National Farmers' Market Impact Study 2009 Report

A baseline study that will serve as a benchmark for measurement of the contributions of farmers' markets across Canada and an assessment of trends and opportunities for growth

January 2009

National Farmers' Market Impact Study 2009 Report

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Study contracted by: Farmers' Markets Canada in July 2008

Acknowledgments

Farmers' Markets Canada appreciates the support of the following contributors:

Agriculture and Agri-Food Canada

- Farmers' Markets Canada acknowledges the vital contribution of the federal government, through Agriculture and Agri-Food Canada, in enabling the extensive original research that underlies this report to be conducted and the report itself, in both official languages, to be produced.

- Agriculture and Agri-Food Canada is pleased to participate in the production of this report. AAFC is committed to working with our industry partners to increase public awareness of the importance of the agriculture and agri-food industry to Canada. Opinions expressed in this document are those of the consulting firm, Experience Renewal Solutions, and not necessarily of AAFC nor of Farmers' Markets Canada and its members.

Agriculture and Agri-Food Canada Agriculture et Agroalimentaire Canada

The Farmers' Markets and their Managers

- Thank you to all 70 farmers' markets that agreed to on-site observation and interviewing. The 70 market managers opened their markets to teams of anywhere from two to six researchers for a full market day. Also, this report would not be possible without the support, understanding and contributions of 282 market managers who responded to a long national survey. Your contributions are greatly appreciated

The Vendors

- Close to 500 vendors agreed to complete the farmers' market vendors interview at various locations across Canada. Thank you to all the vendors who set aside their daily duties to contribute their ideas, thoughts, insights and knowledge about the current condition of farmers' markets in Canada

The Market Shoppers and Non-Users

- Over 4,400 consumers agreed to participate in the farmers' market interview at various locations across Canada and on the web. Most of the consumers showed a great attachment to their local market and were very willing to participate in the interview. Thank you to all of the consumers whose feedback and insights were essential to the completion of this report

Economic Analyst

- Thanks to Dr. David Connell, of the University of Northern British Columbia, for your tireless and continuing efforts to understand and measure the community, regional and national economic contributions of farmers' markets

Farmers' Markets Canada Board of Directors

- Thank you to the FMC Board of Directors. Their passion, knowledge, dedication and patience have aided in the successful completion of the project

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The State of Farmers’ Markets in Canada

Executive Summary 2009

- Farmers’ markets are a great success story for Canada, with strong consumer and vendor support as evidenced by the growth in attendance and number of markets. Success is built upon many factors including a desire to return to healthier, fresher, locally produced products and a strong belief in the integrity of shopping in the community
- The diversity of market types across the 508 national markets provides consumers with a large number of alternatives when seeking community shopping experiences and local products
- Markets offer a vast array of food and non-food items but clearly the largest demand is for fresh fruits, vegetables and baked goods

- Most customers attend markets regularly and are strong supporters of the farmers’ market industry. They are highly motivated to purchase fresh, in-season produce in clean, simple surroundings
- Customer spending across the country is variable with an average daily spend of approximately $32
- Customers feel a strong sense of community and local pride in attending farmers’ markets. While the customer base of farmers’ markets parallels the grocery-purchasing demographics of Canada, the market customer is uniquely sensitive to the need to support local primary producers (62% feel this is extremely important, 30% feel it is somewhat important)
- Current customers will increasingly look for more product selection and convenience in locations, payment options and lifestyle amenities to ensure their loyalty

The State of Farmers' Markets in Canada

Executive Summary 2009

- Farmers' market vendors are typically primary producers (79%) who achieve a significant portion of their income from participation in the markets; they also find a great deal of local support at markets and are attracted by the social and communal nature of the market experience
- Market vendors are challenged to provide the selection of fresh products required as primary producers while dealing with issues of labour shortages and rising costs of production inputs - - they are also seeking extended hours and days of operations for markets, as well as improved physical amenities
- In some markets there is a growing concern about the role of reseller vendors who are threatening the economic viability of the primary producer vendor
- Vendors are looking for more support in marketing of their locations through signage, advertising and website information and would like to attract new vendors in desired local product categories to increase customer traffic

- Market managers are seeking to develop farmers' markets business growth by attracting and promoting more primary producers and increasing the attractiveness and convenience of the market facilities
- Management and Association opportunities should focus on improving marketing efforts and making the physical market presence an attractive and more accessible venue
- Increasing pressures will occur from Health and Safety requirements, parking needs for vendors and customers and balancing of primary producer capabilities and customer demands for year-round product selection

The State of Farmers’ Markets in Canada

Executive Summary 2009

- The majority of national grocery shoppers are not using farmers’ markets. Non-users are a target growth sector; they express a willingness to become patrons and are not visiting primarily because of convenience and lack of awareness issues. Future growth in the sector will require engaging non-users through increased awareness of benefits, locations and product selection. Trial usage among non-users will be dependent on making local market hours and locations more accessible to time-challenged, health-conscious consumers

- The future for farmers’ markets in Canada is promising with consumer demand and interest closely aligned with support for local production and fresh, healthy food choices
- Farmers’ markets are important contributors to the national economy with impacts ranging from $1.55 to $3.09 billion annually

Fact Sheet

Farmers' Markets in Canada - Insights

HIGHLIGHTS

- Farmers' markets are strong contributors to the economy and to Canadian communities.
- Farmers' markets play a key role in the marketing of Canadian agricultural products; they play a significant role in generating farm incomes.
- Strong growth opportunities in this sector focus on more aggressive marketing and promotion of markets; on encouraging additional vendors and vendor capabilities; on improved access to labour; and on the development of more and improved facilities.
- Farmers' markets across Canada are very popular with their customers; 95% of customers feel the Farmers' market experience met or exceeded their expectation

2008 Field Research Summary – Sample Sizes

- There are 508 identified farmers' markets across ten provinces
- The 2009 Field Research profile:
  - 70 farmers' markets were visited (14% sample)
  - 3174 shoppers were interviewed on-site
  - 1308 non-users were surveyed online
  - 487 vendors were interviewed on-site
  - 282 market managers were interviewed by telephone and web
  - Traffic counts and vendor audits were taken at surveyed markets

Economic Impact in Canada 2008

- 28 million shopper-visits were made to farmers' markets in Canada in 2008
- Average in-market spending by principal shoppers is $32 per visit; ranging from $24.50 at small markets to $35.50 at large markets
- Total farmers' market direct sales across Canada in 2008 are estimated to be approx $1.03 billion
- The combined national economic impact of farmers' markets in Canada is estimated in a range between $1.55 billion and $ 3.09 billion

Fact Sheet

Farmers' Markets in Canada - Insights

Farmers' Markets Shopper Profile in 2008

Demographic Highlights

The results showed that, on average:

- 72 % of market shoppers are female and 28% are male, nearly a 2.5:1 ratio
- 70 % of the principal shoppers are 40 and older; 30% of customers are 18-39
- 96 % of shoppers are Canadian born (83%) or have lived in Canada 20 years or more (13%)

Shopping Patterns

- 60 % state that fresh produce is their number one reason for visiting
- 69 % of shoppers use their own car to reach the market and 21% walk
- 67 % of shoppers take less than 15 minutes to get to the market from home
- 48 % of shoppers visit the market regularly (almost once a week)
- 54 % of market shoppers visit the market alone; 46% visit in groups
- 92% of shoppers state that buying directly from a local farmer is either extremely (62%) or somewhat (30%) important
- 25 % of shoppers are new or infrequent users, representing a growth opportunity

Shopper Satisfaction

- 95 % of shoppers find that their market experience meets or exceeds expectation
- 44 % are very satisfied with the **variety** of products
- 39 % are very satisfied with **facilities** at the market
- 56 % are very satisfied with the market's **location**
- 81% of shoppers believe that food safety practices are better (46%) or about the same (35%) as grocery stores
- Market shoppers are generally pleased with the products they buy at their farmers' markets but would appreciate more vendors providing fresh, in-season produce

Non-User Opportunities

- Non-users identify that location, convenience, competitive positioning and variety will attract them to farmers' markets

Fact Sheet

Farmers’ Markets in Canada - Insights

Market Profile from Market Manager Reports

- 57 % of markets are open Saturdays; 24% Fridays; 17% Thursdays; 2% other days
- 34 % of markets are open more than 26 days per year; 40% of markets are open between 16 and 25 days
- August is the peak sales month
- 56 % of markets are outdoor; 20% indoor; 24% both indoor and outdoor
- 46 % of markets serve municipalities with populations below 10,000
- Market managers classify 68% of their vendors as primary producers: vendors that sell products that they have produced
- 80 % of market managers report that the number of shoppers has increased (56%) or stayed the same (24%)
- 81% of market managers report that the number of vendors at their markets have increased (48%) or stayed the same (35%)
- 81% of market managers report that the number of primary producer vendors has increased (33%) or stayed the same (48%)
- 91% of markets are funded by vendor/booth rentals
- 68% of market managers report no financial support from governments or associations in the past 5 years
- 86% of markets have not had an economic impact assessment
- At markets reporting insurance policies, the average market premium is $1123 annually; 93% of markets have no claim history

Vendor Profile in 2008

- 42% of vendors achieve over 50% of their farm income from sales at farmers’ markets
- 60 % of vendors sell fresh fruit and/or vegetables
- 79 % of vendors identify themselves as primary producers
- 40 % of vendors sell at only one market
- 79 % of vendors report their business has grown bigger (49%) or stayed the same (30%)
- 71 % of vendors travel less than 50 km to reach the market
- 55 % of vendors report the creation of up to 5 jobs as a result of market participation
- 49 % of vendors serve 100 or more customers on each market day
- 26 % of vendors sell over $1000 on a market day
- Cost of fuel and cost of inputs are major negative factors impacting vendors
- Community and social aspects of the farmers’ markets are a major attraction for vendors

Introduction

The Organization

- Announced on November 10th, 2008, Farmers' Markets Canada was formed as a national network for farmers' markets that will help support producers, expand the growth of markets and boost rural economies. Farmers' Markets Canada is proud to announce their establishment, which will look at national issues impacting farmers' markets across our country. Canada is a country that is proud of our agricultural heritage and Farmers' Markets Canada wants to strengthen that concept through market knowledge and expansion.

Purpose of this Study

- This study was contracted by Farmers' Markets Canada to undertake a comprehensive market impact study. Recognizing that data on farmers' markets across Canada was limited, this study was developed as a baseline that will serve as a benchmark for measurement of the contribution of farmers' markets Canada over time. This study was created around two main areas:
    - To understand the profile of the shopper at farmers' markets: demographics, motivations and regional differences to increase sales and opportunities for the future.
    - To understand the profile of the vendors at the farmers' markets: to attract additional vendors and to expand product offerings and market appeal.

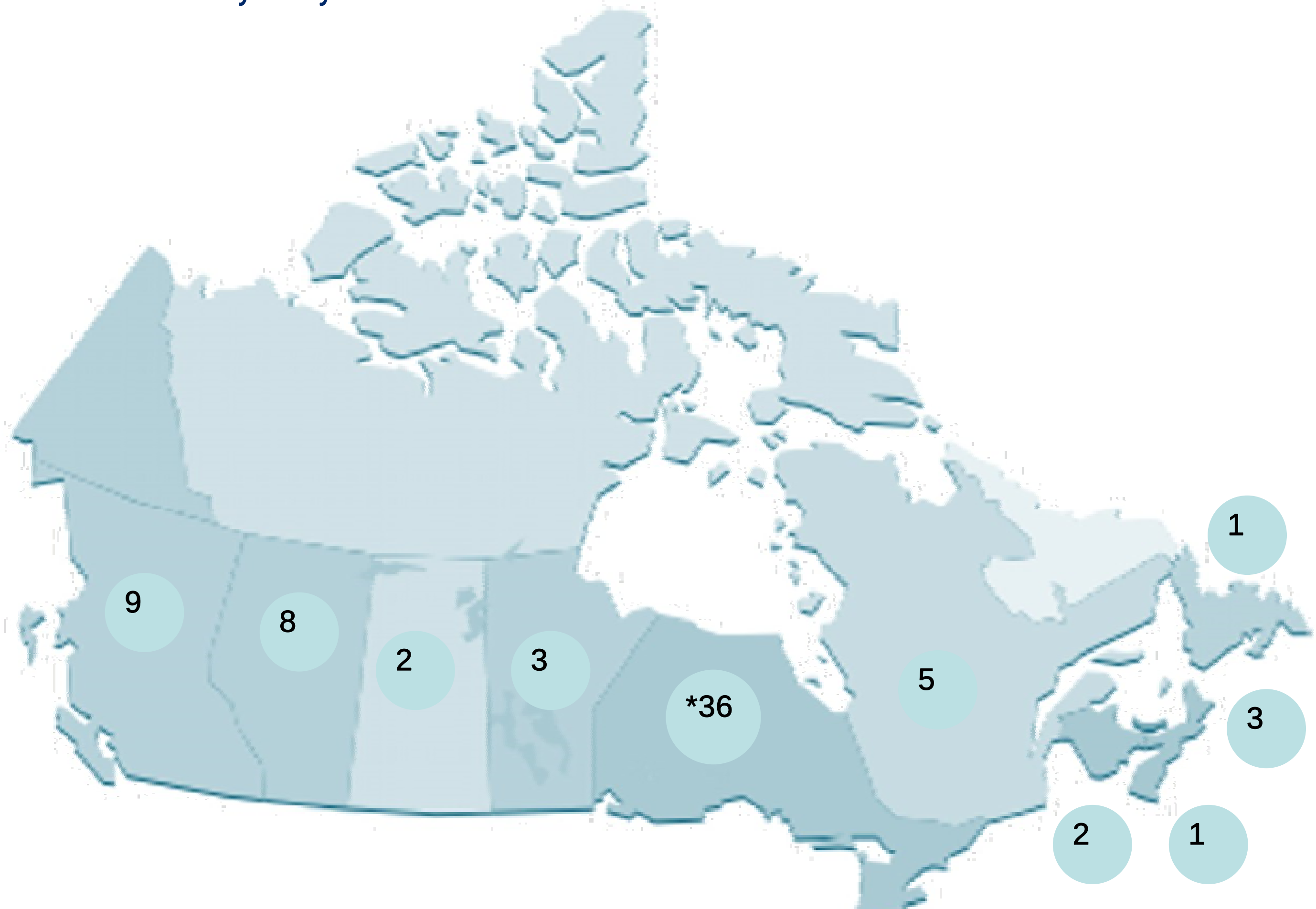
FMC's Mission Statement:

"Our Vision is a future where every Canadian has easy access to a farmers' market"

Data Collection

National Sample Size

Number of Markets Surveyed by Province



* A similar Farmers' Markets Ontario study was completed in conjunction with the National Farmers' Market Impact Study. 12 Ontario markets were included as part of the FMC sample; 24 markets were included as part of the FMO sample – in total, 36 Ontario markets were surveyed.

Markets Visited – Size Categorization

Market	Province	Size
Calgary Farmers' Market	Alberta	Large
Edmonton Farmers' Market	Alberta	Large
Bearspaw Lions Farmers' Market	Alberta	Medium
Claresholm Farmers' Market	Alberta	Small
Grassroots Farmers' Market	Alberta	Small
Morinville Farmers' Market	Alberta	Small
Okotoks Kinsmen Farmers' Market	Alberta	Small
Rose City Farmers' Market	Alberta	Small
Kamloops Farmers' Market	British Columbia	Large
Prince George Farmers' Market	British Columbia	Large
Trout Lake Farmers' Market	British Columbia	Large
Coquitlam Farmers' Market	British Columbia	Medium
Kelowna Farmers' Market	British Columbia	Medium
Quesnel Farmers' Market	British Columbia	Medium
Royal City Farmers' Market	British Columbia	Medium
Vernon Farmers' Market	British Columbia	Medium
Riley Park Farmers' Market	British Columbia	Small
Le Marche St. Norbert Farmers' Market	Manitoba	Large
Fort Whyte Alive Farmers' Market	Manitoba	Small
Warren Farmers' Market	Manitoba	Small
Moncton Farmers' Market	New Brunswick	Large
Sussex Farmers' Market	New Brunswick	Large
St. John's Farmers' Market	Newfoundland	Small
Halifax Farmers' Market	Nova Scotia	Large
Cape Breton Farmers' Market	Nova Scotia	Medium
Lunenburg Farmers' Market	Nova Scotia	Small
Guelph Farmers' Market	Ontario	Large
London Covent Garden Farmers' Market	Ontario	Large
Ottawa ByWard Market	Ontario	Large
St. Lawrence Farmers' Market	Ontario	Large
Stratford Farmers' Market	Ontario	Large
Your Kitchener Farmers' Market	Ontario	Large
Barrie Farmers' Market	Ontario	Medium
Brampton Farmers' Market	Ontario	Medium

Market	Province	Size
Brantford Farmers' Market	Ontario	Medium
Brick Works Farmers' Market	Ontario	Medium
Burlington Farmers' Market	Ontario	Medium
Creemore Farmers' Market	Ontario	Medium
Downtown Georgetown Farmers' Market	Ontario	Medium
Downtown Sudbury Farmers' Market	Ontario	Medium
Kingston Farmers' Market	Ontario	Medium
Newmarket Main Street Farmers' Market	Ontario	Medium
Orangeville Farmers' Market	Ontario	Medium
Orillia Farmers' Market	Ontario	Medium
Port Hope Farmers' Market	Ontario	Medium
Riverdale Farmers' Market	Ontario	Medium
Welland Farmers' Market	Ontario	Medium
Woodstock Farmers' Market	Ontario	Medium
Bloor/Borden MyMarket	Ontario	Small
Cambridge Farmers' Market	Ontario	Small
East York Farmers' Market	Ontario	Small
Grand Bend Farmers' Market	Ontario	Small
Horton Farmers' Market	Ontario	Small
Milton Farmers' Market	Ontario	Small
Nathan Phillips Farmers' Market	Ontario	Small
Ottawa Parkdale Market	Ontario	Small
Pembroke Farmers' Market	Ontario	Small
Peterborough Wednesday Farmers' Market	Ontario	Small
SickKids Hospital MyMarket	Ontario	Small
Simcoe Valley Farmers' Market	Ontario	Small
St. Catharines Farmers' Market	Ontario	Small
St. Marys Farmers' Market	Ontario	Small
Charlottetown Farmers' Market	Prince Edward Island	Large
Marche Jean Talon	Quebec	Large
Marche Vieux Port du Quebec	Quebec	Large
Marche Champetre de Melbourne	Quebec	Medium
Marche Public de Drummondville	Quebec	Medium
Marche Centre de Ste-Hyacinthe	Quebec	Small
Saskatoon Farmers' Market	Saskatchewan	Small
Tisdale Farmers' Market	Saskatchewan	Small

Market Size Definition Small = 0-19 Vendors | Medium = 20-39 Vendors | Large = 40+ Vendors

Research Methodology

This study took place from July to October, 2008

	Methodology	Study Elements	Sample Size
Customer Survey *ERS In-Experience Interviewing & Observing*	• Intercepted customers at various locations within selected farmers' market sites across Canada • Sample of current market customers who had a market experience were interviewed to gain an understanding of the profile of customers at farmers' markets	• Demographics • Motivators • Visit frequency • Purchase characteristics • Product characteristics • Regional differences among markets	3174 face-to-face surveys
Vendor Survey *ERS In-Experience Interviewing*	• Intercepted vendors at various locations within selected farmers' market sites across Canada • Sample of vendors were interviewed to gain an understanding of the profile of the vendors at farmers' markets	• % of products sold that are produced by farmers • % of income generated by access to farmers' markets • Identify means by which a new national association might be funded on a sustainable basis	487 face-to-face surveys
Non-Users *Innovative interviewing*	• ERS partnered with HOTSPEX (an online polling company) • Sample of current market non-customers across Canada to understand the reasons why customers do not come to farmers' markets	• Grocery shopping role(s) in household • Length of time in Canada • Location shopped for grocery needs • Factors encouraging to visit a farmers' market	1308 online surveys

