Seasonal market | 1 ASK Q2C |
|-----------------|-----------|

OR

A year round market 2 ASK Q2D.

2c. Approximately how many vendors are usually at the market? _____

2d. And how many vendors would that be: READ BELOW

At the market high season _____

And how many during the winter season? _____

3a. Does your market have: READ BELOW/SELECT ONE ONLY

Only vendors selling produce 1

A mix of produce and value-added such as baked goods 2

Produce, value-added and crafts 3

OTHER (PLEASE SPECIFY) 4

3b. And, does it also include: READ BELOW/ENTER RESPONSE

	Yes	No	DK
Meat			
Dairy, such as cheese			
Prepared food			

3b. Overall, does the market have:

A good balance of products 1 SKIP TO Q.4

OR

A gap –other items are needed 2 ASK Q. 3c

3c. What other farm or non-farm products would help boost the market? DO NOT READ

Meat, beef, pork 1

Chicken 2

Eggs 3

Cheese 4

Bread, baking 5

Crafts 6

Flowers 7

Coffee 8

Prepared food 9

OTHER (PLEASE SPECIFY) _____

DON'T KNOW 0

4a. Does your market have..? READ BELOW/ ENTER RESPONSE FOR EACH

	Yes	No	DON'T KNOW
Regular entertainment and events			
Sufficient parking nearby			
Access to washrooms			
ATM access nearby			
Regular advertising or promotions in the local media			
A website			

4b. Is your market a member of FMO/Farmers Markets Ontario?

Yes 1 ASK Q. 4c
 No 2 SKIP TO Q. 5a
 DON'T KNOW 3 SKIP TO Q. 5a

4c. Is your market's insurance covered by FMO?

Yes 1
 No 2
 DON'T KNOW 3

5a. And, would you please tell me if the market is located on: READ BELOW

Privately owned property, such as a mall parking lot 1 OR
 A publicly owned property, such as a community park 2

5b. How much influence does the property owner have on the market operations? READ AND RECORD

Little to no influence 1 SKIP TO Q5D
 Medium influence 2 ASK Q 5c
 A lot of influence 3 ASK Q 5c

5c. Could you please explain? Is there anything else? PROBE

5d. Does the property owner charge the market for the following: READ BELOW/RECORD ANSWER

	Yes	No	DK
Water			
Power/energy			
Site use	Ask 5e	Skip to 6a	Skip to 6a

5e. Is this charge: READ/RECORD FOR EACH

	Yes	No	DK
An administrative fee, for example a city permit fee			
A rental charge			
A charge to cover specific costs incurred on market days, for example to cover a parking monitor or other non-market staff time			
A charge to cover other services provided by the site owner, for example entertainment or advertising			

6a. Now looking at the impact of local government on the market. Is your local government involved in any way in the operations or funding of the market?

Yes 1 ASK Q. 6b
 No 2 SKIP TO Q. 7
 DON'T KNOW 3 SKIP TO Q. 7

6b. I am going to read you a list of items related to local government involvement, for each would you please tell me if it applies to your market. READ AND RECORD BELOW

	Yes	No	DK
Provide funding for staff, promotions, etc.			
Conducts economic impact assessments of the market			
Provides guidance and moral support			
Promotes/advertises the market			
Permanent signs or banners			
Free "rent" for market (provide location, street closures, vendor permits etc. . .)			
Free/subsidized Parking for customers			
Site Maintenance (garbage, recycling, repairs)			
Paid staff			
Office space			
Storage space			
Washroom facilities			
Supportive attitude			

6c. Have any programs or organizations helped or assisted your market in the past three years? This could include promotion, financial support, or training for vendors or managers?

Yes 1 ASK Q. 6d
 No 2 SKIP TO Q. 7
 DON'T KNOW 3 SKIP TO Q. 7

6d. What programs or organizations have helped your market? DO NOT READ

Clean & Beautiful Cities	1
Eat Local, Farm Fresh	2
FMO/Farmers' Markets Ontario	3
Greenbelt Foundation	4
OMAFRA/Ontario government/Ontario Ministry of Agriculture, Food and Rural Affairs	5
TFMN/Toronto Farmers' Market Network	6
OTHER (PLEASE SPECIFY)	7
DON'T KNOW	8

7a. Now looking at the hours involved in your position and remuneration. Approximately, how many hours per week do you work as a market manager? DO NOT READ

