EVALUATING ECONOMIC IMPACT, IDENTIFYING OPPORTUNITIES, AND ASSESSING FEASIBILITY OF A STATEWIDE FARMERS MARKET ASSOCIATION AS A SOLUTION TO DIRECT MARKETING CHALLENGES
FY 2010

Farmers markets are an important and growing segment of Maryland's agricultural industry. Over the past 10 years, the number of new farmers markets has steadily grown, indicating an increasing demand on the part of Maryland consumers for local, farm fresh items purchased directly from producers. To date, however, marketing for farmers markets has been fragmented, with individual markets bearing the majority of the burden for knowing their customer base, assessing economic conditions for a thriving market, and managing both risks and rewards of selling directly to the consumer. This project addressed direct marketing challenges faced by the state's farmers market by:

- Assessing characteristics and economic impact of Maryland farmers markets through surveys of consumers, market organizers, and producers;

- Highlighting best practices and marketing opportunities through an analysis of infrastructural and organizational information gleaned from the aforementioned surveys;

- Assessing the potential of incentive programs to increase sales and expand the consumer base at farmers markets; and

- Exploring the pros and cons of forming a state farmers market association.

FINAL REPORT

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2010-11 USDA Federal-State Marketing Improvement Program (FSMIP)

Final Report

"Farmers' Markets in Maryland: Evaluating Economic Impact, Identifying Opportunities, and Assessing Feasibility of a Statewide Farmers' Market Association as a Solution to Direct Marketing Challenges"

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Project Background and Main Issue Addressed

Farmers markets are an important and growing segment of Maryland's agricultural industry. Over the past 10 years, the number of new farmers markets has steadily grown – indicating an increasing demand on the part of Maryland consumers for local, farm fresh items purchased directly from producers. To date, however, marketing for farmers markets has been fragmented, with individual markets bearing the majority of the burden for knowing their customer base, assessing economic conditions for a thriving market, and managing both risks and rewards of selling directly to the consumer. While the Maryland Department of Agriculture (MDA) coordinates the federally funded Farmers' Market Nutrition Program (FMNP) to increase access to markets for lower-income women, infants, children and seniors, there is no dedicated funding for marketing and promotion of farmers markets. One of the reasons for this was the paucity of economic, demographic, and infrastructural data to support the case for increasing the state's investment in this fast-growing agricultural market segment. While branding campaigns for Maryland agricultural products have been implemented in recent years, there has not been a concerted focus on the development of marketing tools and resources exclusively for farmers markets.

Maryland farmers markets are struggling to make improvements and meet the rising demand for local. Many market managers are volunteers or part-time which limits their ability to evaluate marketing barriers and adopt strategies to address challenges. The perception that Maryland farmers markets do not need assistance since each year the number of markets has grown is misleading; many markets have few resources to meet their basic needs from operating costs to programming. While new markets open other markets close and little research has been done on the myriad potential reasons for market failure. This project aimed to address the overall lack of information on the composition of this segment of the local agricultural economy in Maryland in order to identify options for growth and improvements. Through an investigation of marketing barriers, the goal was to identify what resources are needed to address challenges in the farmers market realm of direct-to-consumer sales. The potential for increased access to and sales at markets for lower-income populations through incentive programs was also evaluated. A comprehensive assessment of Maryland farmers markets was undertaken to estimate their economic impact, highlight best practices and delineate opportunities for growth. This initial research then provided the basis for an evaluation of whether the formation of a farmers market association is a feasible solution to address direct marketing challenges.

This project is timely due to the combination of increasing interest in ensuring access to fresh food and agricultural products to combat the obesity epidemic, the desire to expand healthy eating and the need to address rising consumer demand for local products. In an era when more consumers want to know where their food is coming from, tainted food has led to a distrust of long food supply chains, and many are getting to know their farmers, farmers markets can address all of these concerns. Those who worry about environmental impacts can also find answers at the farmers market, whether through reducing the carbon footprint of their eggs or better understanding what (if any) chemical products were utilized in the production of their apples and why. All indications are that the direct-to-consumer market segment will continue to grow for food and agricultural products, and farmers markets stand to play a key role in this sustained demand for the foreseeable future. The strengthening and growth of the farmers market sector in Maryland will also contribute to reinvigorated local and regional food systems during this time of heated debate over agricultural and economic policies at the national level.

How Issue was Approached via the Project

The issue of lack of quality information gathered systematically and statewide necessary to identify opportunities in the farmers market segment of Maryland's agricultural economy was addressed through the implementation of a statewide survey of farmers market stakeholders and an evaluation of the potential for increased access and sales through incentive programs at farmers markets. The information from these two investigations was then analyzed to identify direct marketing challenges and assess whether or not the establishment of a Maryland Farmers Market Association could be a solution to address the identified challenges. Each of these portions of the project addressed the four objectives set out in the proposal via the tasks outlined in the work plan:

- To assess farmers markets and their impact in Maryland: 3 different surveys were directed at consumers, market organizers, and producers which assessed the landscape of Maryland farmers' markets, estimated their economic impact, and identified marketing barriers. The surveys were designed and analyzed with Professor Hanson and his graduate assistant Aaron Adalja from the University of Maryland Agricultural & Resource Economics Department. They were vetted by a small group of market managers, farmers, and marketing experts and distributed via email, mail, and in person.
- To highlight best practices and marketing opportunities: an analysis of infrastructural and organizational information gleaned from the aforementioned surveys was undertaken to evaluate best practices as well as what areas markets could consider for improving marketing opportunities to increase customer base and market sales. A list of farmers market barriers and challenges was developed from this exercise (see section related to results below).
- To assess the potential of incentive programs to increase sales and expand the consumer base at farmers' markets: independent consultants compiled information on current incentive programs and summarized all Maryland direct-to-consumer data related to farmers markets. An analysis of the potential market from federal nutrition benefit programs available at markets was compiled, as well as a nationwide review of market-based incentive programs to identify best practices for urban, suburban, and rural farmers markets. The summary of these best practices was provided to market managers at the 2011 Farmers Market Conference.
- To perform a feasibility analysis of the formation of a farmers' market association: an evaluation of existing farmers' market associations and literature review was completed as a benchmark for potential services to be provided and solutions to direct marketing challenges in Maryland markets. A comparison of the farmers market barriers and challenges in Maryland with the services or programs that an Association could provide was completed.

Project Partners

Partners in the work performed included both public and private agencies. The University of Maryland was the public institution through which Professor Jim Hanson provided his expertise along with the excellent analysis done by his Graduate Research Assistant Aaron Adalja. This collaboration centered on the survey portion of the project – in particular the design, vetting and analysis of data received. Private partners in this project included: the Crossroads Farmers Market consultants Michele Levy and Michelle Dudley; the independent consultant Nessa Richman; and market manager and farmer Cindy Yingling. The Crossroads Farmers market consultants performed the analysis of incentive programs, for which they were well suited as they manage one of the first and most successful such programs in the country. They reviewed incentive programs throughout the nation and developed a set of best practices that were provided to market managers. Nessa Richman, an independent consultant with expertise in food system research, did an analysis of Maryland direct-to-consumer data as well as what potential market exists from federal nutrition benefit program participants spending their benefits at farmers markets. Cindy Yingling provided review and her expert opinion on the surveys for market managers and farmers.

Project Results, Conclusions, and Lessons Learned

The results of the project were in keeping with the logic model included in the original proposal, delineated by project tasks. These tasks included: conduct surveys; analyze and compile survey data; conduct research regarding incentive programs at farmers markets; outreach to key audiences regarding incentive programs; and research on farmers market associations. The results, conclusions and lessons learned are discussed in detail below in conjunction with each task as well as evaluation and whether or not project objectives were met.

Conduct Surveys. Three distinct surveys were envisioned for what was presumed to be the main farmers market stakeholder groups: consumer, producer, and sponsor/community organizations. Upon review of the type of data that was sought from these groups, the last category was revised from sponsor/community groups to market managers. It was difficult to identify sponsor/community groups and market managers could actually provide all necessary information related to these groups in addition to substantive market data. This was a lesson learned to identify the key stakeholders by first assessing the types of data sought and then seeking respondents that would have the expertise and experience to respond to such questions. The output of distribution of 300 surveys to 100+ Maryland farmers markets was exceeded – over 500 surveys were sent out. Of these, 408 were sent via email to market managers and producers and the remainder were distributed via mail. An additional 2500 "Hot Cards" – small cards advertising the consumer survey were sent out for market managers to distribute at market. These Hot Cards were also include in MDA materials for anyone to access via the information table at the Headquarters as well as through various promotional events related to farmers markets. The performance measure target was a 75% response rate; this was not achieved. The response rate for each survey was as follows: market managers – 38%, vendors – 19%, and consumers – 4%. This was a lesson learned; that much more targeted outreach and follow up would be necessary to increase response rates. See Appendices A – C for copies of the surveys distributed.

Analyze And Compile Survey Data. Despite the seemingly low rates of response, 40% of the markets in the state were represented. See Appendices D - I for a report on the findings and the data for each survey. Perhaps the most significant conclusion that can be drawn from the vendor survey is a benchmark for sales at Maryland farmers markets. Over $2.275 million in sales was reported through the survey for 53 farms that participate in farmers markets. As the average number of farmers at any of Maryland's 117 markets (in 2010 – the year of the survey data) was 12, assuming that ½ of these vendors participate in 2 markets, approximately 700 vendors sold through farmers markets. If 53 vendors reported over $2 million in sales, the sales potential at Maryland farmers markets could be estimated as high as $30 million for one season. The reported sales represented 18% of direct-to-consumer sales in Maryland based on the 2007 Agricultural Census (see Appendix J). From the market manager perspective, almost $3.7 million was reported in sales for the 47 markets represented. Since this was the total sales for 40% of all of the markets in the state, then sales at markets could be estimated as high as $9.2 million. The reported sales 29% of direct-to-consumer sales in Maryland based on the 2007 Agricultural Census (see Appendix J). Regardless of the method of calculation, this benchmark of 18-29% of the Maryland direct-to-consumer sales economy demonstrates the potential for growth in the farmers market sector. The differing reports of sales at market also highlights consistent and dependable data collection as an area for improvement so as to clearly estimate and communicate the value of the farmers market sector in Maryland. One additional lesson learned with regards to the consumer survey was that few of the respondents were utilizing federal benefit nutrition programs at market; this may have been a reflection of the distribution method for the surveys as well as a language barrier since other estimates of participation in these programs through statewide programs such as the Eat Fresh Maryland Network indicate differently. These other estimations of participation are higher than were reflected in the consumer survey; however this area remains less than fully utilized as a revenue stream at farmers markets, which was the reason for the research focus on incentive programs at market.

Conduct Research Regarding Incentive Programs At Farmers Markets. A literature review of Maryland direct-to-consumer data was compiled and highlighted the potential for growth in the farmers market sector. See Appendix J for the full report on the results of these findings; the conclusion drawn from this analysis is that Maryland already has a vibrant direct-to-consumer sector, and there is room for continued growth and improvement. A subsequent analysis of the potential expansion of markets' customer base from federal nutrition benefits programs was undertaken, and these two analyses were combined into a one-page summary (See Appendix K). The conclusion from this was the in the 2011 season, federal nutrition benefits programs were potentially worth over $10m to producers selling through Maryland farmers markets. This is a largely untapped source of funding (as aforementioned, total reported sales in 2011 were $3.7m), leading to the conclusion that more work remains to be done on increasing the utilization of these benefits at farmers markets. One means of increasing access and redemption of these benefits nationally has been through incentive programs.

A review of incentive programs throughout the country was completed, with the research lending to what was initially set out as a suite of best practices and case studies highlighting best practices in three types of markets – urban, suburban, and rural. However, upon completion of the analysis, it was discovered that best practices were the same regardless of the type of market. So the suite was combined into one set of best practices with three case studies representing the different types of market – urban, suburban, and rural. See Appendix L.

The last piece of the incentive program portion of the project was to develop marketing plans for outreach to federal nutrition benefit clients. This was not completed as set out in the proposal, mostly due to the challenge of finding one such template that would work for all markets. Rather than develop such a template, the Eat Fresh Maryland Network now works with individual markets to assess their populations and target each type of federal nutrition benefit client as appropriate.

Lessons learned for all three of these tasks as part of the project included positive and strategic management of independent consultants, willingness to reevaluate and redesign outputs as appropriate based upon research findings, and the challenge of developing a template for marketing plans for farmers markets, as each markets needs can vary greatly with differing customers and needs in different areas of the state.

Outreach To Key Audiences Regarding Incentive Programs. The goal of this task was to inform farmers, market managers, State points of contact and policy decision makers with regards to this project and in particular incentive programs. The goal was set to present at the annual farmers market conference as well as 4 regional workshops on research findings, as well as presentation of reports to State points of contact and policy decision makers. This goal was not obtained; as there was only the presentation at the farmers market conference and one regional workshop in 2011 in conjunction with the Eat Fresh Maryland Network. This was partly due to the increasing focus of the Eat Fresh Maryland Network on incentive programs, which reduced the need for formal presentations of research findings in lieu of the Network providing such information to a wide audience. The presentations to key State points of contact and policy decision makers also did not materialize due to the incongruence with completion of the reports and the timing of the legislative sessions and the market season when such issues would be of interest. Although this was a lesson learned in potentially missed opportunities, it could remain a future benefit of the project to provide a packet of information to relevant stakeholders. This aspect might be turned into a positive one in light of the current debate on the 2012 Farm Bill.

Research On Farmers Market Associations. A literature review of statewide farmers market associations was undertaken, highlighting the services that such organizations provide for their respective farmers market communities. See Appendix M. Then a comparison was made between the issues exposed as farmers market barriers and challenges through the surveys and the services that other statewide farmers market associations provide to see if the establishment of a Maryland farmers market association would help address these concerns. The conclusion found was that the establishment of a Maryland Farmers Market Association (FMA) could address the barriers and challenges faced by Maryland farmers markets, and the suite of services it could provide would be complementary to those that State agencies such as MDA manage. Another conclusion is that there is interest and demand for a Maryland FMA, as 86% of market managers would be willing to pay to participate in such an organization. See Appendix N.

Final project deliverable is this report, which will be distributed to farmers market managers and farmers market stakeholders in Maryland.

<u>Current or Future Benefits of Project</u>

The most significant current benefit derived from the project is a better understanding of the farmers market sector in Maryland, and the ability of MDA to benchmark different aspects of farmers market management and operations. For example, an inquiry with regards to market fees charged can now be answered with concrete data from 43 markets as to what and how they charge fees. This and other information and practices from sales to budgets to operational details like management structure and producer-only policies will help existing and new markets better understand where they might be able to improve their operations, procedures, or policies or at a minimum where any given market falls in the broad spectrum of Maryland farmers markets. This data will also inform future policy decisions and inform the debate on expanding local and regional food systems.

Future benefits might include the use of this data as a basis for a more comprehensive analysis of utilization of federal nutrition benefit programs in Maryland and subsequently a plan to increase access to and utilization of these benefits by eligible participants. Some of this work has already begun in conjunction with the Eat Fresh Maryland Network, and the findings from this report should continue to inform and ground such efforts to improve food access through farmers markets for all Marylanders.

Recommendations for Future Research

Recommendations for future research would be in the area of developing guidelines for the systematic collecting, reporting, and evaluation of sales data through farmers markets, as these surveys illustrate that there is still not a consistent standard for sales reporting to track annual growth and development of this direct-to-consumer sector. Also the area of federal nutrition benefit program access and redemption could be a potential research topic, which USDA has already begun to undertake through a recent survey on SNAP at farmers markets. Lastly, research on what would be necessary to establish an independent farmers market association in Maryland would be pertinent, as this project illustrated the demand, need, and potential for such an organization to assist Maryland farmers markets.

Project Beneficiaries

Project beneficiaries include the 100+ farmers markets in Maryland, which includes their market management, as well as their vendors. Over 400 vendors participate in Maryland farmers markets, and almost 14,000 consumers shopped at the 43 markets that responded to the survey in 2010. Over 100,000 Women, Infants, and Children (WIC) and more than 6,000 Seniors are provided with Farmers Market Nutrition Program checks to spend at farmers markets – all of these participants will indirectly benefit from this project through the improvement of markets that they attend. Lastly, over 700,000 people participate in the Food Supplement Program (SNAP in Maryland, formerly known as Food Stamps); they can benefit by increased access to this program through their market as identified herein as one way in which market managers can increase their customer base and thus sales.

Additional Information Generated by the Project

Please see the Appendix for the surveys (Appendices A-C) and publications (Appendix O) generated as a result of the project.

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Appendix:

A. 2011 Farmers Market Vendor Survey
B. 2011 Farmers Market Manager Survey
C. 2011 Farmers Market Consumer Survey
    1. MDA FSMIP Consumer Hotcards
D. Farmers Market Vendor Survey Report
E. Farmers Market Manager Survey Report
F. Farmers Market Consumer Survey Report
G. Farmers Market Vendor Data
H. Farmers Market Manager Data
I. Farmers Market Consumer Data
J. Maryland Direct-To-Consumer Summary Report
K. Direct-To-Consumer & Federal Nutrition Benefits One-page Summary
L. Incentive Program Best Practices and Case Studies
M. Literature Review on Statewide Farmers Market Associations
N. Maryland Comparison and Potential Farmers Market Association Services
O. University of Maryland: Fact Sheet 934

2011 Farmers Market Vendor Survey

Please fill out the following information based on the 2010 market season.
This information will remain CONFIDENTIAL - there will be no publication of any financial data linked to your name or your farm/company.

Farm / Company Name:

Your Name:

In what county is your farm/company located? *

- (•) Allegany
- ( ) Anne Arundel
- ( ) Baltimore City
- ( ) Baltimore County
- ( ) Calvert
- ( ) Carroll
- ( ) Caroline
- ( ) Cecil
- ( ) Charles
- ( ) Dorchester
- ( ) Frederick
- ( ) Garrett
- ( ) Kent
- ( ) Harford
- ( ) Howard
- ( ) Montgomery
- ( ) Prince George's
- ( ) Queen Anne's
- ( ) St. Mary's
- ( ) Somerset
- ( ) Talbot
- ( ) Washington
- ( ) Wicomico
- ( ) Worcester
- ( ) Other (outside Maryland)

Do you own or rent acres to farm? *

(•) Own ( ) Rent ( ) Both ( ) Neither

What is the size of the owned land in acres?

Maryland Department of Agriculture's marketing program conducts promotions and advertising of local agriculture throughout the year. Were you aware of these MDA marketing programs? *

(•) Yes ( ) No

Have these MDA marketing programs resulted in increased sales for you? *

(•) Yes ( ) No ( ) I don't know.

Does your farm/company have a web page? *

(•) Yes ( ) No ( ) Not yet - it's in process.

Web page address:

How many farmers' markets did you participate in each week? *

What are your expected gross sales from farmers' markets for the 2010 season? *

$ ______ . ______

Dollars Cents

What percentage of your total farm / company sales comes from farmers' markets? *

Have your gross sales increased since 2006?

- ○ No
- ◉ Yes

By what percentage have your gross sales increased since 2006?

What percentage of your farmers' market income comes from certified organic goods?

- ◉ 0 - 20%
- ○ 21 - 50%
- ○ 51 - 75%
- ○ 75 - 100%

What percentage of your total farmers' market income came from the Farmers' Market Nutrition Program (FMNP - Seniors & WIC) in 2010? *

How many days per week did you attend farmers' markets? *

- ◉ One
- ○ Two
- ○ Three
- ○ Four
- ○ Five
- ○ Six
- ○ Seven

What percentage of your farmers' market income came from the Farmers' Supplemental Nutrition Assistance Program (SNAP, formerly Food Stamps) in 2010? *

What is the gender of the principal farmer?

- ○ Female
- ◉ Male

What is the age of the principal farmer?