Research Methodology

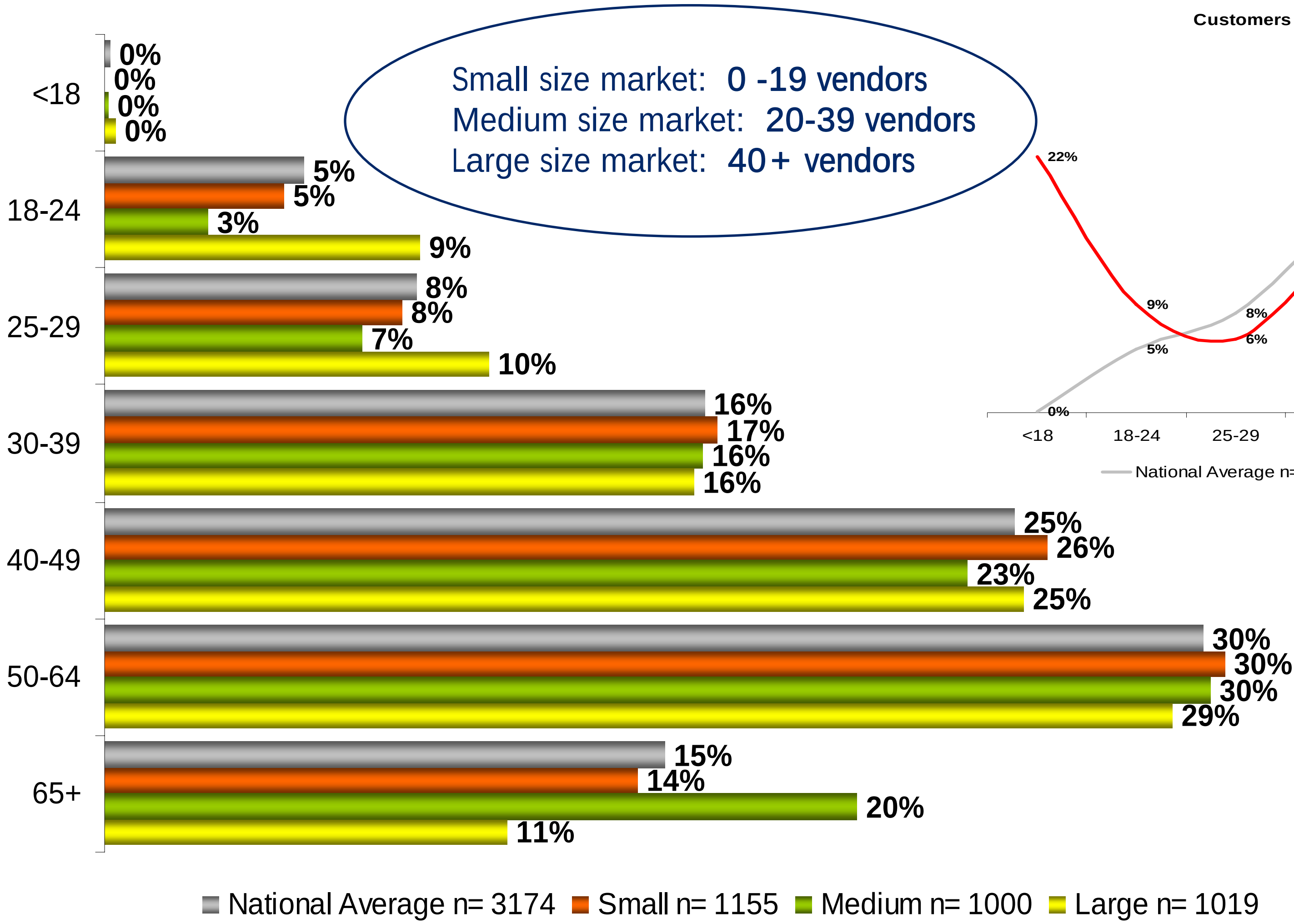
This study took place from July to October, 2008

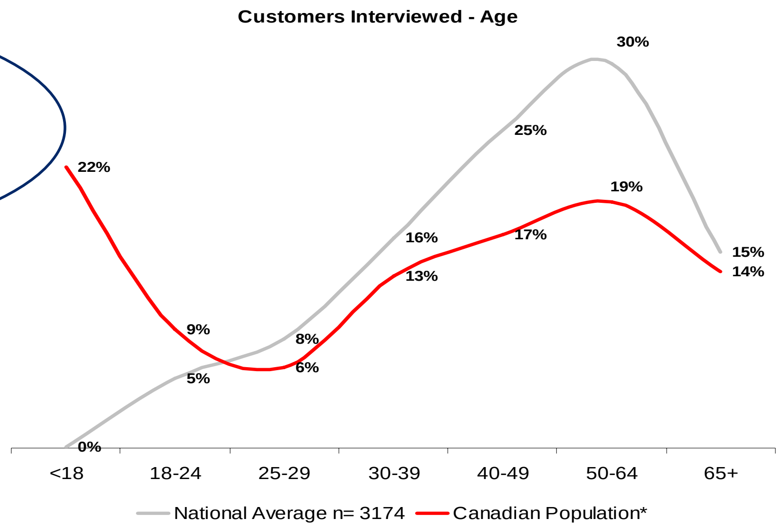
	Methodology	Study Elements	Sample Size
Market Manager Survey *ERS Telephone Interviewing technique*	• Called all known market managers from 10 provinces (AB, BC, MB, NB, NF, NS, QC, PEI, SK) • Collected contacts for a market database by searching online for the market managers' contact information • Contacted local municipalities, Chamber of Commerce or provincial associations if required • Interviewed to provide a composite national profile of farmers' markets	• Contact Information • Website Address • Location • Open Market Days • Size of Community • Trading Area • History of Market • Role of Managing Assoc./ Provincial Assoc./ Provincial Government • Selling Characteristics	282 phone surveys completed of 500 Markets contacted
Traffic Count *ERS In-Experience Observation techniques*	• Conducted traffic counts at selected locations across Canada • Traffic counts taken each hour on the hour for ten minutes at each exiting point at the market • Observed market customers entering market to gain a better understanding of traffic flow	• Estimate of number of people visiting market	68 Markets

Market Customer Profile

Customer Demographics by Market Size

- Large markets are attracting younger customers while small and medium markets are visited more by seniors
- Market customers are typical grocery customers, ages 25-64



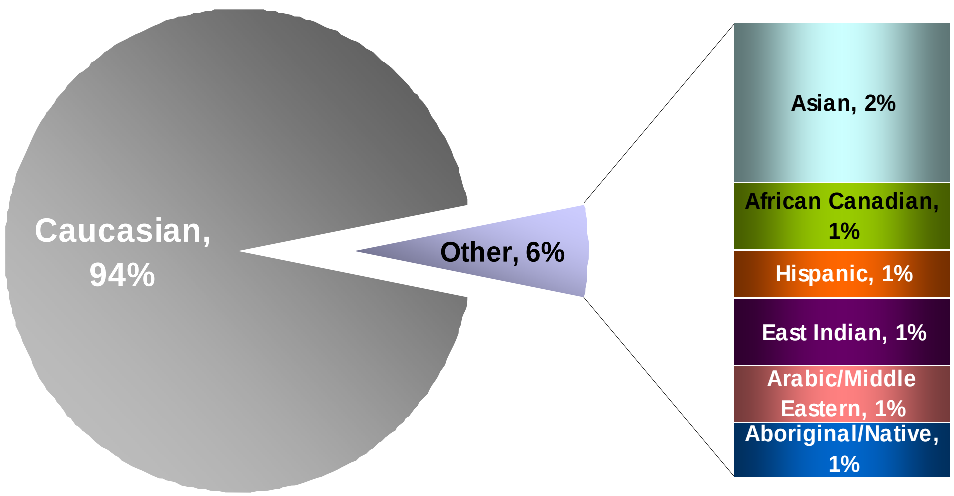


* Source: Statistics Canada, 2006 Census of Population, Statistics Canada catalogue no. 97-551-XCB2006009, Customer Survey

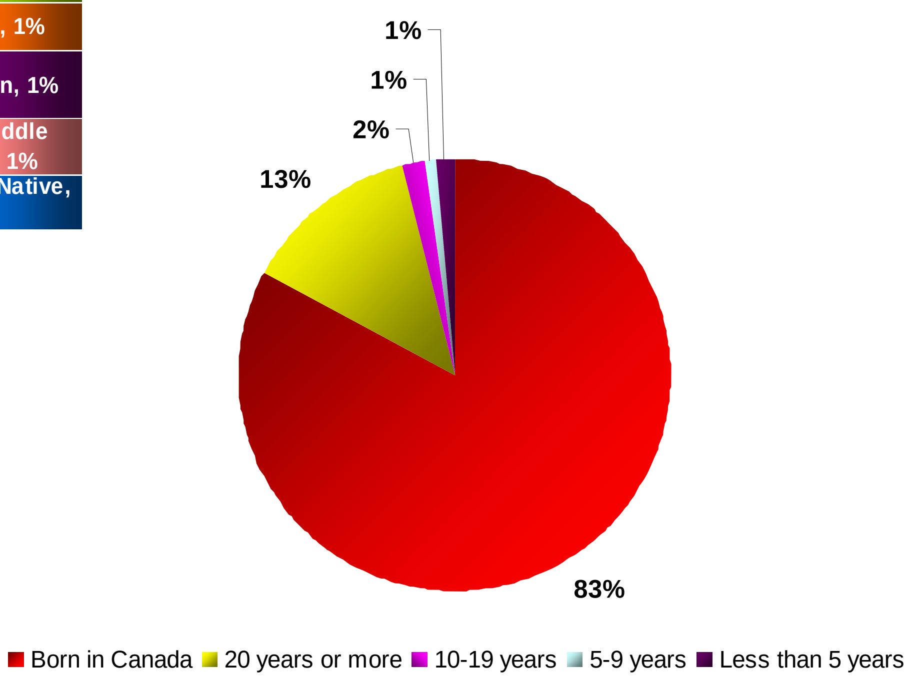
Customer Demographics by Origin & Ethnicity

- Markets are not attracting recent immigrants nor non-Caucasian origins – a major future opportunity

Ethnicity of Customers Interviewed

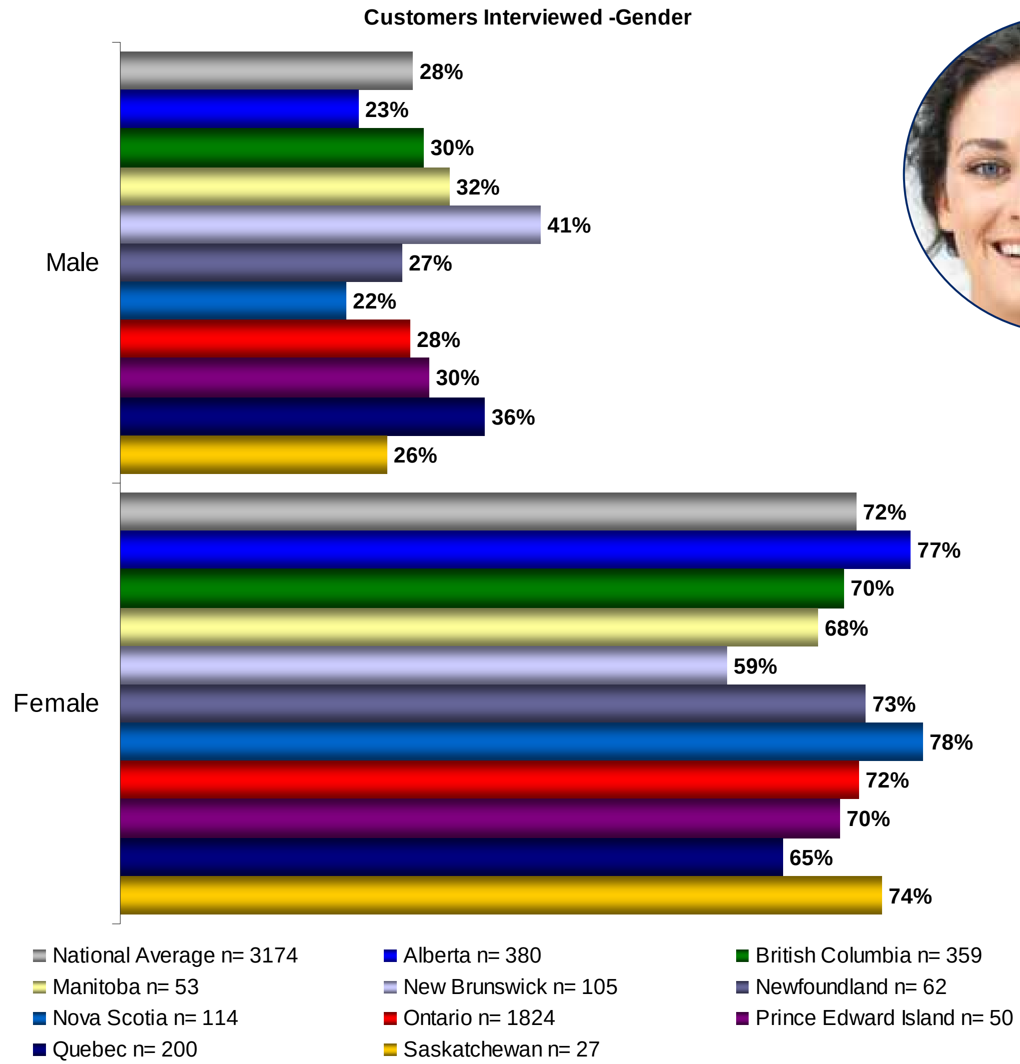


How long have you lived in Canada?



Customer Demographics by Gender, National Comparison

- Market shopping is dominated by women in all provinces

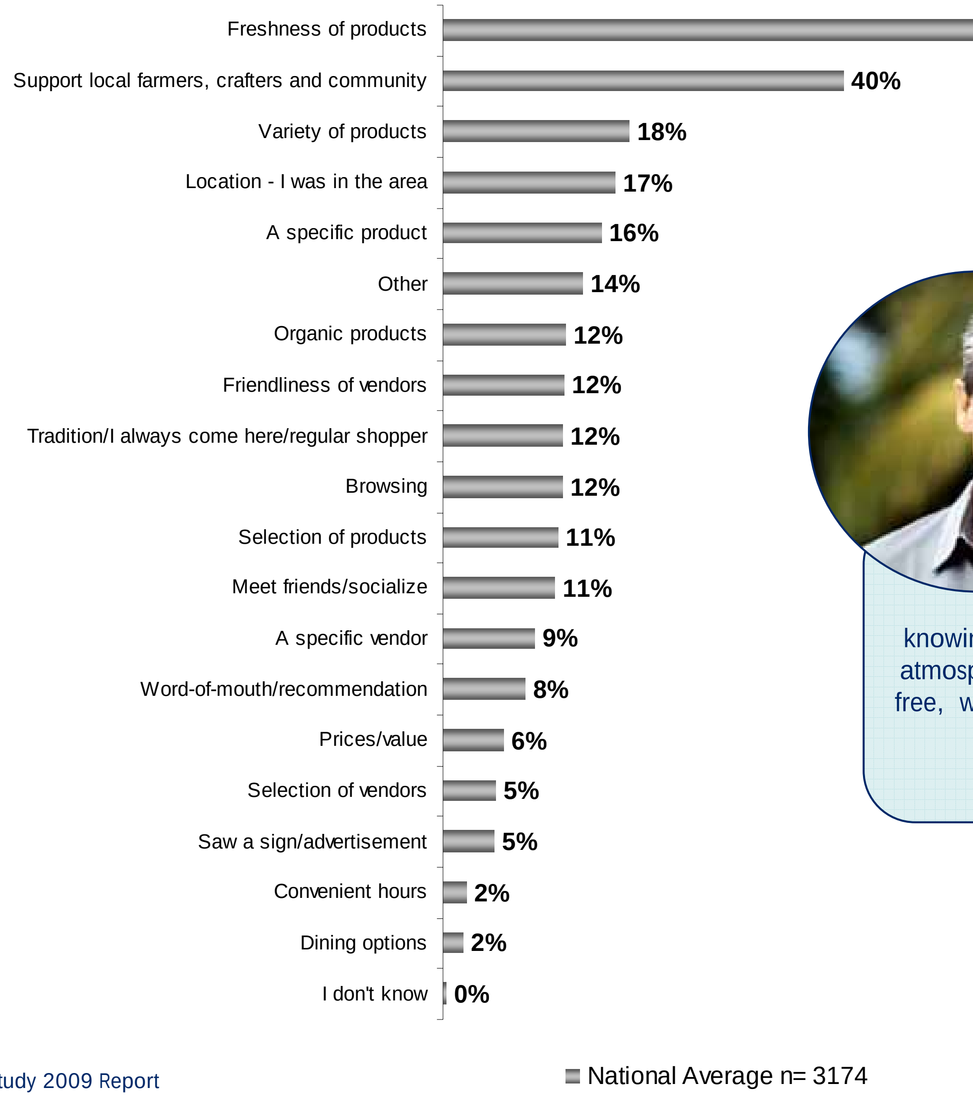


Source: Customer Survey

Motivation to Visit Market

- Fresh products and support for local farmers dominate the reasons for visits

What motivated or influenced you to visit this farmers' market?



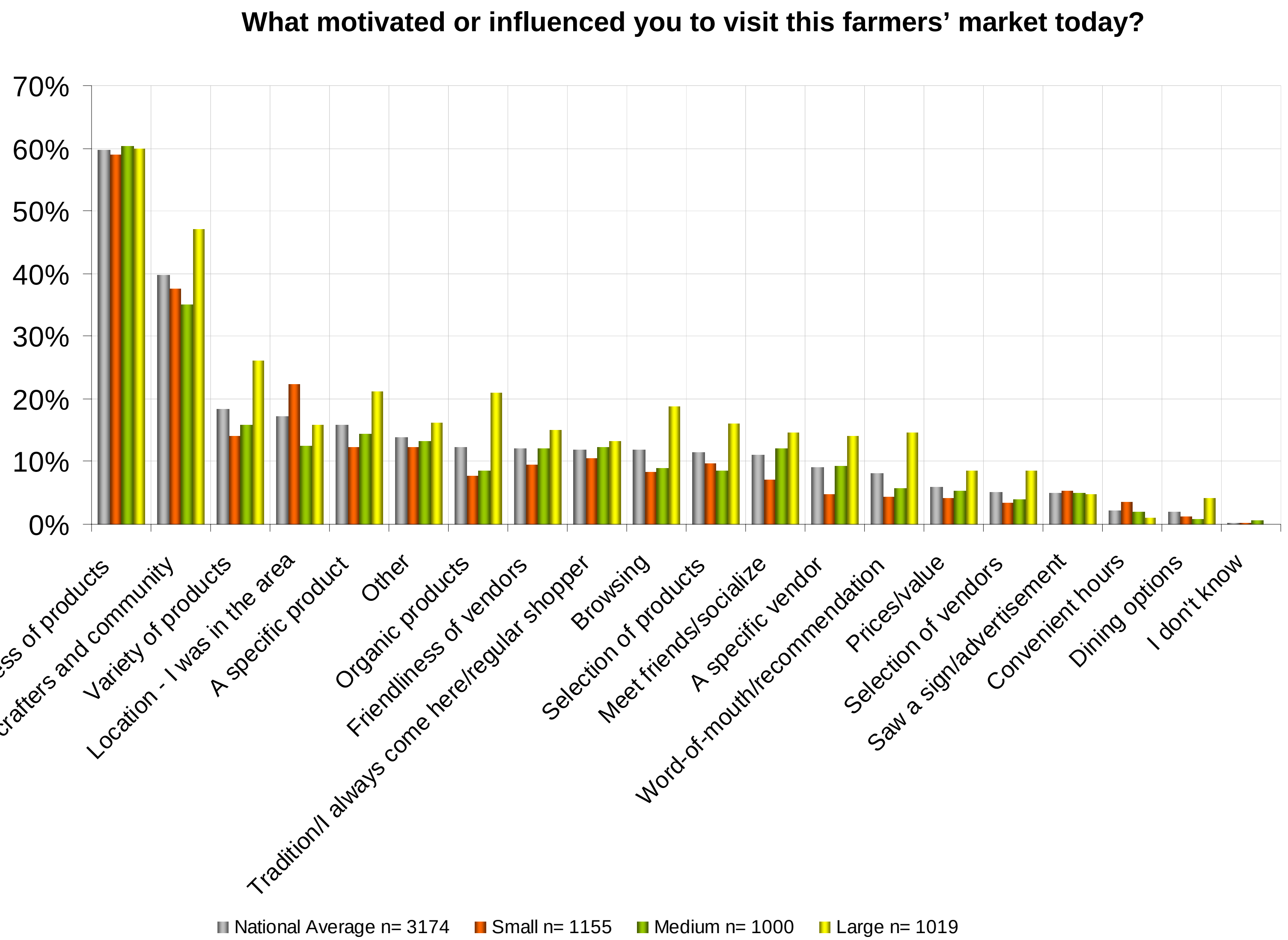
Other Responses

knowing/controlling what's in my food, samples, atmosphere/ambiance, quality, outdoors, gluten-free, website, sense of community, entertainment, environmental