1 – 9 hours	1
10 – 15	2
16 – 20	3
21 – 25	4
26 – 30	5
More than 30	6
DON'T KNOW	7

7b. Is your market manager position:

A paid position	1	ASK Q.7c
A volunteer position	2	SKIP TO Q. 8

7c. What is the source of your salary as a Market Manager? READ LIST

Strictly revenue from the market	1
Supported by the BIA (Business Improvement Area)	2
Supported by a grant	3
Provided by the local government	4
OTHER (PLEASE SPECIFY)	_____

7d. Would that be an: READ BELOW

An annual honorarium	1
Paid by the hour	2
A fixed salary	3
OTHER (PLEASE SPECIFY)	_____

8a. What are the major tasks in your job? DO NOT READ

Organizing events/event management	1
Marketing/promoting/advertising	2
Meeting with local govt/local BIA	3
Budgeting/finances	4
Dealing with local health department	5
Onsite problem solving	6
Customer relations/shopper contact	7
Vendor communications	8
Vendor selection	9
collecting vendor fees	0
Setup and cleanup	X

OTHER (PLEASE SPECIFY) _____

8b. What skills should a market manager have in order to succeed? DO NOT READ

Administrative/administration	1
Organizing	2
Management	3
Knowledge of farming/agriculture	4
Local food awareness/knowledge	5
A good 'people' person	6
Event planning	7
Advertising/promotions	9
OTHER (PLEASE SPECIFY)	0

8c. Now thinking about professional development or educational support for market managers and what might be of interest to you. I am going to read you a list of possible items and for each rate it using a 10 point scale where 10 is Very Interested and 1 is Not at all Interested. PLEASE REPEAT IF

	1-10	DK
Accounting/bookkeeping		
Advertising/promotions		
Creating and running a market committee		
Event planning and organizing		
Connecting your market with the community		
Enhancing your market's atmosphere		
Farm inspections		
Tracking and using market sales data		
Conducting and using customer surveys		

Mediation and conflict resolution		
Grants/accessing financial support		

8d. Are there any other topics that would help enhance your skills as a market manager?

Yes 1 ASK Q. 8e.

No 2 SKIP TO Q. 9

DON'T KNOW 3 SKIP TO Q. 9

8e. What is that? _____

9a. Are you interested in knowledge sharing with other market managers?

Yes 1 ASK Q. 9b.

No 2

DON'T KNOW 3

9b. Would you attend professional development events for market managers?

Yes 1

No 2

DON'T KNOW 3

9c. Would your market vendors benefit from resource materials or other learning opportunities? Please rate the potential value of each of the following using a 10 point scale were 10 is the highest interest and 1 is the lowest interest. READ BELOW/ROTATE

	1 to 10	
Display or sales techniques		
New product ideas		
Season extension techniques		
Ways of promoting your farm		

10. Now thinking about market policies and the decision making process. ASK BELOW AND RECORD FOR EACH

	Yes	No	DON'T KNOW
a.Does the market have a formal list of rules/policies that is handed out to vendors?	ASK B	SKIP TO C	SKIP TO C
b. Are the market rules derived using a shared decision making process that invites input from vendors?			
c. Are formal meetings held from time-to-time with the market			

vendors?			
d. Does the local government play a role in shaping the market policies?			
e. Is the public health department involved in shaping the market policies?			

11a. Does your market allow farmer vendors to sell produce or items that does not come from their farm?

Yes 1

No 2

DON'T KNOW 3

11b. Would you please tell me more about that. PROBE

11c. Are there ever challenges for you, among vendors or with customers regarding the source of products at the market?

Yes 1

No 2

DON'T KNOW 3

11d. Here is a list of statements, would you please tell me if you Strongly Agree, Agree Somewhat, Disagree Somewhat or Disagree Strongly or with each: READ BELOW

	Strongly Agree	Agree Somewhat	Disagree Somewhat	Strongly Disagree	DK
There should not be limits on what vendors are allowed to bring.					
There are not enough vendors to meet the demand at markets.					
The farmer who is selling what they grow on their farm should have priority over vendors selling what other local farmers have grown.					
Farmers' markets should be for farmers only.					
More markets should be open year-round.					
Farmers' markets should provide some flexibility to farmer-vendors supplementing what they produce with other products for sale.					
I see the increase in number of farmers' markets in recent years as a positive thing.					
Markets should consider longer seasons, e.g. adding a month overall in the fall.					

