

# 2019 National Farmers Market Manager Survey

## Market Characteristics, Organization, and Activities by Market Size



Developed through a  
Wheaton College and  
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# Introduction

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

This document details the practices, organizational strategies, and services and programs offered by farmers markets when grouped by size. For this purpose, size is measured in three ways: average number of vendors present, average market sales during peak season, and average number of households that shopped on a market day.

*Collectively, the results suggest that markets with more vendors, more shopping households, and higher average sales levels were more likely to offer activities, programming, and conduct evaluations.*

To categorize farmers markets by size, markets were grouped into quartiles according to managers' responses to three questions:

- On an average market day during peak market season, how many vendors sold at this farmers market at this location in 2019?
- On an average market day during peak market season, how many households shop at this farmers market?
- On an average market day during peak market season, what are the average sales totals for this farmers market at this location?

To best represent the diversity of demographic, cultural, and economic practices and circumstances across the U.S., farmers markets were initially separated by U.S. Census Region (Northeast, South, Midwest, and West). After being separated into regions, markets were then assigned a quartile rank. Quartiles take all the data for a given variable and break it into four groups of more-or-less equal size, ranking responses from smallest to biggest based on that variable. Ranking markets by quartiles provides a rough indication of the size of each market relative to all other markets. As quartile increases, so does the size of the market in relation to other markets.

Once each market was assigned to a quartile category within its region, each quartile category was grouped together to compose a national market grouping. To aid in the interpretation of results for this study, markets in Quartile 1 are named "small," markets in Quartile 2 "medium," markets in Quartile 3 "large," and markets in Quartile 4 "extra-large." Categorizing markets into quartiles by these three metrics allows market managers and other stakeholders to compare a particular market's organization and activities to markets of similar size (i.e., markets in the same quartile), or to other-sized markets in different quartiles.

That said, the analysis in this report uses these size metrics solely to identify trends within and across quartiles for benchmarking and not as performance metrics. To explain, there are several factors not captured in this survey that prevent a researcher from assessing market size, such as capacity limits. Second, no questions in the survey captured a market's desire to grow on any of the three metrics.

Figure 1 demonstrates the average number of vendors per market by size and location, as well as average sales during peak season.

**Figure 1. Average Number of Vendors and Average Sales During Peak Season, by Market Size**

Region/urbanicity	Small		Medium		Large		Extra-large	
U.S.	7	\$670	14	\$2,510	23	\$7,614	60	\$34,175
Northwest Region	5	\$787	11	\$2,106	18	\$5,246	44	\$26,501
Midwest Region	5	\$809	12	\$3,632	21	\$8,841	50	\$27,269
South Region	6	\$345	13	\$1,485	23	\$3,657	55	\$16,332
Western Region	10	\$1,082	21	\$4,846	36	\$17,318	84	\$54,714
Urban	7	\$777	16	\$3,338	28	\$10,630	67	\$38,734
Suburban	5	\$615	10	\$1,886	17	\$4,352	41	\$19,664
Rural	5	\$461	10	\$1,749	16	\$3,735	41	\$8,839

Collectively, the results suggest that markets with more vendors, more shopping households, and higher average sales levels were more likely to offer activities, programming, and conduct evaluations.

## Market Activities by Market Size

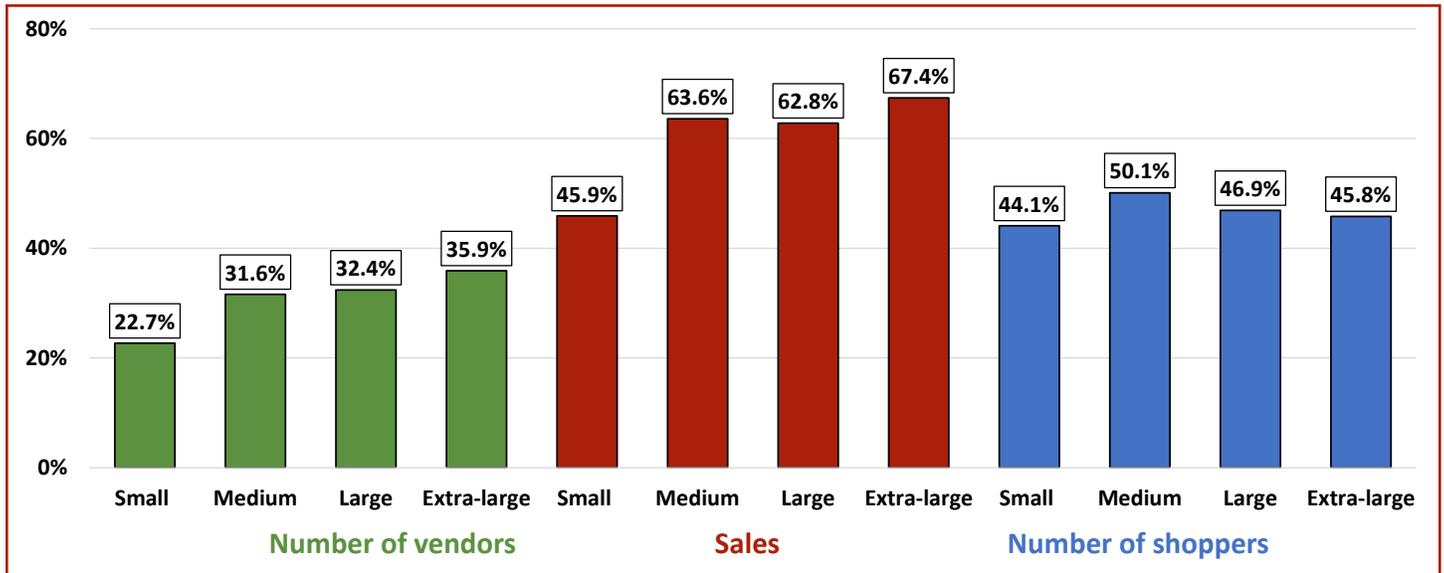
Next, this analysis looked at the types of training, business development, services, programs, food waste/conservation, and market evaluation techniques that markets offered within the same quartiles. The aim of this analysis was to reveal what small, medium, large, and extra-large markets do in addition to providing a space to sell goods and services.