Source: Customer Survey

Motivation to Visit Market by Market Size

- Large market visitors are likely to shop for a broader range of reasons

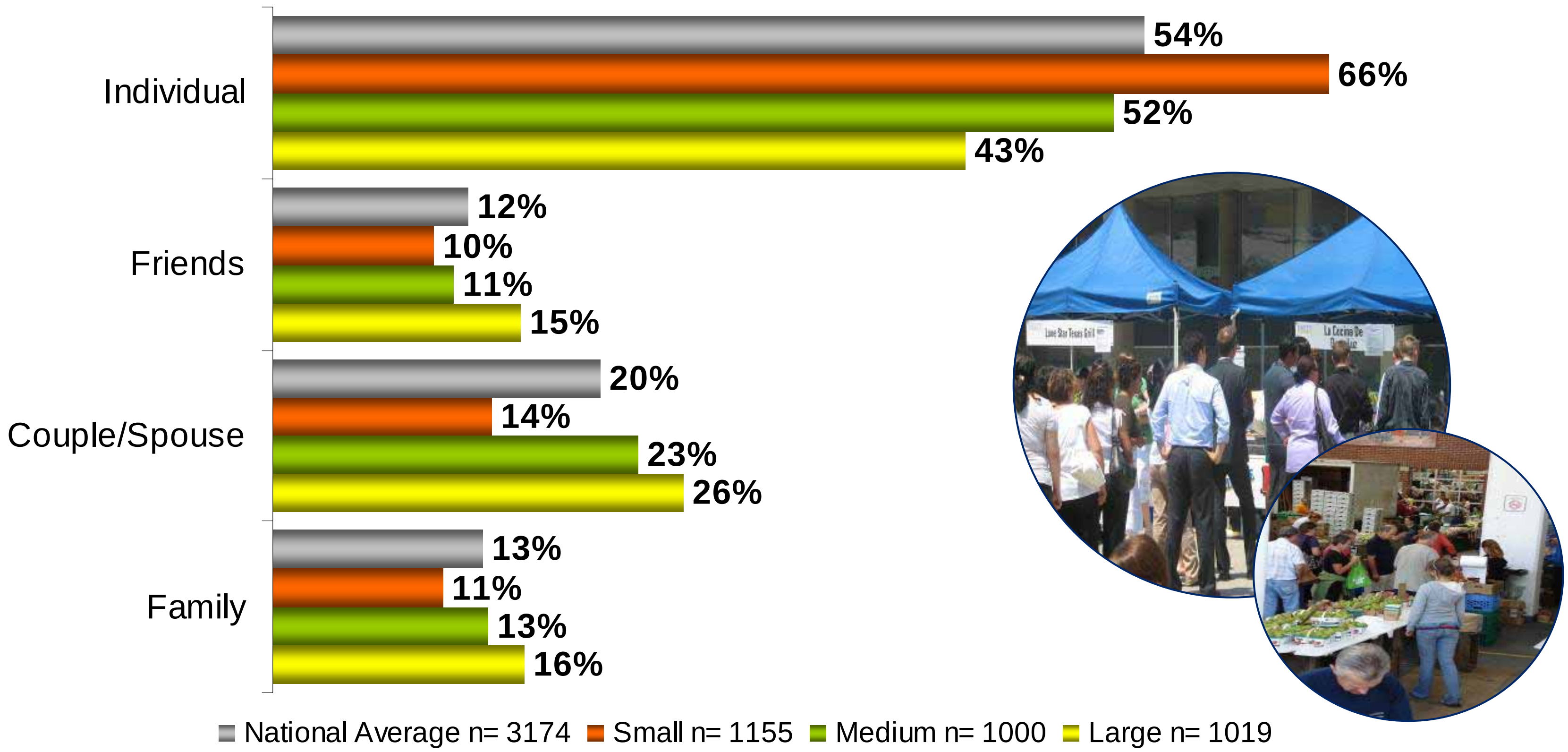


Source: Customer Survey

Group Shopping Behaviour

- As market size increases, the probability of shopping in groups increases

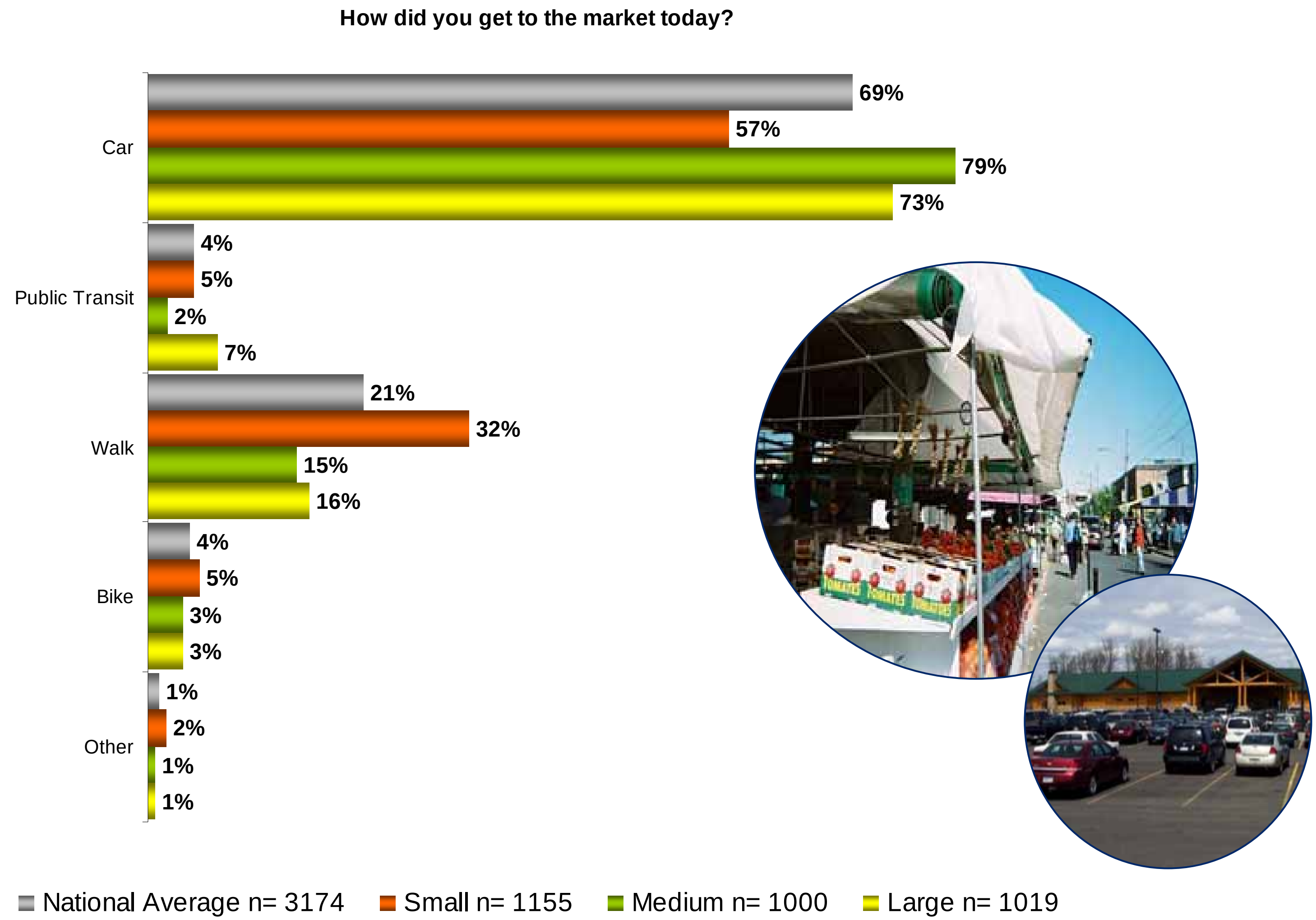
Customers Interviewed - Grouping



Source: Customer Survey

Customer Journey to Market

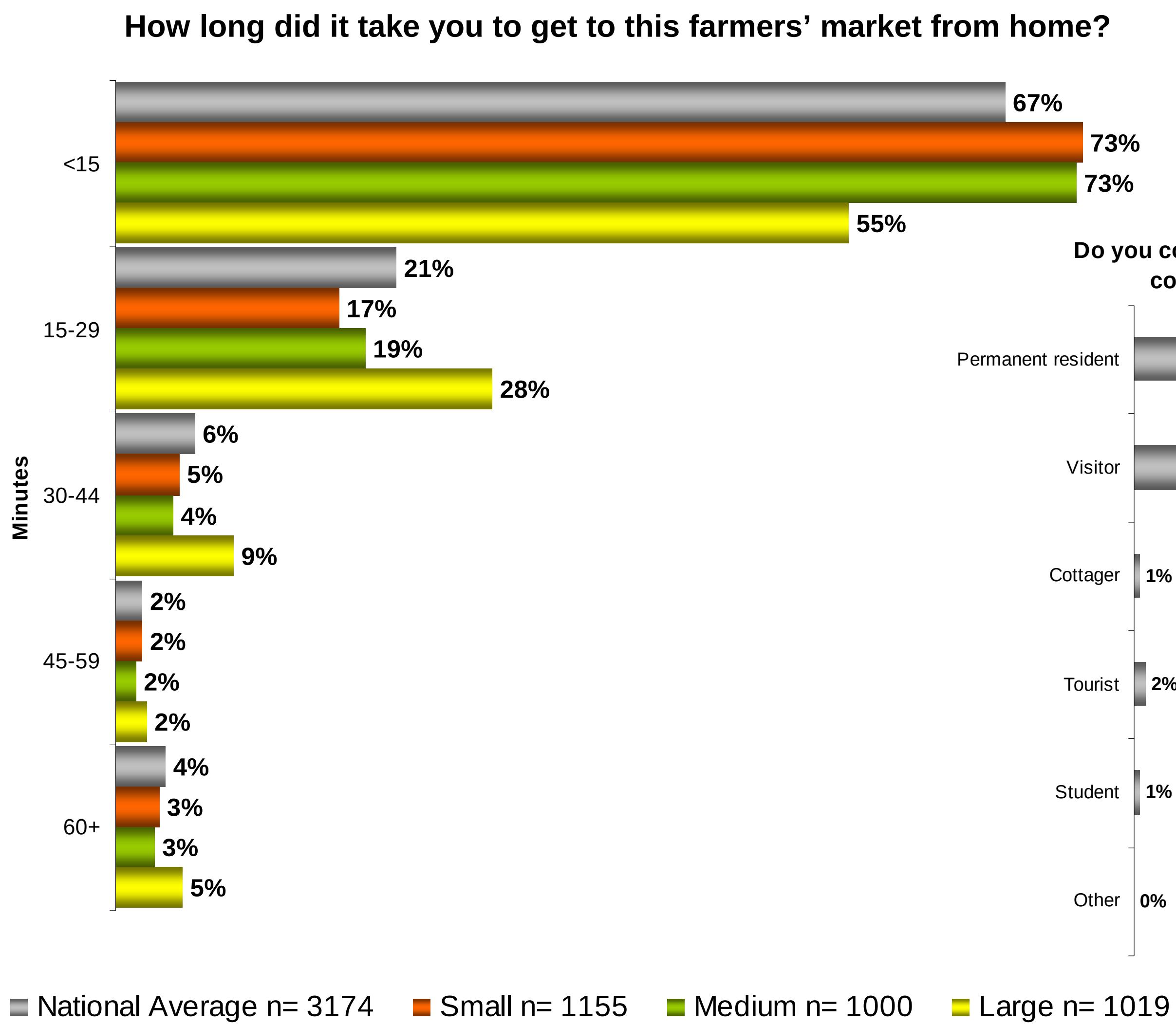
• 43% of small market customers do not come by car, but visitors to larger markets are more likely to drive

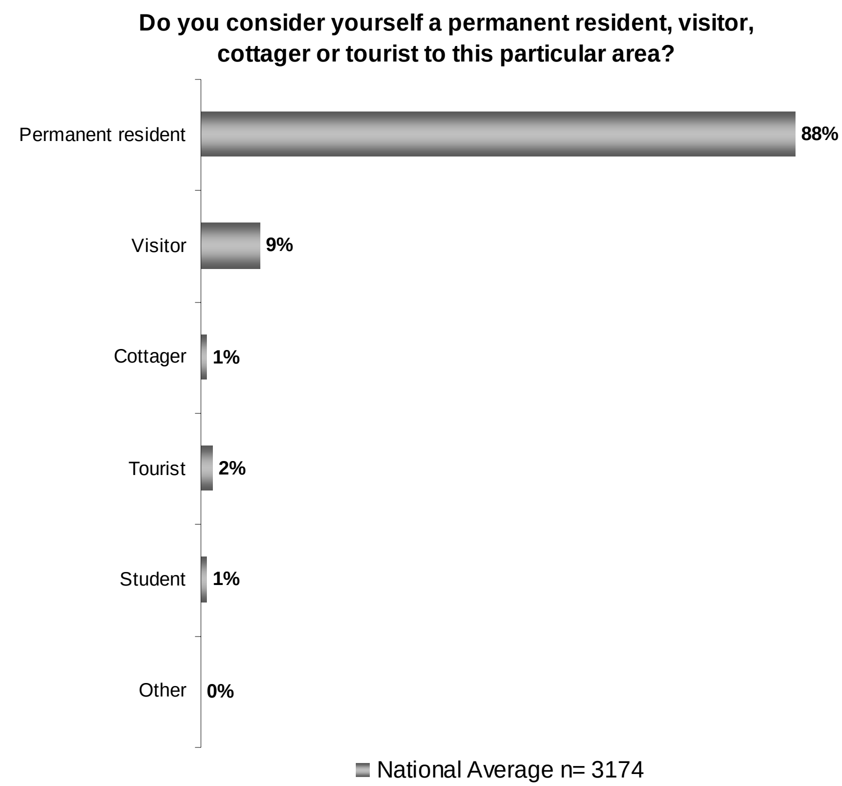


Source: Customer Survey

Customer Journey to Market

- Most markets are visited by local community members but larger markets are more likely to pull from a greater distance (16% take over 30 minutes to travel to large markets)



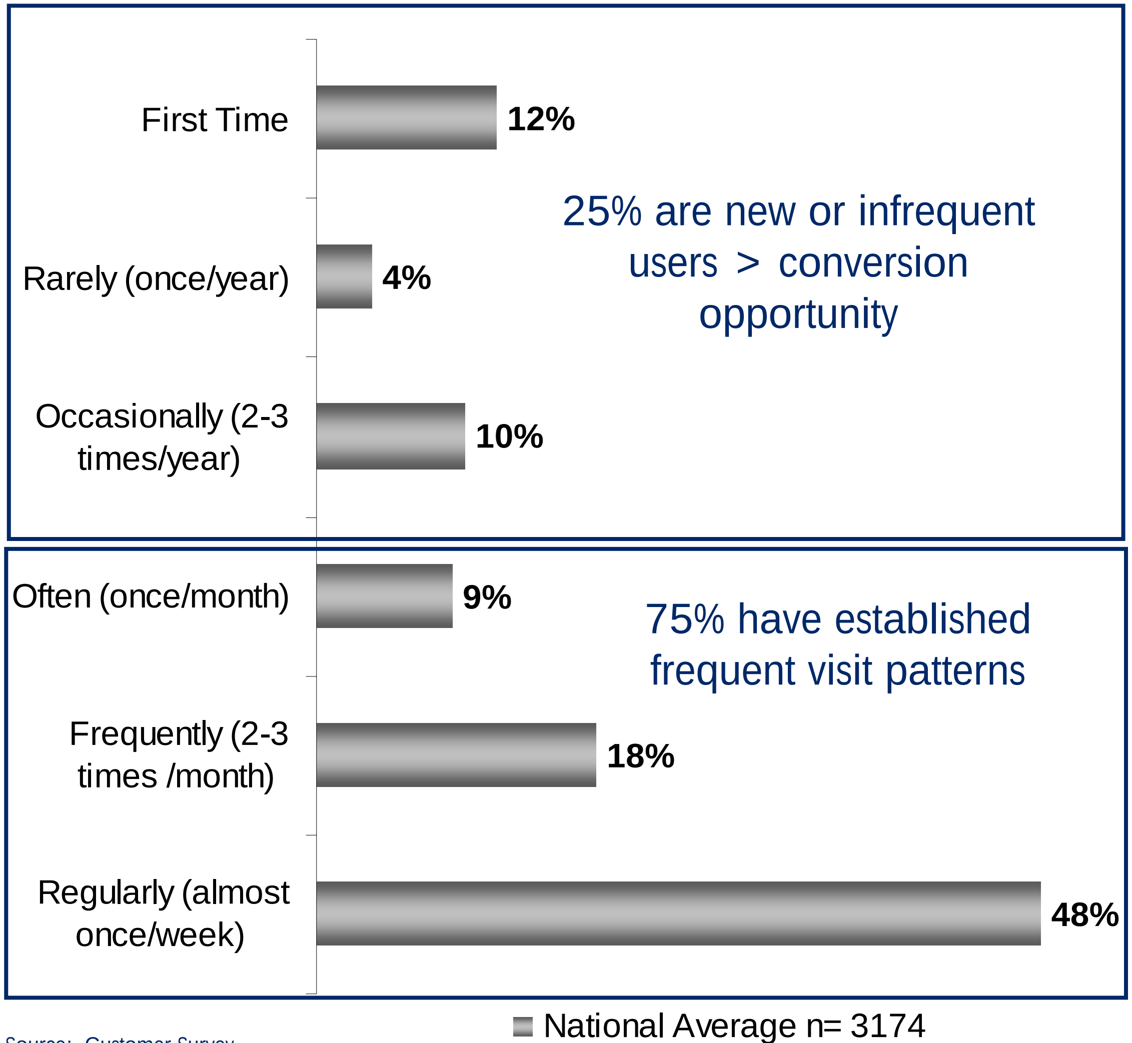


Source: Customer Survey

Frequency of Visitation

- Markets have a large, stable base of regular and frequent visitors

How often do you visit this farmers' market?