12a. Now thinking about the market sales and revenue. Comparing total market sales in 2009 with the past few years. From what you can tell, have sales at the market:

- | | | |
|-----------------|---|---------------|
| Increased | 1 | ASK Q. 12B |
| Decreased | 2 | ASK Q. 12B |
| Remained stable | 3 | SKIP TO Q. 13 |
| DON'T KNOW | 4 | SKIP TO Q. 13 |

12b. What factors are related to the changes? DO NOT READ/RECORD BELOW

- | | |
|----------------------------------|---|
| The economy/recession | 1 |
| More vendors | 2 |
| Fewer vendors | 3 |
| New location | 4 |
| More advertising/promotions | 5 |
| Less/no advertising/promotions | 6 |
| Events/more events/entertainment | 7 |
| Better signage/new signage | 8 |
| Weather | 9 |
| Competition from other markets | 0 |
| OTHER (PLEASE SPECIFY) | X |

13a. Is a record kept of market activities and sales for each market day?

- | | | |
|------------|---|-----------------|
| Yes | 1 | ASK Q 13b |
| No | 2 | SKIP TO Q. 13c. |
| DON'T KNOW | 3 | SKIP TO Q.13c |

13b. Just to clarify, are sales estimates provided by each vendor?

- | | | |
|------------|---|---------------|
| Yes | 1 | ASK q.13d |
| No | 2 | SKIP TO Q. 14 |
| DON'T KNOW | 3 | SKIP TO Q. 14 |

13c. If vendors were willing to provide sales estimates on an anonymous basis, do you think that this information would be helpful?

- | | | |
|------------|---|---------------|
| Yes | 1 | ASK q.13d |
| No | 2 | SKIP TO Q. 13 |
| DON'T KNOW | 3 | SKIP TO Q.13 |

13d. Please tell me about how this information is used. DO NOT READ

- | | |
|--|---|
| I want to know/need to know what's happening | 1 |
|--|---|

Need for planning	2
Good for supporters	3
Keeps track of sales	4
Grants/funding	5
BIA/Chamber of Commerce/local government wants it	6
OTHER (PLEASE SPECIFY) _____	
DON'T KNOW	7

14. I am going to read you some statements, for each would you please tell me if you agree or disagree. READ BELOW/RECORD FOR EACH/ ROTATE THE ORDER

	Agree	Disagree	DK
I have trouble keeping the vendors happy/loyal.			
I am having difficulty finding more vendors for the market.			
I don't think vendors should have to provide sales estimates.			
Our market needs to obtain financial support in order to continue operating.			
In order for our market to improve we need financial support.			
Our market is thriving.			
Sometimes I have difficulty getting compliance with market rules from some vendors.			

15. Now thinking about the people who shop at the market, here is list of statements. For each would you tell me if you agree or disagree. READ BELOW/RECORD FOR EACH /ROTATE

	Agree	Disagree	DK
Our shoppers are interested learning more about farms and how the produce is grown.			
I am finding that more shoppers are asking for organic produce/items.			
I often hear complaints about prices at the market.			
Many of the shoppers expect that the market prices should be the same as those at the supermarket.			
Customers need more information about the benefits of buying local.			
Customers are interested in information about how to prepare meals with market ingredients.			
As far as I can tell, the number of people who shop at the market has increased in the last year.			

16a. What is done to promote and advertise the market? DO NOT READ/RECORD BELOW

Newspaper ads/articles	1
Radio ads	2
Television ads	3
E-newsletter	4
Website	5
Signs/sandwich boards	6
Banners/posters	7
Twitter, Facebook or related	8
NOTHING	9

OTHER (PLEASE SPECIFY) _____

16b. Approximately, how much money was spent on advertising/promoting the market in 2009?

Under \$200	1
\$200 – 499	2
\$500- 999	3
\$1,000-1,999	4
\$2,000-2,999	5
\$3,000-3,999	6
\$4,000-4,999	7
\$5,000 – 9,999	8
\$10,000 or more	9

DON'T KNOW

16C. Thinking about all efforts to advertise or promote the market, approximately what proportion is free, donated or generated by staff? READ BELOW/SELECT ONE

About a quarter or less	1
Between a quarter and a half	2
Between a half and three quarters	3
Most or all of it	4
DON'T KNOW	5

17a. Now thinking about ways for building on the current market. What are the main changes that you would make if you could? DONOT READ

Advertising/promotion/more promotions	1
Events/more events	2
Entertainment/more entertainment	3