- (x) 0 - 25
- ( ) 26 - 50
- ( ) 51 - 75
- ( ) 75+
- ( ) Other

What products do you sell at Maryland farmers' markets? *

- [ ] Fruits / Vegetables
- [ ] Poultry / Eggs
- [ ] Flowers / Plants
- [ ] Honey
- [ ] Jam / Prepared Foods (relishes, salsas, etc.)
- [ ] Baked Goods (pies, breads, cookies, etc.)
- [ ] Meat / Fish
- [ ] Crafts / Art
- [ ] Other

If you selected "Other" above, please elaborate here:

How many years has your farm/company sold at farmers' markets? *

Do you sell to customers through any other direct marketing channels such as those below? Please select all that apply: *

- [ ] Community Supported Agriculture (CSA)
- [ ] On-farm stand
- [ ] Online orders
- [ ] Phone orders
- [ ] Restaurants
- [ ] Other

If you selected "Other" above, please elaborate here:

Did you use any of the following methods to attract customers at the farmers' market? Please select all that apply: *

- ☐ Free samples
- ☐ Discounts
- ☐ Non-agricultural marketing (tote bags, gifts, etc.)
- ☐ None of the above
- ☐ Other

If you selected "Other" above, please elaborate here:

What do you feel is the biggest challenge of selling at Maryland farmers' markets? *

- ◉ Learning about licenses, permits needed
- ○ Obtaining licenses & permits needed
- ○ Dealing with market management
- ○ Understanding what programs are available at markets (FMNP, FVC, SNAP)
- ○ Cost of participating in the market
- ○ Selling enough product at market
- ○ Other

Market-Specific Information

This section is designed to capture information on each market that you participated in during the 2010 season.

How many markets does your farm/company attend? *

○ One ○ Two ○ Three ○ Four ○ Five ◉ Five+

Market Name (1) *

Transportation Miles to Market, One-way (1) *

No. of employees at market, including yourself (1) *

Is there an Electronic Benefit Transfer "EBT" machine at the market (1)? *

○ Yes ◉ No ○ I don't know

What factors influenced your choice to sell at this farmers market (1)? *

- (•) Sales figures
- ( ) Access to market (ability to join)
- ( ) Less competition
- ( ) Distance to farm/company
- ( ) Niche opportunity
- ( ) Other

What type of fees do you pay for this market (1)? *

- ( ) Flat fee for entire 2010 market season
- ( ) Stall fee for entire 2010 market season
- ( ) Flat fee for entire 2010 market season + percentage of weekly sales
- ( ) Percentage of weekly sales
- ( ) Other

List the total amount of market fees that you pay for this market (1).

$ ______ . ______

Dollars Cents

Market Name (2)

Transportation Miles to Market, One-way (2)

No. of employees at market, including yourself (2)

Is there an Electronic Benefit Transfer "EBT" machine at the market (2)?

( ) Yes (•) No ( ) I don't know

What factors influenced your choice to sell at this farmers market (2)?

- (•) Sales figures
- ( ) Access to market (ability to join)
- ( ) Less competition
- ( ) Distance to farm/company
- ( ) Niche opportunity
- ( ) Other

What type of fees do you pay for this market (2)? *

- ( ) Flat fee for entire 2010 market season
- ( ) Stall fee for entire 2010 market season
- ( ) Flat fee for entire 2010 market season + percentage of weekly sales
- ( ) Percentage of weekly sales
- ( ) Other

List the total amount of market fees that you pay for this market (2).

$ ______ . ____

Dollars Cents

Market Name (3)

Transportation Miles to Market, One-way (3)

No. of employees at market, including yourself (3)

Is there an Electronic Benefit Transfer "EBT" machine at the market (3)?

( ) Yes (•) No ( ) I don't know

What factors influenced your choice to sell at this farmers market (3)?

- (•) Sales figures
- ( ) Access to market (ability to join)
- ( ) Less competition
- ( ) Distance to farm/company
- ( ) Niche opportunity
- ( ) Other

What type of fees do you pay for this market (3)? *

- ( ) Flat fee for entire 2010 market season
- ( ) Stall fee for entire 2010 market season
- ( ) Flat fee for entire 2010 market season + percentage of weekly sales
- ( ) Percentage of weekly sales
- ( ) Other

List the total amount of market fees that you pay for this market (3).

$ ______ . ____

Dollars Cents

Market Name (4)

Transportation Miles to Market, One-way (4)

No. of employees at market, including yourself (4)

Is there an Electronic Benefit Transfer "EBT" machine at the market (4)?

( ) Yes (•) No ( ) I don't know

What factors influenced your choice to sell at this farmers market (4)?

- (•) Sales figures
- ( ) Access to market (ability to join)
- ( ) Less competition
- ( ) Distance to farm/company
- ( ) Niche opportunity
- ( ) Other

What type of fees do you pay for this market (4)? *

- ( ) Flat fee for entire 2010 market season
- ( ) Stall fee for entire 2010 market season
- ( ) Flat fee for entire 2010 market season + percentage of weekly sales
- ( ) Percentage of weekly sales
- ( ) Other

List the total amount of market fees that you pay for this market (4).

$ ______ . ______

Dollars Cents

Market Name (5)

Transportation Miles to Market, One-way (5)

No. of employees at market, including yourself (5)

Is there an Electronic Benefit Transfer "EBT" machine at the market (5)?

( ) Yes (•) No ( ) I don't know

What factors influenced your choice to sell at this farmers market (5)?

- (selected) Sales figures
- Access to market (ability to join)
- Less competition
- Distance to farm/company
- Niche opportunity
- Other

What type of fees do you pay for this market (5)? *

- Flat fee for entire 2010 market season
- Stall fee for entire 2010 market season
- Flat fee for entire 2010 market season + percentage of weekly sales
- Percentage of weekly sales
- Other

List the total amount of market fees that you pay for this market (5).

$ ______ . ____

Dollars Cents

2011 Farmers Market Manager Survey

The Maryland Department of Agriculture has been awarded a Federal-State Marketing Improvement Program (FSMIP) grant to conduct this survey and do a feasibility study on a Maryland farmers market association.

This survey should take no longer than 10 minutes to complete - there are 5 sections and less than 50 questions. Please fill out the requested information based on the 2010 market season.

This information will remain CONFIDENTIAL - there will be no publication of any financial data linked to your name or your market. Questions with an asterisk (*) are required.

Please fill out one form per market - after submitting this information for one market, return to the link and complete the information for the next market. Markets that are open twice per week are considered one market for the purposes of this survey.

1 Market Operations 2 Financial 3 Marketing / Advertising 4 Federal Nutrition Benefit Programs 5 Future / Planning

Market Operations

This section is about general market operations.

Name:

How many farmers' markets do you manage? *

○ One ○ Two ○ Three ◉ Other (Three+)

What aspect of farmers' markets most influenced you to become a market manager? Please select all that apply: *

☐ Provide customers with a source of nutritious food

☐ Support the local economy

☐ Improve the income of small farmers

☐ Connect customers to farmers & foster a personal connection

☐ Other

What do you feel are the most important reasons consumers shop at farmers' markets?
Please select all that apply:

- ☐ Price
- ☐ Freshness of product
- ☐ Taste of product
- ☐ Support of local agriculture
- ☐ Access to locally produced food
- ☐ Variety of products offered
- ☐ Ability to know where food is produced
- ☐ Social atmosphere of market
- ☐ Other

Farmers' Market Name: *

Does the farmers' market have a web page? *

◉ Yes ○ No ○ Not yet - it's in process.

Web page address:

What year was the market established? *

What type of legal entity is the market? *

- ◉ Non-profit (501c3, etc.)
- ○ For-profit (corporation, etc.)
- ○ Part of another organization
- ○ The market does not have a formal legal entity
- ○ Other

Does the market have insurance? *

- ◉ Yes
- ○ No
- ○ Other (please explain)

What products are sold at this farmers' market? Please select all that apply: *

- ☐ Fruits / Vegetables
- ☐ Meat / Fish
- ☐ Poultry / Eggs
- ☐ Baked Goods (bread, pies, etc.)
- ☐ Honey
- ☐ Jam / Prepared foods (salsa, relishes, etc.)
- ☐ Flowers / Plants
- ☐ Crafts / Art
- ☐ Other

How many months in 2010 was this market open? *

On average, approximately how many shoppers attended the market each week in 2010? *

Do you count the number of visitors/shoppers at market? *

- ◉ Yes
- ○ No

How many farmers participated in the market for the 2010 season? *

How many other vendors participated in the market for the 2010 season? *

Is the market Producer-Only? *

- ◉ Yes
- ○ No

If the market is Producer-Only, how is this enforced?

- ◉ Farmer/Vendor Agreements or Contracts.
- ○ Farm / Company visits are conducted.
- ○ It is the Market Manager responsibility to monitor vendors.
- ○ It is not enforced.
- ○ Other

Are certified organic products sold at the farmers' market? *

- (x) Yes
- ( ) No

How many hours per week are you paid to work for the market? *

How many additional paid workers work for this market? *

How many hours per week (paid & unpaid) do you work for the market? *

How many additional volunteers work for this market? *

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This survey should take no longer than 10 minutes to complete - there are 5 sections and less than 50 questions. Please fill out the requested information based on the 2010 market season.

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Please fill out one form per market - after submitting this information for one market, return to the link and complete the information for the next market. Markets that are open twice per week are considered one market for the purposes of this survey.

1 Market Operations 2 Financial 3 Marketing / Advertising 4 Federal Nutrition Benefit Programs 5 Future / Planning

Financial

This section is on the financial aspects of the market.

Do farmers/vendors report market sales?

- (•) Yes
- ( ) No

If farmers/vendors report market sales, how often do they provide this information?

- (•) Weekly
- ( ) Monthly
- ( ) Once per season
- ( ) Other

What were the approximate total market sales for the 2010 season? *

$ ______ . ______
Dollars Cents

What type of fee do you charge each vendor for this market? *

- (•) Flat fee per season ($)
- ( ) Flat fee per market day ($)
- ( ) Flat fee per market space ($)
- ( ) Variable fee based on sales (%)
- ( ) Other (please explain)

What amount is the market fee?

$ [ ] . [ ]
Dollars Cents

What percent is the market fee?

[ ]

Does the market have its own bank account? *

- (•) Yes
- ( ) No
- ( ) Other [ ]

What is the annual operating budget for the market's labor costs? *

$ [ ] . [ ]
Dollars Cents

What is the annual operating budget for the market's other costs? *

$ [ ] . [ ]
Dollars Cents

Does the market rely on outside funding from any of the following sources to cover operating expenses? Please select all that apply: *

- [ ] Public organizations
- [ ] For-profit private organizations
- [ ] Non-profit private organizations
- [ ] Other sources
- [ ] No, the market does not rely on outside funding.

2011 Farmers Market Manager Survey

The Maryland Department of Agriculture has been awarded a Federal-State Marketing Improvement Program (FSMIP) grant to conduct this survey and do a feasibility study on a Maryland farmers market association.

This survey should take no longer than 10 minutes to complete - there are 5 sections and less than 50 questions. Please fill out the requested information based on the 2010 market season.

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1 Market Operations 2 Financial 3 Marketing / Advertising 4 Federal Nutrition Benefit Programs 5 Future / Planning

Marketing / Advertising

This section is meant to capture what marketing and advertising areas the market currently uses and what areas in which the market could use assistance.

What methods of advertising does the farmers' market use? Please select all that apply: *

- ☐ Print media (brochures, flyers, newspaper, etc.)
- ☐ Television / Radio
- ☐ Website
- ☐ Word of Mouth
- ☐ Other

Does the market sponsor special events to attract more business? Please select all that apply: *

- ☐ Cooking demos / chef appearances
- ☐ Children's programs
- ☐ Musical acts
- ☐ Other

What is the annual operating budget for the market's advertising costs? *

$ ______ . ____

Dollars Cents

2011 Farmers Market Manager Survey

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Please fill out one form per market - after submitting this information for one market, return to the link and complete the information for the next market. Markets that are open twice per week are considered one market for the purposes of this survey.

1 Market Operations 2 Financial 3 Marketing / Advertising 4 Federal Nutrition Benefit Programs 5 Future / Planning

Federal Nutrition Benefit Programs

This section is to capture information on the extent that federal nutrition benefit programs such as FMNP, FVC, and SNAP are available and utilized at market.

Did the market accept the Farmers' Market Nutrition Program (FMNP-WIC & Seniors) in 2010? *

- (•) Yes
- ( ) No

Did the market accept the Supplemental Nutrition Assistance Program (SNAP, formerly Food Stamps) in 2010? *

- (•) Yes
- ( ) No

Did the market use incentive program(s) for SNAP/FMNP customers in 2010? *

- (•) Yes
- ( ) No

If the market used incentive program(s) in 2010, please elaborate on what types here:

2011 Farmers Market Manager Survey

The Maryland Department of Agriculture has been awarded a Federal-State Marketing Improvement Program (FSMIP) grant to conduct this survey and do a feasibility study on a Maryland farmers market association.

This survey should take no longer than 10 minutes to complete - there are 5 sections and less than 50 questions. Please fill out the requested information based on the 2010 market season.

This information will remain CONFIDENTIAL - there will be no publication of any financial data linked to your name or your market. Questions with an asterisk (*) are required.

Please fill out one form per market - after submitting this information for one market, return to the link and complete the information for the next market. Markets that are open twice per week are considered one market for the purposes of this survey.

1 Market Operations 2 Financial 3 Marketing / Advertising 4 Federal Nutrition Benefit Programs 5 Future / Planning

Future / Planning

This section is intended to identify areas in which the market wants to grow, as well as programs or services that could be useful to the market.

Which of the following do you feel is the largest issue standing in the way of growth for your farmers' market? *

- (●) Finding new vendors, farmers, and producers
- ( ) Understanding state policies for farmers' markets
- ( ) Lack of incentive programs for SNAP/FMNP customers
- ( ) Fundraising and generating revenue
- ( ) Compliance with county/city-level licensing and policies
- ( ) Paying for market staff
- ( ) Other

Would the market be interested in a Producer-Only certification program? *

- ( ) Yes
- (●) No
- ( ) Maybe (please elaborate)

What role(s) do you think a Maryland farmers market association should fulfill?
Please select all that apply: *

- ☐ Grants & resources
- ☐ Insurance & risk management
- ☐ Nutrition-related services
- ☐ Basic training & education
- ☐ Market start up
- ☐ Professional networking & information sharing
- ☐ Market promotion & advertising
- ☐ Policy & advocacy
- ☐ Other

Would your market be willing to pay an annual fee of $25-50 to belong to a Maryland farmers market association? *

- ◉ Yes
- ○ No
- ○ Other

Is the market interested in having more certified organic farmers? *

- ◉ Yes
- ○ No
- ○ Maybe (please explain)

Would the market like to do more outreach to federal nutrition program participants to expand the customer base? *

- ◉ Yes
- ○ No
- ○ Maybe (please explain)

Are you interested in learning more about insurance options for the market and/or its vendors? *

- ◉ Yes
- ○ No
- ○ Maybe (please explain)

If there are any other issues or concerns that you would like to

express, please use this space to provide your feedback. Thank you!

2011 Farmers Market Consumer Survey

Please complete this form regarding your farmers' market experience in 2010.

Starred questions are required in order to be able to submit your responses.

How many different farmers' markets did you shop at during the 2010 season? *

How frequently did you attend a farmers' market in the 2010 season? *

- Weekly
- Monthly
- Less than once a month

On average, how much money did you spend per week at the farmers' market? *

$ ______ . ______

Dollars Cents

In weeks that you purchased food at the farmers' market(s), what percentage of your total weekly food expenditure did that make up? *

- 0 - 25%
- 26 - 50%
- 51 - 75%
- 75 - 100%

How would you best describe your farmers' market purchases? *

- I buy products at the farmers' market that are also available at the supermarket.
- I buy products at the farmers' market that I cannot buy at the supermarket.

What are the major reasons that you shop at farmers' markets?
Please select 3 from the below: *

- ☐ Freshness of product
- ☐ Price
- ☐ Taste of product
- ☐ Support of local agriculture
- ☐ Access to locally produced food
- ☐ Variety of products offered
- ☐ Ability to know where food is produced

In the 2010 season, did you attend any of the following types of market sponsored events?
Please select all that apply: *

- ☐ Cooking demos / chef appearances
- ☐ Children's programs
- ☐ Musical acts
- ☐ Other events

What types of items do you buy at the farmers' market?
Please select all that apply: *

- ☐ Fruits / Vegetables
- ☐ Meat / Fish
- ☐ Poultry / Eggs
- ☐ Baked Goods
- ☐ Honey
- ☐ Jam / Salsas / Prepared Foods
- ☐ Crafts / Art
- ☐ Other

What types of items do you want to buy at the farmers' market that are currently not available?
Please select all that apply:

- ☐ Fruits / Vegetables
- ☐ Meat / Fish
- ☐ Poultry / Eggs
- ☐ Baked Goods
- ☐ Honey
- ☐ Jam / Salsas / Prepared Foods
- ☐ Crafts / Art
- ☐ Other
- ☐ There is nothing I want that is not available there.

Do you participate in the Supplemental Nutrition Assistance Program (SNAP, formerly Food Stamps)?

- ○ Yes
- ◉ No

Do you participate in the Farmers' Market Nutrition Program (FMNP-WIC & Seniors)?

- ○ Yes
- ◉ No

Do you use the farmers' market website (if available) to get any of the following? *

- ☐ Market information
- ☐ Recipes
- ☐ Vendor information
- ☐ Other
- ☐ Market website is not available

During the season, how do farmers' markets fit into your weekly food purchases? *

- ◉ I shop at farmers' markets as my primary source of food each week
- ○ I shop at farmers' markets to supplement my purchases at the supermarket

What is your age?

What is your gender?

How many people do you shop for in your family?

How far do you travel to shop at the farmers' market (in miles)? *

What is the maximum distance you would travel to shop at the farmers' market (in miles)? *


2011 FARMERS MARKET SURVEY
Let us know what you think about Maryland farmers markets!
www.marylandsbest.net
Martin O'Malley, Governor
Earl F. Hance,Secretary
Mary Ellen Setting, Deputy Secretary

Help Us Improve Maryland Farmers' Markets!

Take the 2011 Farmers Market Survey:
https://mdamarketing.wufoo.com/forms/2011-farmers-market-consumer-survey/

Sponsored by USDA
Federal-State Marketing Improvement Program
www.ams.usda.gov/fsmip

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Agriculture

“Farmers Markets in Maryland: Evaluating Economic Impact, Identifying Opportunities, and Assessing Feasibility of a Statewide Farmers Market Association as a Solution to Direct Marketing Challenges”
FSMIP Producer / Vendor Survey Summary

Vendor Demographics
The vendor survey includes responses from 53 vendors across 18 different counties in Maryland and one in Pennsylvania, with a combined 45% of responses coming from Baltimore County, Carroll County, Harford County, and Montgomery County. Just over half (55%) the respondents reported owning their own land, 9% rent their land, 26% both own and rent land, and the remaining 9% do neither (i.e. they are not farmers). Furthermore, about half (49%) the vendors have a webpage in place, with an additional 13% in process

About two-thirds of principal farmers fall between the ages of 51 and 75, and 25% fall between the ages of 26 and 50. Men make up 70% of the principal farmers as well. Over 40% of vendors have been selling at farmers’ markets for less than 5 years; so many vendors are relative newcomers to the farmers’ market distribution channel, but the average is 13.3 years.

Also, about 55% of vendors attend 1 or 2 farmers’ markets each week, with the overall average at 2.8 markets per week. On average, farmers send 2.3 employees to each farmers’ market (including the farmer). The average reported number of acres farmed was 111 acres, but about 57% of respondents reported farming less than 50 acres (15% of which left the question blank).

Sales
In 2010, farmers’ markets made up an average of 51.4% of total farm sales, with an average farmers’ market gross sales by farm of $42,933. It should be noted that 51% of farmers reported gross market sales of less than $10,000.

Market Opportunities
Nearly 40% of vendors are unaware of MDA marketing programs that promote local agriculture. Of the 60% aware of the programs, 30% reported increased sales as a result. This suggests that raising awareness of MDA marketing programs may be a relatively easy way to increase market growth.

Market Barriers
About 49% of vendors felt that the biggest challenge of selling at MD farmers’ markets was selling enough product. The next most cited challenge was learning about licenses and permits needed at 15%. This type of barrier could be removed through an online tutorial organized by MDA or potentially by a state farmers’ market association.

Products Sold
85% of vendors reported selling fruit and vegetables at the farmer’s market, which is nearly double the national average of 45.2%. Similarly, 35% of vendors reported selling

plants and flowers, while only 15.4% did so nationally. We see similar trends across most product categories.

