



2019 National Farmers Market Manager Survey

General Characteristics and Market Practices



Developed
through a
Wheaton College
and USDA
partnership.

Introduction

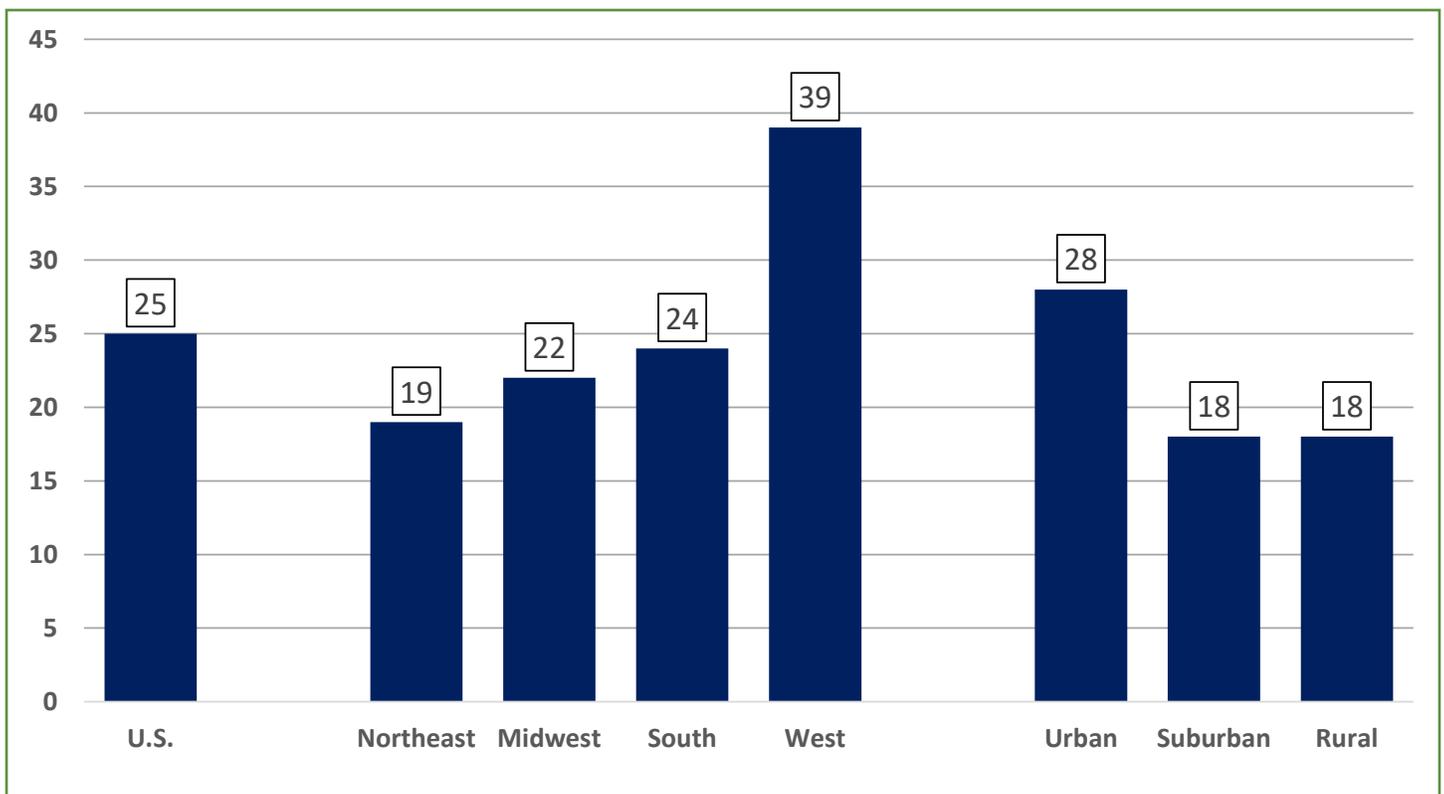
In 2020, the United States Department of Agriculture – National Agricultural Statistical Service (USDA-NASS) conducted a survey of farmers market managers in the U.S. under an agreement with the USDA Agricultural Marketing Service (USDA-AMS). The [National Farmers Market Managers Survey](#) collected data from the managers of U.S. farmers markets that were operating in 2019 in the 48 contiguous states. For this survey, a farmers market was defined as a collection of two or more farm vendors selling agricultural products directly to customers at a common, recurrent physical location. For more information about the survey, reference the *Farmers Market Managers Survey Overview*.