Financial/economic support	4	
Café/value-added food	5	
More vendors	6	
More farmers selling their produce	7	
Crafts/more crafts	8	
Better location	9	
Bigger location	0	
Parking/more parking	X	
Year round location	Y	
Indoor location	Z	
Broadening the customer base/more customers		00
OTHER (PLEASE SPECIFY) _____		
DON'T KNOW		000

17b. What non-financial supports would help you to make your market stronger? PROBE

17c. Here are some ideas for growing farmers' markets; we would like your opinion about how useful each item is using a 10 point scale were 10 is the most useful and 1 is no use at all. In your opinion would you please rate the usefulness of each of the following ideas. ROTATE

	1 to 10	DK
Merchandising which includes displays, pictures of the farm, attractive signage.		
Signage promoting each farm		
Onsite education about local and seasonal food.		
Onsite cooking classes and food demonstrations		
Market website featuring the farmers pictures of the farms, a story about the farms		
Entertainment		
Provide a broader range of products		

17d. And in closing, looking ahead, as far as you can what is the future for farmers' markets in the Greenbelt region? Is there anything else? PROBE

Name: _____

Contact Information: _____

Thank you! IF A RESPONDENT HAS INQUIRIES THEY SHOULD CONTACT ANNE FREEMAN 416-536-9103 OR EMAIL ANNE.FREEMAN@SYMPATICO.CA

Telephone Interview – Vendors

Hello, my name is ____ and I am calling on behalf of Informa Market Research and the Greenbelt Farmers' Market Network regarding an interview. It concerns your experiences at farmers' markets. It should take about 10 or 15 minutes. IF INCONVENIENT NOW ARRANGE TIME FOR INTERVIEW

Name: _____

1a. Approximately how many acres is your farm? DO NOT READ

- | | |
|-----------------|---|
| Under 10 acres | 1 |
| 10 – 69 acres | 2 |
| 70 – 129 acres | 3 |
| 130 – 179 acres | 4 |
| 180 – 239 acres | 5 |
| 240 – 399 acres | 6 |
| Over 400 acres | 7 |
| DON'T KNOW | 8 |

1b. Of that how many acres are used to grow for the markets? DO NOT READ/REPEAT TABLE ABOVE

- | | |
|-----------------|---|
| Under 10 acres | 1 |
| 10 – 69 acres | 2 |
| 70 – 129 acres | 3 |
| 130 – 179 acres | 4 |
| 180 – 239 acres | 5 |
| 240 – 399 acres | 6 |
| Over 400 acres | 7 |
| DON'T KNOW | 8 |

1c. Which terms do you use to describe your farming practices? I'm going to read a list of some examples. More than one may apply. You may also add other terms after we read the list.
READ LIST/RECORD

- | | |
|---------------------------------------|---|
| Practicing Integrated Pest Management | 1 |
| Conventional | 2 |
| Certified Organic | 3 |
| In transition | 4 |

LFP certified _____ 5
Other (Please Specify) _____

1d. How many people are employed for the farm operation and market staff, including paid and unpaid assistance? For each would you please tell me the number and whether they are full time or part-time/seasonal employees. INSERT ANSWERS BELOW

Type of Employment:	Farm Operation	Market Staff
Full time		
Part-time/Seasonal		

2a. How many farmers' markets did you participate in in 2009? DO NOT READ

One 1
2-3 2
4-5 3
6-7 4
More than 7 5

2b. Compared to 2007, in 2009 were you going to READ BELOW

Same number of markets 1
More markets 2
Fewer markets 3
NOT APPLICABLE/STARTED IN 2008/2009 4

2c. And, overall in 2009 have your total market sales: READ BELOW

Increased 1 IF CODE 2 FOR Q 2B ASK Q2D
Decreased 2
Remained stable 3
REFUSED 4
DON'T KNOW 5

2d. Is the increased revenue the result of attending more markets?