FMNP / SNAP

Over 75% of respondents reported that FMNP comprised less than 5% of their total farmers' market sales (average of 5.3%), and a staggering 98% of vendors reported that SNAP accounted for less than 5% of sales (average of 0.9%). Improving FMNP and SNAP sales is a potentially large untapped source of growth.

Factors Influencing Decision to Sell at Farmers' Market

"Sales figures" and "distance to market" together comprise 55% of responses for the most important factor influencing a vendor's decision to sell at the farmers' market. Looking at distance traveled for all reported markets, 25% of vendors travel less than 10 miles to market, while an additional 35% travel between 11 and 30 miles. These numbers are at odds with the nationally reported numbers, which indicate that 58% of vendors travel less than 6 miles. The overall average travel distance to farmers' markets was 29.6 miles.

Source: USDA National Farmers Market Manager Survey 2006

"Farmers Markets in Maryland: Evaluating Economic Impact, Identifying Opportunities, and Assessing Feasibility of a Statewide Farmers Market Association as a Solution to Direct Marketing Challenges"

FSMIP Market Manager Survey Summary

Market Demographics & Logistics

The market manager survey includes responses from 39 managers representing 43 farmers' markets across Maryland. While 77% of respondents managed one market, 10% managed two markets, 10% managed three markets, and one individual managed greater than four markets.

About 24% of farmers' markets in Maryland are 20 years or older, which compares very closely with the national average of 26.1%. Indicative of the recent surge in popularity of farmers' markets, over 40% of farmers' markets in Maryland were established within the last five years, significantly higher than the national figure of 27.8%. The average market age is about 13 years old.

Unsurprisingly, the vast majority of markets operate seasonally in Maryland and are open for an average of 6.1 months (slightly higher than national average of 4.5 mos), with a mere 12% of markets open year round, which is right on par with the national average. In 2010, the average number of farmers at Maryland farmers' markets was 12, with an additional 7.7 other vendors on average. This is somewhat lower than the national average of 31 vendors, but close to the Mid-Atlantic average of 21 vendors.

Sales

The 2010 average reported annual sales for Maryland farmers' markets is about $120,000 (excluding blanks), which is significantly below the national average of $243,000 as well as the Mid-Atlantic average of $306,000. This disparity suggests that we have significant underreporting or that our sample is weighted more heavily toward smaller markets.

Organic

60.5% of Maryland farmers' markets reported selling certified organic products, which is well above the national average of 47%. Additionally, 77% of markets polled expressed an interest in recruiting more certified organic farmers for their market.

Customer Intelligence

Freshness of product ranked as the #1 reason market managers perceive that customers shop at farmers' markets, with 92% of managers selecting it. This is consistent with the national data, where 98% of managers selected this attribute. On average, 387 customers shop at a given Maryland farmers' market each week. This is slightly below the Mid-Atlantic average of 474 customers, and well below the national figure of 601 customers.

Advertising

Markets use a variety of advertising media to communicate with customers, but print media and word of mouth were the most commonly cited methods of advertising in Maryland (95% each). Nationally, we see similar trends with Banners/Signs and

Newspaper ads leading the way at about 80% each. In Maryland, web advertising is quickly becoming a major player, with 88% of managers citing its use.

Market Fees & Labor

The majority of Maryland farmers' markets (67%) charge some type of flat fee to vendors, which is slightly below the national figure of 76.4%. Variable fees account for about 14% of MD markets. About 54% of Maryland farmers' markets do not pay the market manager or any other employees, which is close to the national average of 58.5% of markets that are completely volunteer-run. Maryland markets average an additional 0.7 paid workers per market, along with 2.1 volunteers, which is well below the national average of 3.2 and 7.9, respectively.

In 2010, Maryland farmers' markets had an average labor budget of $3163, average ad budget of $1695, and an average other cost budget of $5845. 63% of markets received no outside funding, while the remainder received some combination of public, private for-profit, private non-profit, and other funding.

Market Barriers

The most cited barrier to growth of farmers' markets was finding new vendors (28%). A close second was fundraising and generating revenue (23%), following by securing more physical space for the market (14%). Additionally, a combined 9.3% of markets felt that compliance with state, county, and city policies/licensing was a large issue.

Infrastructural and Organizational Information

40% of farmers' markets in Maryland are set up as a non-profit (501c, etc.), 26% are part of another organization, 21% are not a formal entity, and 7% are for-profit. Only one market reported not having insurance, while the remainder either carried its own or obtained it through the city or MDA program. The majority of markets (77%) expressed interest in learning about more insurance options. 77% of markets already have a website in place, with an additional 2% in process. Interestingly, only 61% of farmers markets actually have a bank account.

FMNP / SNAP

While 79% of Maryland farmers' markets reported accepting FMNP benefits in 2010, only 37% reported accepting SNAP. Furthermore, only 9% of markets used any FMNP or SNAP incentives in 2010. However, these figures are significantly higher than the national averages, which are 60.7% of FMNP and a mere 6.8% for SNAP (this is due to the fact that very few markets in 2005 had EBT terminals to accept food stamps).

86% of markets expressed interest in more outreach to FMNP participants, so this presents a good opportunity for growth, particularly given the low usage of FMNP incentives in 2010.

FMA Feasibility / Interest / Role

86% of markets would be willing to pay an annual fee of $25-$50 for a state farmers' market association, and an additional 5% were unsure. Market promotion and advertising ranked highest (91%) among roles market managers thought a farmers' market association should fulfill. Additional high-ranking roles included professional networking (70%) and grants & resources (63%).

Source: USDA National Farmers Market Manager Survey 2006

"Farmers Markets in Maryland: Evaluating Economic Impact, Identifying Opportunities, and Assessing Feasibility of a Statewide Farmers Market Association as a Solution to Direct Marketing Challenges"

FSMIP Consumer Survey Summary

Market Attendance

There were 108 online respondents to the FSMIP Consumer Survey. With regards to questions dealing with market attendance, 19% attended one market, 40% attended two markets, and 24% attended three markets during the 2011 farmers' market season. Results also showed the overwhelming majority, 71% of consumers, patronize a famers' market on a weekly basis.

Consumer Spending Habits

There were several questions regarding consumer spending habits. During their trips, 66% of consumers spent $29 or less, with 12% spending $0-9, 18% spending $10-19, and 36% spending between $20 and $29. The overwhelming majority, 66% of consumers stated that their farmers' market purchases accounted for between 0 and 25% of their total weekly food expenditures, 25% of consumers stated 25-50% of their weekly dollars were spent at farmers' markets.

Consumer Shopping Habits

Interestingly, 86% of consumers said they purchase foods at farmers' markets that are already available at supermarkets—this indicates that consumers have additional motivations for shopping at farmers' markets besides the convenience of 'one-stop-shopping' at supermarkets. Reasons were varied, but the most common was that 26% of consumers cited they shop at farmers' market in order to support local agriculture—a very promising and positive indication about the future of farmers' markets in Maryland. Additionally consumers indicated an interest in level of quality, with 25% of consumers citing product freshness and 18% citing product taste as a major reason they shop at farmers' markets. Only 4% of consumers cite product price as a major factor for shopping at farmers' markets.

Market Purchases

The survey indicates that consumers are using markets to purchase a wide variety of products, but 99% of consumers are purchasing fruits and vegetables—the backbone of any successful farmers' market. Additionally, 69% of customers are purchasing baked goods, 52% are purchasing prepared foods, 48% for eggs, 41% for meat and fish, 35% for honey, and 25% for arts and crafts. This indicates a healthy variety of products available at farmers' markets, but also that when these products are available consumers are willing to purchase them. In terms of items that are not available, 45% of consumers stated they are happy with the products available. However, some customers are not fully satisfied with their market offerings and cited some items they would like to see available such as meat and fish (23% cited), additional fruits and vegetables (13% cited), poultry and eggs (11% cited), and prepared foods (8% cited).

Customer Demographics

In terms of characteristics of the customers, 65% of customers are between the ages of 20 and 49, and the vast majority, 73% of them, is women shoppers. The majority of customers are shopping for a family of four or less (92% of respondents), and of these 31% are shopping for a family of two people. Additionally, 46% of customers live within 5 miles of their preferred market, 26% within five to ten miles, and 11% within 11 to 15 miles.

Nutrition Assistance

Finally, the survey shows that few of the respondents redeemed nutrition assistance benefits at farmers' markets with only 2% of customers receiving SNAP benefits and 1% receiving FMNP benefits.

Vendors by County

County	N	%
Adams (PA)	1	1.9%
Allegany	1	1.9%
Anne Arundel	3	5.7%
Baltimore County	8	15.1%
Caroline	2	3.8%
Carroll	7	13.2%
Charles	3	5.7%
Dorchester	1	1.9%
Frederick	3	5.7%
Garrett	2	3.8%
Harford	5	9.4%
Kent	1	1.9%
Montgomery	4	7.5%
Prince George's	2	3.8%
Queen Anne's	3	5.7%
St. Mary's	3	5.7%
Washington	2	3.8%
Worcester	1	1.9%
York	1	1.9%

Breakdown of Land Ownership

Own/Rent	N	%
Own	29	54.7%
Rent	5	9.4%
Both	14	26.4%
Neither	5	9.4%

MDA Marketing Program Awareness

MDA Mktg Prgms	N	%
No	20	37.7%
Yes	33	62.3%

MDA Mktg Prgm: Yes

MDA Marketing Program Increase Sales

MDA Mktg Inc. S	N	%
I don't know.	22	66.7%
No	1	3.0%
Yes	10	30.3%

Webpage Status

Webpage	N	%
No	20	37.7%
Not yet - it's in prc	7	13.2%
Yes	26	49.1%

Number of Farmers' Markets Attended

No. of FMs	N	%	Avg
1	17	32.1%	1.0
2	12	22.6%	2.0
3	8	15.1%	3.0
4	7	13.2%	4.0
5	2	3.8%	5.0
6	3	5.7%	6.0
7	3	5.7%	7.0
8	1	1.9%	8.0
Grand Total	**53**	**100.0%**	**2.8**

2010 Farmers' Markets % of Total Farm Sales

% of Total Sales	N	%	Avg
0% - 10%	10	18.9%	6.8%
11% - 20%	4	7.5%	16.5%
21% - 30%	9	17.0%	27.3%
31% - 50%	8	15.1%	49.4%
51% - 75%	6	11.3%	70.0%
76% - 95%	7	13.2%	90.7%
96% - 100%	9	17.0%	99.4%
Grand Total	**53**	**100.0%**	**51.4%**

Total Acres Farmed

Acres	N	%	Avg
Blank	8	15.1%	0.0
<= 10 Acres	10	18.9%	4.3
11-50 Acres	12	22.6%	28.2
51-100 Acres	10	18.9%	82.0
100+ Acres	13	24.5%	362.8
Grand Total	**53**	**100.0%**	**111.7**

2010 Farmers' Market Gross Sale:

Sales	N	%
$0 - $5000	13	24.5%
$5001 - $10000	14	26.4%
$10001 - $25000	8	15.1%
$25001 - $50000	7	13.2%
$50001 - $100000	7	13.2%
$100000+	4	7.5%
Grand Total	**53**	**#####**

Methods Vendors Use to Attract Customers

Values	Total	%
Free Samples	24	45.3%
Discounts	15	28.3%
Non-Agricultural Marketing	13	24.5%
None	20	37.7%
Other	9	17.0%

Inc. Sales 2006 Yes

Increase in Sales from 2006

% Inc. Sales	N	%	Avg
Blank	7	18.4%	
0% - 10%	6	15.8%	5.0%
11% - 25%	10	26.3%	19.7%
26% - 50%	6	15.8%	38.8%
51% - 100%	5	13.2%	85.2%
100+ %	4	10.5%	225.8%
Grand Total	**38**	**100.0%**	**57.7%**

% of Sales from Certified Organic Goods

% Organic	N	%
0 - 20%	45	84.9%
75 - 100%	8	15.1%

2010 FMNP % Total FM Sales

% FMNP	N	%	Avg
0% - 5%	41	77.4%	1.5%
6% - 25%	10	18.9%	13.3%
> 25%	2	3.8%	41.5%
Grand Total	**53**	**100.0%**	**5.3%**

2010 SNAP % Total FM Sales

% SNAP	N	%
0%	41	77.4%
1% - 5%	11	20.8%
25%	1	1.9%
Grand Total	**53**	**#####**

Biggest Challenge of Selling at MD FMs

Challenges	N	%
Cost of participating in the market	6	11.3%
Dealing with market management	3	5.7%
Learning about licenses, permits r	8	15.1%
Obtaining licenses & permits neec	2	3.8%
Selling enough product at market	26	49.1%
Understanding what programs are available	1	1.9%
Other	7	13.2%

Principal Farmer Gender

Gender	N	%
Female	16	30.2%
Male	37	69.8%

Principal Farmer Age

Age	N	%
0 - 25	3	5.7%
26 - 50	13	24.5%
51 - 75	35	66.0%
75+	2	3.8%

Vendors Selling Product at MD FMs

Products	Total	%
Fruits / Vegetable	45	84.9%
Poultry / Eggs	6	11.3%
Flowers / Plants	19	35.8%
Honey	7	13.2%
Jam / Prepared G	8	15.1%
Baked Goods	6	11.3%
Meat / Fish	2	3.8%
Crafts / Art	6	11.3%
Other	8	15.1%

Other Direct Marketing Channels

Channels	Total	%
CSAs	14	26.4%
On-farm stand	21	39.6%
Online orders	8	15.1%
Phone orders	11	20.8%
Restaurants	22	41.5%
Other	26	49.1%

Days Per Week Attend FMs

FM Days Per Week	N	%
One	16	30.2%
Two	16	30.2%
Three	10	18.9%
Four	7	13.2%
Five	4	7.5%

Years Selling at Farmers' Markets

No. of Years	N	%	Avg
0 - 5	22	41.5%	2.4
6 - 10	6	11.3%	7.5
11 - 15	6	11.3%	14.2
16 - 20	2	3.8%	19.0
21 - 25	6	11.3%	22.5

Number of Farmers' Markets Attended

No. of FMs (v2)	N	%
One	20	37.7%
Two	10	18.9%
Three	7	13.2%
Four	7	13.2%
Five	3	5.7%

26 - 30	5	9.4%	29.6	Five+	6	11.3%
> 30	6	11.3%	34.0			

Number of FMs Managed

	Values	
No. of FMs	N	%
One	30	76.9%
Two	4	10.3%
Three	4	10.3%
Four +	1	2.6%

Count	1	

Aspects of FMs Most Influenced You to Become Mkt Mgr

Values	Total	%
Provide customers with a source of nutritious fo	24	61.5%
Support the local economy	18	46.2%
Improve the income of small farmers	21	53.8%
Connect customers to farmers and foster conne	22	56.4%
Other	7	17.9%

Count	1	

Most Important Reasons Consumers Shop at FMs

Values	Total	%
Price	6	15.4%
Freshness of product	36	92.3%
Taste of product	23	59.0%
Support of local agriculture	26	66.7%
Access to locally produced food	25	64.1%
Variety of products offered	18	46.2%
Ability to know where food is produced	28	71.8%
Social atmosphere of market	29	74.4%

Farmers' Market Website Status

	Values	
Website	N	%
No	9	20.9%
Not yet - it's in process.	1	2.3%
Yes	33	76.7%

Legal Entity of the Market

	Values	
Type	N	%
For-profit (corporation, etc.)	3	7.0%
Non-profit (501c3, etc.)	17	39.5%
Part of another organization	11	25.6%
Not a formal legal entity	9	20.9%
Other	3	7.0%

Insurance Status of Market

	Values	
Insurance	N	%
No	1	2.3%
Yes	37	86.0%
Through City	2	4.7%
MDA Program	3	7.0%

Products Sold at the Farmer's Market

Values	Total	%
Fruits / Vegetables	43	100.0%
Meat / Fish	30	69.8%
Poultry / Eggs	30	69.8%
Baked Goods	43	100.0%
Honey	34	79.1%
Jam / Prepared Foods	39	90.7%
Flowers / Plants	41	95.3%
Crafts / Art	20	46.5%
Other	9	20.9%

Number of Months Open in 2010

	Values		
Months	N	%	Avg
Blank	2	4.7%	0.0
2	1	2.3%	2.0
3	2	4.7%	3.0
4	7	16.3%	4.1
5	5	11.6%	5.0
6	9	20.9%	6.1
7	8	18.6%	7.0
8	4	9.3%	8.0
12	5	11.6%	12.0
Grand Total	**43**	**100.0%**	**6.1**

2010 No. of Farmers at Market

	Values		
Farmers	N	%	Avg
0-5	14	32.6%	3.6
6-10	9	20.9%	7.8
11-15	9	20.9%	13.0
16-20	5	11.6%	18.8
21-30	4	9.3%	27.3
31+	2	4.7%	37.5
Grand Total	**43**	**100.0%**	**12.0**

2010 No. of Other Vendors at Market

	Values		
Addl Vendors	N	%	Avg
0	6	14.0%	0.0
2-5	19	44.2%	3.5
6-10	8	18.6%	7.4
11-15	6	14.0%	13.0
20+	4	9.3%	32.0
Grand Total	**43**	**100.0%**	**7.7**

Certified Organic Products Sold at Market

	Values	
Organic	N	%
No	17	39.5%
Yes	26	60.5%

Hours Market Manager Paid to Work

	Values		
Paid Hours	N	%	Avg
0	23	53.5%	0.0
1-5	9	20.9%	3.2
6-10	4	9.3%	8.3
11-15	4	9.3%	14.0
16-20	2	4.7%	18.0
20+	1	2.3%	22.0
Grand Total	**43**	**100.0%**	**4.1**

No. of Additional Paid Worker for Market

	Values		
Addl Workers	N	%	Avg
0	32	74.4%	0.0
1	4	9.3%	1.0
2	4	9.3%	2.0
4	1	2.3%	4.0
5	1	2.3%	5.0
8	1	2.3%	8.0
Grand Total	**43**	**100.0%**	**0.7**

Total Hours Market Manager Works

	Values		
Total Hours	N	%	Avg
0-5	18	41.9%	3.0
6-10	11	25.6%	9.0
11-15	4	9.3%	12.5
20-30	7	16.3%	23.1
40+	3	7.0%	43.3
Grand Total	**43**	**100.0%**	**11.5**

No. of Additional Volunteers for Market

	Values		
Volunteer	N	%	Avg
0	18	41.9%	0.0
1	8	18.6%	1.0
2	8	18.6%	2.0
3-5	5	11.6%	4.2
6+	4	9.3%	11.5
Grand Total	**43**	**100.0%**	**2.1**

2010 Total Farmers' Market Sales

	Values		
Total Mkt Sales	N	%	Avg
Blank	12	27.9%	$0
$1 - $5000	6	14.0%	$1,834
$15K - $50K	7	16.3%	$35,029
$55K - $100K	6	14.0%	$77,633
$110K - $200K	7	16.3%	$136,894
$201K - $230K	3	7.0%	$213,577
$450K +	2	4.7%	$689,260
Grand Total	**43**	**100.0%**	**$86,035**

Type of Market Fees Charged

	Values	
Fee	N	%
Flat fee per market space ($)	4	9.3%
Flat fee per market day ($)	6	14.0%
Flat fee per season ($)	19	44.2%
Variable fee based on sales (%)	6	14.0%
No Fee	6	14.0%
Other	2	4.7%

Does Market Have Bank Acct.?

	Values	
Bank Acct	N	%
No	16	37.2%
Yes	26	60.5%
(blank)	1	2.3%

Annual Labor Budget

	Values		
Labor	N	%	Avg
$0	21	48.8%	$0
$1 - $1000	5	11.6%	$647
$1K - $5K	9	20.9%	$2,905
$5K - $10K	3	7.0%	$6,763
$10K - $20K	4	9.3%	$15,084
$20K +	1	2.3%	$26,000
Grand Total	**43**	**100.0%**	**$3,163**

Annual Other Cost Budget

	Values		
Other Costs	N	%	Avg
$0	9	20.9%	$0
$1 - $1000	10	23.3%	$498
$1K - $5K	12	27.9%	$2,996
$5K - $10K	7	16.3%	$7,614
$10K - $20K	3	7.0%	$13,027
$20K +	2	4.7%	$59,023
Grand Total	**43**	**100.0%**	**$5,845**

Annual Advertising Budget

	Values		
Advertising	N	%	Avg
$0	4	9.3%	$0
$1 - $500	13	30.2%	$308
$501 - $1000	9	20.9%	$922
$1K - $2K	7	16.3%	$1,671
$2K - $4K	7	16.3%	$3,483
$7K +	3	7.0%	$8,167
Grand Total	**43**	**100.0%**	**$1,695**

Sources of Outside Funding for Market

Sources	Total	%
Public Orgs	7	16.3%
For-profit Private Orgs	7	16.3%
Non-profit Private Orgs	5	11.6%
Other sources	10	23.3%
No outside funding	27	62.8%

Methods of Advertising Used for Market

Methods	Total	%
Print Media	41	95.3%
Television / Radio	15	34.9%
Web	38	88.4%
Word of Mouth	41	95.3%
Other	18	41.9%

Special Events at the Farmers' Market

Methods	Total	%
Cooking demos	20	46.5%
Children's programs	15	34.9%
Musical Acts	23	53.5%
Other	22	51.2%

Did Market Accept FMNP in 2010?