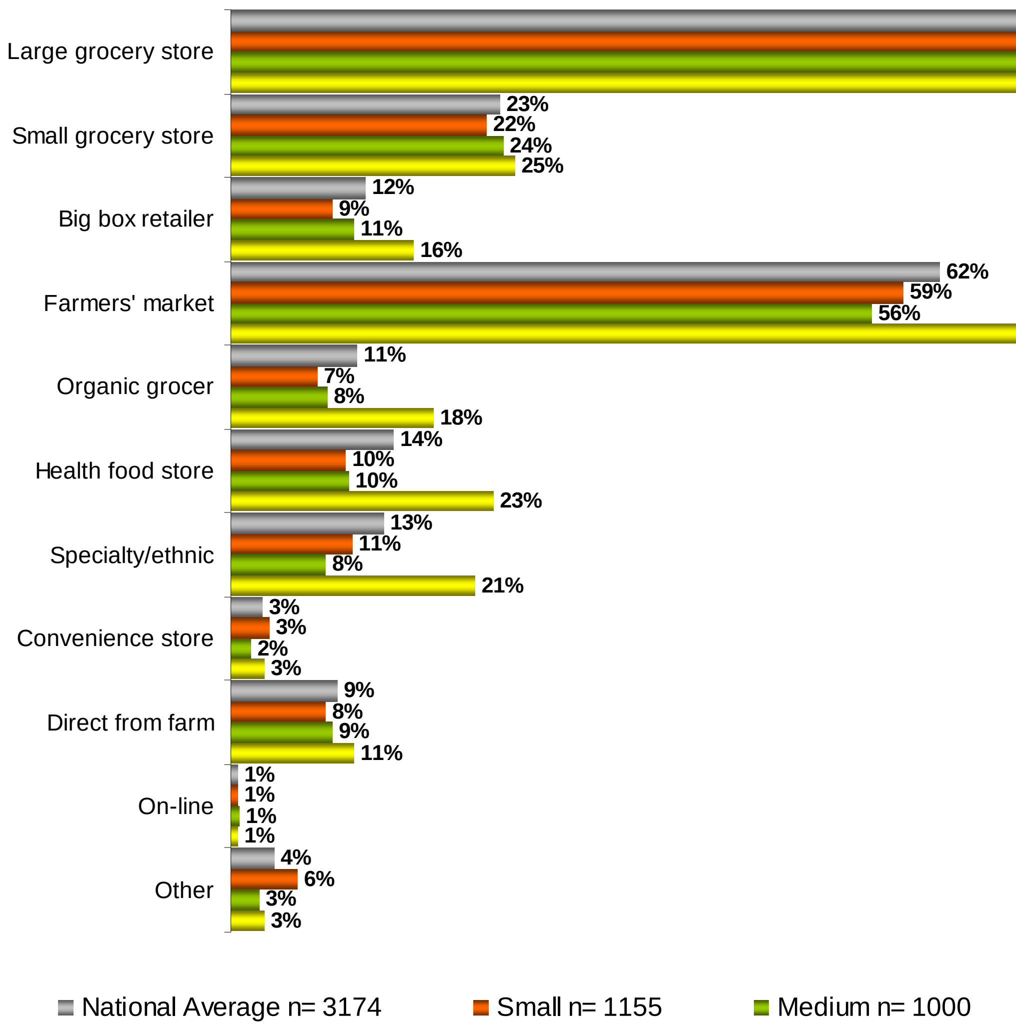


Source: Customer Survey

Grocery Purchasing Habits

- Farmers' markets are the second most popular location for customers to buy their groceries. Large markets are more likely to cater to customers who also shop at organic grocers, health food stores and specialty/ethnic stores

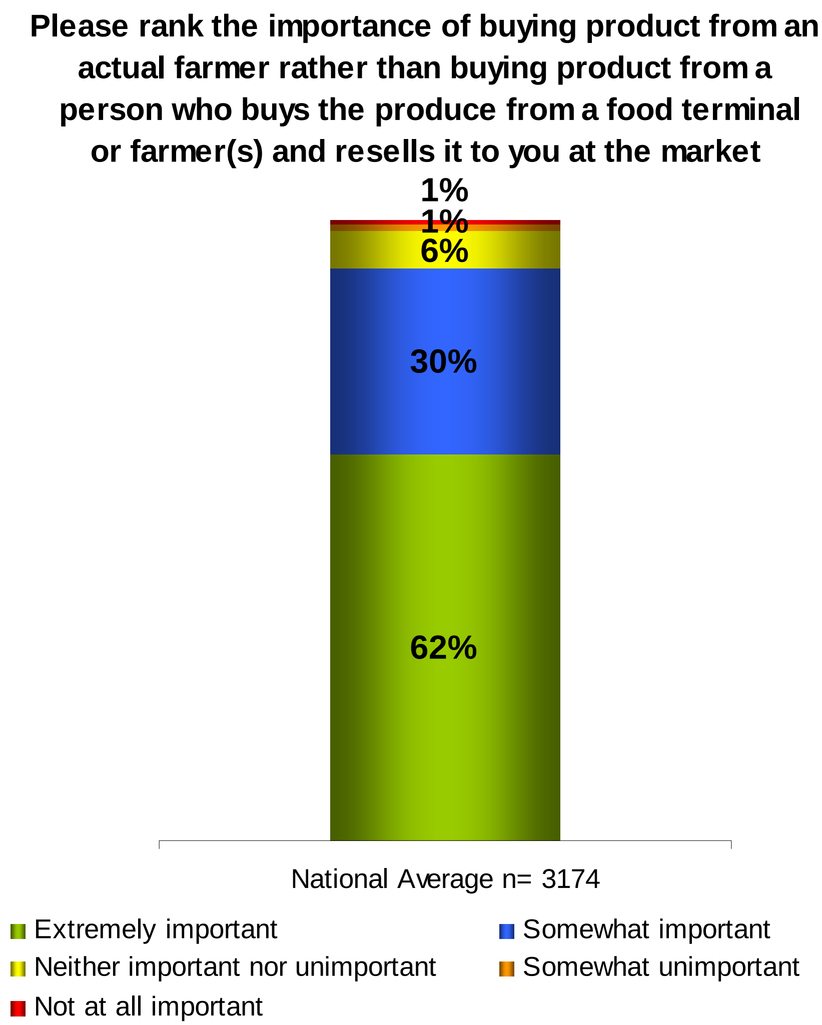
Where do you primarily shop for your grocery needs?



Source: Customer Survey

Farmer Direct Purchase Importance

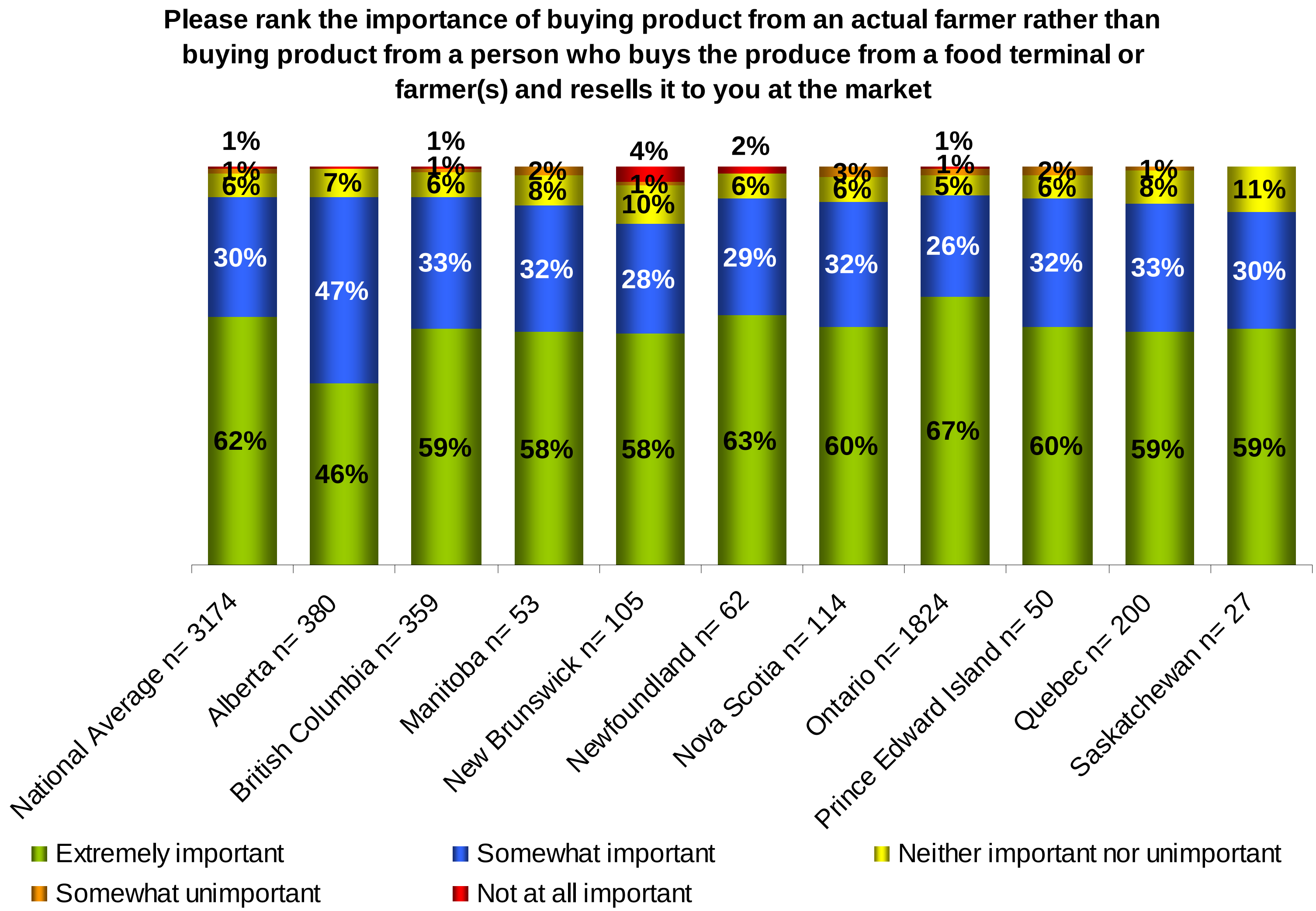
- 92% of shoppers state buying products from an actual farmer as extremely important (62%) or somewhat important (30%)



Source: Customer Survey

Farmer Direct Purchase Importance

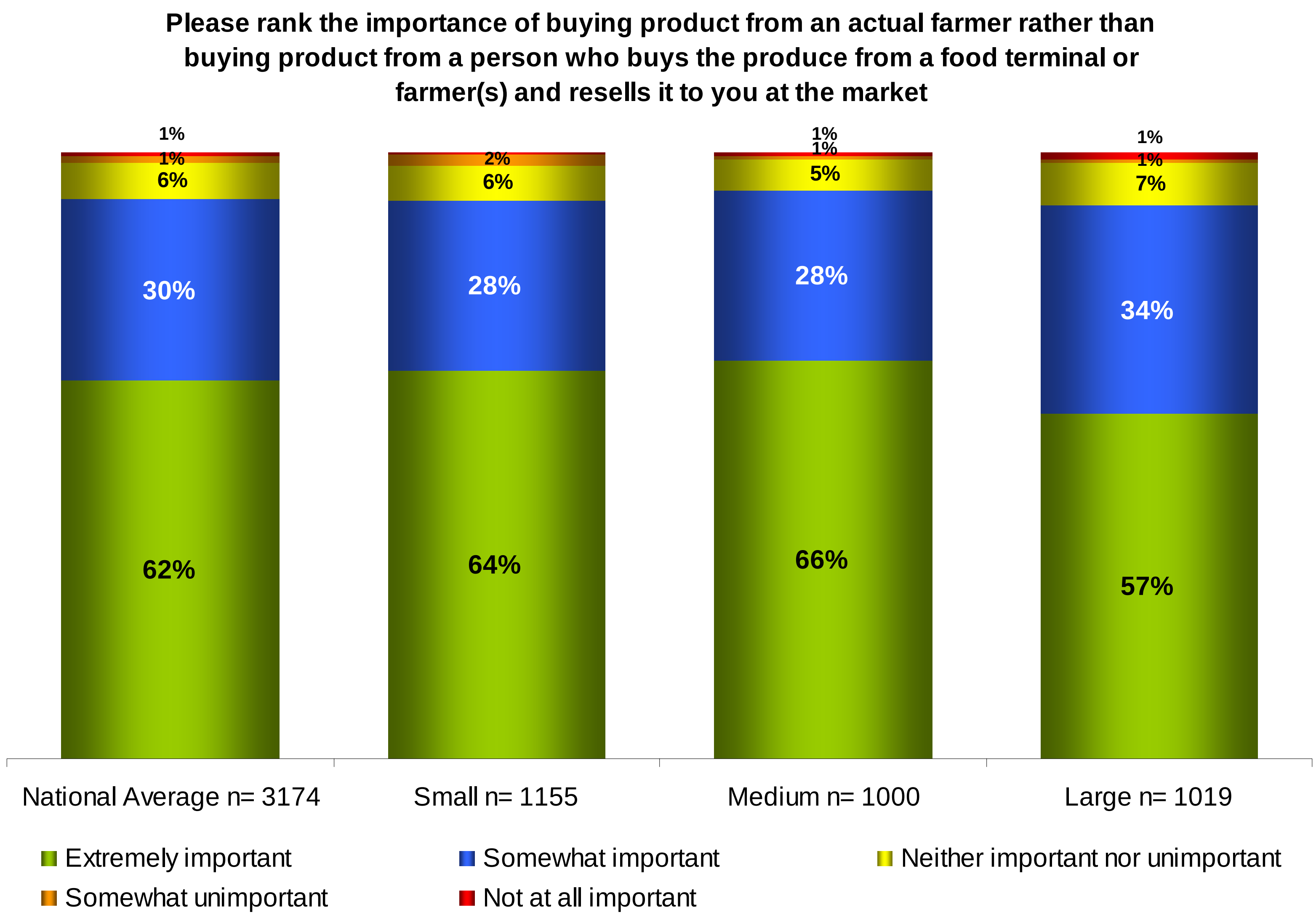
- National Comparison by Province



Source: Customer Survey

Farmer Direct Purchase Importance

- Customers at all sizes of markets believe it is important to buy from local producers

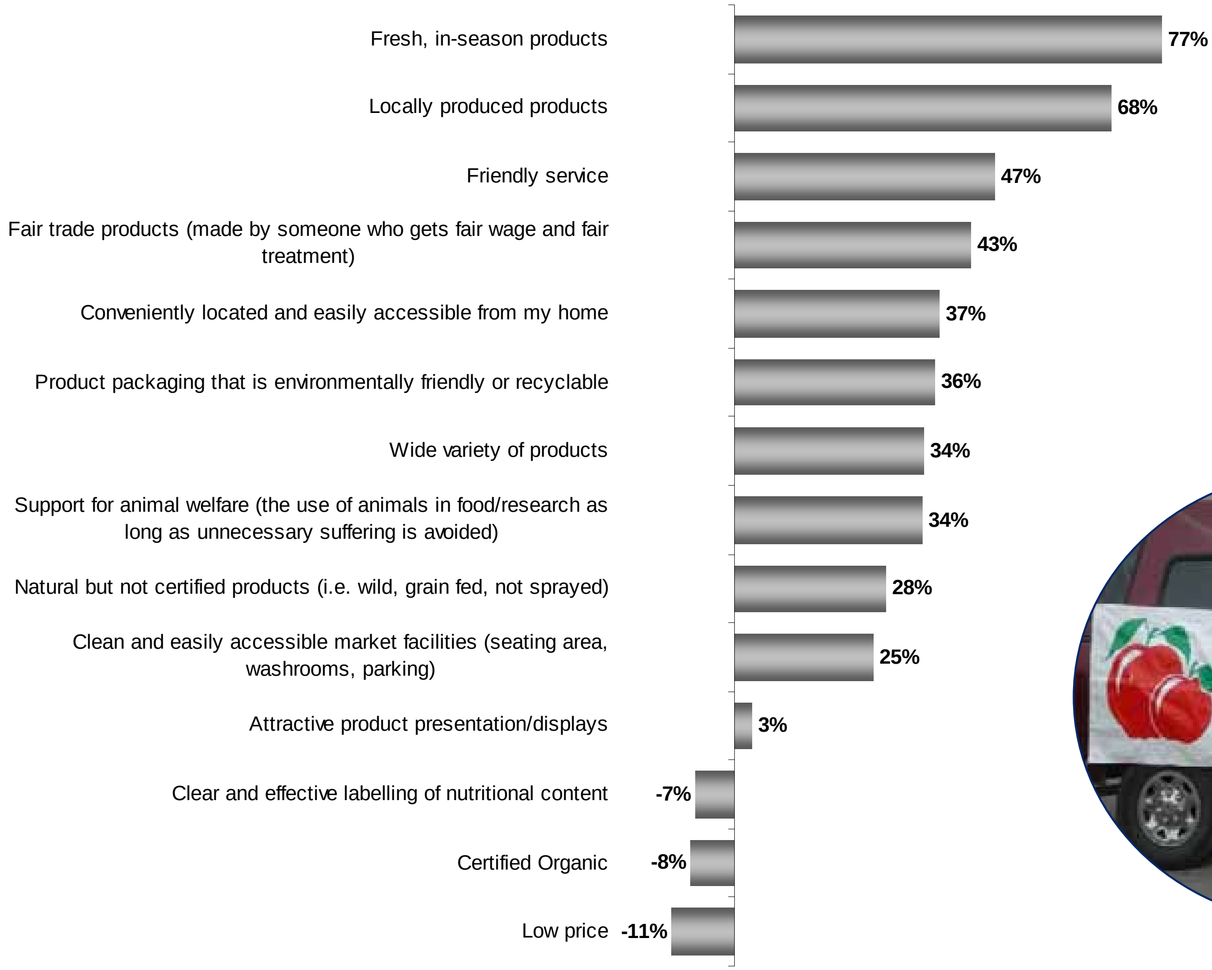


Source: Customer Survey

Market Factor Importance

- The majority of customers believe that fresh, in-season, locally produced products are the most important factors that markets deliver. The least important factors are certified organic, low price, and nutritional labelling

How important are the following to you?



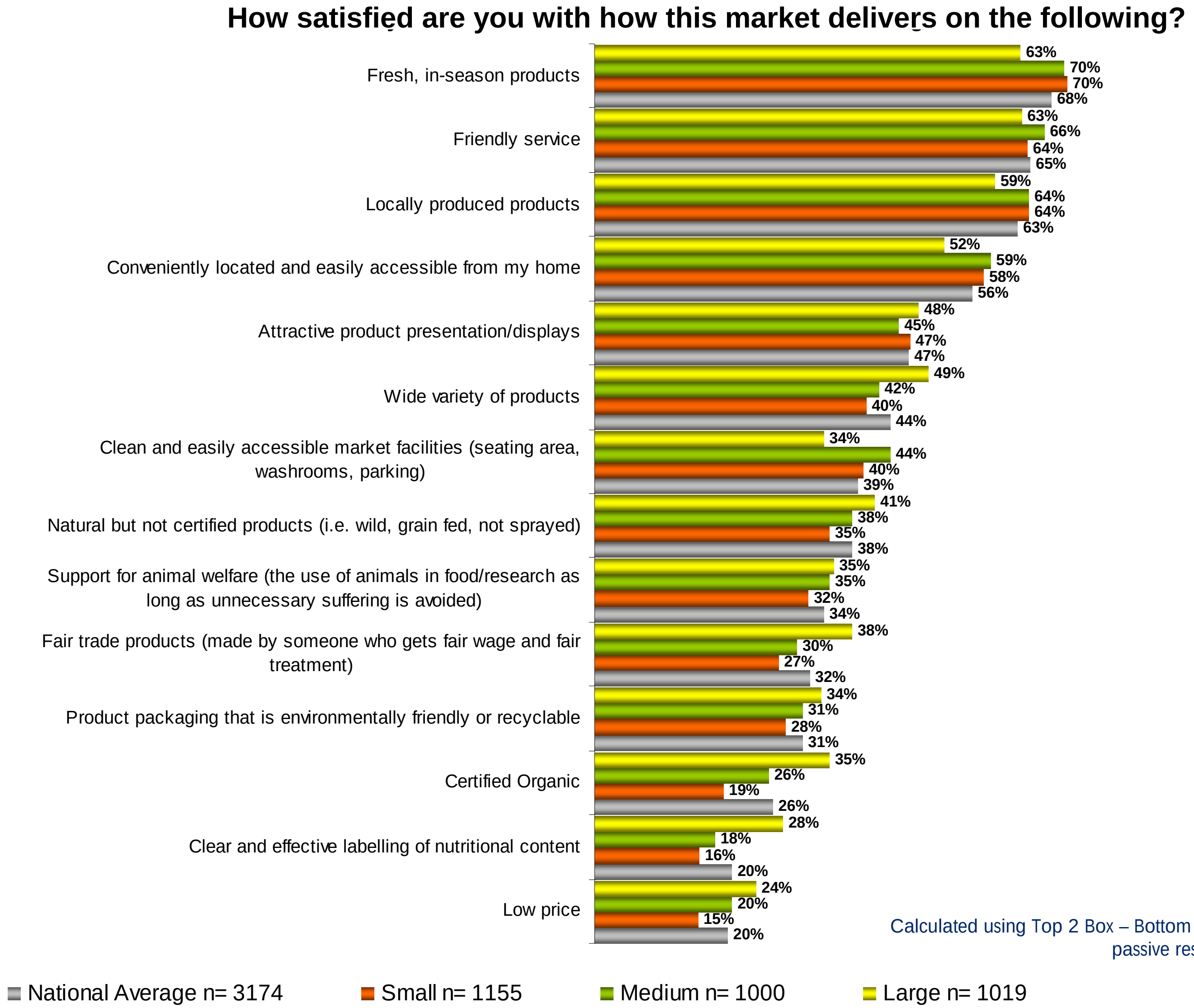
National Average n=3174

Calculated using Top 2 Box – Bottom 6 Boxes on a 10 point scale (removes passive respondents)

Source: Customer Survey

Satisfaction with Market Delivery of Key Factors

- Customers are satisfied that their market provides fresh, local products delivered in convenient locations with attractive displays and friendly service