This document highlights key findings regarding the general characteristics and attributes of farmers markets (i.e., the number of vendors, products available, and market organization), their organizational practices, and other activities, providing a glimpse into the complexity of farmers markets and their functions.

Number of Vendors

To assess the size of their market, managers were asked how many vendors sold products at their farmers market during peak market season in 2019. As shown in Figure 1, in the US, the average number of vendors per market was 25, though this number varied based on location and urbanicity (urban, rural, or suburban). The West reported the highest number of vendors on an average market day (39 vendors) and the Northeast reported the lowest number (19 vendors). The average number of vendors at urban markets was 28, whereas suburban and rural markets each averaged 18 vendors.

Figure 1. Average Number of Vendors per Market, 2019



Vendor Types and Types of Products Available

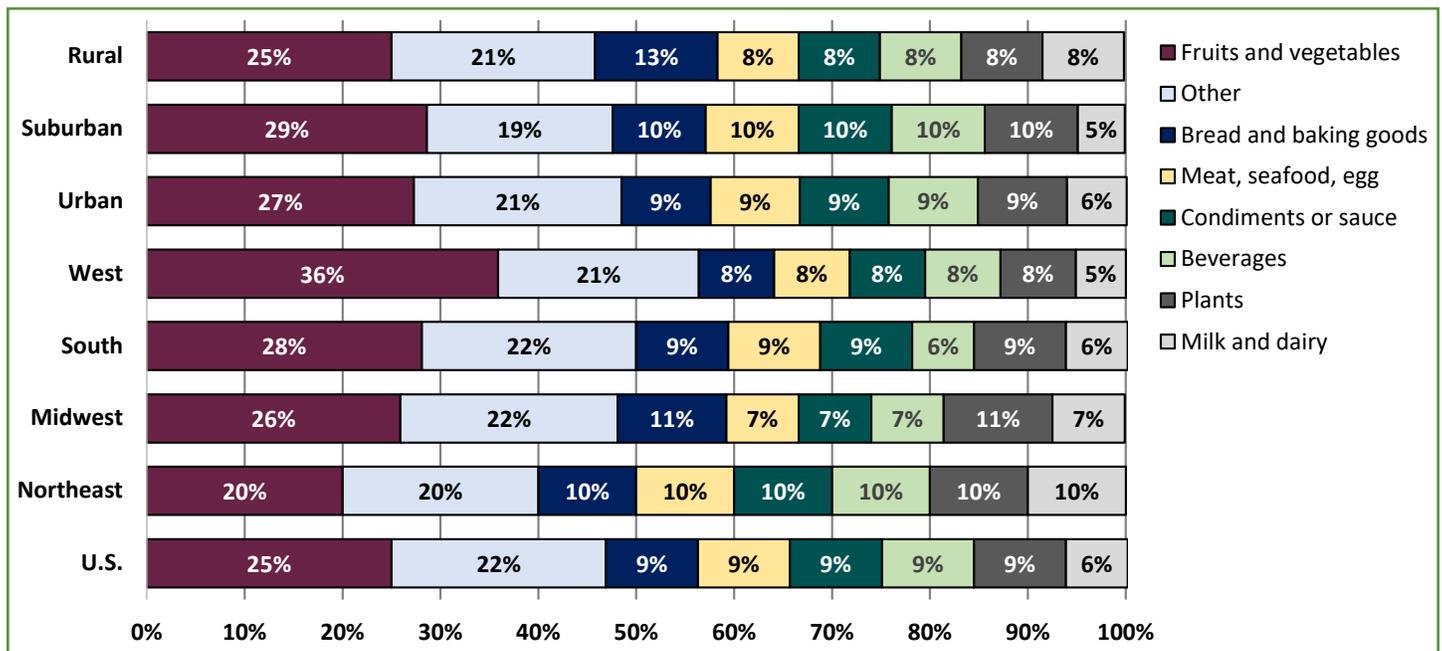
To assess what types of vendors were present at markets, farmers market managers were asked to identify the primary source of revenue for each vendor. Respondents assigned each vendor to one of the seven product categories as shown in Figure 2; “other food products” and “miscellaneous” were one category for this question. Respondents were then asked to list all the types of products that were available for sale at their market, selecting from the 35 products or services commonly available at markets (Figure 2).