Yes 1
No 2
DON'T KNOW 3

2e. What factors are related to the changes? DO NOT READ/RECORD BELOW

Going to more markets 1
Going to less/fewer markets 2
The economy/recession 3

More vendors	4
Fewer vendors	5
New location	6
More advertising/promotions	7
Less/no advertising/promotions	8
Events	9
Better signage	0
Weather	X
Competition from other markets	Y
More people interested in local food	Z
Farm Production e.g./crop failure or bumper crop	00
OTHER (PLEASE SPECIFY)	_____

3a. Now thinking from a business perspective are you considering in 2010: READ BELOW

Adding more markets	1
Reducing the number of markets	2
Attending the same number as 2009	3
DON'T KNOW	4

3b. In addition to selling what you produce on your farm at farmers' markets, what other outlets do you have: DO NOT READ/RECORD ALL

Farm gate/Farm stall/market at the farm	1
CSA/operate a CSA/community shared agriculture	2
Restaurants/Food service	3
Ontario Food Terminal/OFT	4
Farmer Cooperative	5
Local store(s)/small fruit markets	6
Wholesale	7
OTHER (PLEASE SPECIFY)	_____

3c. Now thinking about farmers' markets, what kinds of items do you usually sell there? I am going to read a list of categories – please tell me which ones apply. READ BELOW/MORE THAN ONE MAY APPLY

Vegetables	1
Berries/strawberries/blackberries	2
Tender fruits/peaches/plums	3
Apples and pears	4
Herbs	5

Meat, beef, lamb, pork	6
Chicken	7
Specialty meat (elk, boar, goat)	8
Eggs	9
Cheese	0
Bread, baking	X
Crafts	Y
Cut Flowers	Z
Bedding plants	XX
Plants and seeds	YY
Prepared food	ZZ
Maple Syrup	00
Honey	000
OTHER (PLEASE SPECIFY) _____	

4a. Do any of the markets you attend permit farmer vendors to sell produce/items that does not come from their farm?

- Yes 1 ASK Q. 4b.
 No 2 SKIP TO Q. 4c
 DON'T KNOW 3 SKIP TO Q. 4c

4b. Would you please tell me more about that. Is there anything else? PROBE

4c. Are there challenges among vendors, market management or with customers regarding the source of products at the market?

- Yes 1 ASK Q. 4d
 No 2 SKIP TO Q. 5
 DON'T KNOW 3 SKIP TO Q. 5

4d. Please explain. Is there anything else? PROBE

5a. Now, thinking about the farmers' markets that you have chosen to attend. What are the main factors that you consider when choosing a market? Are there any others? DO NOT READ/RECORD ALL BELOW

- Close to the farm/short travel distance 1
 In my community 2
 Many/lots of shoppers 3
 Good market/strong market 4
 Established market 5

Good management/manager	6
Reasonable rates/cheap rates	7
Flexible market/can come and go	8
Fair treatment/farmer friendly	9
Finding customers who want my product	0
OTHER (PLEASE SPECIFY)	X

5b. What are the three major challenges or problems you encounter attending markets? DO NOT READ/RECORD ALL

Shortage of staff	1
parking/vehicle access	2
market hours	3
lack of electrical or water access	4
too few/not enough customers	5
traffic/transportation time	6
time away from the farm	7
OTHER (PLEASE SPECIFY)	8

5C. Now thinking about market managers, based on your experience at farmers' markets, what skills should an effective market manager have? DO NOT READ/RECORD ALL

Administrative/administration	1
Organizing	2
Management	3
Knowledge of farming/agriculture	4
Local food awareness/knowledge	5
A good 'people' person	6
Event planning	7
Advertising/promotions	9
OTHER (PLEASE SPECIFY)	0

6a. Now thinking about market policies and the decision making processes. ASK BELOW/RECORD FOR EACH

	Yes	No	DON'T KNOW
a. Does the market have a formal list of rules/policies that is handed out to vendors?			
b. Are the market rules derived using a shared decision making			

process that invites input from vendors?			
c. Are formal meetings held from time-to-time with the market vendors?			
d. Does the local government play a role in shaping the market policies?			
e. As far as you know, is the public health department involved in shaping the market policies?			

6b. Are you currently or have you ever been on a market board/committee?

Yes 1
No 2
DON'T KNOW 3

7a. Is a record kept of market activities and sales for each market day at any of the markets you attend?

Yes 1 ASK Q 7b
No 2 SKIP TO Q. 7c.
DON'T KNOW 3 SKIP TO Q.7c

7b. Just to clarify, are sales estimates provided by each vendor?

Yes 1 SKIP TO Q.8a
No 2 ASK Q. 7C
DON'T KNOW 3 ASK Q. 7C

7c. Would you be willing to provide sales estimates for each market day on an anonymous basis in order to track market success or overall economic impact of the market?