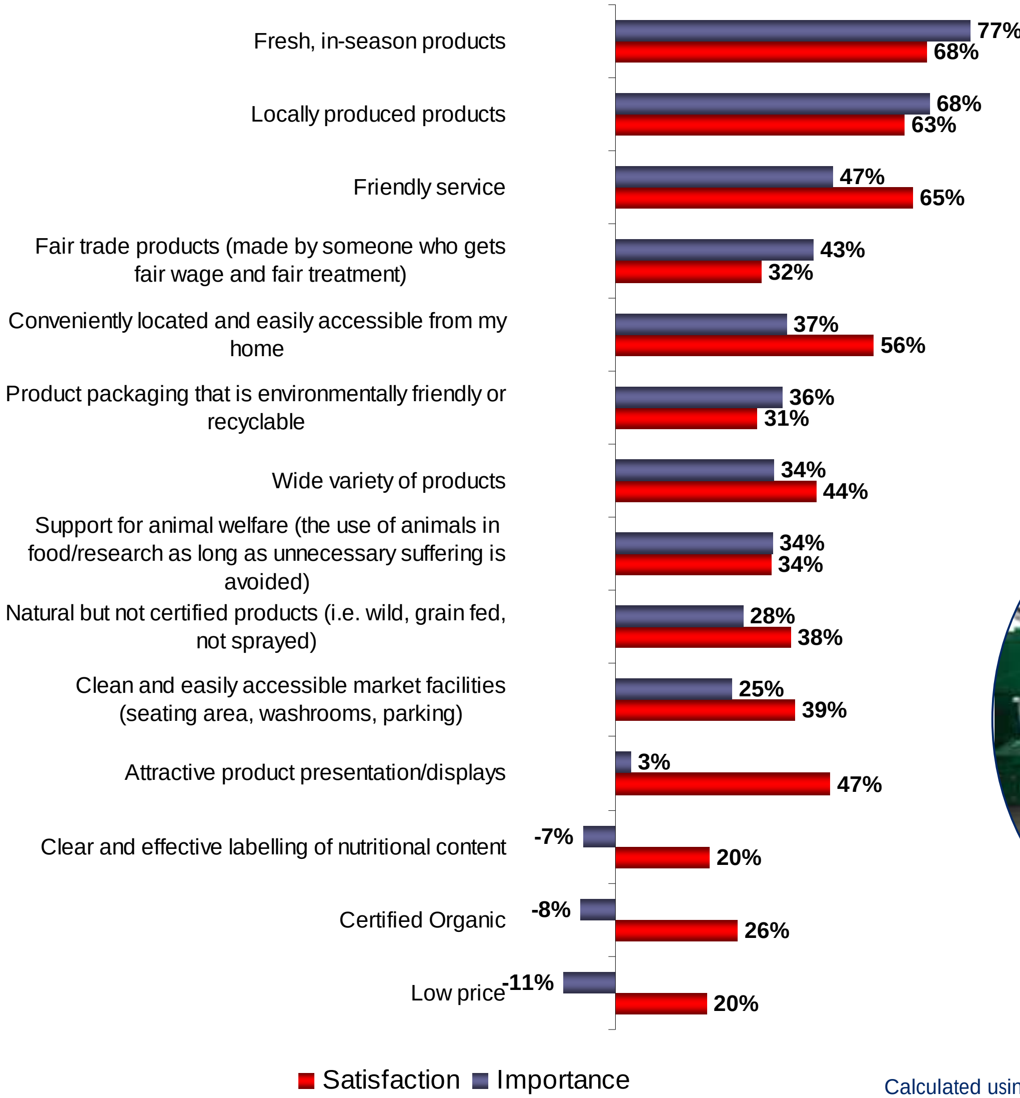


Calculated using Top 2 Box – Bottom 6 Boxes on a 10 point scale (removes passive respondents)

Source: Customer Survey

Market Factor Importance vs. Satisfaction

- Satisfaction aligned to the importance customers feel for key factors will drive opportunity for the industry. Customers place more importance on fresh and local products than is currently being delivered – an opportunity.

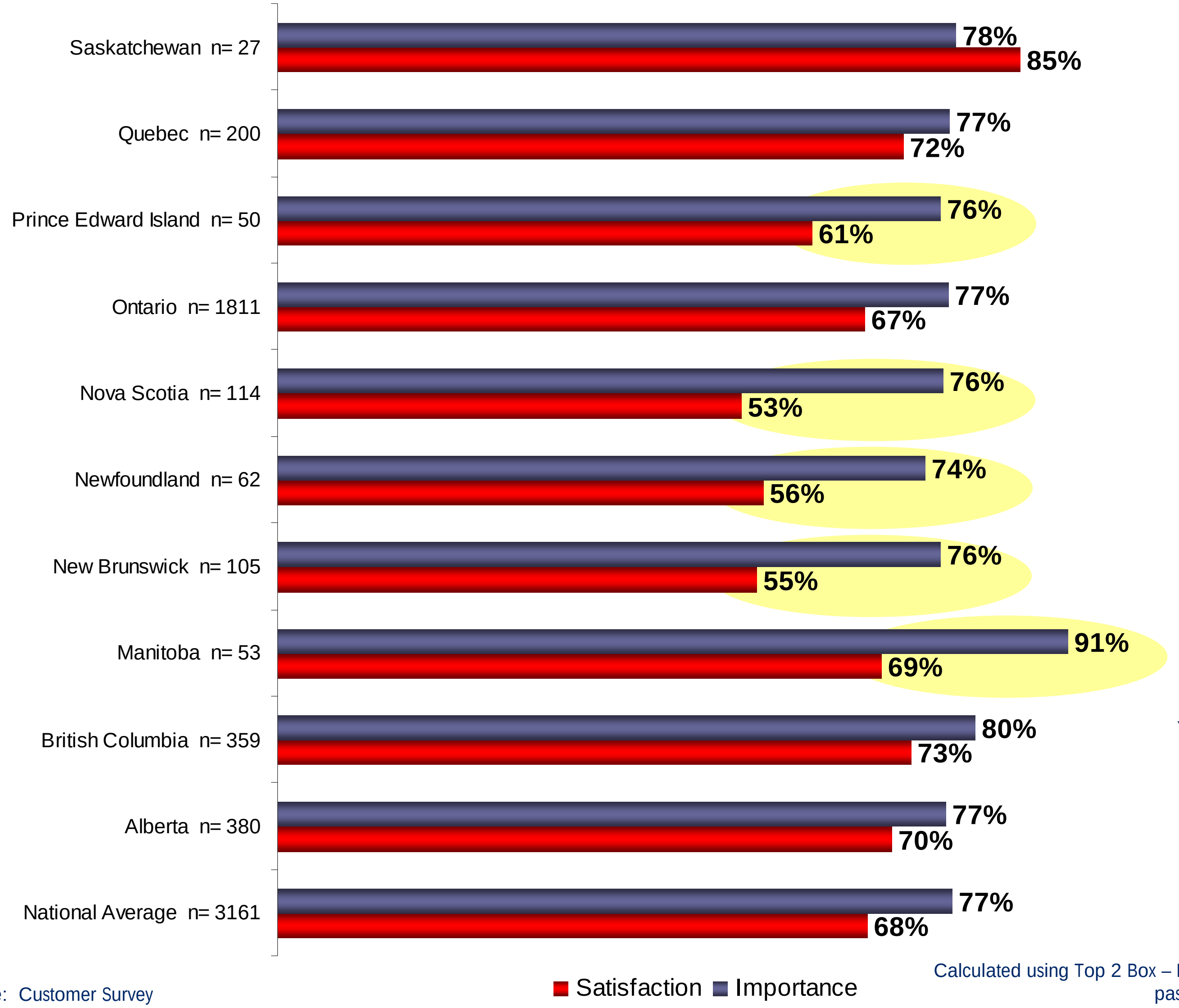


Calculated using Top 2 Box – Bottom 6 Boxes on a 10 point scale (removes passive respondents)

Source: Customer Survey

Impact of Fresh, In-Season Products

- National Comparison of Importance versus Satisfaction with delivery of fresh/seasonal by province



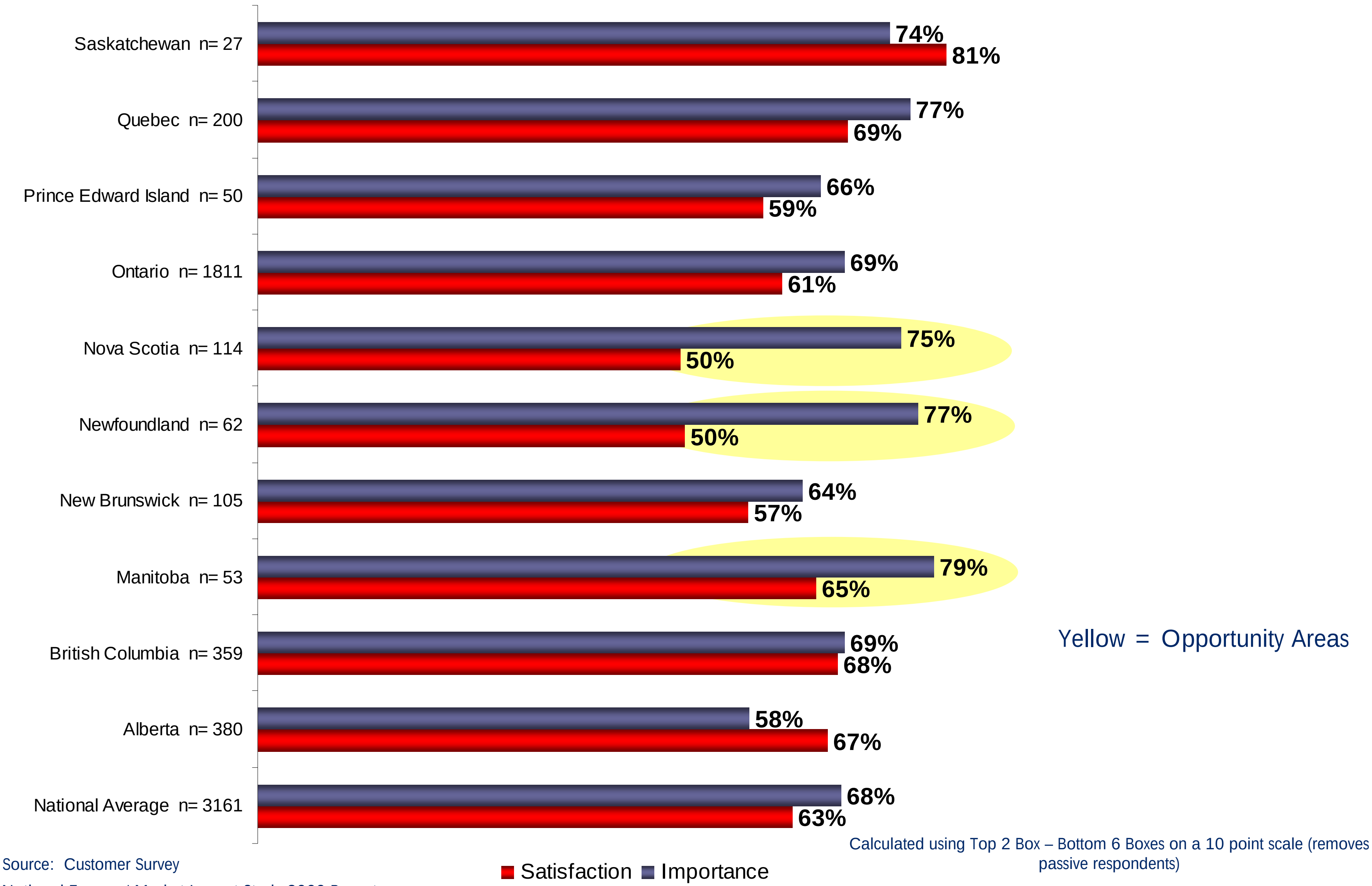
Yellow = Opportunity Areas

Calculated using Top 2 Box – Bottom 6 Boxes on a 10 point scale (removes passive respondents)

Source: Customer Survey

Impact of Locally Produced Products

- National Comparison of Importance versus Satisfaction with delivery of local products by province

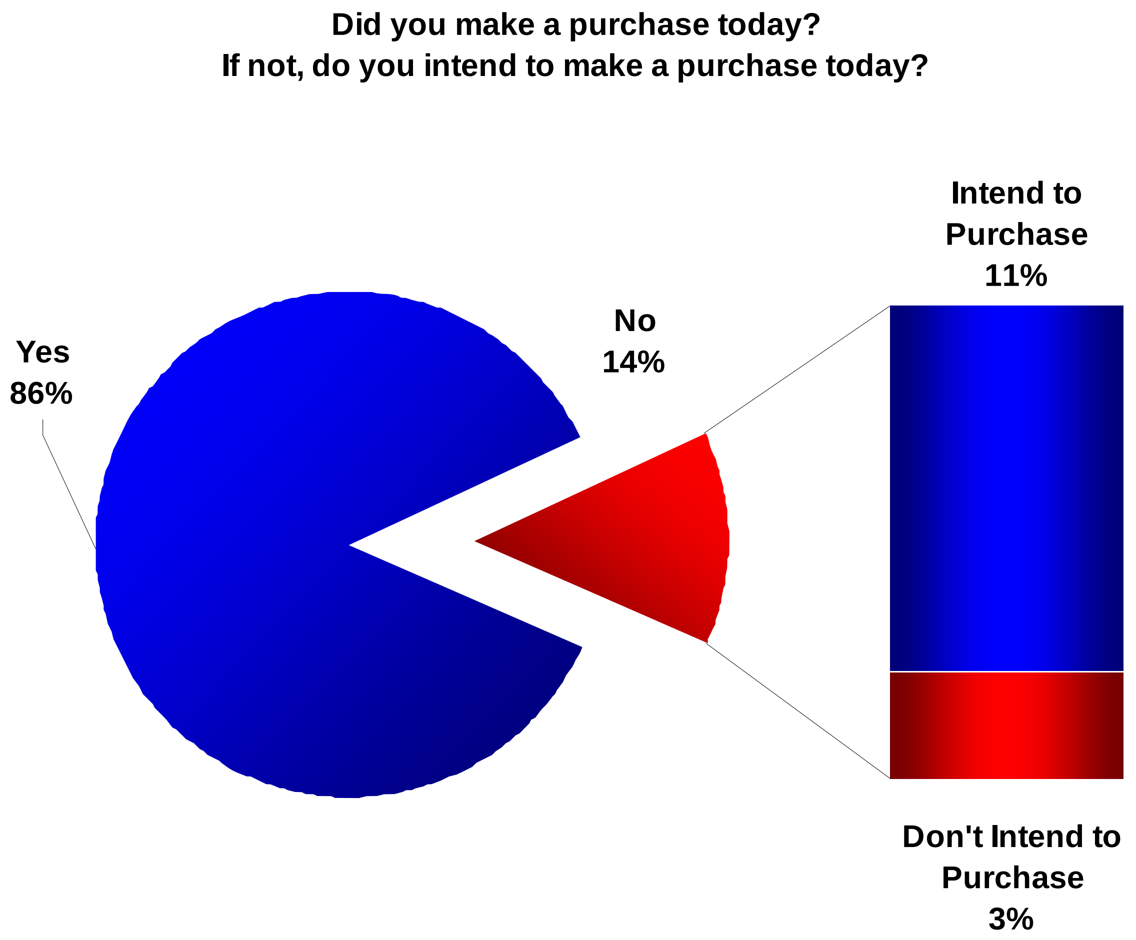


Calculated using Top 2 Box – Bottom 6 Boxes on a 10 point scale (removes passive respondents)

Source: Customer Survey

Purchase Intent Profile

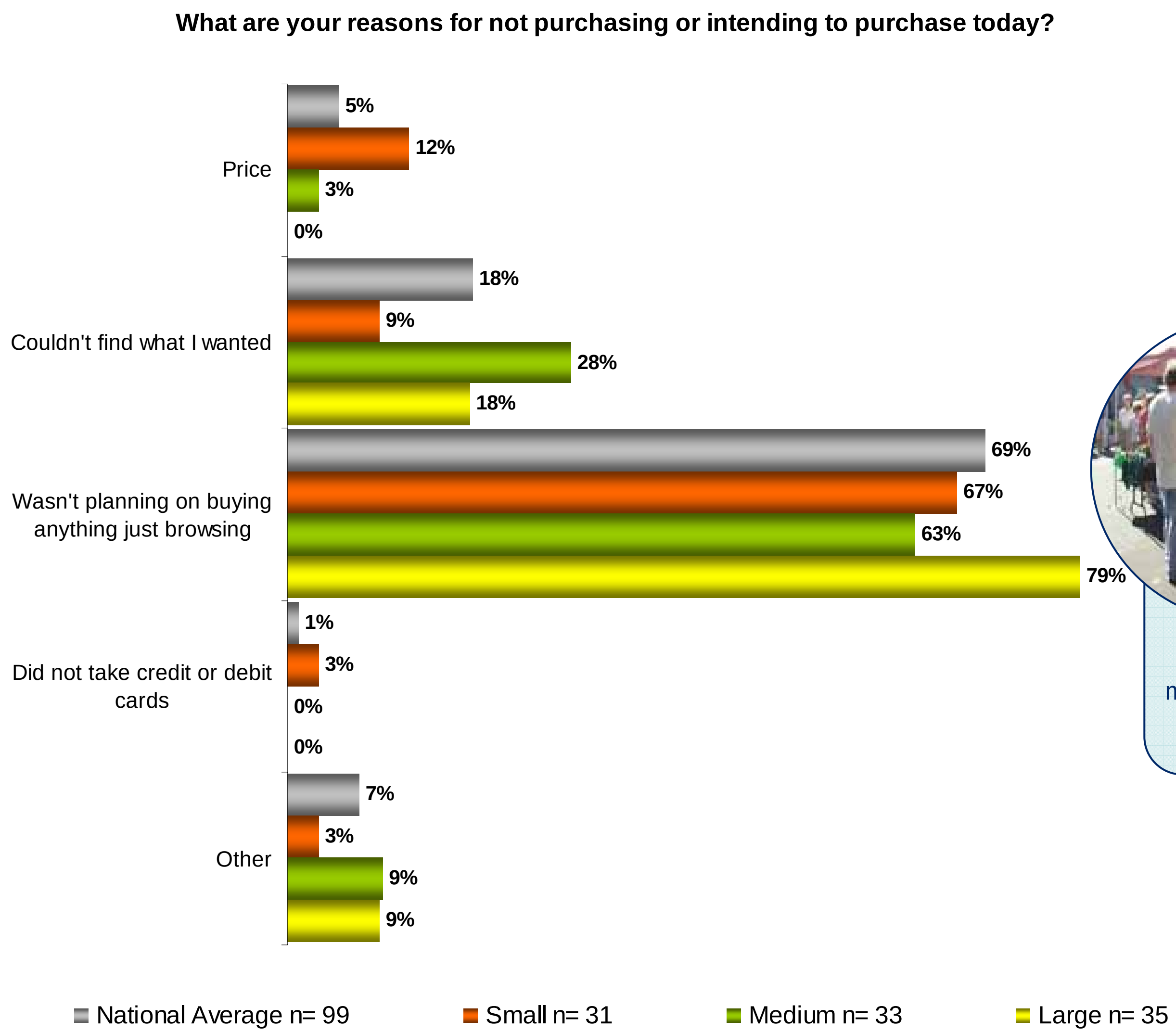
- 97% of market customers have made or intend to make a purchase at the market



Source: Customer Survey

Reasons for Not Purchasing

- Small market customer purchasing is more likely to be impacted by price
- Large markets are more impacted by non-purchaser browsing