	Values	
2010 FMNP	N	%
No	9	20.9%
Yes	34	79.1%

Did Market Accept SNAP in 2010?

	Values	
2010 SNAP	N	%
No	27	62.8%
Yes	16	37.2%

Did Market use FMNP/SNAP Incentives in 2010?

	Values	
2010 SNAP Incentives	N	%
No	39	90.7%
Yes	4	9.3%

Interest in Producer-Only Certification

	Values	
Response	N	%
No	23	53.5%
Yes	16	37.2%
Maybe - need to know more	4	9.3%

Role a Maryland FMA Should Fulfill

Sources	Total	%
Grants & resources	27	62.8%
Insurance & risk mgmt	23	53.5%
Nutrition-related svcs	18	41.9%
Basic training & eduacation	20	46.5%
Market start up	19	44.2%
Professional networking & info s	30	69.8%
Market promotion & advertising	39	90.7%
Policy & advocacy	24	55.8%
Other	1	2.3%

Largest Issue Standing in the Way of Growth

	Values	
Growth Issues	N	%
Finding new vendors, farmers, and producers	12	27.9%
Understanding state policies for farmers' market	1	2.3%
Fundraising and generating revenue	10	23.3%
Compliance with county/city-level licensing and	3	7.0%
Paying for market staff	5	11.6%
Attracting more customers	4	9.3%
Securing more physical space	6	14.0%
Other	2	4.7%

Year Market Established

	Values		
Year Estd.	N	%	Avg
<= 1980	5	11.9%	1972
1981 - 1985	2	4.8%	1984
1986 - 1990	3	7.1%	1990
1991 - 1995	4	9.5%	1992
1996 - 2000	6	14.3%	1999
2001 - 2005	5	11.9%	2004
2006 - 2010	16	38.1%	2009
2011	1	2.4%	2011
Grand Total	**42**	**100.0%**	**1998**

Willingness to Pay $25-$50 for a FMA?

	Values	
Response	N	%
Yes	37	86.0%
No	4	9.3%
Maybe	2	4.7%

Interest in More Certified Organic Farmers

	Values	
Response	N	%
No	10	23.3%
Yes	33	76.7%

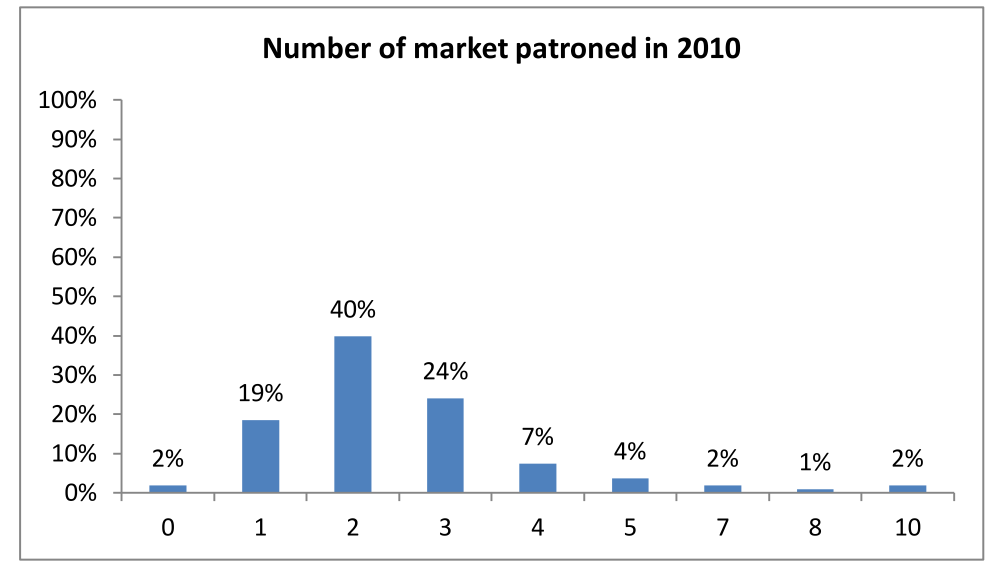
Interest in More Outreach to FNMP Participants

	Values	
FNP Outreach	N	%
No	6	14.0%
Yes	37	86.0%

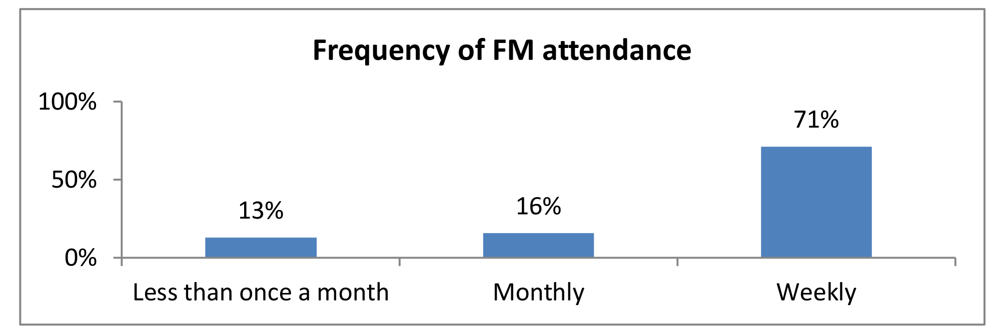
Interest in Learning about Insurance Options

	Values	
Ins. Options	N	%
No	10	23.3%
Yes	33	76.7%

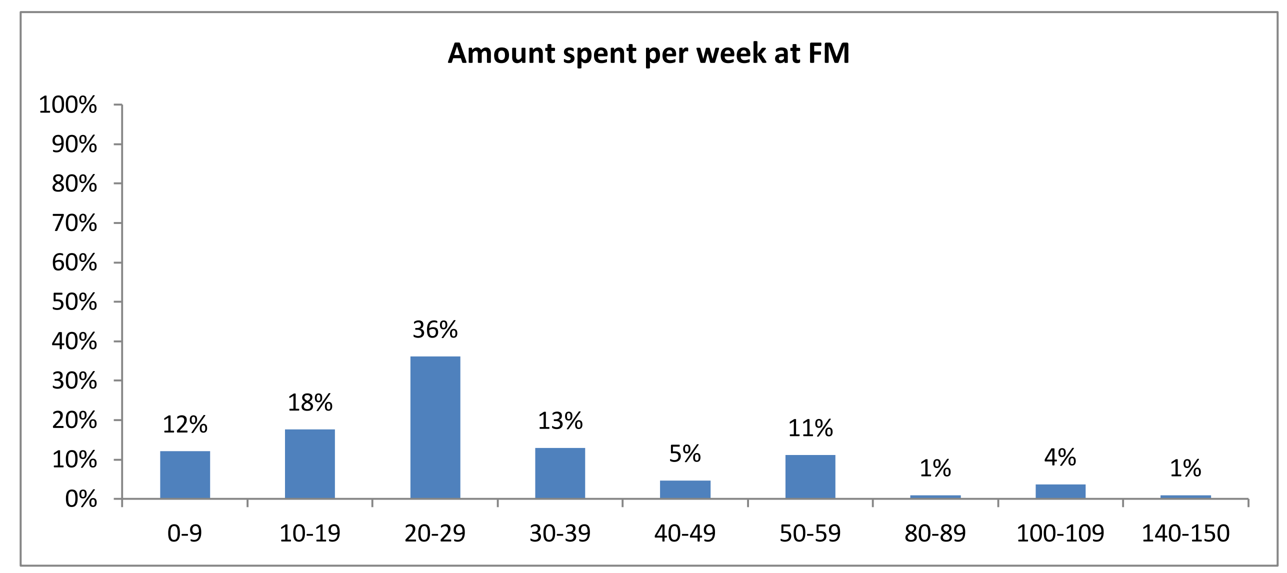
Row Labels	Count of How many different farmers' markets did you shop at during the 2010 season?	
0	2	2%
1	20	19%
2	43	40%
3	26	24%
4	8	7%
5	4	4%
7	2	2%
8	1	1%
10	2	2%
Grand Total	**108**	1.000



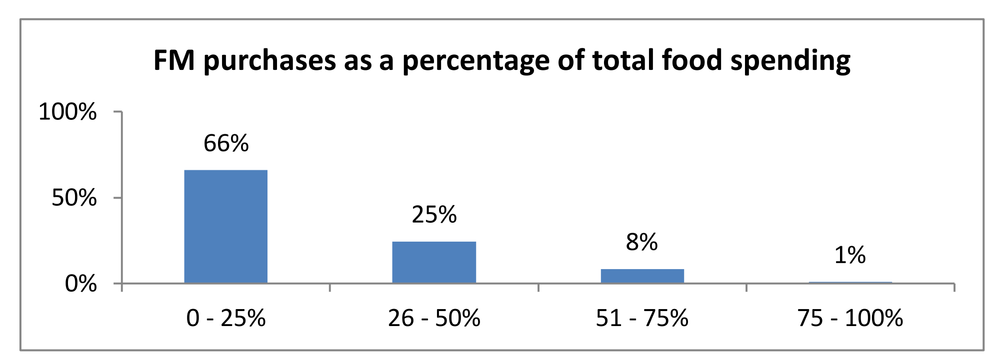
Row Labels	Count of How frequently did you attend a farmers' market in the 2010 season?	
Less than once a month	14	13%
Monthly	17	16%
Weekly	77	71%
Grand Total	**108**	100%



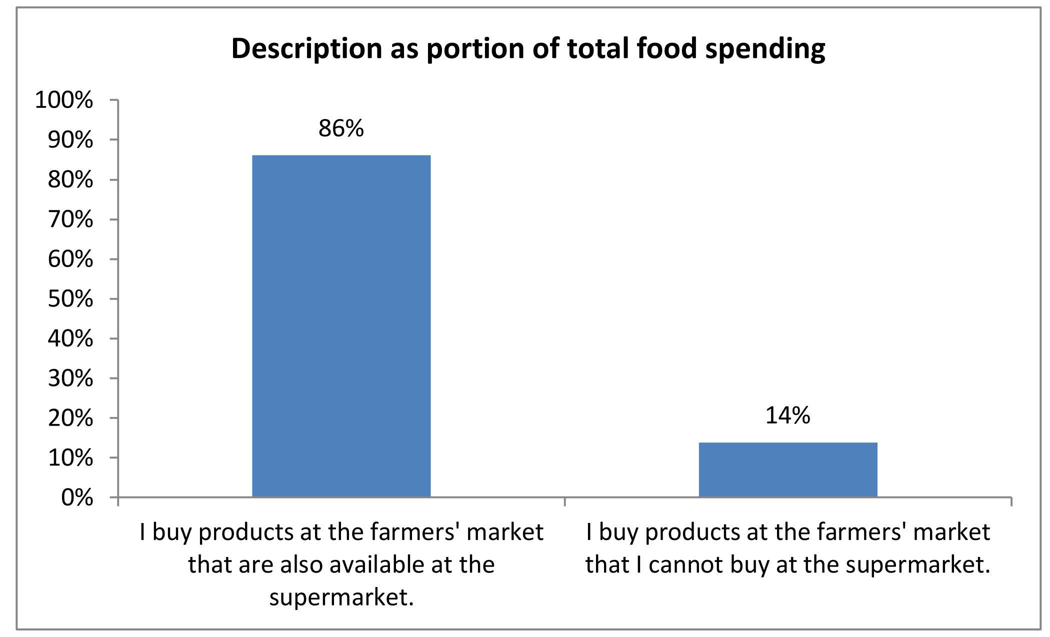
Row Labels	Count of On average, how much money did you spend per week at the farmers' market?	
0-9	13	12%
10-19	19	18%
20-29	39	36%
30-39	14	13%
40-49	5	5%
50-59	12	11%
80-89	1	1%
100-109	4	4%
140-150	1	1%
Grand Total	**108**	



Row Labels	Count of In weeks that you purchased food at the farmers' market(s), what percentage of your total weekly food expenditure did that make up?	
0 - 25%	70	66%
26 - 50%	26	25%
51 - 75%	9	8%
75 - 100%	1	1%
Grand Total	**106**	



Row Labels	Count of How would you best describe your farmers' market purchases?	
I buy products at the farmers' market that are also available at the supermarket.	93	86%
I buy products at the farmers' market that I cannot buy at the supermarket.	15	14%
Grand Total	**108**	



Row Labels	Count of What are the major reasons that you shop at farmers' markets? Please select 3 from the below:
	25
Freshness of product	83
Grand Total	**108**

Row Labels	Count of What are the major reasons that you shop at farmers' markets? Please select 3 from the below:
	96
Price	12
Grand Total	**108**

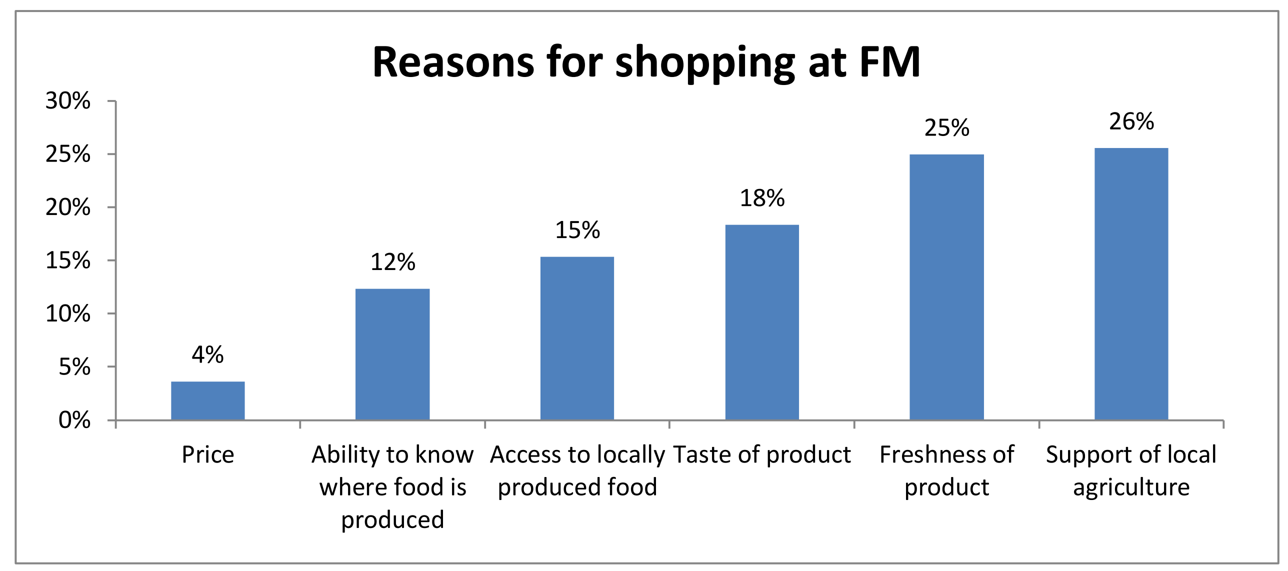
Row Labels	Count of What are the major reasons that you shop at farmers' markets? Please select 3 from the below:
	47
Taste of product	61
Grand Total	**108**

Row Labels	Count of What are the major reasons that you shop at farmers' markets? Please select 3 from the below:
	23
Support of local agriculture	85
Grand Total	**108**

Row Labels	Count of What are the major reasons that you shop at farmers' markets? Please select 3 from the below:
	57
Access to locally produced food	51
Grand Total	**108**

Row Labels	Count of What are the major reasons that you shop at farmers' markets? Please select 3 from the below:
	67
Ability to know where food is produced	41
Grand Total	**108**

	Yes	Didn't select	
Price	12	96	4%
Ability to know where food is produced	41	67	12%
Access to locally produced food	51	57	15%
Taste of product	61	47	18%
Freshness of product	83	25	25%
Support of local agriculture	85	23	26%
	333		



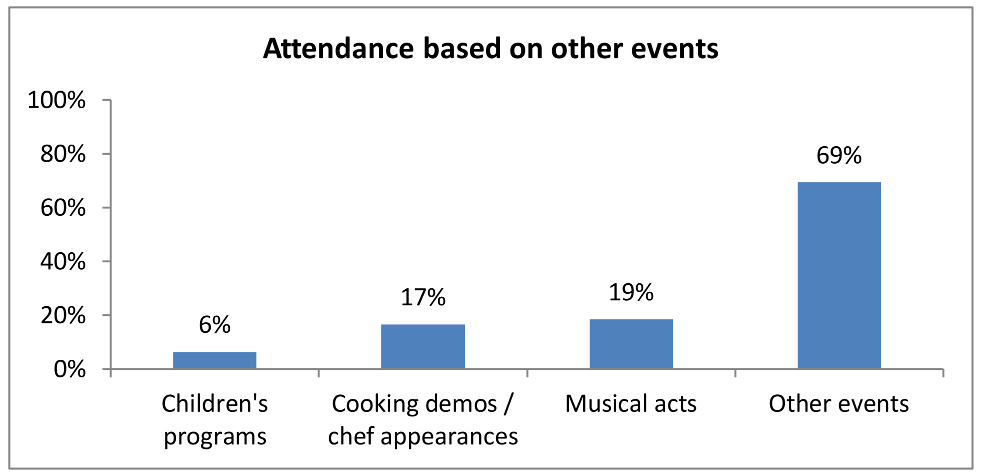
Row Labels	Count of In the 2010 season, did you attend any of the following types of market sponsored events? Please select all that apply:
	90
Cooking demos / chef appearances	18
Grand Total	**108**

Row Labels	Count of In the 2010 season, did you attend any of the following types of market sponsored events? Please select all that apply:
	101
Children's programs	7
Grand Total	**108**

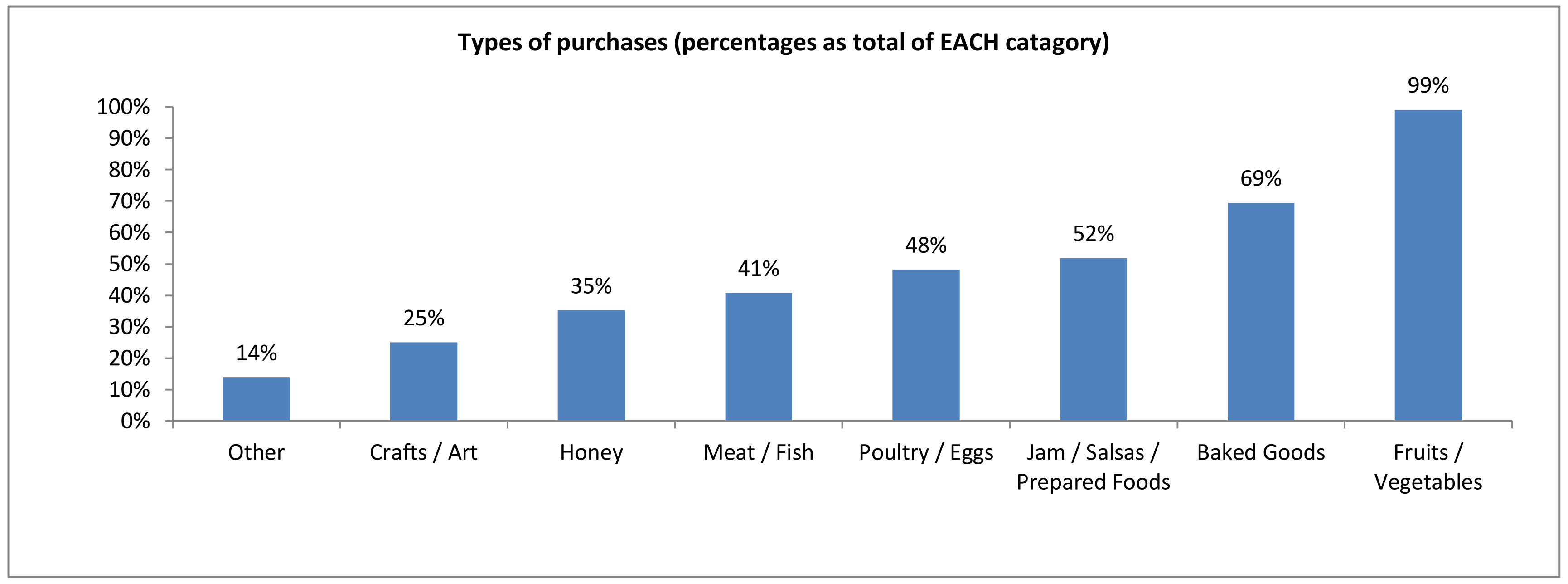
Row Labels	Count of In the 2010 season, did you attend any of the following types of market sponsored events? Please select all that apply:
	88
Musical acts	20
Grand Total	**108**