### Training and Business Development Activity

Market managers responded to questions about whether their market offered training and/or business development opportunities to vendors, such as workshops, training or consultations on merchandising, bookkeeping, and business planning.

- Figure 2 shows that markets with more vendors were more likely to offer training and/or business development opportunities: 23% of small markets offered these activities, whereas 32% of medium, 32% of large, and 36% of extra-large markets offered these types of activities. Similarly, the percentage of markets that offered training and/or business development generally increased as market sales increased.
- Even more, the percentage of markets offering merchandising, marketing, and food handling increased as the number of vendors increased.

**Figure 2. Percentage of Markets that Offered Training and Business Development Opportunities, By Quartile**



## Health and Fitness Programs

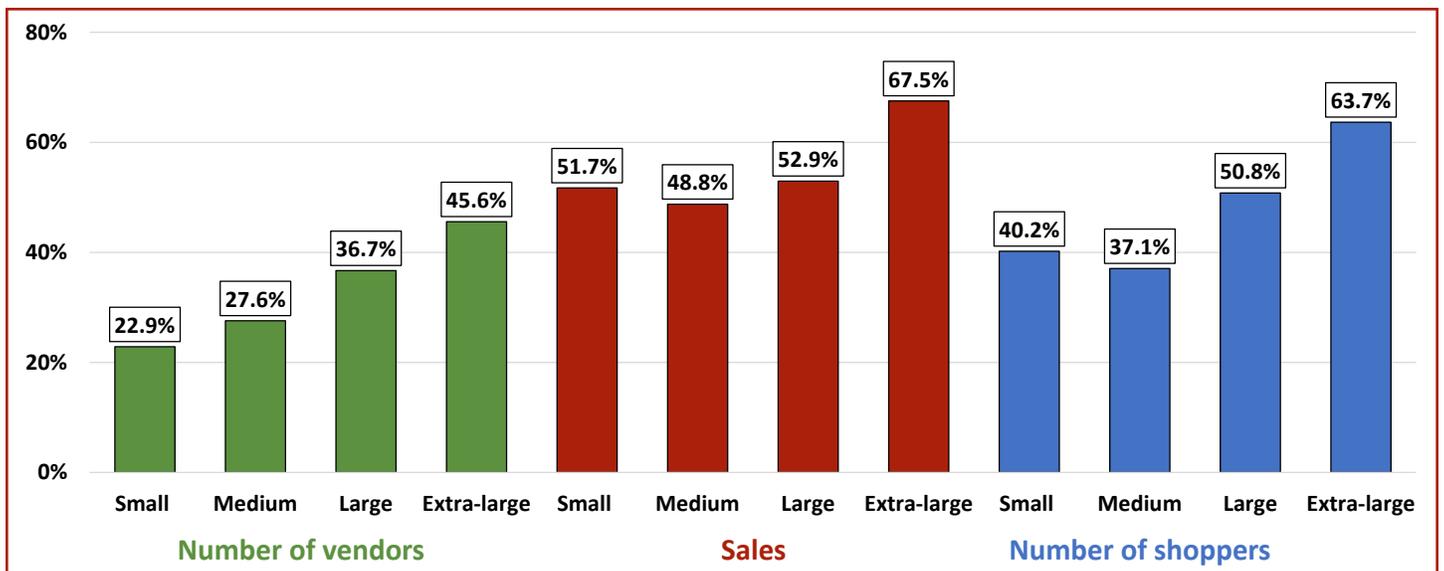
Market managers were also asked a series of questions about whether their market offered health and/or fitness programs during market sessions.

- The percentage of markets that offered health and/or fitness programs increased from 34% at small markets to 58% at extra-large markets as the number of vendors increased.
- Many markets offered health and/or fitness programs in the medium (74%), large (70%), and extra-large (76%) size quartiles based on number of shopping households. Though a lower percentage, more than half of small markets also offered these programs (59%).

## Food Waste and Conservation Programs

Market managers responded to questions about market participation in food waste and/or conservation programs, most commonly donating leftover produce to food banks and offering recycling during a market session. The results were categorized into quartiles based on the three market-size metrics and presented as national averages, shown in Figure 3.

**Figure 3. Percentage of Markets that Offered Food Waste or Conservation Programs, By Quartile**



- Generally, the percentage of markets that participated in food waste and/or conservation programs increased as the number of vendors increased.
- When categorized by market sales, roughly half of small (52%), medium (49%), and large (53%) markets and 68% of the extra-large markets offered these programs.
- In all versions, the larger markets were more likely to offer food waste and/or conservation programs than small and medium-sized markets.

## Market Research Studies/Evaluation

Market managers answered a series of questions about whether their market conducted market research studies and/or evaluation. The results were categorized into quartiles based on the number of vendors and presented as national averages.<sup>1</sup>

- The percentage of markets that performed market research studies/evaluation increased as the number of vendors increased: 16% of small markets, 24% of medium markets, 25% of large markets, and 34% of extra-large markets conducted such studies/evaluation.
- Nationally, the analysis found that markets with more vendors are more likely to conduct market research studies and/or evaluation. Customer counts and surveys of vendors were consistently the most common form of market evaluation, whereas feasibility studies and community needs assessments were the least common.

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1 Due to data limitations, analysis based on market sales and the number of shopping households was not possible.