

Survey Highlights

Farmers Markets and the Experiences of Market Managers in Washington State

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Farmers markets are one of the most visible cornerstones of modern farm-direct marketing. Washington State has a rich variety of farmers markets, from the world-famous Pike Place Market founded in 1907 to new markets opening each year. As with national trends, the number of markets in Washington has grown significantly, quintupling in the last two decades to just over 160. In 2010, a “Survey of Market Managers” was sent to every farmers market in the state as part of a farmers market research project¹. With an adjusted response rate of over 78%, the responding farmers markets represented 32 out of Washington’s 39 counties.



Pike Place Express City Hall Market

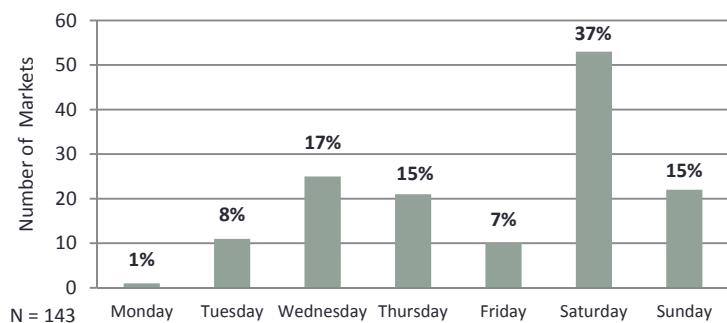
General Market Characteristics

The majority of the markets in the survey were small or very small (63%), with 30 or fewer vendors on a typical market day. Most markets were also relatively new, with over 60% having started up in the decade prior to the survey. Around 40% were in their first five years of operation. Most markets operated seasonally for an average of 21 weeks. Most typically, the market season started in May and ended in October; however, we found five markets that operated year-round and a range of opening and closing dates.

Table 1. Farmers Markets Categorized by Size*

Market Size Category	Number of Vendors on a typical market day during the summer season	Percentage
Very small	10 or less	19
Small	11 to 30	44
Medium	31 to 50	24
Large	51 to 100	9
Very large	101 and over	5
Total	N = 123	100

Figure 1. Markets by Day of the Week



Vendors and Products

Washington markets were quite diverse in terms of their vendor characteristics, their vendor mix, and the types of products sold. Most markets had a mix of farmers and other types of vendors, under half allowed reselling, and 82% had immigrant or minority vendors. When all markets were combined, farmers were the most common type of vendor, although this was not necessarily true for individual markets. More than half (58%) the markets prioritized vendors from within a specific geographic area. Only a minority of respondents (13%) said their markets prioritized vendors with organic products. All markets offered vegetables and fruits and most had cut flowers and baked goods. Other items, such as eggs, meats, dairy products, and grains were found at a lower percentage of markets.

¹ This research is part of the project “Engines of the New Farm Economy: Assessing and Enhancing the Benefits of Farmers Markets” led by M. Ostrom, C. Donovan, J. García-Pabón, J. Goldberger and V. McCracken of Washington State University and the Washington State Farmers Market Action Team. The USDA Agricultural Food Research Initiative of the National Institute of Food and Agriculture Grant #2009-55618-05172 supported this project.

Sales, Customers and Business Development

Market sales for 2009 varied dramatically among farmers markets. At the extremes, 14 markets reported annual sales over \$500,000 and nearly 20 with annual sales under \$25,000. Average annual sales among the markets surveyed were \$347,941 and the median was \$137,773. Washington State farmers markets were a huge draw for shoppers with several drawing over 5,000 shoppers on a typical market day. When asked about their sources of competition, respondents most readily identified other farmers markets and supermarkets, while CSAs and food co-ops/natural food stores were seen as enhancing sales. Finally, farmers markets were widely seen as valuable incubators of new businesses.

Figure 2. Farmers Market Sales



Table 2. Shoppers on Typical Market Day in Summer Season

Shoppers Visits per Market	Percentage
Under 1,000	59
1,001 to 2,500	27
2,501 to 5,000	9
Over 5,000	5
Total (N = 108)	100

The total estimated annual shopper visits to farmers markets was 10,453,852.

Organizational Structure

Three-fourths of all markets were organized as non-profits or under non-profits, while the rest were organized as private businesses or under government entities. Fees from vendors were the most common source of market revenue, with additional support provided by volunteerism, reduced or free rent, and grants. The organizational revenue generated per market varied widely, from under \$1,000 to over \$100,000. While average revenue was \$48,342, the median was only \$15,255. Revenue generally increased in relationship to market sales, however, markets with similar sales sometimes captured vastly different amounts of revenue. Staffing and marketing were the largest expenses reported. Over 86% of respondents were positive about their market's five-year economic outlook. Long-term goals and challenges included organizational development, attracting vendors and shoppers, and addressing regulatory and siting issues.

Community and Environmental Dynamics

Analysis of respondents' comments shows that community and environmental goals constitute strong components of many markets' organizational missions. Moreover, these goals influence their practical management practices. The commitment of so many markets to serving low-income community members was particularly striking, with 88% of markets participating in federal nutrition assistance programs and 86% making produce donations. Most respondents could name significant community and environmental contributions made by their markets.

Table 3. Primary Motivation for Starting a Farmers Market

Primary Motivation	Percentage of Markets
To support farmers	36
To improve community access to fresh farm produce	24
To improve community access to healthy foods	9
To create a fun community event	8
To promote economic development	4
To help local business district	2
To support/incubate small businesses	1
Other*	15
Total (N = 90)	100

* The most frequent "other" was a combination of motivations.

Table 4. Total Number of Farmers Market Employees by Status

Employment Status	Total Number of Employees
Full-time, year-round	29
Part-time, year-round	31
Full-time, seasonal	10
Part-time, seasonal	79
Total (N = 80)	150

Statewide, 65% of managers were paid and 35% were volunteers.