Row Labels	Count of In the 2010 season, did you attend any of the following types of market sponsored events? Please select all that apply:
	33
Other events	75
Grand Total	**108**

	Yes	Did not select	
Children's programs	7	101	6%
Cooking demos / chef appearances	18	90	17%
Musical acts	20	88	19%
Other events	75	33	69%
	120	312	

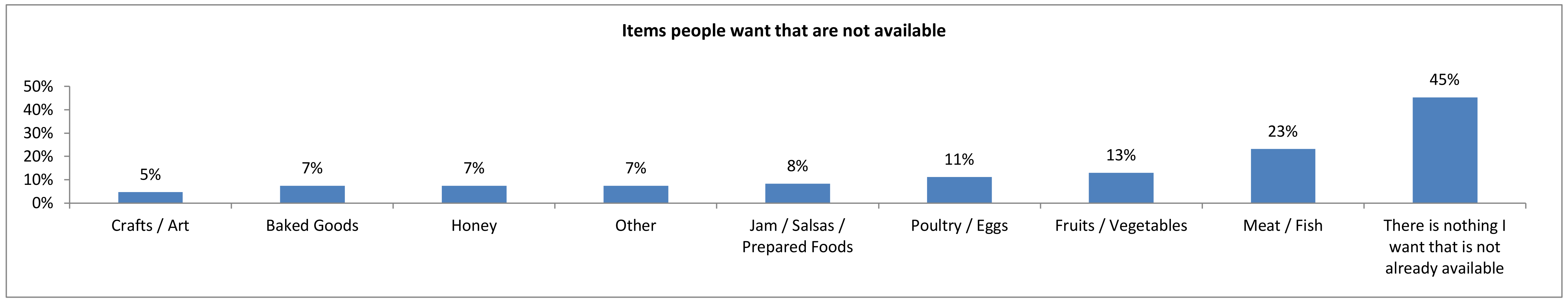


What types of items do you buy at the farmers' market? Please select all that apply:		
Other	15	14%
Crafts / Art	27	25%
Honey	38	35%
Meat / Fish	44	41%
Poultry / Eggs	52	48%
Jam / Salsas / Prepared Foods	56	52%
Baked Goods	75	69%
Fruits / Vegetables	107	99%

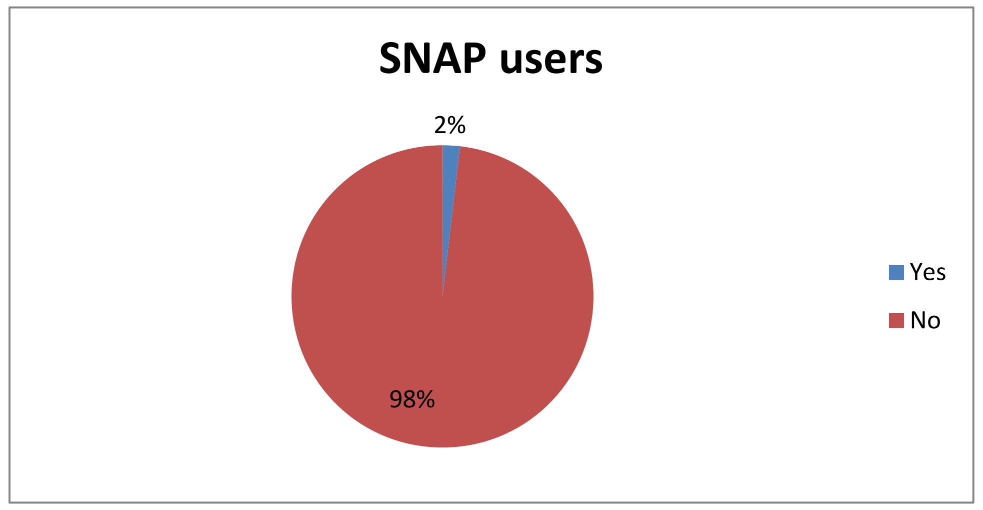


What types of items do you want to buy at the farmers' market that are currently not available? Please select all that apply:

Crafts / Art	5	5%
Baked Goods	8	7%
Honey	8	7%
Other	8	7%
Jam / Salsas / Prepared Foods	9	8%
Poultry / Eggs	12	11%
Fruits / Vegetables	14	13%
Meat / Fish	25	23%
There is nothing I want that is not already available	49	45%



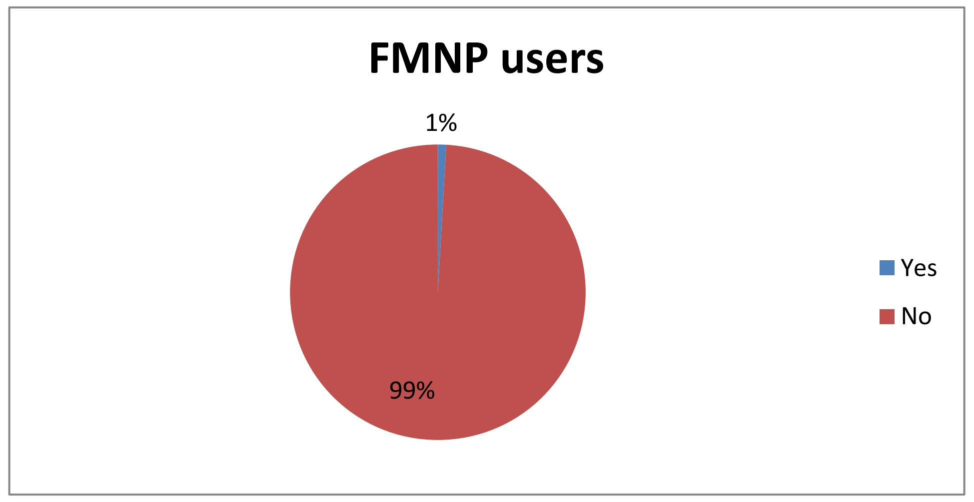
Do you participate in SNAP		
Yes	2	2%
No	106	98%



Of the 2 "Yes" answers:
As a participant in SNAP, do any of the following prevent you from shopping more frequently at the farmers' market? Please select all that apply:

Market day of the week	1
Market hours	1
Other	1

Do you participate in the Farmers' Market Nutrition Program (FMNP-WIC & Seniors)?		
Yes	1	1%
No	107	99%



How many times per month do you use FMNP checks at the farmers' market?	2

As a participant in FMNP, do any of the following prevent you from shopping more frequently at the farmers' market? Please select all that apply:

Insufficient federal benefits (not enough benefits to merit a trip to market)

Lack of incentive programs that match amount of money spent at market so that I can buy more

Other

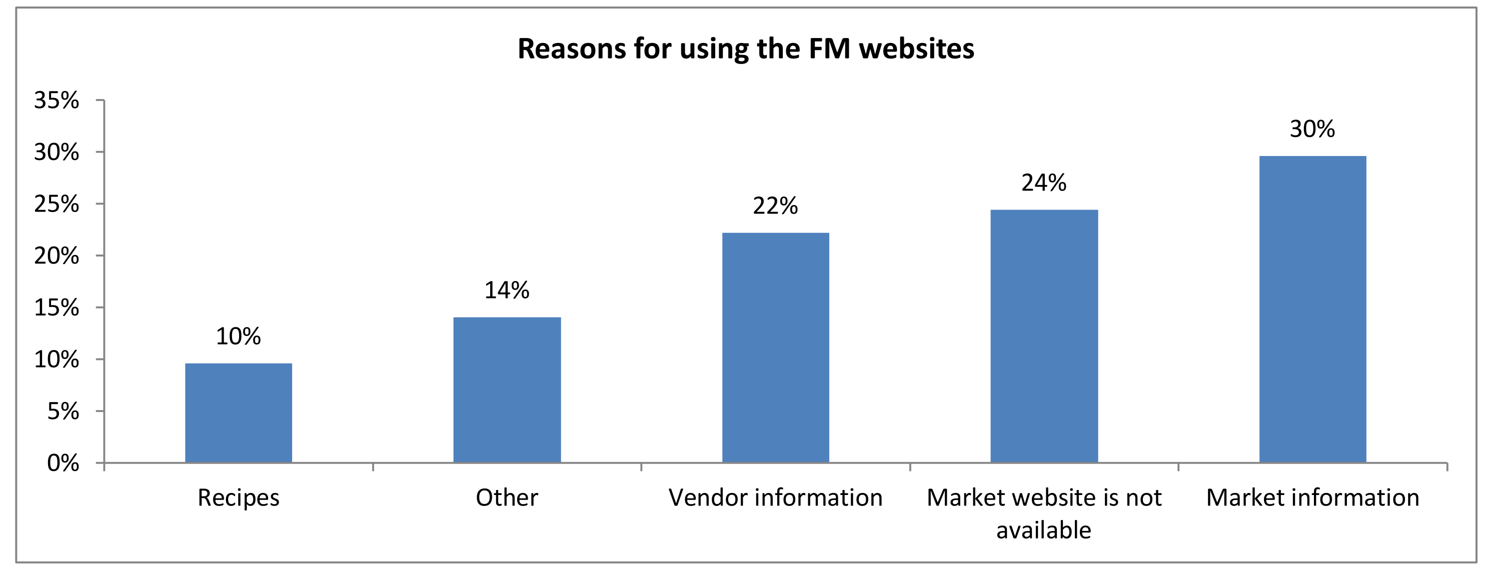
Row Labels	Count of Do you use the farmers' market website (if available) to get any of the following?
	68
Market information	40
Grand Total	**108**

Row Labels	Count of Do you use the farmers' market website (if available) to get any of the following?
	95
Recipes	13
Grand Total	**108**

Row Labels	Count of Do you use the farmers' market website (if available) to get any of the following?
	78
Vendor information	30
Grand Total	**108**

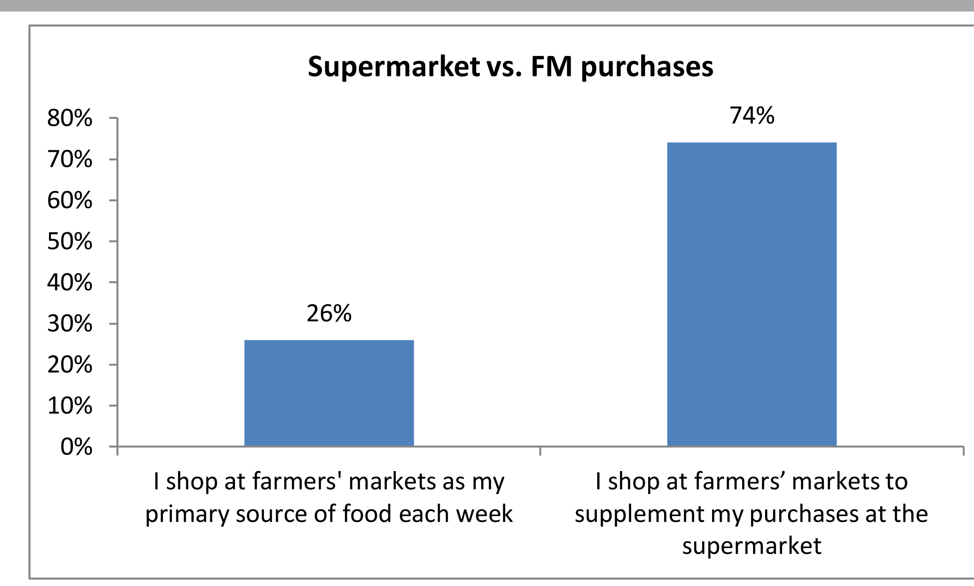
Row Labels	Count of Do you use the farmers' market website (if available) to get any of the following?
	89
Other	19
Grand Total	**108**

Row Labels	Count of Do you use the farmers' market website (if available) to get any of the following?
	75
Market website is not available	33
Grand Total	**108**

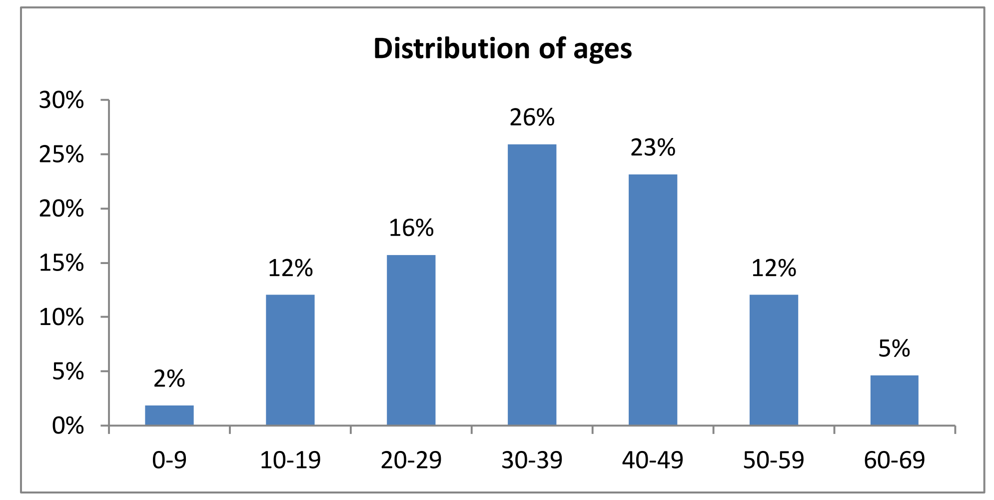


Recipes	13	95	10%
Other	19	89	14%
Vendor information	30	78	22%
Market website is not available	33	75	24%
Market information	40	68	30%
	135	405	

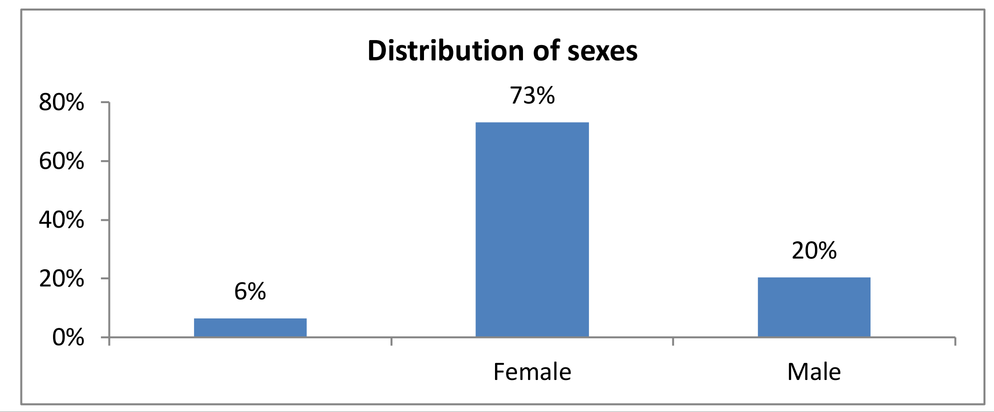
Row Labels	Count of During the season, how do farmers' markets fit into your weekly food purchases?	
I shop at farmers' markets as my primary source of food each week	28	26%
I shop at farmers' markets to supplement my purchases at the supermarket	80	74%
Grand Total	**108**	



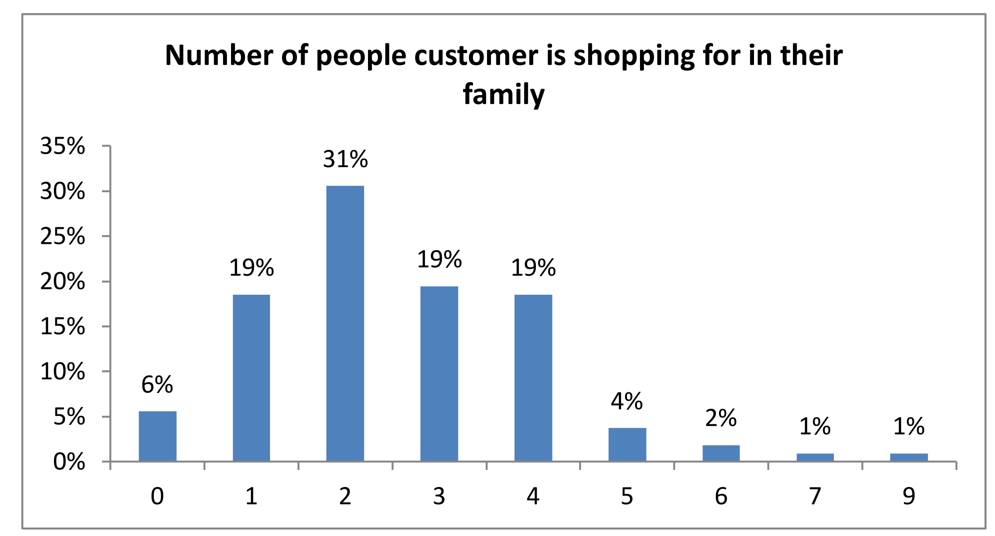
Row Labels	Count of What is your age?	
0-9	5	5%
10-19	2	2%
20-29	13	12%
30-39	17	16%
40-49	28	26%
50-59	25	23%
60-69	13	12%
70-79	5	5%
Grand Total	**108**	100%



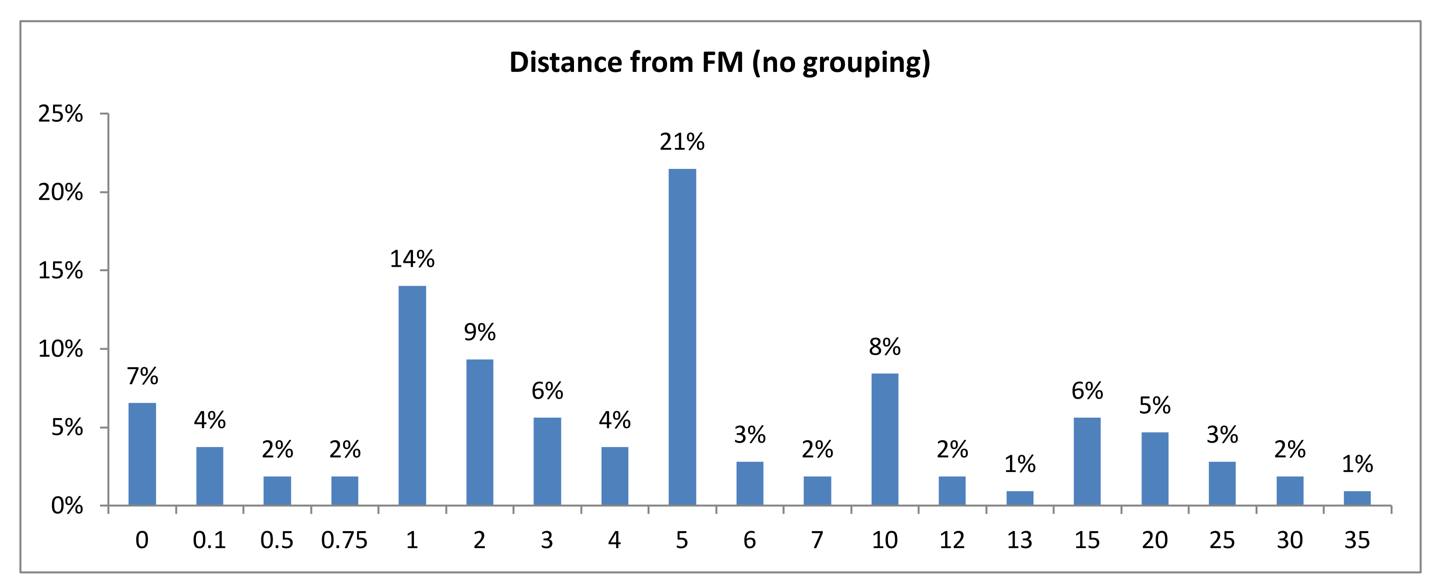
Row Labels	Count of What is your gender?	
	7	6%
Female	79	73%
Male	22	20%
Grand Total	**108**	