Yes 1
No 2
DON'T KNOW 3

8a. Approximately what percent of your total farm sales comes from farmers' markets: READ BELOW

Less than 25% 1
25-50% 2
51 to 75% 3
76% to 100% 4
REFUSED 5
DON'T KNOW 6

8b. Just looking over the past 5 years, are sales at farmers' markets representing: READ BELOW

- A larger share of total revenue 1
- The same share of total revenue 2
- A smaller share of total revenue 3
- DON'T KNOW 4
- REFUSED 5

9. Has attending markets led to increased contacts with other sales channels such as chefs, stores near the market, CSA customers?

- Yes 1
- No 2
- DON'T KNOW 3

10. Now thinking about the people who shop at the market, here is list of statements. For each would you tell me if you agree or disagree. READ BELOW/RECORD FOR EACH /ROTATE

	Agree	Disagree	DK
Our shoppers are interested learning more about farms and how the produce is grown.			
I am finding that more shoppers are asking for organic produce/items.			
I often hear complaints about prices at the market.			
Many of the shoppers expect that the market prices should be the same as those at the supermarket.			
Customers need more information about the benefits of buying local.			
Customers are interested in information about how to prepare meals with market ingredients.			
As far as I can tell, the number of people who shop at the market has increased in the last year.			

11a. Here is a list of statements, would you please tell me if you Strongly Agree, Agree Somewhat, Disagree Somewhat or Disagree Strongly or with each: READ BELOW

	Strongly Agree	Agree Somewhat	Disagree Somewhat	Strongly Disagree	DK
There should not be limits on what vendors are allowed to bring.					
There are not enough vendors to meet the demand at markets.					
The farmer who is selling what they grow on their farm should have priority over vendors selling what other local farmers have grown.					

Farmers' markets should be for farmers only.					
More markets should be open year-round.					
Farmers' markets should provide some flexibility to farmer-vendors supplementing what they produce with other products for sale.					
I see the increase in number of farmers' markets in recent years as a positive thing.					
Markets should consider longer seasons, e.g. adding a month overall in the fall.					

11b. Based on your experience at farmers' markets, have you: READ BELOW

	Yes	No	DK
Tried growing different crops/raising different livestock or adding new products.			
Produced new value-added items			

12. I am going to read a list of things that market managers should be doing. For each, please tell me if it is Very Important, Somewhat Important, Somewhat Unimportant or Not at all Important. READ BELOW/RECORD FOR EACH

	Very Important	Somewhat Important	Somewhat Unimportant	Not at all important	DK
Advertise and promote the market.					
Hold regular meetings with market vendors.					
Ensure that vendors are selling only or mainly what they grow.					
Establish a market board that has farmer representatives					
Gather sales data anonymously and share it regularly.					
Market managers need to be educated – what's local and when the crop is ready.					
Do farm inspections					
Survey customers for feedback					

13. Here are some ideas for growing farmers' markets. Now using a 10 point scale where 10 is the highest score and 1 is the lowest score would you please rate each of the following ideas.

	1 to 10	DK
Onsite promotions including displays, pictures of the farm, attractive signage, etc		
Signage promoting each farm		
Onsite education about local and seasonal food.		
Onsite cooking classes and food demonstrations		
Market website featuring the farmers pictures of the farms, a story about the farms		
Entertainment		
Signs and posters outside the market/in the area of the market		
Provide a broader range of products		

14a. Now looking at promoting your farm, do you advertise or promote it in any way, aside from onsite at the farmers' market(s)?

Yes 1 ASK Q.14B

No 2 SKIP TO Q.15

DON'T KNOW 3 SKIP TO Q.15

14b. What does that include? DO NOT READ

Website 1

Email to customers 2

Brochure/flyer 3

Roadside sign(s) 4

Ads in local paper 5

OTHER (PLEASE SPECIFY)

15. Now looking at information or training that could boost revenue, please rate your interest in each of the following using a 10 point scale were 10 is the highest interest and 1 is the lowest interest. READ BELOW

	1 to 10	
Display or sales techniques		
New product ideas		
Season extension techniques		
Ways of promoting your farm		

16a. From what you can tell now, are markets here to stay? Would you say: READ BELOW

Definitely 1

Not sure 2

Definitely not 3
DON'T KNOW 4

16a. Now in closing, what are the key issues or factors for farmers who are selling at farmers' markets now and in the near future? Is there anything else? PROBE

Thank you very much for your valuable assistance!

IF A RESPONDENT HAS INQUIRIES THEY SHOULD CONTACT ANNE FREEMAN 416-536-9103 OR EMAIL ANNE.FREEMAN@SYMPATICO.CA