Figure 3 shows percent of sales for each product type by region and urbanicity. The West had the highest percentage (36%) of vendors that made their primary revenue from fruits and vegetables, followed by the South (28%). The distribution of vendor types in each urbanicity category is relatively similar to the U.S. as a whole, suggesting that vendor types are relatively similar across urbanicities.

Figure 2. Product categories and product types, as listed in the survey



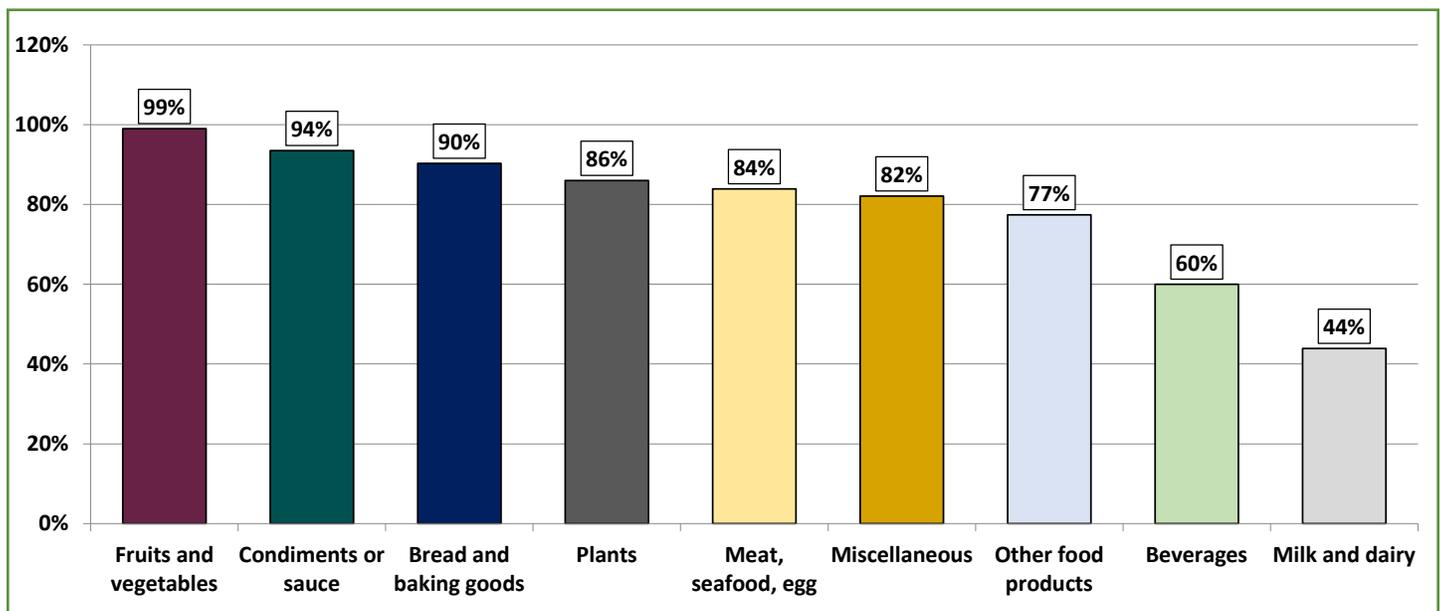
Figure 3. Product category from which vendors made their primary revenue, by U.S. and region



Nationally, 22% of vendors reported “other food products” and “miscellaneous” as their primary revenue source, after 25% for fruits and vegetables. This suggests that a variety of products fell outside the categories commonly considered to be available for sale. Understanding these outliers could indicate new vendor types that other farmers markets could seek to add to their markets.