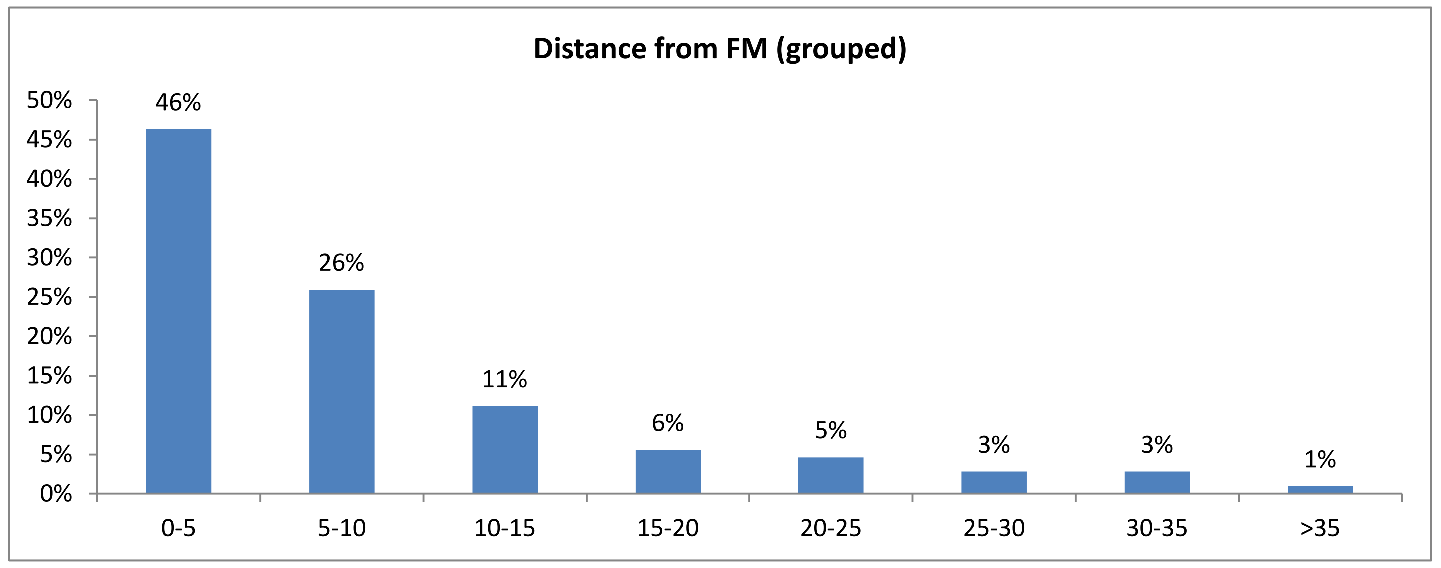
Row Labels	Count of How many people do you shop for in your family?	
0	6	6%
1	20	19%
2	33	31%
3	21	19%
4	20	19%
5	4	4%
6	2	2%
7	1	1%
9	1	1%
Grand Total	**108**	



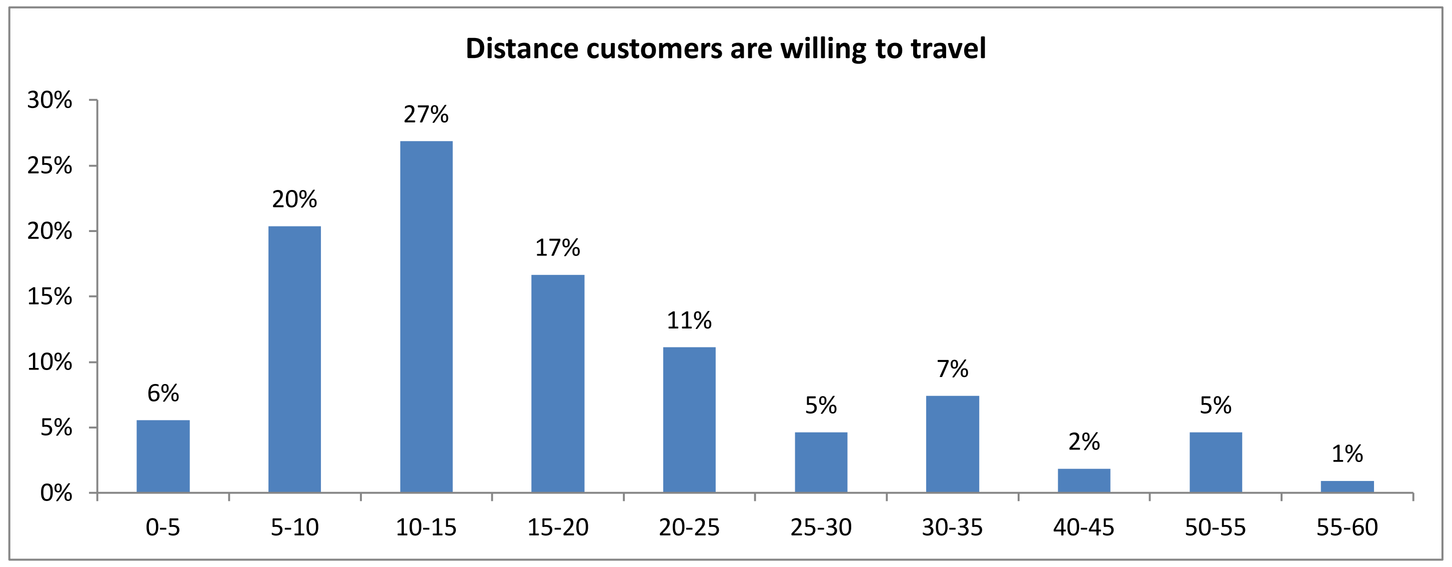
Row Labels	Count of How far do you travel to shop at the farmers' market (in miles)?	
0	7	7%
0.1	4	4%
0.5	2	2%
0.75	2	2%
1	15	14%
2	10	9%
3	6	6%
4	4	4%
5	23	21%
6	3	3%
7	2	2%
10	9	8%
12	2	2%
13	1	1%
15	6	6%
20	5	5%
25	3	3%
30	2	2%
35	1	1%
Grand Total	**107**	



Row Labels	Count of How far do you travel to shop at the farmers' market (in miles)?	
(blank)		
0-5	50	46%
5-10	28	26%
10-15	12	11%
15-20	6	6%
20-25	5	5%
25-30	3	3%
30-35	3	3%
>35	1	1%
Grand Total	**108**	



Row Labels	Count of What is the maximum distance you would travel to shop at the farmers' market (in miles)?	
(blank)		
0-5	6	6%
5-10	22	20%
10-15	29	27%
15-20	18	17%
20-25	12	11%
25-30	5	5%
30-35	8	7%
40-45	2	2%
50-55	5	5%
55-60	1	1%
Grand Total	**108**	



“Farmers Markets in Maryland: Evaluating Economic Impact, Identifying Opportunities, and Assessing Feasibility of a Statewide Farmers Market Association as a Solution to Direct Marketing Challenges”

FSMIP Report on “Direct-to-Consumer Sales of Agricultural Products in Maryland: A Survey of Activity, Support, and Research”

Agriculture and Direct Marketing Trends in Maryland

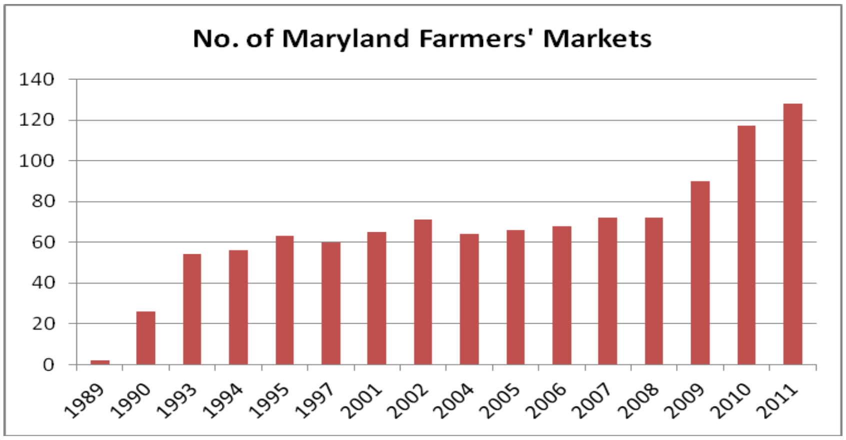
The United State Department of Agriculture Census of Agriculture, which is developed and published by the USDA’s National Agricultural Statistics Service (NASS) every five years, states that the value of agricultural products sold directly to individuals for human consumption rose nationally between 2002 and 2007. Direct-to-consumer sales of agricultural products account for a small, but fast-growing segment of U.S. agriculture. The total amount has increased from 2002 to 2007 by $399 million (49% percent). According to the 2007 Census, 6 percent of all farms (136,800 farms) in the United States participated in direct-to-consumer sales, selling a total of $1.2 billion worth of farm products directly to consumers. This $1.2 billion accounted for 0.4 percent of all agricultural sales. Participating farmers earned an average of $8,853 per year through direct-to-consumer sales.

In Maryland, the number of farms reporting participation in direct-to-consumer sales in the state rose from 1,168 to 1,407, a 20% or 239 farm increase. The value of direct-to-consumer sales in the state rose from $12,551,000 to $21,220,000, an increase of over 69% or $8,670,000, over the national average reported above.

Increase in Farms Participating in Direct-to-Consumer Sales, Maryland, 2002-07
Farms 2007 = 1,407
Farms 2002 = 1,168
Increase in Value of Direct-to-Consumer Sales, Maryland, 2002-07
$1000 2007 = 21,220
$1000 2002 = 12,551

Source: USDA, Economic Research Service analysis of USDA, National Agricultural Statistics Service, Census of Agriculture data, 2002 and 2007.

Farmers’ markets are popular direct-to-consumer venues. These common areas, usually outdoors, are where several farmers gather on a recurring basis, usually weekly, to sell a variety of fresh fruits, vegetables, meats, dairy products, and other farm products. Nationally, the number of farmers’ markets grew to 5,274 markets in 2009, a 92 percent increase from 1998 (USDA, AMS, 2009). The number of farmers’ markets in the state is also on the rise. The Maryland Department of Agriculture lists 117 markets in operation in the 2010 market season.



There are markets in all Maryland counties. There is a full list provided in the Appendices of this report. The markets are distributed over the 24 counties, with a breakdown as follows for the 2010 market season:

County	Number of Farmers Markets (2010)	Number of Farmers Markets (2011)
Allegany	4	3
Anne Arundel	8	7
Baltimore City	13	18
Baltimore	14	15
Calvert	4	4
Caroline	3	2
Carroll	4	6
Cecil	1	1
Charles	2	3
Dorchester	1	1
Frederick	11	9
Garrett	2	2
Harford	4	3
Howard	5	5
Kent	1	1
Montgomery	16	19
Prince George's	9	13
Queen Anne's	1	1
St. Mary's	2	2
Somerset	1	1
Talbot	2	2
Washington	3	2
Wicomico	2	2
Worcester	4	4

MDA Website, October 2010

Direct Marketing Outreach Programs in Maryland

The Maryland Department of Agriculture Marketing Division's principle role is to identify and develop profitable local, national, and international marketing opportunities for Maryland farmers and agricultural producers. This Division supports farmers' market programs. It also houses a National Marketing Office which helps producers market their products directly to consumers, in addition to wholesale buyers.

MDA's state branding program, Maryland's Best®, identifies and markets Maryland grown products at farmers' markets, as well as through advertising promotional activities and trade shows. They maintain an active web site which features direct-from-the-farm products (e.g., poultry, ornamental plants, dairy products, grain) and processed or value-added products (e.g., ice cream, bread, candy, snack foods). The site also provides links to a Farmers' Market Directory, a Buyer-Grower Directory, and an On-Line Farmers Market where local food can be bought, sold and traded. (www.marylandsbest.net).

According to the MDA Website, "In 2007, nearly 300 farmers participated in 82 farmers' markets across the state." MDA also developed initiatives to address emerging opportunities with direct-to-consumer market potential, such as wine, aged raw-milk cheese, and rabbit and poultry processing.

The University of Maryland Extension Service provides extensive information on local direct-to-consumer markets in the state, with a searchable by-county database with contact and other information for 60 Community Supported Agriculture (CSA) operations, 206 Farms with Websites, 57 MDA Farm Markets, 43 Pick-Your-Own farms and 81 Private Farm Markets (http://www.marylandagriculture.info/index.cfm).

In addition to these governmental agencies working to increase direct-to-consumer sales in Maryland, there are both quasi-governmental and non-governmental nonprofit organizations doing the same.

The quasi-governmental Southern Maryland Agriculture Development Commission also markets locally grown direct-to-consumer food. SMADC was developed by the Tri-County Council for Southern Maryland, a non-profit, quasi-governmental body, to develop a program to stabilize the region's agricultural economy as farmers convert from tobacco to alternative crop and other agricultural enterprises. Many of their programs, most notably the "So. Maryland So Good" marketing initiative, focus on direct-to-consumer sales opportunities (http://www.somarylandsogood.com/).

The "So. Maryland So Good" program has been designed to help consumers identify Southern Maryland products in particular. It has a focus on the direct link between buyers and growers of the five Southern Maryland counties (Anne Arundel, Calvert, Charles, Prince George's and St. Mary's), and promoting the advantages of buying local. Their materials provide a focus on both consumers and producers (existing and potential new), as well as on purchase of Southern Maryland goods by Southern Maryland restaurants and markets.

SMADC supports several other direct-to-consumer campaigns that focus at least in part on direct to consumer marketing. The most comprehensive of these is "The Buy Local Challenge." This program started in 2007 to highlight the benefits of buying local to Maryland's economy and environment. It has been adopted in many Maryland counties and, in 2008, was supported by a special event by Governor Martin O'Malley and the Maryland Department of Agriculture. According to the SMADC website, "A user-driven, online community component to the official BLC Web site has been created to allow individuals, companies, ag marketing professionals and others across the country to bring the BLC to their region. Also, the BLC logo and promotional materials are available free of charge."

As mentioned earlier, several non-governmental initiatives have sprouted up in the last few years. Some of the most notable are listed below, with website information in the Appendix.

- Non-governmental resources for farmers market and other direct-to-consumer information in Maryland include:

  - Chesapeake Sustainable Business Alliance. http://www.csballiance.org/

    "We are an alliance that educates the public on the importance of supporting the local economy, and encourages businesses and consumers to be environmentally sustainable and socially responsible. We envision a sustainable global economy as a network of Local Living Economies, building long-term economic empowerment and prosperity in communities through local business ownership, economic justice, cultural diversity and a healthy natural environment. Independent businesses create wealth by engaging local people in the production, marketing, and consumption of goods, they pay taxes, and reinvest in our communities."

  - Buy Fresh, Buy Local Chesapeake. http://www.cbf.org/eatlocal and http://www.buyfreshbuylocalcr.org/ and Buy Fresh, Buy Local Annapolis. www.buylocalannapolis.org and www.annapolisfirst.org.

    "These Buy Fresh – Buy Local campaigns work to support and further develop a vibrant and sustainable local farm community in Maryland. By generating new market opportunities and preserving the rural character of this place, Food and Farming is committed to bringing the producers and consumers of our local food system to the same."

  - Slow Food Baltimore. http://www.slowfoodbaltimore.blogspot.com/

    "Slow Food USA seeks to create dramatic and lasting change in the food system. We reconnect Americans with the people, traditions, plants, animals, fertile soils and waters that produce our food. We seek to inspire a transformation in food policy, production practices and market forces so that they ensure equity, sustainability and pleasure in the food we eat. Slow Food organizes fairs, markets and events locally and internationally to showcase products of excellent gastronomic quality and to offer discerning consumers the opportunity to meet producers. For more information about events like Salone del Gusto, Cheese, Slow Fish, Aux Origine du Gout and A Taste of Slow - go to the Slow Food International web site.

  - Future Harvest/Chesapeake Alliance for Sustainable Agriculture. http://www.futureharvestcasa.org/

"Future Harvest-CASA is a network of farmers, agricultural professionals, landowners and consumers in the Chesapeake region that promotes profitable, environmentally sound and socially acceptable food and farming systems and sustainable communities. The Amazing Grazing directory lists grass-based farms in Maryland, Virginia, and West Virginia that sell their products directly to consumers."

- Real Time Farms. http://www.realtimefarms.com/welcome

  "This new model for regional/national food listings helps individuals understand where their food comes from. Individuals can learn about farms in their area, and see where they can get their goods at farmers markets, farm stands, and locally sourced restaurants around them."

In addition to these local sites, there are national aggregation sites with extensive information on where Maryland food can be purchased in Maryland. The most notable of these sites is the Local Harvest website, which provides mapped detail by county on farmers markets, Community Supported Agriculture (CSA) operations, and other direct-to-consumer sales opportunities in the state (e.g. Pick Your Own, farm stand, and buying club businesses. The site lists 95 farmers markets and 86 CSA farms in Maryland. www.localharvest.org.

Maryland is also lucky to have within its borders the Johns Hopkins Center for a Livable Future (CLF). CLF has performed extensive research on local food availability in the city, and is working to expand its data and research statewide. Two of CLF's program areas — farming and eating for our future — touch directly upon direct-to-consumer sales of Maryland agricultural products. They perform research, educational outreach, and community action in both of these areas.

According to the CLF website, "The Farming for the Future Program includes a variety of projects and activities that document the impacts of industrial agriculture practices, gather evidence to inform policymaking, and promote more sustainable alternatives. Drawing upon scientific expertise from throughout Johns Hopkins University, the program advances scientific knowledge, communicates research findings, develops educational tools, and serves as a resource for those working to protect health, the global environment, and our ability to sustain life for future generations."

Further the website states that the "Eating for the Future Program integrates scientific evidence to guide its technical assistance and leadership support in efforts to increase community food security, promote eat-local activities, and encourages the development of relationships among local and regional food and nutrition organizations."

This program houses a comprehensive food system mapping tool to examine the current landscape of Maryland's food system, and inform activities aimed at strengthening that system. It includes both direct-to-consumer and non-direct-to-consumer data. Further detailed information is presented for the Baltimore City region which examines availability of and access to healthy foods, including through direct-to-consumer retail venues.

The CLF also houses several other projects that touch on direct-to-consumer sales of Maryland agricultural products, including: CSA and Eat Local initiatives. These can be viewed on the CLF website: http://www.jhsph.edu/clf/.

Maryland's Specialty Crops Block Grant Program and Direct Marketing

The Maryland Department of Agriculture's Specialty Crops Block Grant Program represents an opportunity to increase the consumption of Maryland-grown specialty crops (specialty crops include vegetables and fruits) while also increasing food access for the state's most vulnerable communities.

The Specialty Crop Block Grant Program is managed by the USDA, which provides block grants to state departments of agriculture to enhance the competitiveness of specialty crops. Federal funds totaling $49 million in fiscal year 2009 have been provided for this program and $55 million each in fiscal years 2010 through 2012 is expected.

SCBGP funds can be used to fund a wide range of projects that enhance the competiveness of fruits, vegetables, tree nuts, dried fruit, horticulture, nursery crops, and floriculture. Projects may be related to increasing child and adult nutrition knowledge and consumption of specialty crops, as well as many other types of projects related to direct-to-consumer sales of specialty crops. States are especially encouraged to develop projects involving partnerships with producer groups, academia, non-profit organizations, community-based organizations, or other states to address practical problems faced by the specialty crop industry. In 2010, Maryland received $432,766.91 and funded 9 projects (see back of this sheet for details).