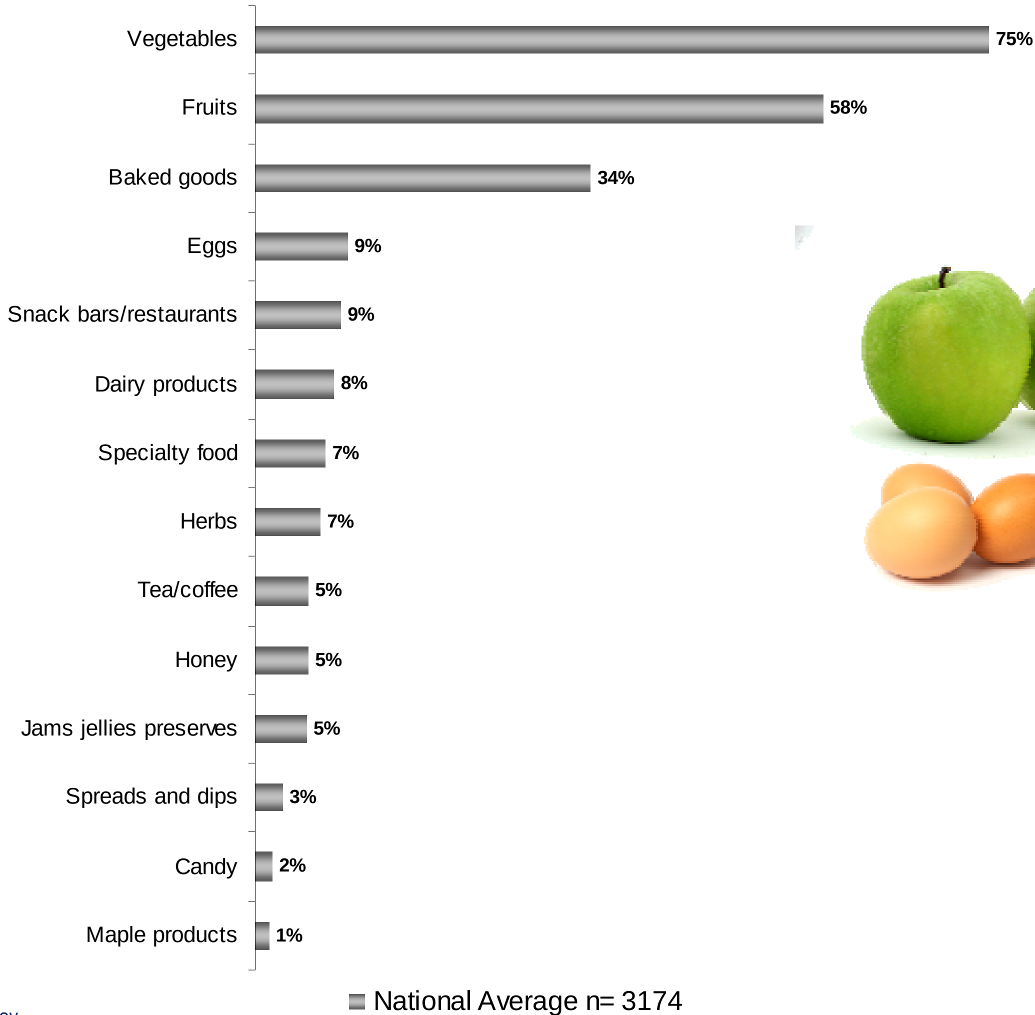
Other Responses

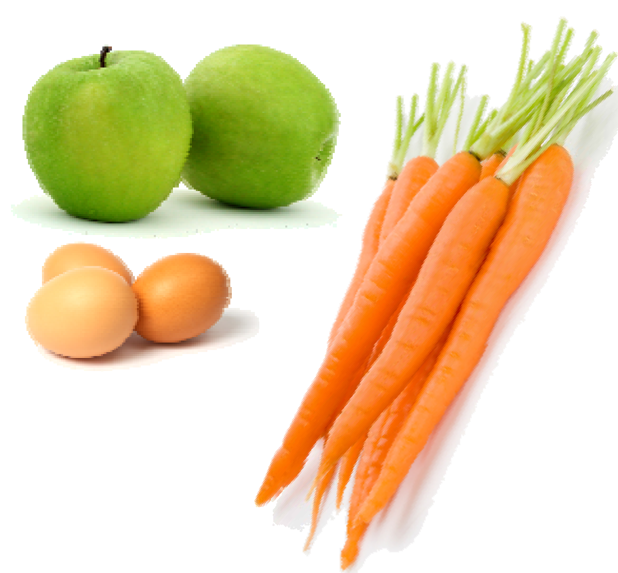
staying at hotel, can buy at grocery store, lack of money, have my own garden, long walk home, I do not have a cooler

Source: Customer Survey

Products Purchased -- Fruit/Vegetables/Other Food Categories

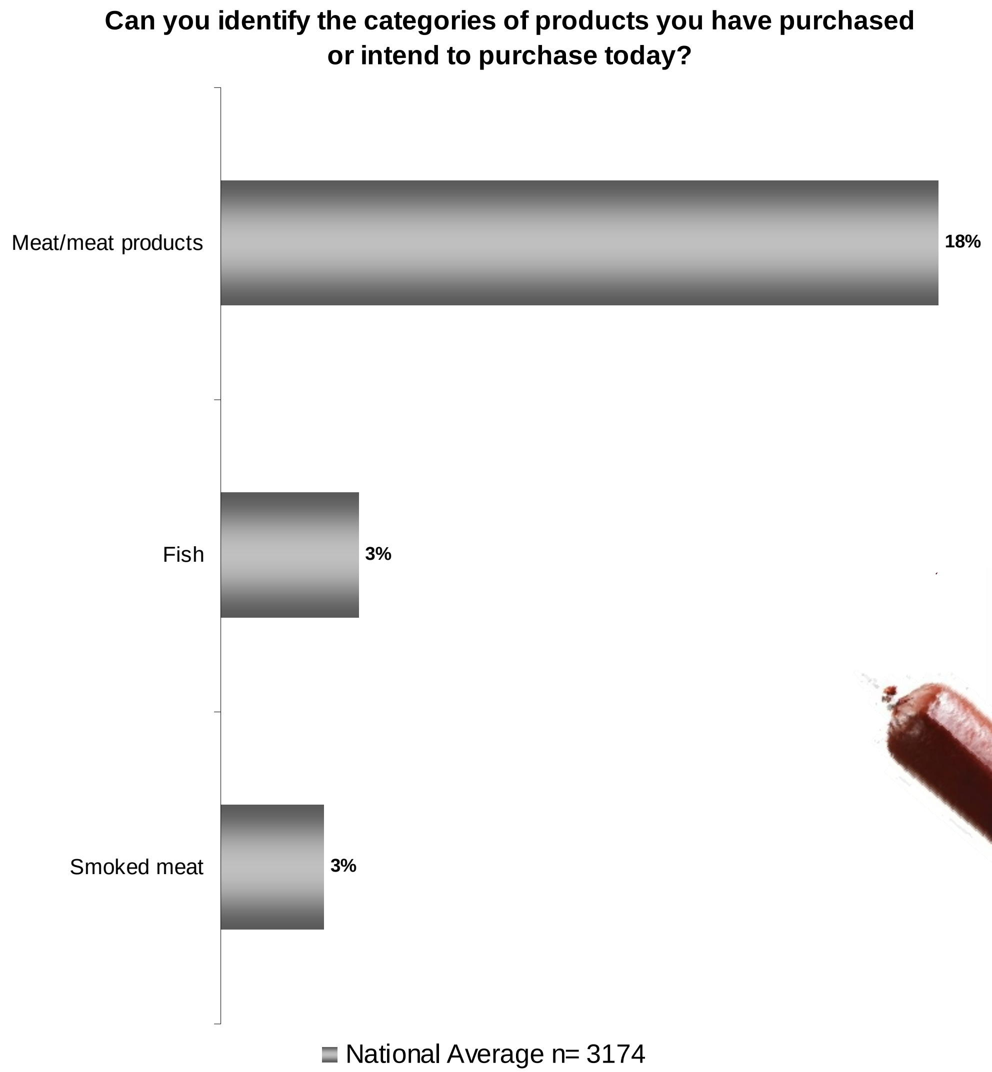
Can you identify the categories of products you have purchased or intend to purchase today?





Source: Customer Survey

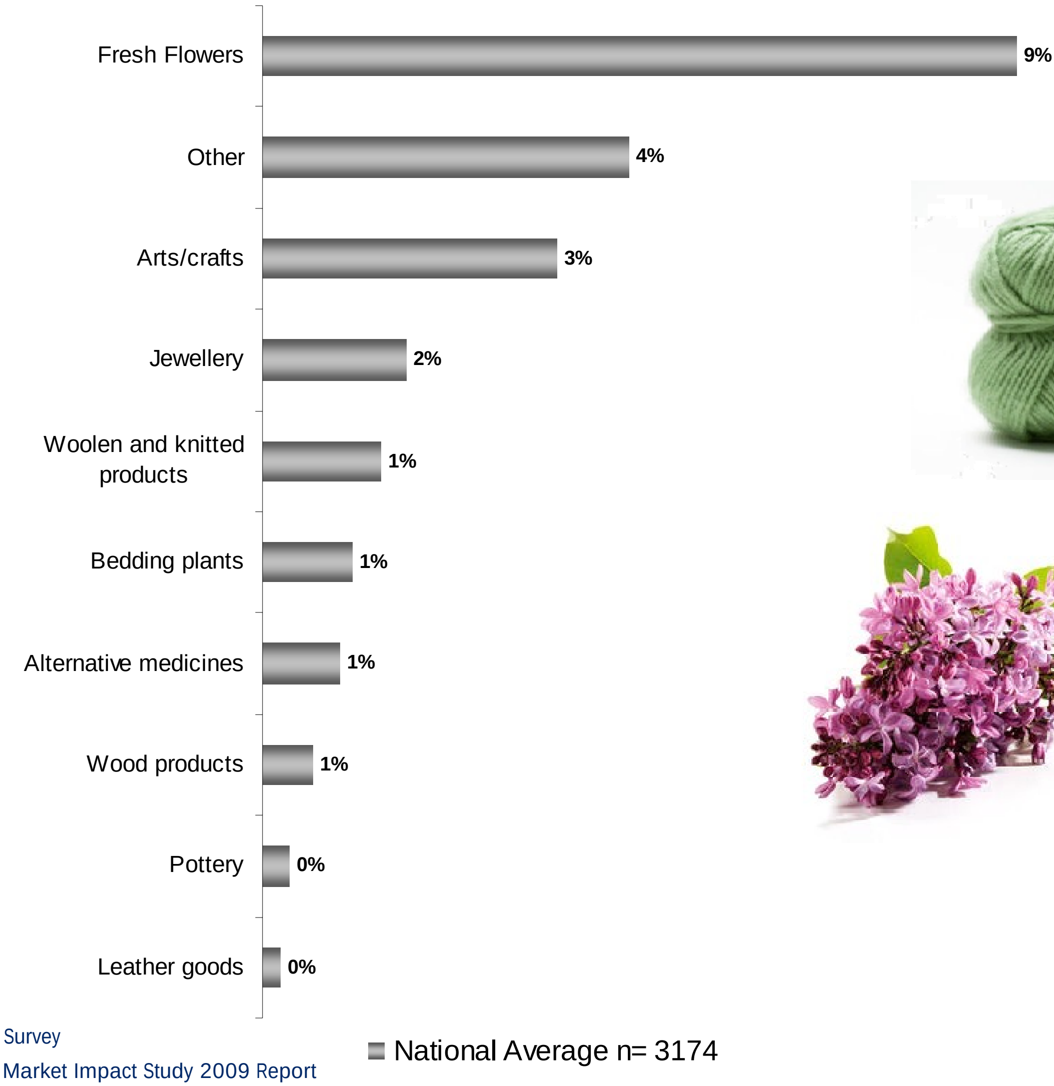
Products Purchased -- Meat/Fish



Source: Customer Survey

Products Purchased -- Non-Food

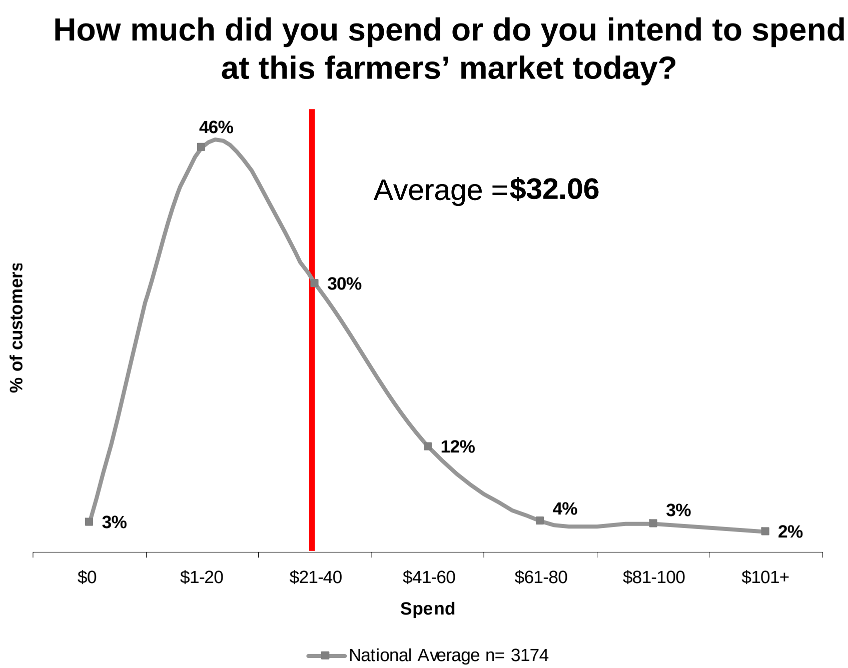
Can you identify the categories of products you have purchased or intend to purchase today?

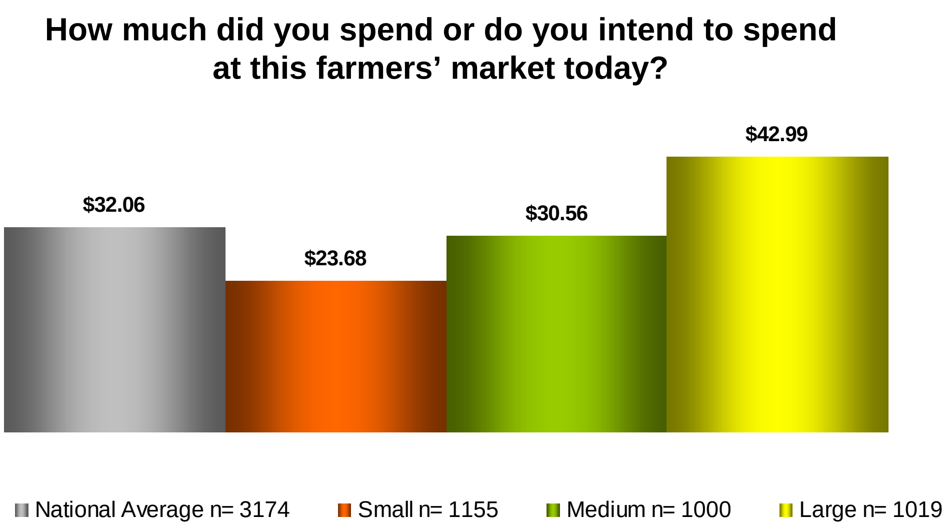


Source: Customer Survey

In-Market Spending

- Customers spent/intend to spend an average of $32.06. Small and medium market customers spend less and large market customers spend more than average

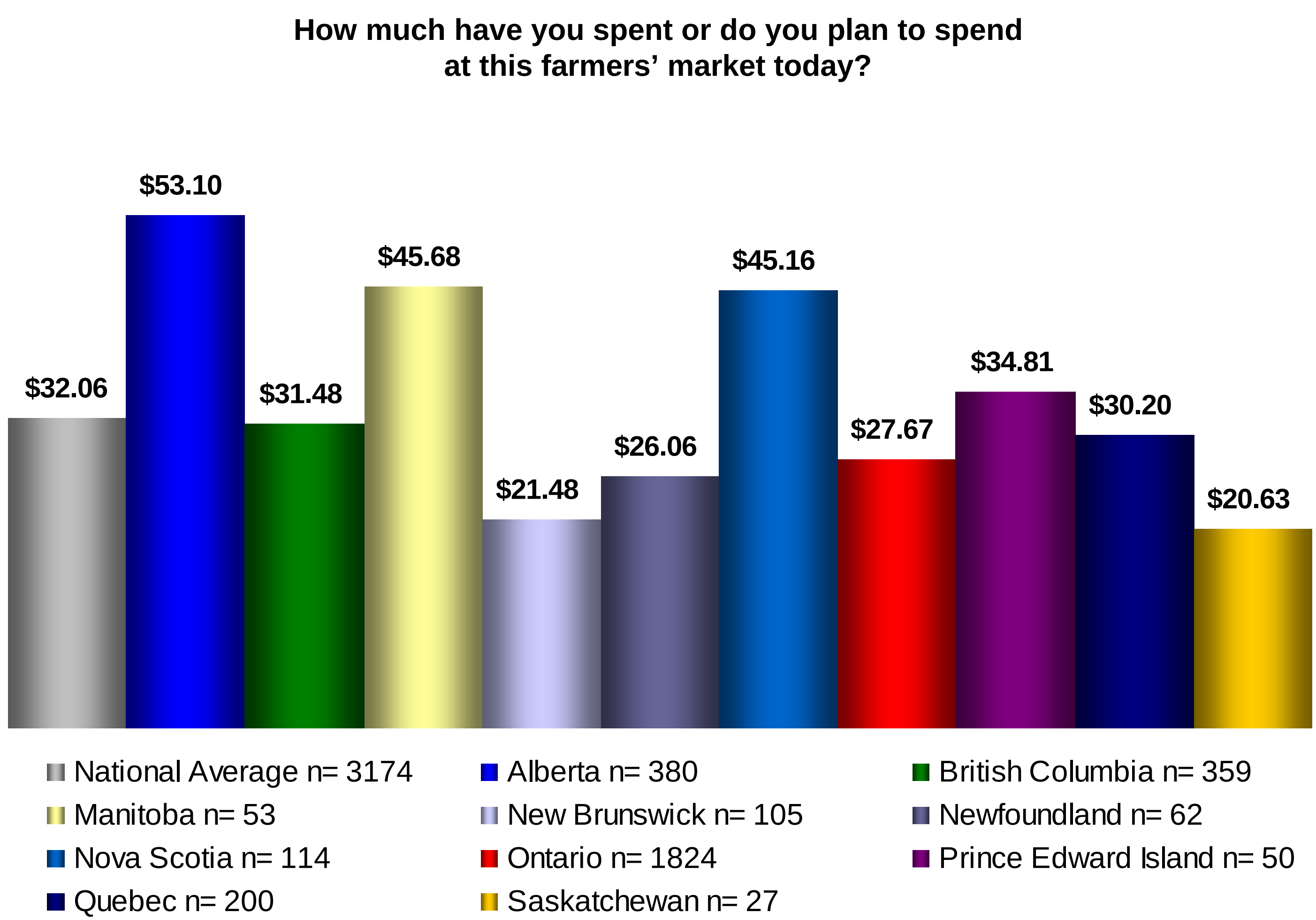




Source: Customer Survey

In-Market Spending

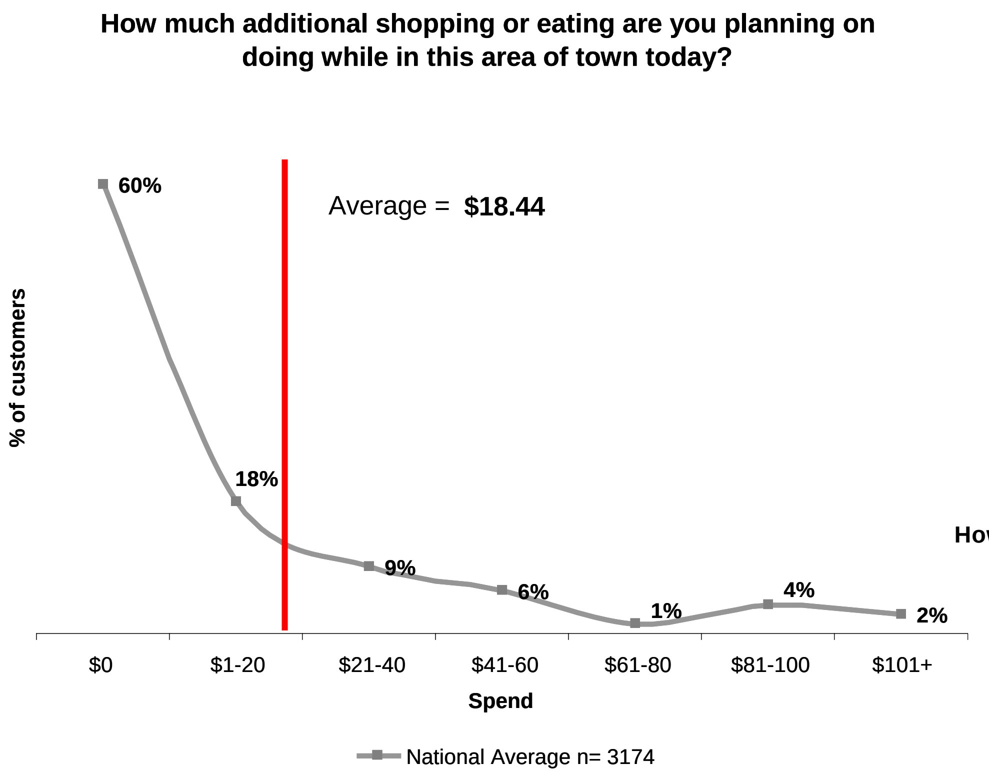
- Spending appears higher in provinces with large markets