Nationally, almost 100% of markets included fruits and vegetables, as shown in Figure 4. Condiments (94%) and bread and baked goods (90%) were the next most widely available products. Aside from milk and dairy, all other product types were available at more than half of all markets.

Figure 4. Farmers market product type availability



More than three-quarters of farmers markets (77%) had at least one product that was in the “other food products” category, while 82% of markets reported “miscellaneous” products, revealing the prevalence of items beyond the listed categories.

Organizational Practices

The survey asked respondents to describe the organizational practices of their farmers market. Practices include the existence and composition of a collective decision-making board and written policies for market practices, such as by-laws or rules, regulations, and requirements. Additionally, respondents were asked about their work arrangement and employees, including volunteers, as well as their market's budget, fees, and sources of funding.

Decision-Making Process

Respondents provided several insights into the way they organize their farmers market and the rules, regulations, and operating procedures that govern them. Nationally, 5,437 farmers markets (70%) reported a board or group of people collectively making decisions. Of that subset of markets, 47% had boards made up completely of community members, 30% made up completely of market vendors, and the rest were a mixture.

Urban market boards were more likely to be made up of all (43%) or mostly (26%) community members. Suburban and rural market boards were much more likely to be made up of all vendors (43%) or all community members (58%).

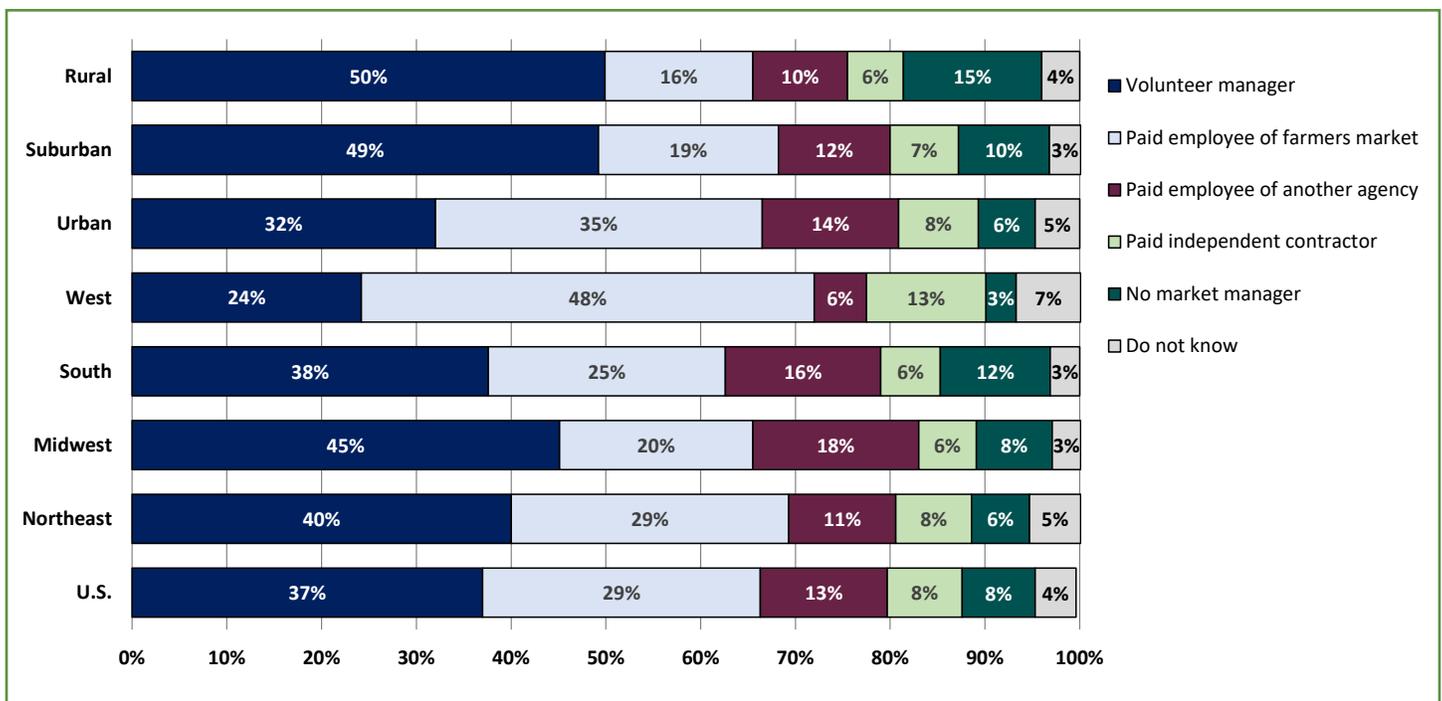
Nationally, 93% of farmers markets had at least one rule, regulation, or operating procedure. The two most cited rules, regulations, or operating procedures were signed agreements between the market and vendors (83%) and guidelines for safe food handling (81%). More than three-quarters of farmers markets (78%) had written by-laws, and 35% of markets charged a membership or application fee.¹ Even more managers reported a signed agreement between vendor and market regarding the market by-laws (83%) and a promise to adhere to market food safety guidelines (81%).