This year, the SCBPG funded a project through Crossroads Farmers Market to educate interested farmers markets across the state on how to replicate their successful program of outreach to federal nutrition benefit program recipients. Crossroads Farmers Market is now educating 11 interested markets about how to increase specialty crop sales to low-income populations in Maryland Communities through outreach and marketing campaign promoting usage of the new WIC Fruit and Vegetable Checks.

Specialty Crop Bock Grant Program-funded research published in 2002 as "Buyers and Sellers' Responses to Ethnic and Specialty Produce in the Baltimore-Washington Area" by Stephan L. Tubene, R. David Myers, Charles McClurg, and Yao Afantchao looked at a two-year Maryland Department of Agriculture (MDA) specialty crops initiative. MDA initiative encompassed nine projects implemented by the University of Maryland Cooperative Extension (MCE) and commercial agricultural professionals in the areas of specialty crops production, marketing and education. These nine projects range from specialty vegetables and fruits production trials and marketing (i.e., leafy oriental vegetables, high-tunnel greenhouse for cut flowers, beach plumbs, table/wine grapes, high-tunnel organic salads, asparagus, strawberries) to special seminars on aquaculture and workshops on organic products.

The objectives of MDA specialty crops initiative were threefold: (1) test the potential for growing specialty crops under diverse Maryland environments; (2) evaluate specialty crops market potential in the state; (3) and provide valuable production and marketing guidelines to producers, retailers, wholesalers, and agricultural professionals.

The report had some findings relevant to direct-to-consumer sales in Maryland by farmers' market buyers. For this portion of the project, five farmers' markets were randomly selected in the Baltimore-Washington corridor. Five buyers were interviewed at each farmers' market. When asked about most purchased ethnic and specialty vegetables at the farmers' markets, buyers replied that cilantro, eggplants, and hot peppers were the most purchased vegetables (Table 3). Most farmers' market buyers shop once or twice a week and spent an average of $30 weekly. They shop at the farmers' markets not only for the freshness and quality of the produce but also for recreational purpose. However, farmers' market shoppers would not change their shopping habits if farmers' markets were open several days during the week.

Farmers' Market Buyers' Responses to Ethnic and Specialty Vegetables

Questions	***Responses***
Most purchased vegetables?	Cilantro, specialty herbs, hot peppers, and eggplants
Number of farmers' markets visited per season?	1 farmers' market on average
Number of visits at farmers' markets per season?	1-2 visits per week
Weekly purchased quantity?	1 pint per vegetable
Average purchases per week?	$20-50
Reasons for shopping at farmers' markets?	Better quality and freshness but also for fun and enjoy good outdoor time
Attitude toward additional market days?	Additional days would not affect shopping patterns
Specialty vegetables network?	Useful for specialty vegetable growers, sellers, and buyers to network

"Buyers and Sellers' Responses to Ethnic and Specialty Produce in the Baltimore-Washington Area" by Stephan L. Tubene, R. David Myers, Charles McClurg, and Yao Afantchao

Conclusion

With its proximity to Washington DC, Maryland has benefited from national political attention for its work around increasing direct-to-consumer sales of agricultural products. One example of this is the October 13, 2010 visit by FNS Undersecretary Kevin Concannon to the Crossroads Farmers Market in Takoma Park (http://dcfoodforall.com/2010/10/usda-under-secretary-kevin-concannon-to-appear-at-crossroads-farmers-market/).

Another example is the July 19, 2010 visit by USDA Deputy Secretary Kathleen Merrigan to Annapolis for a celebration of a state-wide local foods recipe contest. Merrigan viewed Governor Martin O'Malley issue a buy local challenge week (July 17-July 25), asking every Maryland citizen eat at least one locally grown food item each day. Merrigan noted that, over the past decade, Maryland has been losing mid-sized family farms, stating in her published report that "According to the latest Census of Agriculture, between 2002 and 2007 alone, 155 Maryland farmers with gross sales between $100,000 and $500,000 disappeared," and noting that "Local and direct markets are one way to help existing farmers hold on and new ones flourish. By being closer to the consumer farmers are able to capture more value for their products. Making sure consumers have an opportunity to know their farmer is also about appreciating all the things other than delicious food that farmers do for us." (http://kyf.blogs.usda.gov/2010/07/19/the-maryland-challenge/).

“Farmers Markets in Maryland: Evaluating Economic Impact, Identifying Opportunities, and Assessing Feasibility of a Statewide Farmers Market Association as a Solution to Direct Marketing Challenges”

FSMIP Key Facts on “Direct-to-Consumer Sales of Agricultural Products in Maryland and Potential for Sales at Farmers Markets through Federal Nutrition Benefit Programs”

- In Maryland, the number of farms reporting participation in direct-to-consumer sales rose from 1,168 to 1,407, a 20% or 239 farm increase. The value of direct-to-consumer sales in the state rose from $12,551,000 to $21,220,000, an increase of over 69% or $8,670,000 from the 2002 to the 2007 National Agricultural Census.

- Nationally, the number of farmers’ markets grew to 5,274 in 2009, a 92% increase from 1998 (USDA, AMS, 2009). The number of farmers’ markets in the state is also on the rise. The Maryland Department of Agriculture lists 117 markets in operation in the 2010 market season, up from just over 60 in 2005, a 95% increase.

- In 2007, nearly 300 farmers participated in 82 farmers’ markets across Maryland.

- There are four federal nutrition programs whose benefits are useable at farmers’ markets in Maryland. These include: the Supplemental Nutrition Assistance Program (SNAP, formerly Food Stamps), Women Infants Children (WIC) Farmers’ Market Nutrition Program (FMNP), Seniors’ FMNP, and WIC Program Fruit and Vegetable Checks (WIC FVC).

- Federal nutrition benefit programs represent an important part of the national safety net for our vulnerable populations and also represent a considerable market opportunity for farmers’ market vendors who choose to participate in them. They are potentially worth an estimated $10,447,159 to Maryland farmers’ market vendors for the 2011 market season.

- The University of Maryland Extension Service provides extensive information on local direct-to-consumer markets in the state, with a searchable by-county database with contact and other information for 60 Community Supported Agriculture (CSA) operations, 206 Farms with Websites, 57 MDA “Farm Markets”, 43 Pick-Your-Own farms and 81 Private Farm Markets (http://www.marylandagriculture.info/index.cfm).

- MDA’s state branding program, Maryland’s Best, identifies and markets Maryland-grown products at farmers’ markets, as well as through advertising promotional activities and trade shows. MDA’s Marketing Department maintains an active web site for the program, which features direct-from-the-farm products (e.g., poultry, ornamental plants, dairy products, grain), direct-to-consumer outlets such as farmers’ markets and CSAs, and processed or value-added products (e.g., ice cream, bread, candy, and snack foods). The site also provides links to other resources, such as the State Farmers’ Market Directory, a Buyer-Grower Directory as well as a News and Events section. http://www.marylandsbest.net/

- Non-governmental resources for farmers market and other direct-to-consumer information in Maryland include:

    - Buy Fresh, Buy Local Chesapeake. http://www.cbf.org/eatlocal
    - Chesapeake Sustainable Business Alliance. http://www.csballiance.org/
    - Future Harvest/Chesapeake Alliance for Sustainable Agriculture. http://www.futureharvestcasa.org/
    - Maryland Organic Food and Farming Association. http://www.marylandorganic.org/
    - Slow Food Baltimore. http://www.slowfoodbaltimore.blogspot.com/

"Farmers Markets in Maryland: Evaluating Economic Impact, Identifying Opportunities, and Assessing Feasibility of a Statewide Farmers Market Association as a Solution to Direct Marketing Challenges"

<u>FSMIP Report on Best Practices for Incentive Programs at Farmers Markets and Case Studies</u>

First piloted at the Crossroads Farmers Market in Takoma Park, MD in 2007, financial incentive programs now exist at over 160 farmers markets in 20 states and Washington, DC. Incentive programming at farmers markets is an ever more popular model with demonstrated success in increasing access to and affordability of fresh, local, and nutritious foods. This model enables federal nutrition benefits clients to access privately funded dollar-value coupons for redemption at their local farmers market. These clients may include participants in the following programs: Supplemental Nutrition Assistance Program (SNAP, formerly known as food stamps); Women, Infant, and Children (WIC) program; Senior Farmers Market Nutrition Program (SFMNP); and/or Social Security Income (SSI/disability).

A review of current incentive programs in urban, suburban, and rural farmers market communities throughout the country led to the identification of the following best practices:

- **Partnerships with local benefits offices and social services agencies**

Of all markets surveyed, those with the highest incentive program participation rates attribute high turnout to a close relationship with local benefits offices, such as WIC clinics, Department of Social Services (DSS), Health and Human Services (HHS), and county extension agents focusing on SNAP outreach.

- **Diverse, community-specific market offerings**

The most successful markets vary greatly in size, but consistently provide a wide selection specific to their community's demographics. Vendors at these markets vary in size, price point, and offerings, and, where relevant, sell prepared ethnic foods in addition to traditional local produce, meats, dairy, and baked goods.

- **Market location in or within close proximity to area with high federal nutrition benefits participation rates**

Participation in incentive programs is highest in communities where a significant percentage of the population participates in WIC, SNAP, Senior FMNP, and/or SSI. Alternatively, markets in mixed-income neighborhoods or towns within close proximity to low- and moderate-income communities were also successful. In urban and suburban communities, public transportation access is essential.

- **Paid market manager**

A paid market manager is instrumental in ensuring dedicated staff to oversee market operations, outreach to shoppers, local media coverage, and data collection.

- **Data tracking and collection**

Successful incentive programs track and evaluate participant data to gauge success, monitor participation rates, and inform operational decisions.

- **501(c)(3) status or fiscal agent**

Access to private sources of funding for incentive programs requires non-profit status or a fiscal agent with non-profit status.

As this model remains relatively new, some best practices are still in development. Specifically, data is inconclusive regarding: 1) the minimum/maximum number of incentive dollars to distribute to each family each week, 2) procedures for incentive funds distribution, and 3) what, if any, amount in benefits or cash the market requires a federal nutrition benefits client to spend to receive incentive dollars.

Best Practices for Incentive Programs at Urban Farmers Markets
Case Study: Farm Fresh Rhode Island, Providence, Rhode Island

Background

Founded in 2004, Farm Fresh Rhode Island is a Providence, Rhode Island-based nonprofit organization committed to "growing a local food system that values the environment, health and quality of life of RI farmers and eaters" by developing a network of urban farmers markets. Farm Fresh RI operates seven markets in and around Providence, two of which run year-round, plus an annual holiday market. All of Farm Fresh RI's markets are equipped with Electronic Benefits Transfer (EBT) technology, enabling Supplemental Nutrition Assistance Program (SNAP, formerly known as food stamps) participants to redeem those benefits at market. All fruit and vegetable vendors must be certified to accept WIC Cash Value Vouchers (CVV) and WIC and Senior Farmers Market Nutrition Program (FMNP) benefits.

Farm Fresh RI launched its incentive program, "Bounty Bucks," in July 2009. During the pilot season, the markets matched up to $10 in SNAP transactions per individual per week. EBT usage consequently increased over 700% from previous seasons. In 2010, the match was decreased to $5. While growth rates were more modest than in 2009, program participation remained high. The seven markets distributed a combined $8,410 in Bounty Bucks during the 2010 summer markets. Bounty Bucks are currently used for matching SNAP benefits only; however, Farm Fresh RI is pursuing funding to match WIC CVV and Senior FMNP for the 2011 market season.

Best Practices

- Relationship with benefits offices

Farm Fresh RI coordinates with the Rhode Island SNAP Outreach Program, "eat better today," for print, web, and on-the-street outreach. This partnership increases overall participation in the SNAP program, and directs current and potential SNAP participants to the Farm Fresh RI markets.

- Diverse, community-specific market offerings

Farm Fresh RI selects a range of market vendors to appeal to the largest potential audience and offer the greatest possible selection to SNAP participants. The markets offer a mix of vendors selling highly priced specialty items with farmers marketing large quantities at produce at a lower, more affordable price point.

- Market location in or near area with high nutrition benefits participation

Farm Fresh RI's markets are neighborhood-based, located in low-income, mixed-income, and high-income neighborhoods. All markets, however, are situated within close proximity and with easy access to low- and mixed-income areas.

- Public transportation accessible

One of Farm Fresh RI's primary criteria for market location is that it must be on a bus line, increasing accessibility for the greater numbers of low-income shoppers.

- Data collection/paid market manager

Farm Fresh RI has a paid staff to oversee market operations and programming. These individuals collaborate with Wholesome Wave to separately track market sales, EBT transactions, and Bounty Bucks distribution at each of their markets.

Best Practices for Incentive Programs at Suburban Farmers Markets
Case Study: Crossroads Farmers Market, Takoma Park, Maryland

Background

The Crossroads Farmers Market was founded in 2007 to focus primarily on access and affordability of fresh, local, and healthy foods. It is located at the Takoma Park / Langley Park, Maryland/DC border, a low- to moderate-income area with sizeable Latino, West African, Caribbean, and South Asian populations. Upon opening, it became the first market in Maryland to accept *multiple* federal nutrition benefits, including Women, Infant, Children Program (WIC) and Senior Farmers Market Nutrition Program (FMNP) and the Supplemental Nutrition Assistance Program (SNAP, formerly known as food stamps). Crossroads was also the first market in the country to launch a financial incentive program for federal nutrition benefits clients, referred to at Crossroads as "Fresh Checks."

Fresh Checks operates as an eligibility program, rather than as an exact dollar match. WIC, Senior FMNP, and SNAP clients are eligible to receive a set number of Fresh Checks each week to purchase foods at market. The dollar amount of Fresh Checks allotted per family per week has varied over time based on available funds. In 2010, the market distributed $5 per week to WIC and senior (FMNP) participants. SNAP participants had the option of receiving a set $5 or of spending their SNAP benefits and earning up to $25 in matching funds. Over the 22-week season, Crossroads distributed $39,225 in Fresh Checks to 1,247 low-income families.

Best Practices

- Partnerships with local benefits offices

Crossroads is located in the parking lot of the largest WIC clinic in Maryland, and works closely with the agency staff to promote the market to clients. Crossroads also operates a SNAP Outreach Program as part of the Maryland SNAP Outreach Plan. A SNAP Outreach Specialist conducts outreach, eligibility pre-screenings, and provides application assistance at the market and other community spaces, including the WIC office, throughout the year.

- Diverse, community-specific market offerings

While the market is small (eight vendors at peak season), vendors are carefully selected for this diverse community. In addition to larger-scale conventional growers able to offer fruits and vegetables at a lower price point and small, organic growers, the market features specialty ethnic foods, including a Salvadoran prepared foods vendor and a Guatemalan bakery.

- Location in area with high-federal nutrition benefits participation

The Crossroads neighborhoods have high rates of food insecurity and WIC and SNAP participation. Approximately 73% of total market sales in 2010 were in federal nutrition benefits (SNAP, WIC, Senior FMNP) and Fresh Checks.

- Public transportation accessible

The market is located at a major intersection and accessible by a number of bus lines. Most shoppers come by foot or bus from surrounding neighborhoods. Crossroads also coordinates a "market bus" which shuttles to and from local subsidized senior housing complexes during the market.

- Data collection and paid market manager

The market contracts two paid market managers to run market operation and programming year-round. Data collection, with support from Wholesome Wave, is an important part of market operations and fundraising. Market Managers track sales in each payment category (WIC, SNAP, Senior FMNP, Fresh Checks, and cash).

Best Practices for Incentive Programs at Rural Farmers Markets
Case Study: Abingdon Farmers Market, Abingdon, Virginia

Background

The Abingdon Farmers Market is located in Abingdon, Virginia (pop. 8,000), in the Appalachian Valley. The producers-only market, which serves not only residents of the town of Abingdon but families from around Washington County, began in a parking lot in 1998 and moved to a permanent structure in 2007, a pavilion that the town built to house the market. Abingdon Farmers Market is open twice a week during the market season, and holds a monthly winter market throughout the off-season.

Through a partnership with Appalachian Sustainable Development (ASD) and Wholesome Wave, Abingdon Farmers Market was one of three markets in the "Tri-Cities" region of Southwest Virginia/Northeast Tennessee to acquire an Electronic Benefits Transfer (EBT) wireless system in July 2009 to accept Supplemental Nutrition Assistance Program (SNAP, formerly known as food stamps) benefits at market. At that time, the market launched its incentive program, offering SNAP participants a one-to-one dollar match of up to $25 for the purchase of farm-fresh foods at market. Abingdon Farmers Market also doubles Senior Farmers Market Nutrition Program (SFMNP) benefits. In Virginia, eligible seniors receive $20 in SFMNP for the market season. During Abingdon Farmers Market's pilot season offering incentives, the market doubled SFMP, providing eligible seniors with a $40 coupon book at the beginning of the season; in 2010, that shifted to a one-to-one match ($20/season). As Virginia WIC does not participate in FMNP, the market is unable to accept or match WIC FMNP benefits.

- Partnerships with local benefits and social services agencies

The market attracts its customer base largely through partnerships with local food banks, community social workers, and social service organizations that promote the market to their clients. A Washington County, Virginia extension agent conducting a SNAP education program has also been instrumental, writing press releases about the market's offerings and conducting food demonstrations at market.

- Wide range of vendors and market offerings

Abingdon Farmers Market is the largest in its region, with 44 seasonal vendors offering a range of produce, dairy, meats, local wine, and crafts. The size and selection at the market draws individuals from outlying parts of the county.

- Location in area with high federal nutrition benefits participation

13% of individuals in Washington County receive SNAP benefits. Abingdon also has a large senior citizen population, and consequently, high SFMNP participation.

- Paid market manager

Abingdon Farmers Market's EBT and incentive program has had significantly higher participation rates than its partnering markets in ASD. The market attributes this success to a paid market manager able to work year-round on outreach, partnership building, and market operations.

- Data collection

With support from Wholesome Wave, the Abingdon Farmers Market tracks SNAP, SFMNP, and incentive dollar transactions. This data is instrumental in assessing program success and identifying areas for growth and improvement.

“Farmers Markets in Maryland: Evaluating Economic Impact, Identifying Opportunities, and Assessing Feasibility of a Statewide Farmers Market Association as a Solution to Direct Marketing Challenges”

FSMIP Literature Review on Statewide Farmers Market Associations

Farmers Market Coalition (May 2009): Services, Structures, and Self-Identified Needs of State Farmers Market Associations / Organizations

- Surveyed 26 state FMAs to identify:
    - How FMAs are organized
    - How they operate
    - Where they need assistance
- Stage of Growth:
    - Majority of FMAs formed in 1990s to represent farmers markets on the state level
    - Membership ranges from 9-200 member markets, representing several hundred to 2000 farmers per state
    - 50% of FMAs extend membership to farmers markets, roadside stands, farms stands, etc.
    - Membership dues vary from $10-$1000 annually, majority are in the $25-$50 range per year
- Resources:
    - Over 61% FMAs have annual budget less than $50K.
    - > 2/3 FMAs use membership dues as primary source of revenue.
    - Supplemental income: competitive state/federal grants, cooperative agreements with state
    - 57% operate as stand-alone organizations, rest operate under umbrella org.
    - Paid staff typically is only one person, rely heavily on volunteer labor
    - Average 30-40 hours per month for volunteers
- Structure:
    - Most FMAs have Board of Directors: 7-9 members
    - Board membership drawn from farmers, market managers, state dept of ag, university extension faculty, non-profits
    - Primary communication via email, meetings, and conference calls
    - Board functions:
        - General guidance
        - Develop policy procedures
        - Attend to membership needs
        - Develop programs
        - Advocacy
- Services:
    - Eight general service areas:
        - Insurance & risk mgmt
        - Grants & resources
        - Nutrition-related services

  - Basic training and education
  - Market start up
  - Professional networking & info sharing
  - Market promotion
  - Policy & advocacy

Table 2

Most commonly offered services by state FMAs

	n	%
Organizing state wide farmers market conferences	21	80.8
Providing educational materials for market managers, such as fact sheets, guides, and other materials	19	73.1%
Providing technical assistance for start up markets	19	73.1%
Creating sample documents, forms and other materials relating to market operations	18	69.2%
Producing an email listserv for members	18	69.2%
Maintaining a statewide market directory	17	65.4%
Creating educational materials specifically for vendors/farmers	17	65.4%

- Challenges:
  - 50% cited identifying, supporting, and recruiting new vendors/farmers/producers as biggest challenge
  - 38% understanding, navigating, applying state policies for farmers mkts
  - 23% fundraising and revenue generating
- Networking:
  - 53% FMAs talk to colleagues in other FMAs > 3-4 times annually
  - FMAs primarily working in isolation
  - Opportunites:
    - Building strategic partnerships w/ other FMAs
    - How to create & use a strategic plan
    - Member recruitment & benefits
- Limitations of the study:
  - Excludes orgs that operate on a more localized level:
    - CFMA (SF Bay Area)
    - Pacific Coast FMA, Marin Farmers Markets
    - FreshFarm Markets in DC
    - Neighborhood Farmers Market Alliance (Seattle)

National AgLaw Center (2002):Farmers' Markets Rules, Regs and Opportunities

This article looks at the structure and operation of farmers' markets from a legal/regulatory standpoint. They provide models and examples of farmers' market rules and bylaws, drawing 30 farmers' markets in 15 states. The goal of the article is to identify challenges and opportunities for existing farmers' markets as well as highlight potential issues for future farmers' markets. It almost provides a how-to guide for starting a farmers' market from a legal perspective.