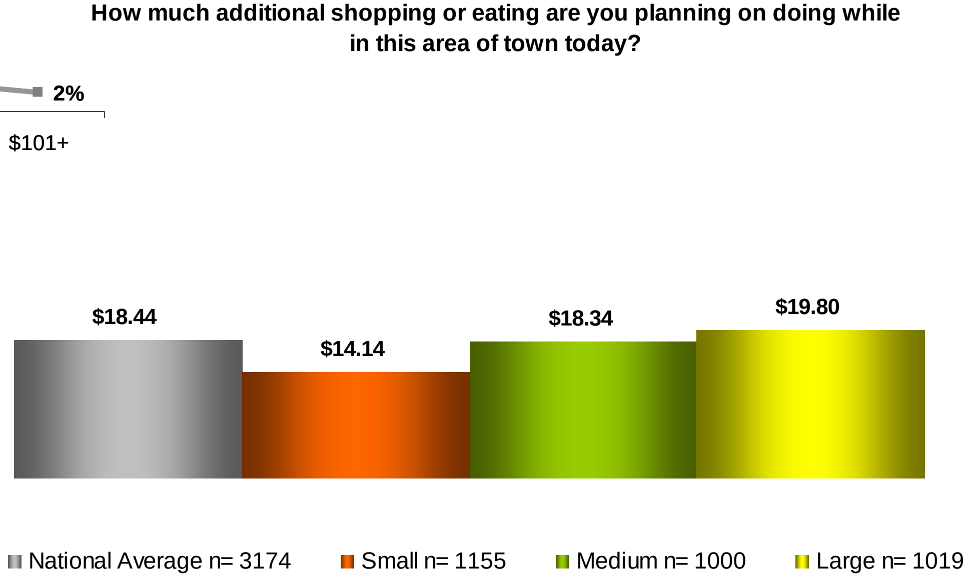


Source: Customer Survey

Additional Spending in Region

- Most customers plan to spend additional money shopping or eating after their visit to the farmers' market



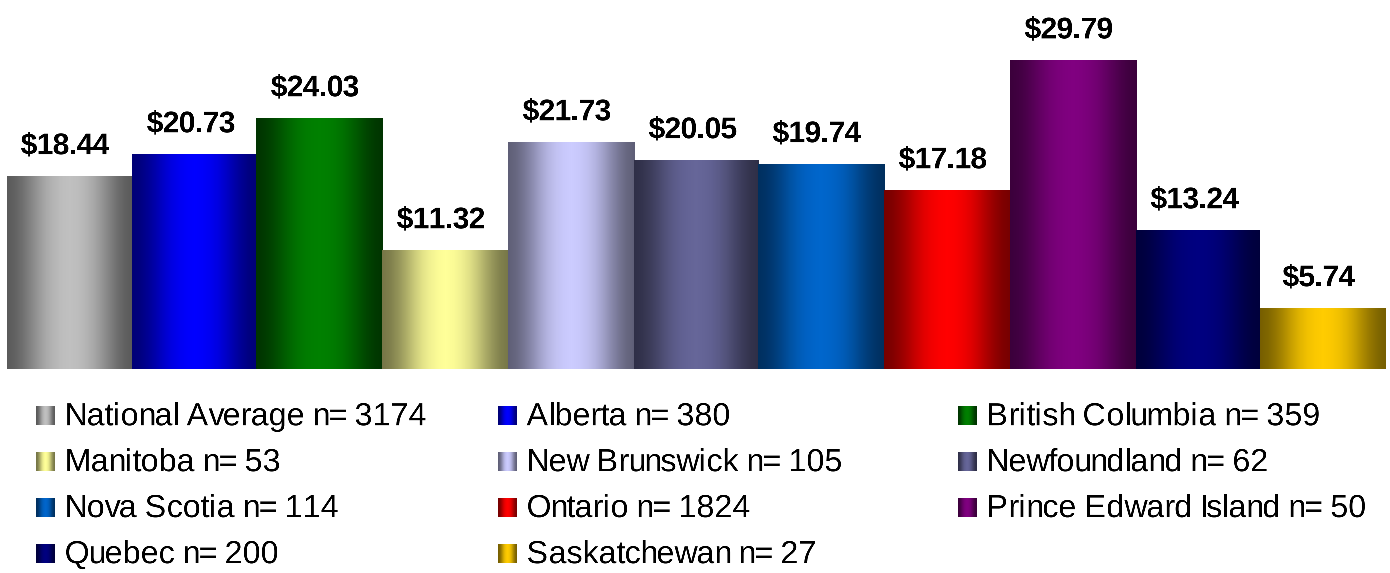


Source: Customer Survey

Additional Spending in Region

- By Province

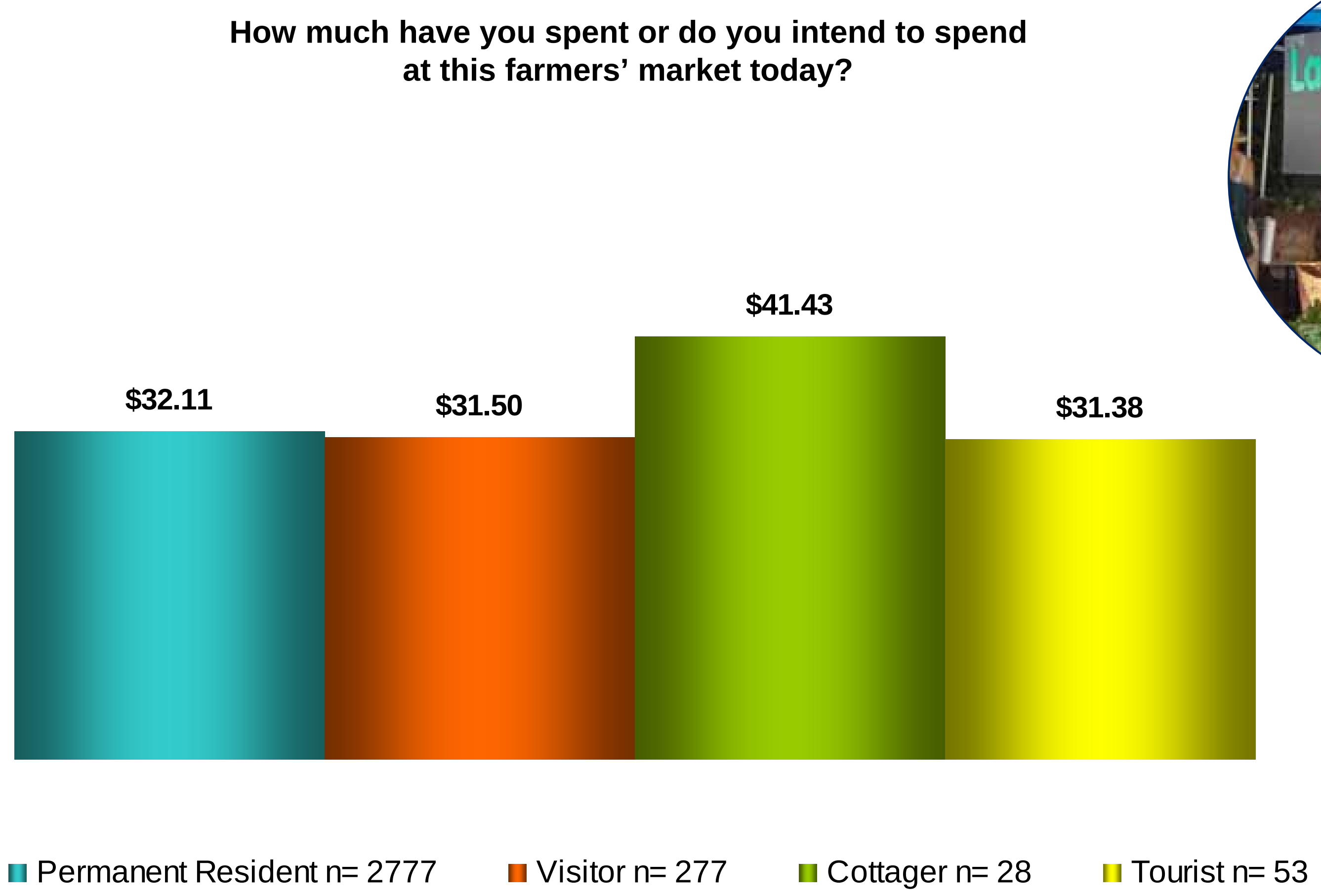
How much additional shopping or eating are you planning on doing while in this area of town today?



Source: Customer Survey

Average Spend by Type of Customer

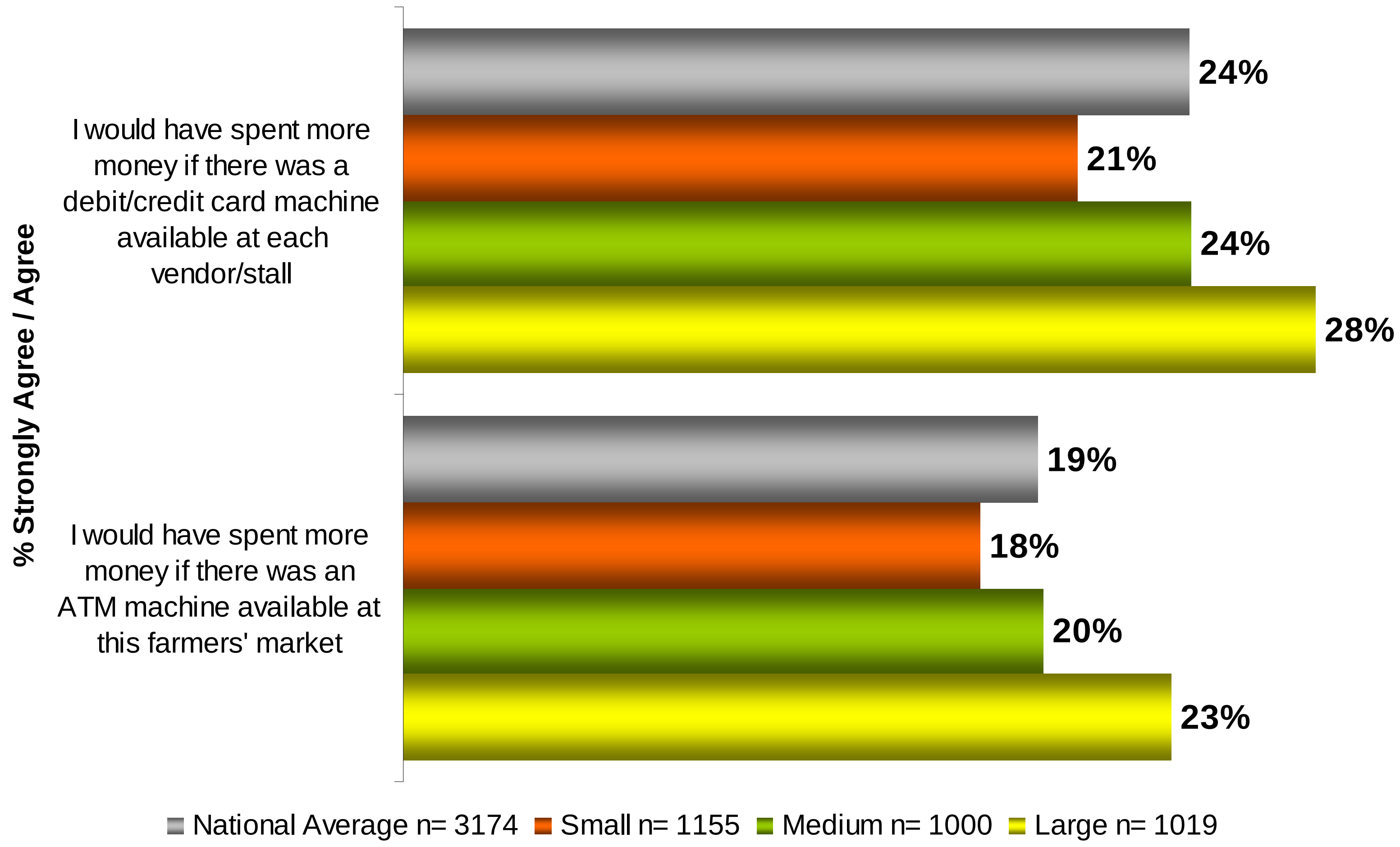
- Cottagers/Seasonal Residents are big spenders



Source: Customer Survey

Impact of Debit, Credit, ATM on Purchase

- 18-28% of customers feel that electronic cash/ payment systems on-site would have a positive impact on spending

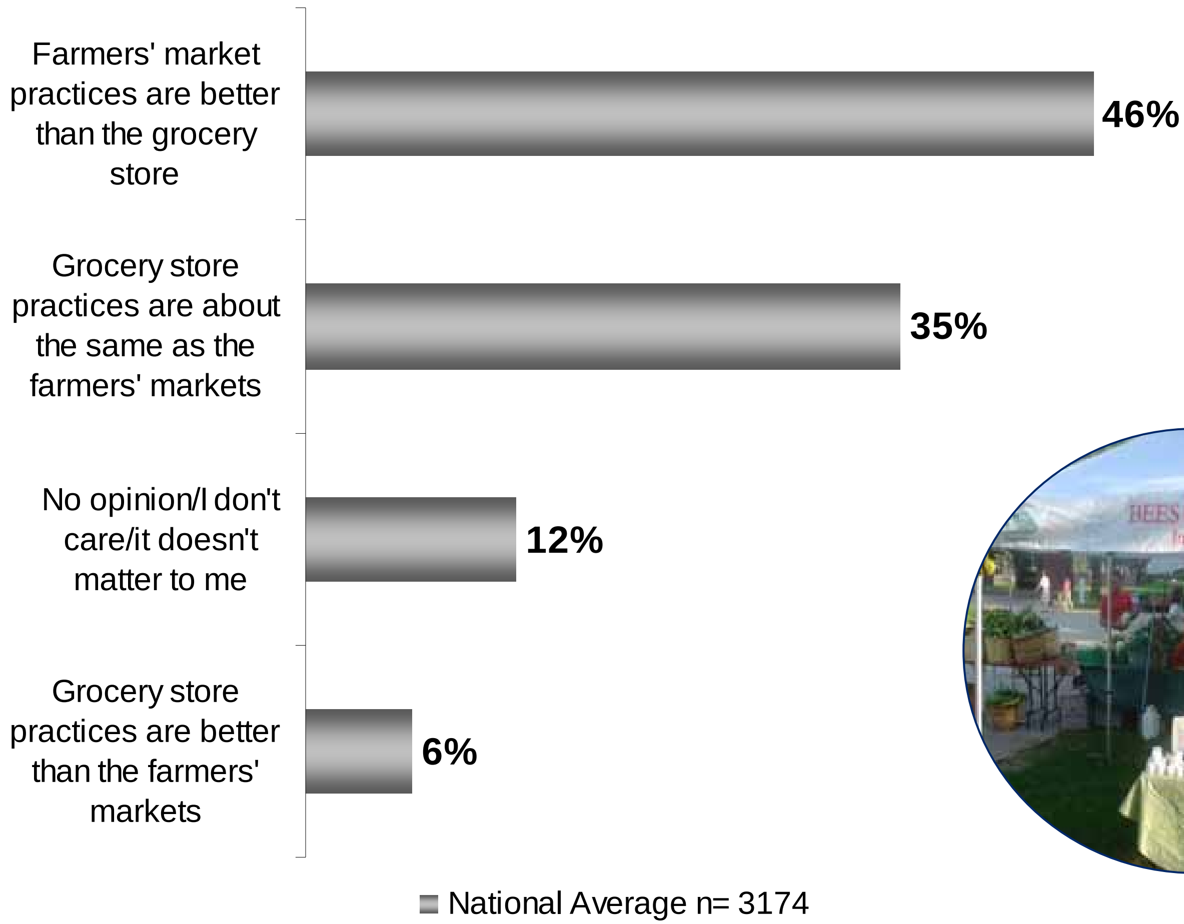


Source: Customer Survey

Food Safety Perception

- Most customers believe that markets have better/the same food safety practices than grocery stores

What is your perception of farmers' market food safety in relation to grocery store practices?

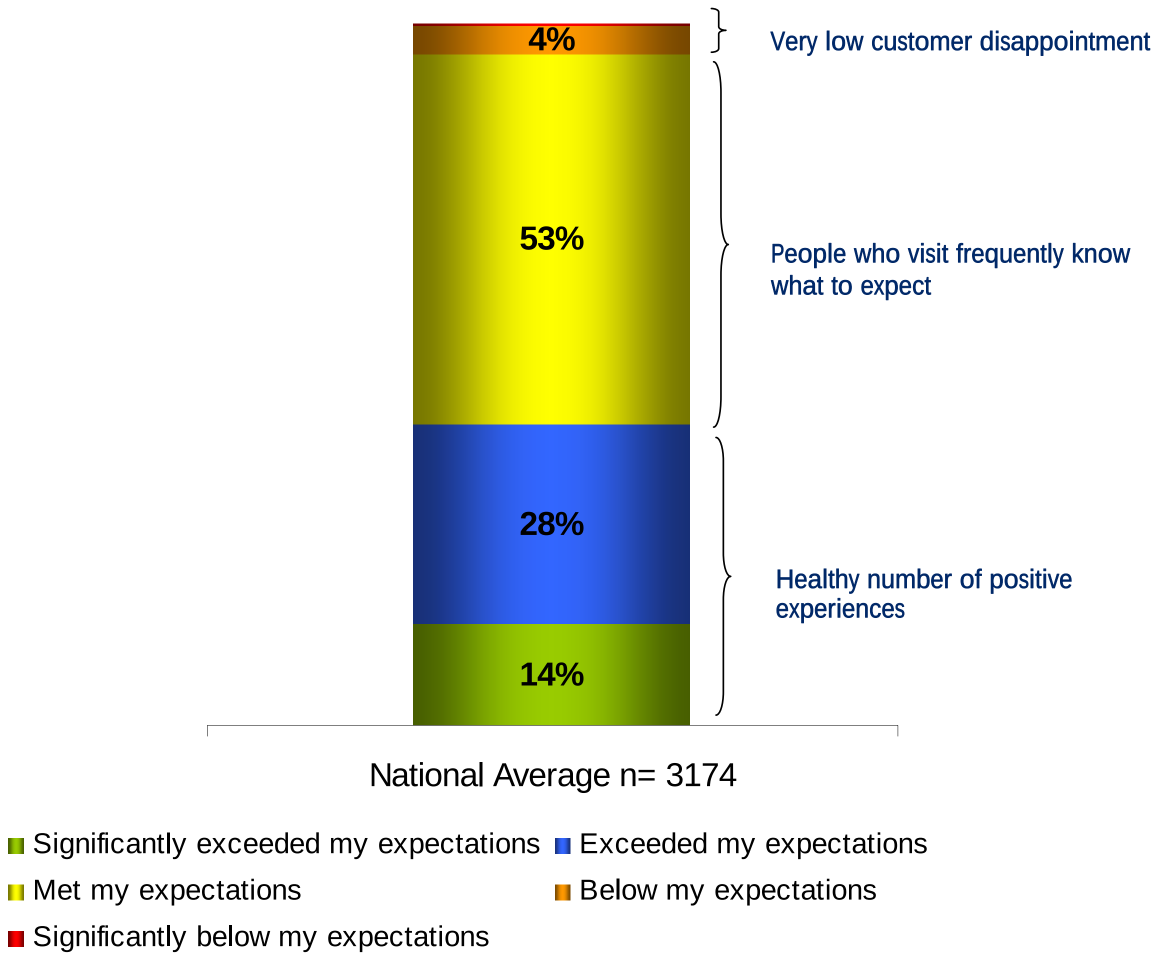


Source: Customer Survey

Meeting Expectations

- Adding new or unexpected elements to markets will aid in "surprising" loyal customers and improving the overall experience

How did your experience at this farmers' market meet your expectations today?