Farmers Market Manager’s Role

Respondents were asked about the presence of a farmers market manager. If the market had a manager, respondents were also asked about the work arrangement between the market and the manager.

As shown in Figure 5, the most common work arrangement (37%) was volunteering, followed by paid employees of the market (29%), paid employees of another agency (13%), and paid independent contractors (8%). Notably, 8% of markets did not have a manager. Regional differences were distinct. The West had the highest percentage of markets with a paid manager (48%), whereas the other regions had more volunteer managers. Urban areas had a higher percentage of markets with a paid manager (35%), though volunteering (32%) was a close second in terms of arrangements. Suburban (49%) and rural markets (50%) were more likely to have volunteer managers than urban markets (32%).

Figure 5. Market manager work arrangements

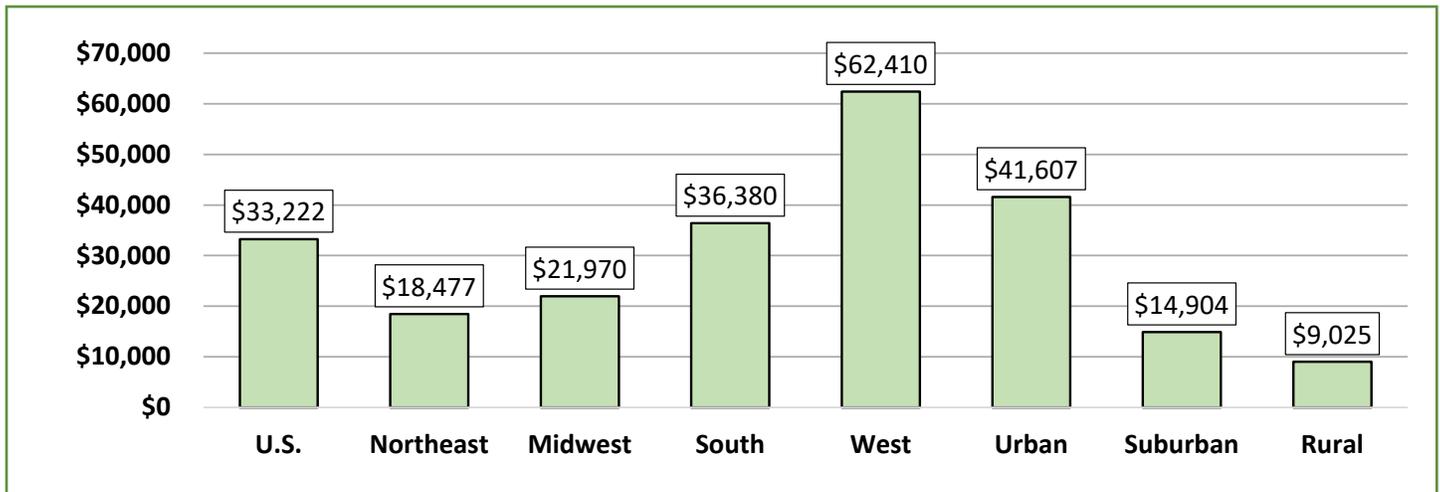


1 The survey asked about the presence of these two fee structures as one question.

Operating Budget

Nationally, 48% of markets reported an operating budget and the average operating budget was \$33,222 for the 2019 season. Markets in the West had the largest budgets (\$62,410, on average) while the markets in the Northeast averaged only \$18,477. Urban markets reported higher budgets (\$41,607) than suburban (\$14,904) and rural (\$9,025) markets (Figure 6).² Most markets (79%) charged vendors a fee to sell at the market. Further, most markets (73%) that charged a flat rate fee.³

Figure 6. Average operating budget, by U.S., region, and urbanicity



Other Market Activities

The survey included questions about other activities and opportunities farmers markets can provide beyond a place to conduct transactions. These questions focused on the existence and prevalence of activities, services, programs, and evaluation that occurred at farmers markets in 2019. Question topics ranged from business training and support, such as hosting workshops, training or consultations on merchandising, bookkeeping, and business planning; to the types of market services provided or managed, including shared kitchen space, community supported agriculture (CSA) programs, and storage space; to health and fitness programs; to market research and evaluation.