Marketumbrella.org (1998): Barriers to Growth | Problems Facing Small-scale Agriculture in the Great New Orleans Region

This article highlights some of the issues facing small-scale farmers in the Louisiana delta region. It points to two key barriers: a lack of information on sustainable farming techniques, and low prices from farm products. In response to these problems, the author advocates technical support for farmers in sustainable practices and education for consumers about the value of local food. The author also promotes the use of direct sales mechanisms such as the Louisiana Farmers Market system.

Otto & Varner (2005): Consumers, Vendors, and the Economic Importance of Iowa Farmers' Markets: An Economic Impact Survey Analysis

This article reports the results of a 2004 survey of Iowa farmers' markets administered to vendors and consumers, aimed at estimating the economic impact of farmers' markets (using an IMPLAN I-O model). They collected sales data, demographic info, and other market participation info from 4500 consumers & over 780 vendors. While it does not include the actual survey, the results provide enough information to figure it out. They also calculate multipliers for gross sales and personal income effects.

USDA (2008): National Farmers Market Summit Proceedings Report

This report summarizes proceedings of the National Farmers Market Summit, attended by 75 individuals ranging from national resource providers, farmers market reps, and community partners. The summit's broad objectives are to: 1) identify farmers market needs and existing gaps, 2) prioritize future research and initiatives, and 3) provide guidance to policymakers on how to allocate resources. **The appendix contains contact information for all the Summit participants.

USDA (2006): National Farmers Market Manager Survey

This was a national survey sent by email and letter to 3,743 farmers market managers across the country, which represented 85.4% of the 4,385 farmers markets in the US during the 2005 season. The response rate was 34.5% (1,292 responses). The results contain a tremendous amount of demographic, sales, and market participation data. The report also includes the original survey, which is a great source for finding survey questions for us. It seems like this survey has a lot of overlap with what we're trying to do.

Oberholtzer & Grow (2003): Producer-Only Farmers' Markets in the Mid-Atlantic Region

This is survey focusing on farmers' markets in the Mid-Atlantic region, and directed at market managers. Similar to the USDA survey, this survey collects data on organizational and operational aspects of farmers' markets, and it assesses challenges and opportunities. It contains a very brief literature review in the "Research and Analysis of Farmers' Markets" section. The results are compiled from 43 responses from producer-only markets (75% response rate). This report has a very comprehensive works cited page, and it also includes the original survey, which we can use for finding questions.

Econsult Corp (2007): Estimating the Economic Impact of Public Markets

This study was commissioned by the Project for Public Spaces, and it examines the direct and indirect impact of public markets on local economic impact. The end goal was to great a matrix of economic activity multipliers based on market type, vendor, and community, based on expenditure data collected from seven public markets across the country. The analysis was geared toward large terminal-style markets, mid-size public markets, and mid-size farmer's markets. I'm not sure the sample data is representative of typical farmers' markets, though, so multipliers should be carefully considered.

Varner & Otto (2007): Factors Affecting Sales at Farmers' Markets: An Iowa Study

In this article the authors takes the survey data from Otto & Varner (2005) and perform regression analysis to ascertain significant factors affecting: 1) sales per vendor and 2) per capita sales (which are set up as two separate models).

Hughes, Brown, et. al. (2008): Evaluating the Economic Impact of Farmers' Markets Using an Opportunity Cost Framework

Similar to Otto & Varner (2005), the authors conduct a study of the net impact of farmers' markets in West Virginia using a producer survey. The survey results are used in an IMPLAN I-O model to estimate the economic impact. The article contains a literature review in which Otto & Varner (2005) is specifically cited.

Kremen, Greene, & Hanson (2003): Organic Produce, Price Premiums, and Eco-Labeling in US Farmers' Markets

This report from the USDA ERS presents findings from a phone survey of market managers in >20 states regarding the role of farmers markets as outlets for organic produce. The questions for the survey were modeled after those used in the USDA survey above, but focus on organic growers and products. In total, 210 market managers were surveyed in 23 states. The article contains a lot of qualitative data regarding factors that affect demand for organic produce.

“Farmers Markets in Maryland: Evaluating Economic Impact, Identifying Opportunities, and Assessing Feasibility of a Statewide Farmers Market Association as a Solution to Direct Marketing Challenges”

FSMIP Report on Services of Statewide Farmers Market Associations (FMA) versus Market Barriers and Challenges which could be Addressed by the Establishment of a Maryland FMA

Findings on services provided by Statewide Associations

Eight general service areas:

- Insurance and risk management
- Grants and resources
- Nutrition-related services
- Basic training and education
- Market start up
- Professional networking and information sharing
- Market promotion
- Policy and advocacy

Table 2

Most commonly offered services by state FMAs

	n	%
Organizing state wide farmers market conferences	21	80.8
Providing educational materials for market managers, such as fact sheets, guides, and other materials	19	73.1%
Providing technical assistance for start up markets	19	73.1%
Creating sample documents, forms and other materials relating to market operations	18	69.2%
Producing an email listserv for members	18	69.2%
Maintaining a statewide market directory	17	65.4%
Creating educational materials specifically for vendors/farmers	17	65.4%

From: Farmers Market Coalition (May 2009): Services, Structures, and Self-Identified Needs of State Farmers Market Associations / Organizations

Farmers Market Barriers and Challenges Identified through Surveys

Needs highlighted through market manager survey included: resources to pay market managers for their work, assistance in setting up SNAP and incentive programs at market, outreach to federal nutrition benefit clients, leveraging low-cost advertising solutions, finding new vendors and generating revenue. The majority (67.5%) of managers work up to 10 hours per week and are not paid for this market-related work. Most markets have no budget to cover labor costs, minimal funding for advertising, and few sources of outside funding for market initiatives. Of the markets that responded, 37% had SNAP and only 4 had incentive programs for the 2010 season. In all of Maryland only 14% of markets have SNAP programs. More than half of markets have advertising budget of less than $1000 per year, and 76% were interested to learn more about insurance options. Other issues market managers felt to be standing in the way of growth included:

Finding new vendors, farmers, and producers	27.9%
Fundraising and generating revenue	23.3%

Securing more physical space	14.0%
Paying for market staff	11.6%
Attracting more customers	9.3%
Compliance with county/city-level licensing and policies	7.0%

Barriers and challenges identified by producers were: accessing SNAP funds (77% did not have any sales via SNAP); increasing amount of sales through farmers markets (the majority had less than 50% of their farm sales through markets); and identifying and evaluating marketing efforts.

Services that Maryland Farmers Market Association Could Provide

A role for a potential MD FMA and services identified by market managers include (in order of priority): market promotion and advertising (91%), professional networking (70%) and grants and resources (63%).

Analysis of services that a MD FMA could provide:

Service Category	***Identified as Need in Maryland?***	***Service that MD FMA could provide?***
Insurance and risk management	Y	Y
Grants and resources	Y	Y
Nutrition-related services	N	Y
Basic training and education	Y	Y
Market start up	Y	Y
Professional networking and information sharing	Y	Y
Market promotion	Y	Y
Policy and advocacy	N	Y

UNIVERSITY OF MARYLAND EXTENSION

Solutions in your community

FACT*Sheet*

Fact Sheet 934
2011

Assessing the Need for a Statewide Farmers' Market Association in Maryland

What is a Farmers' Market Association?

Farmers' markets are an important and growing segment of Maryland's agricultural industry. Many promising opportunities for continued growth exist but farmers' markets also face a unique set of issues in Maryland. In other states, statewide farmers' market associations provide services to help facilitate market development directly through promotion and technical assistance and indirectly through education and general advocacy (Wasserman 2009).

The Maryland Department of Agriculture (MDA) wants to evaluate the feasibility of establishing a state farmers' market association as a potential solution to the direct marketing challenges in Maryland farmers' markets[1]. While farmers' market associations share many common features across states, it is important to understand the specific needs of Maryland farmers' markets, consumers, vendors, and market managers when developing such an organization. These considerations will help shape the organization's roles to more effectively deal with relevant issues. Furthermore, this approach will prioritize concerns to make best use of the typically limited budget of a potential farmers' market association.

Survey of Market Managers, Vendors, and Consumers in Maryland

◆ *Survey Information*

In order to assess the needs of stakeholders in farmers' markets, an online survey was administered to consumers, vendors, and market managers.

The market manager survey included questions to address the manager motivation, farmers' market structure, market sales data, market barriers, and the role and feasibility of a farmers' market association. Market managers were also asked about the reasons they perceive consumers shop at farmers' markets. The survey includes responses from 39 managers representing 43 farmers' markets across Maryland.

The vendor survey similarly included questions to address vendor structure and sales data, perceived opportunities and barriers, and factors that influence their decision to sell at farmers' markets. The survey includes responses from 53 vendors across 18 different counties in Maryland and one in Pennsylvania. Lastly, the consumer survey, which received 108 responses, included questions to address shopping frequency, average expenditures, reasons for shopping at farmers' markets, and other related logistics and demographics.

◆ *Farmers' Market Snapshot*

Seventy-seven percent of market managers managed one market, 10% managed two markets, 10% managed three markets, and one individual managed more than four markets. The average farmers' market in Maryland has been operating for

[1] Research is funded by a grant from the USDA Federal-State Marketing Improvement Program (FSMIP). FSMIP provides matching funds to State Departments of Agriculture, State agricultural experiment stations, and other appropriate State agencies to assist in exploring new market opportunities for U.S. food and agricultural products, and to encourage research and innovation aimed at improving the efficiency and performance of the marketing system.

about 13 years, but 24% of farmers' markets have been in operation for more than 20 years. Indicative of the recent surge in popularity of farmers' markets, over 40% of farmers' markets in Maryland were established within the last five years, significantly higher than the national figure of 28% (Ragland & Tropp 2009).

The majority of farmers' markets operate seasonally in Maryland and are open for an average of 6.1 months, with 12% of markets open year round. About 80% of farmers' markets are producer-only and, on average, 12 farmers sell at each market along with 8 additional vendors such as local artisans. This is somewhat lower than the national average of 31 vendors, but close to the Mid-Atlantic average of 21 vendors (Ragland & Tropp 2009).

◆ *Vendor Snapshot*

A combined 45% of vendor responses came from Baltimore County, Carroll County, Harford County, and Montgomery County. Just over half (55%) the respondents own their own land, 9% rent their land, 26% both own and rent land, and the remaining 9% do neither (i.e. they are artisans not farmers). Furthermore, about half (49%) the vendors have a webpage in place, with an additional 13% in process.

Over 40% of vendors have been selling at farmers' markets for less than 5 years; so many vendors are relative newcomers to the farmers' market distribution channel, but the average is 13.3 years. Also, about 55% of vendors attend 1 or 2 farmers' markets each week, with the overall average at 2.8 markets per week. On average, farmers send 2.3 employees to each farmers' market (including the farmer).

Important Functions of a Farmers' Market Association in Maryland

◆ *Concerns of Farmers' Markets*

Table 1 shows the response from market managers when asked to identify the largest single issue standing in the way of growth of farmers' markets in Maryland. The most cited barrier to the growth of farmers' markets is finding new vendors (28%). Coupled with fundraising and generating revenue (23%), these two concerns comprised over 50% of responses. Part of the reason for this problem is that the direct-to-consumer segment has grown very quickly, so farmers' markets have expanded faster than farmers have to supply them. With regards to fundraising, 63% of the surveyed farmers' markets receive no outside funding and rely on a significant volunteer effort to operate the market.

State farmers' market associations often provide cost sharing options to assist in market promotion and other outreach activities that may help address the issue of finding new vendors. Additionally, associations can also provide services to help markets identify resources and write grants to aid in fundraising efforts (Wasserman 2009).

Table 1:
Largest Issue Standing in the Way of Farmers' Market Growth

	N	%
Finding new vendors, farmers, and producers	12	27.9%
Fundraising and generating revenue	10	23.3%
Securing more physical space	6	14.0%
Paying for market staff	5	11.6%
Attracting more customers	4	9.3%
Compliance with county/city-level licensing and policies	3	7.0%
Other	2	4.7%
Understanding state policies for farmers' markets	1	2.3%
Grand Total	**43**	**100.0%**

◆ *Challenges for Vendors*

Table 2 presents what vendors perceive as the biggest challenge of selling at farmers' markets in Maryland. Almost 50% of vendors felt that the biggest challenge is selling enough product. This poses an interesting circular problem, though. Vendors prefer to sell at markets with a large customer base so they can sell more product, and customers prefer to shop at markets with a large number of vendors for more product variety (as shown in Table 4). However, for this mutual arrangement to occur one action must seed the other, but no clear first mover exists. The next largest issue, cited by 15% of vendors, is learning about licenses and permits needed to sell at farmers' markets.

Both of these issues are readily addressed through a state farmers' market association. Through market promotion and advertising, associations can help build a larger customer base for farmers' markets, which in turn will improve market sales. Associations can also provide education and market start up services to help market managers and vendors navigate all the legal issues related to licenses and permits required to sell at a farmers' market in Maryland.

Table 2:
Biggest Challenge of Selling at Farmers' Markets

	N	%
Selling enough product at market	26	49.1%
Learning about licenses, permits needed	8	15.1%
Other	7	13.2%
Cost of participating in the market	6	11.3%
Dealing with market management	3	5.7%
Obtaining licenses & permits needed	2	3.8%
Understanding what programs are available	1	1.9%
Grand Total	**53**	**100.0%**

In addition to challenges, vendors also identified leading factors that influence their choice to sell at specific farmers' markets in Maryland. As shown in Table 3, the most frequently chosen factor was the sales figures of a market, which was selected by 28% of vendors. The next highest factor was distance to farm/company, which garnered 19% of vendors' responses.

While an association cannot directly address the distance factor expressed by vendors, it can help with sales figures. A market's sales figures provide a direct feedback loop between a farmers' market's ability to attract new vendors and the vendors' choice to sell at a given market. A state farmers' market association is in a unique position to help a market build sales figures through market promotion and advertising, thus reinforcing the link[2].

Table 3:
Factors Influencing Choice to Sell at Farmers' Market

	N	%
Sales figures	37	27.8%
Distance to farm/company	25	18.8%
Other	25	18.8%
Access to market (ability to join)	21	15.8%
Niche opportunity	15	11.3%
Less competition	10	7.5%
Grand Total	**133**	**100.0%**

◆ *Demands of Consumers*

In addition to assessing the needs of farmers' markets and vendors, it is important to understand what motivates consumers to shop at farmers' markets, since ultimately their patronage forms the foundation of a successful market. On average, 387 consumers shop at a given Maryland farmers' market each week. Table 4 shows the most important reasons consumers shop at farmers' markets, as observed by market managers. Freshness of product ranks as the number one reason customers shop at markets, with 92% of market managers selecting it. The results of the consumer survey reinforce this, with 77% of respondents also selecting freshness of product as a major reason. According to 75% of market managers, the social atmosphere of the market was also an important reason, and 72% believe the ability to know where food is produced is important to consumers as well.

These reasons all lie at the heart of successful farmers' markets; and while a state farmers' market association may not directly address these consumer demands, it indirectly does as it helps farmers' markets thrive.

Table 4:
Most Important Reasons Consumers Shop at Farmers' Markets

	N	%
Freshness of product	36	92.3%
Social atmosphere of market	29	74.4%
Ability to know where food is produced	28	71.8%
Support of local agriculture	26	66.7%
Access to locally produced food	25	64.1%
Taste of product	23	59.0%
Variety of products offered	18	46.2%
Price	6	15.4%

[2] Of the markets surveyed, only 28% (a total of 12 farmers' markets) indicated that farmers and vendors presently report market sales.

◆ *Needs of Market Managers*

So much of the success of a farmers' market hinges on the motivation and determination of the market manager. Accordingly, another important consideration in this equation is the individual needs of market managers. About 54% of Maryland farmers' markets do not pay the market manager or any other employees. As such, the majority of market managers volunteer their time in return for the personal satisfaction of organizing and running a farmers' market. Table 5 illuminates some of the specific reasons market managers choose to do so. As indicated by 62% of market managers, the aspect of farmers' markets that most influenced them to become market managers is to provide customers with a source of nutritious food. The second most cited reason is to connect customers to farmers and foster a personal connection, as indicated by 56% of market managers.

Based on these responses, it is clear that market managers really believe in what they are doing and derive value from the institution and community of farmers' markets. A state farmers' market association can facilitate the professional and personal development of market managers by organizing statewide farmers' market conferences, providing opportunities for professional networking and information sharing, and engaging in policy and advocacy at the state and local level (Wasserman 2009).

Table 5:
Aspects of Farmers' Markets that Influenced Market Managers

	N	%
Provide customers with a source of nutritious food	24	61.5%
Connect customers to farmers and foster a personal connection	22	56.4%
Improve the income of small farmers	21	53.8%
Support the local economy	18	46.2%
Other	7	17.9%

Potential Role of a State Farmers' Market Association vis-à-vis Important Functions

Building on the needs expressed thus far, market managers were also asked about the roles they thought a potential Maryland state farmers' market association should fulfill. The results of this question are presented in Table 6. As indicated by 91% of responses, market promotion and advertising ranked highest among the roles market managers think a farmers' market association should fulfill. Additional high-ranking roles included professional networking (70%), grants and resources (63%), and policy and advocacy (56%). Somewhat expectedly, the ranking of these roles aligns very closely with the previously expressed needs of farmers' markets, vendors, consumers, and market managers.

In Fiscal Year 2011, MDA spent approximately $20,000 on market promotion.[3] MDA would welcome input from a farmers' market association on how to spend that money more effectively and also as a partner in raising additional funds. In addition, MDA, as a state agency, is limited in its advocacy; but an association could actively work with legislators on behalf of farmers' markets in Maryland.

Table 6:
Role a Maryland Farmers' Market Association Should Fulfill

	N	%
Market promotion & advertising	39	90.7%
Professional networking & information sharing	30	69.8%
Grants & resources	27	62.8%
Policy & advocacy	24	55.8%
Insurance & risk management	23	53.5%
Basic training & education	20	46.5%
Market start up	19	44.2%
Nutrition-related services	18	41.9%
Other	1	2.3%

More than half of market managers also think insurance and risk management is an important role for a state farmers' market association. While all but one of the farmers' markets included in the survey already carried insurance, 77% of market managers expressed an interest in learning about more insurance options.

[3] Personal communication, Mark S. Powell, Chief of Marketing and Agricultural Development, Maryland Department of Agriculture, November 7, 2011.

Lastly, a point worth mentioning is the issue of funding a Maryland state farmers' market association. Most associations rely on membership dues as their primary source of revenue, with the remainder of funds typically comprised of grants and cooperative agreements with the state (Wasserman 2009). Fortunately, in Maryland, 86% of markets indicated a willingness to pay an annual fee of $25 to $50 for a state farmers' market association, and an additional 5% were unsure. If the decision were made to create a farmers' market association in Maryland, then Wasserman (2009) provides helpful resources to accomplish that goal.

Summary

The direct-to-consumer market segment continues to grow for food and agricultural products, and farmers' markets play a key role in this growth. While farmers' markets will likely continue to grow, it is clear that a state farmers' market association can enhance this growth by alleviating some of the unique direct marketing challenges markets face. In establishing a Maryland state farmers' market association, it is important to incorporate the specific needs of farmers' markets, vendors, consumers, and market managers to ensure an effective organization and an efficient use of resources.

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