Nationally, 30% of farmers markets offered training and/or business development support to vendors. The most common trainings focused on marketing (72%), food handling safety (52%), and merchandising (40%) (Figure 7). Only 17% of markets nationally provided one of the following services for their vendors: shared kitchen space, storage space, or packaging services. Yet, 26% of markets managed customer-facing services for their vendors, including a community supported agriculture (CSA) program, food hub, or mobile market.

Figure 7. Trainings offered at farmers markets, by U.S., region, and urbanicity

Training Offered	U.S.	Northeast	Midwest	South	West	Urban	Suburban	Rural
Marketing	72%	78%	68%	74%	67%	73%	68%	68%
Food handling/food safety	52%	28%	52%	57%	67%	53%	53%	47%
Merchandising	40%	49%	33%	39%	43%	45%	34%	23%
Farming for beginners	24%	40%	12%	27%	19%	26%	19%	17%

Note: These percentages are a subset of the markets that offer training and/or business development opportunities to their market managers.

² Only markets that responded they had an operating budget are included in this data.

³ The survey did not specify the duration of time, such as per session or for an entire season, associated with the flat fee.

Training Offered	U.S.	Northeast	Midwest	South	West	Urban	Suburban	Rural
Business planning	24%	45%	16%	21%	18%	25%	21%	25%
Production planning	20%	36%	14%	18%	17%	22%	15%	18%
On-farm food safety	19%	4%	15%	30%	20%	18%	12%	13%
Bookkeeping/accounting	17%	37%	10%	10%	17%	18%	22%	27%
Value-added production/processing	16%	17%	14%	18%	15%	16%	15%	19%
Other	21%	42%	23%	13%	15%	22%	19%	19%

Note: These percentages are a subset of the markets that offer training and/or business development opportunities to their market managers.

Overall, about one-third (33%) of farmers markets offered or engaged in at least one food waste and/or conservation program in 2019. Markets in the West were most likely to offer food waste and/or conservation programs (47%), whereas markets in the Midwest were the least likely (27%). Urban markets (37%) were more likely than suburban (23%) and rural (22%) markets to offer food waste and/or conservation programs. Of markets that offered food waste and/or conservation programs, 72% did so frequently (from once per week to twice per month).

As shown in Figure 8, of the 2,575 markets in the U.S. that participated in food waste and/or conservation programs, the most common programs were donating to food banks (66%), recycling (44%), and composting (41%), but some also conducted gleaning programs (22%), gardening and horticultural instruction (22%), and canning and processing demos (12%).

Figure 8. Types of food waste or conservation programs offered by farmers markets, U.S.

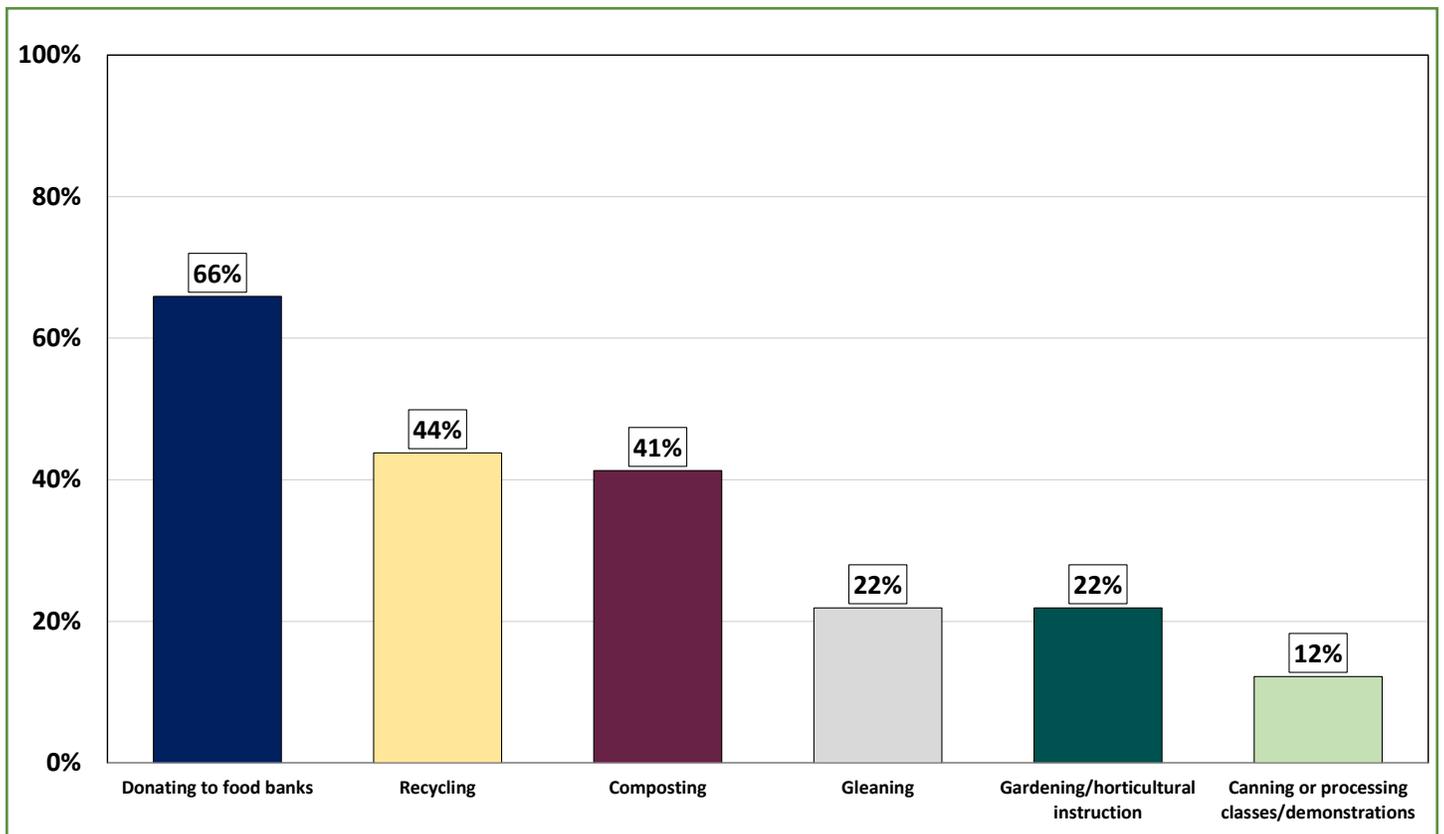
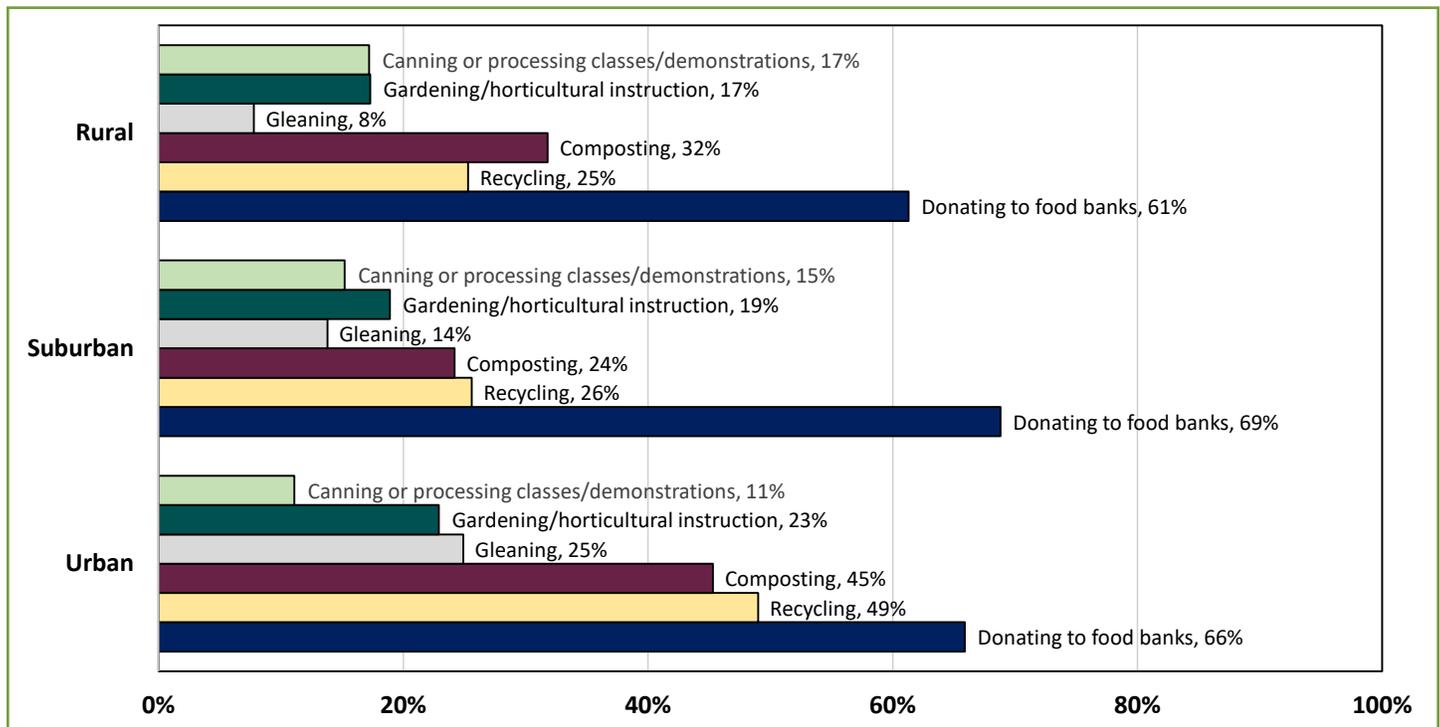


Figure 9. Types of food waste or conservation programs offered by farmers markets, by urbanicity



Almost half (45%) of farmers markets offered or sponsored at least one health and/or fitness program to encourage healthy dieting or lifestyle choices. Urban markets were more likely to offer health and/or fitness programs (51%) than suburban (36%) and rural markets (30%). Of the 3,554 markets in the U.S. that offered health and/or fitness programs, 51% did so frequently (from once per week to twice per month) and 29% did so occasionally (once per month).

Market Research Studies and/or Evaluations

Overall, only 25% of markets reported that they conduct market research studies and/or market evaluations, either internally or by hiring an outside consultant (Figure 10). Of the 1,907 markets that did some form of evaluation, the most common evaluation type was customer counts/estimates (75%), followed by surveys of vendors (51%), sales data collection (42%), surveys of customers about product preferences (45%), and customer surveys regarding market date preferences. Feasibility studies and community needs assessments were less common, at 18% each.

Figure 10. Percentage of markets that conducted market research or evaluations