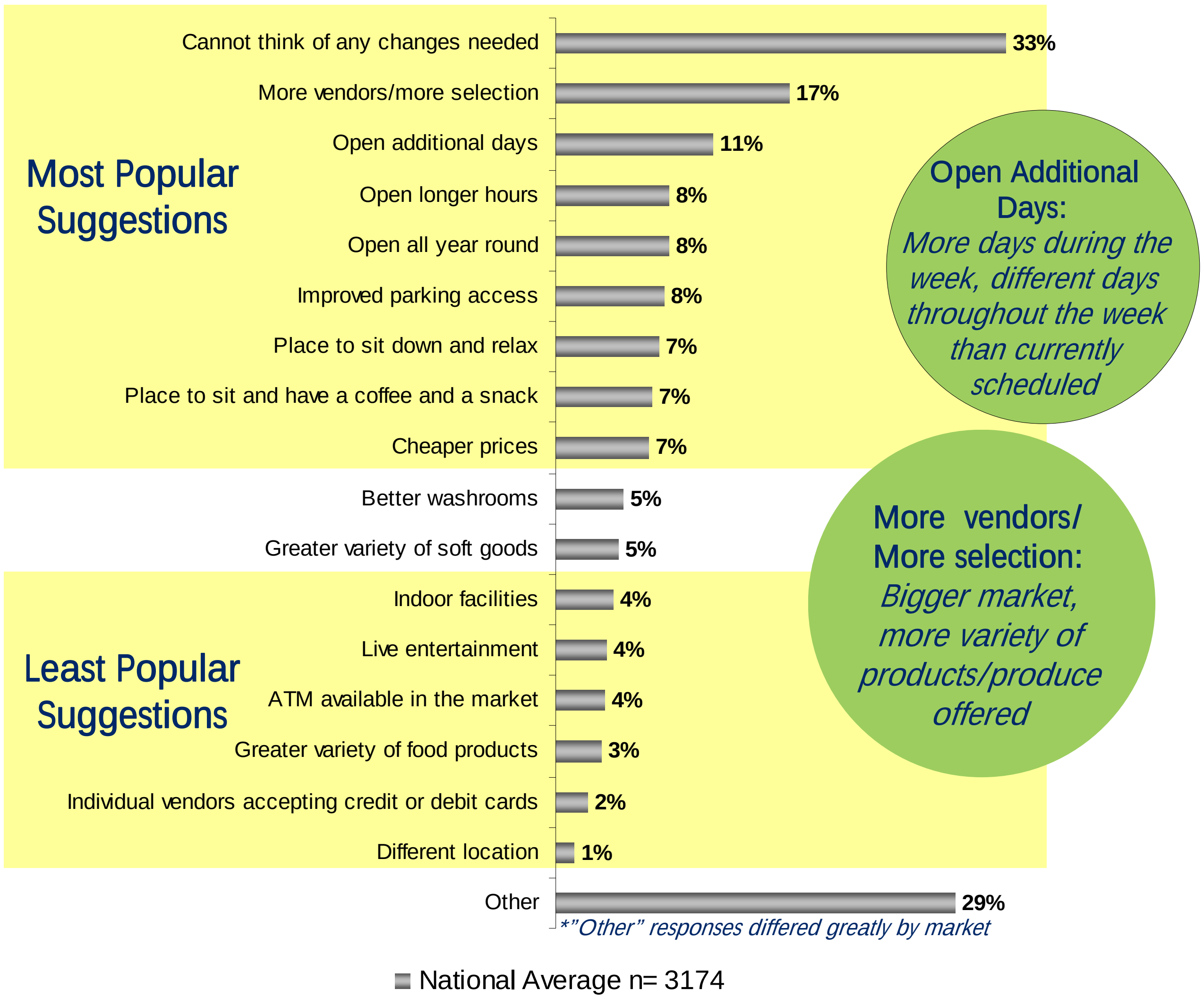


Source: Customer Survey

Suggestions for the Market

- Varied responses based on individual market conditions – many customers suggested more selection and more open hours

What suggestions do you have for improving this farmers' market?

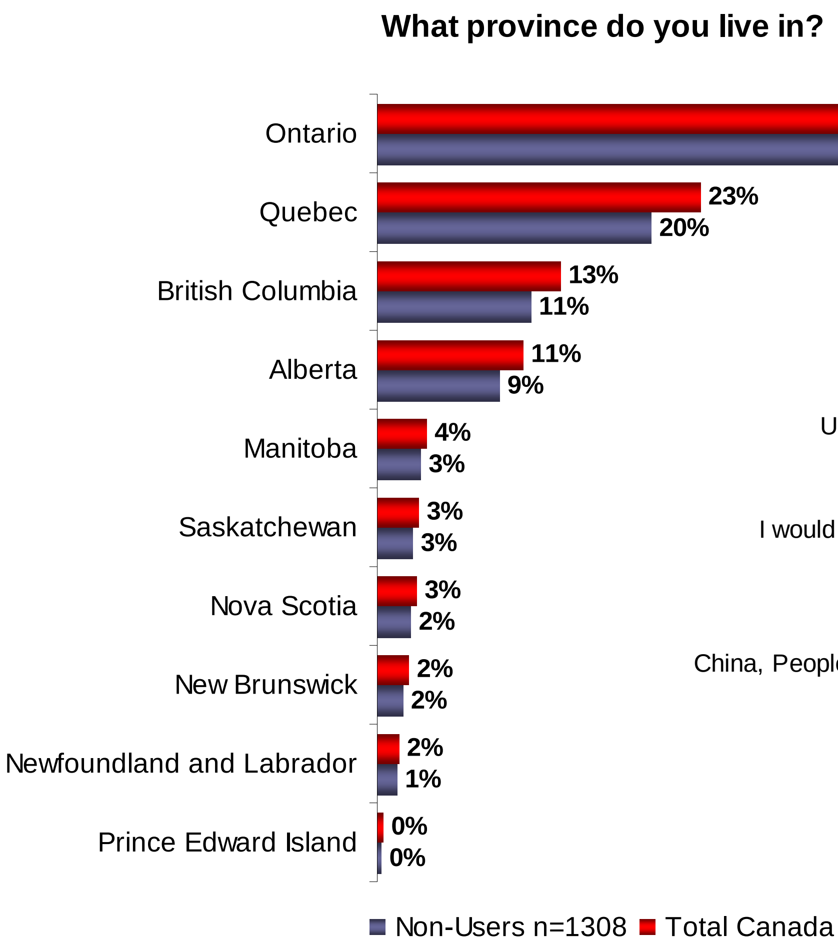


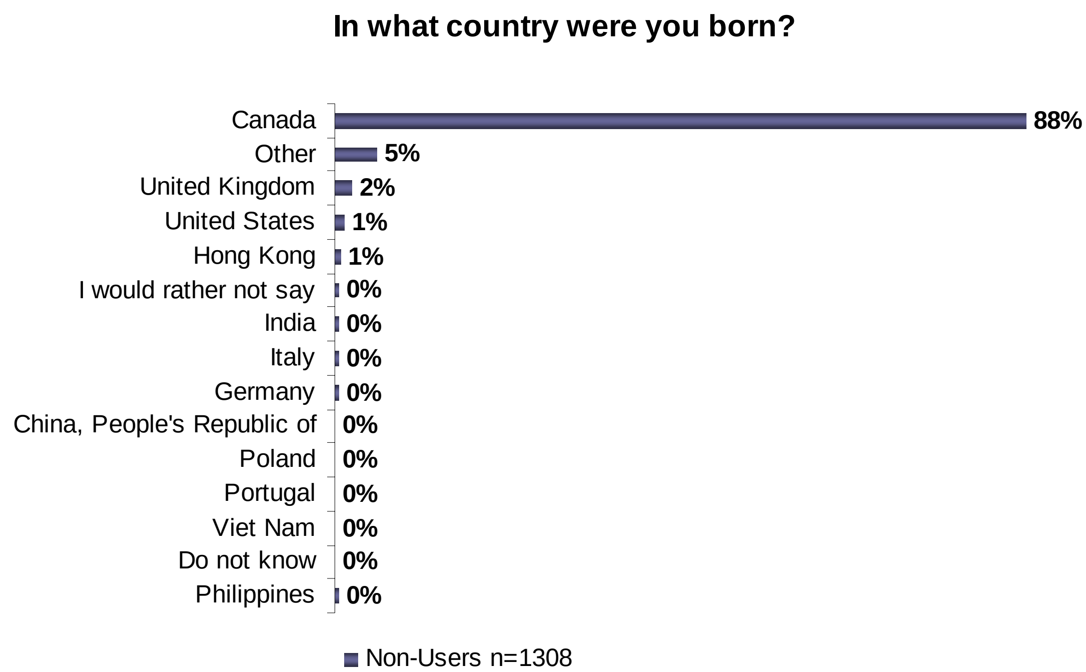
Source: Customer Survey

Non-User Insights

Non-User Profile

- Users = those who regularly, frequently, often OR occasionally visit a farmers' market
- Non-Users = those who rarely OR never visit a farmers' market

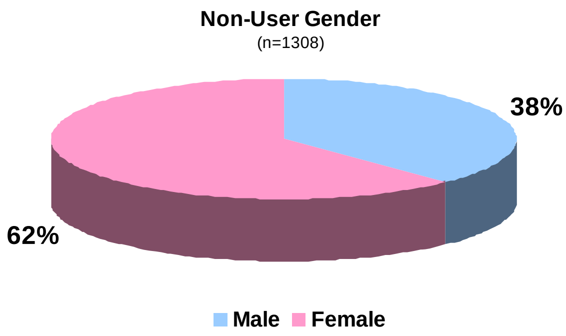


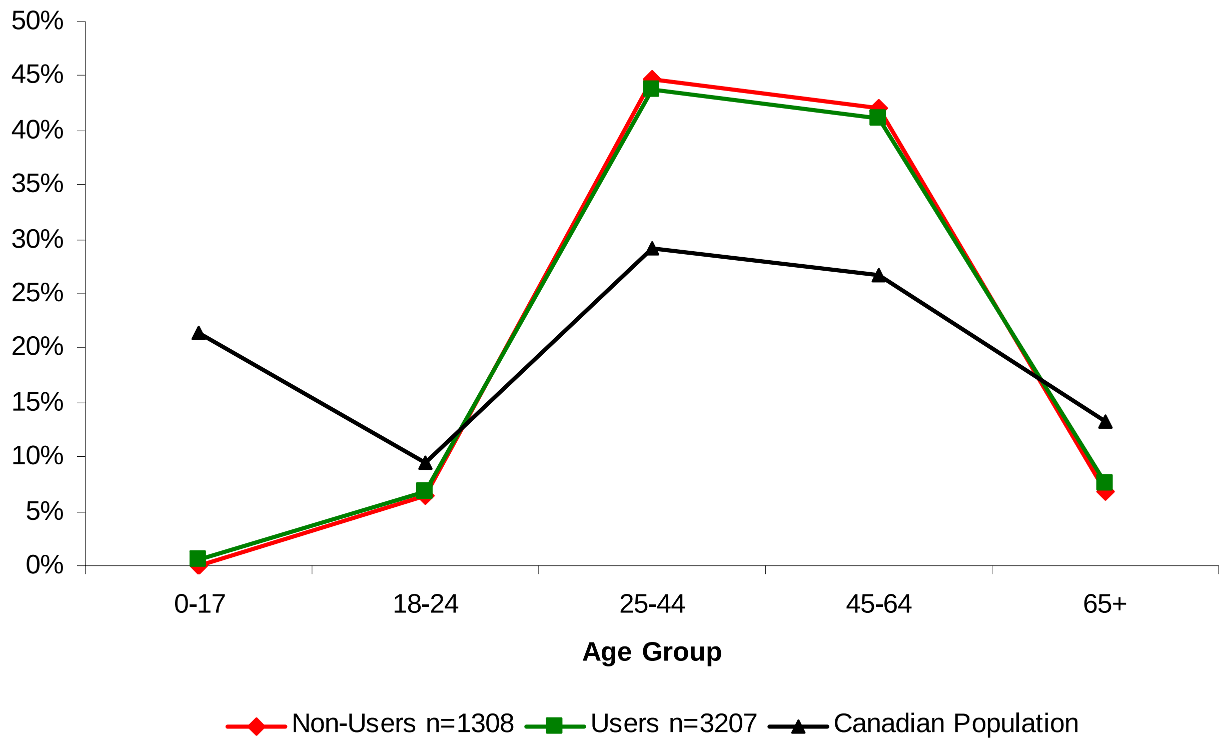


Source: Non-User Survey
* Source: Statistics Canada, 2006 Census of Population, Statistics Canada catalogue no. 97-551-XCB2006009, Customer Survey

Non-User Demographics

- Non-User profile differs from Market Shopper: 10% more males/ younger median age





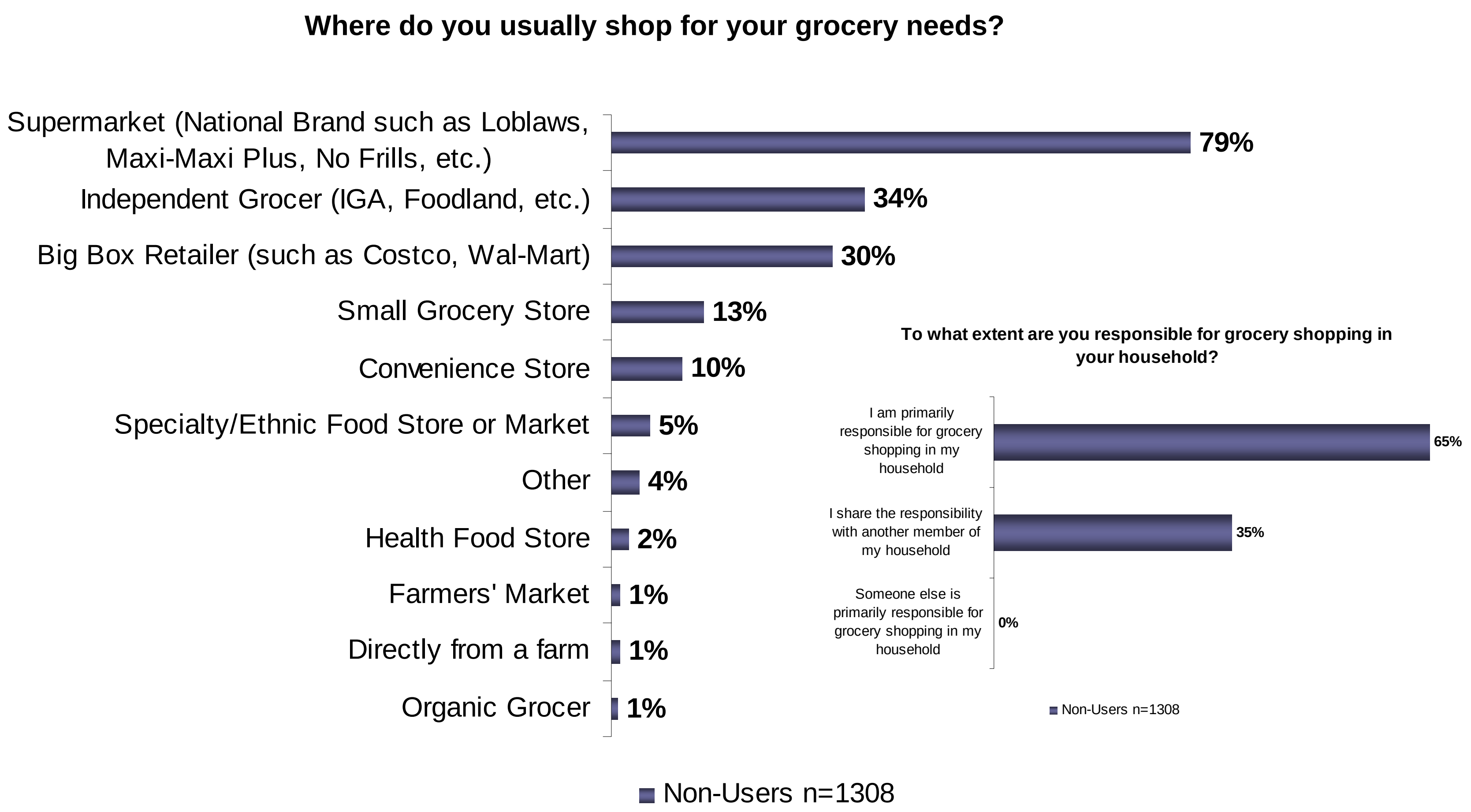
Respondents skewed female as they were pre-qualified prior to completing the survey for the following:

- Had to be primarily responsible or shared responsibility for their household grocery shopping
- Had to be over the age of 17
- Had to have never visited a farmers' market or only visited once or twice

Source: Non-User Survey

Usual Grocery Shopping Destination

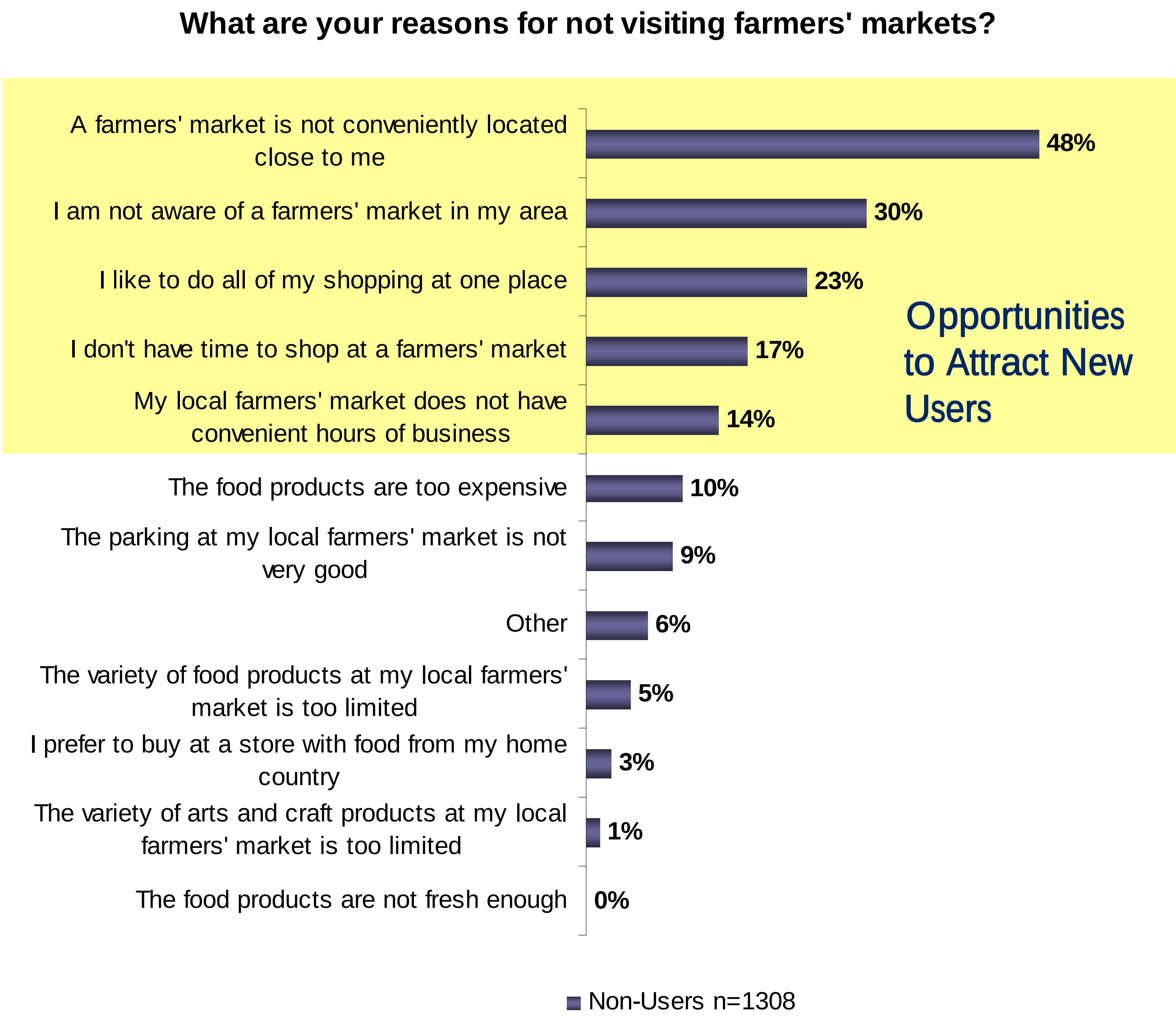
- Non-users were slightly more likely to use supermarkets in contrast to farmers' market users who engage many alternate food sources such as health food stores, markets, farms and organic grocers



Source: Non-User Survey

Reasons for Not Visiting Farmers' Markets

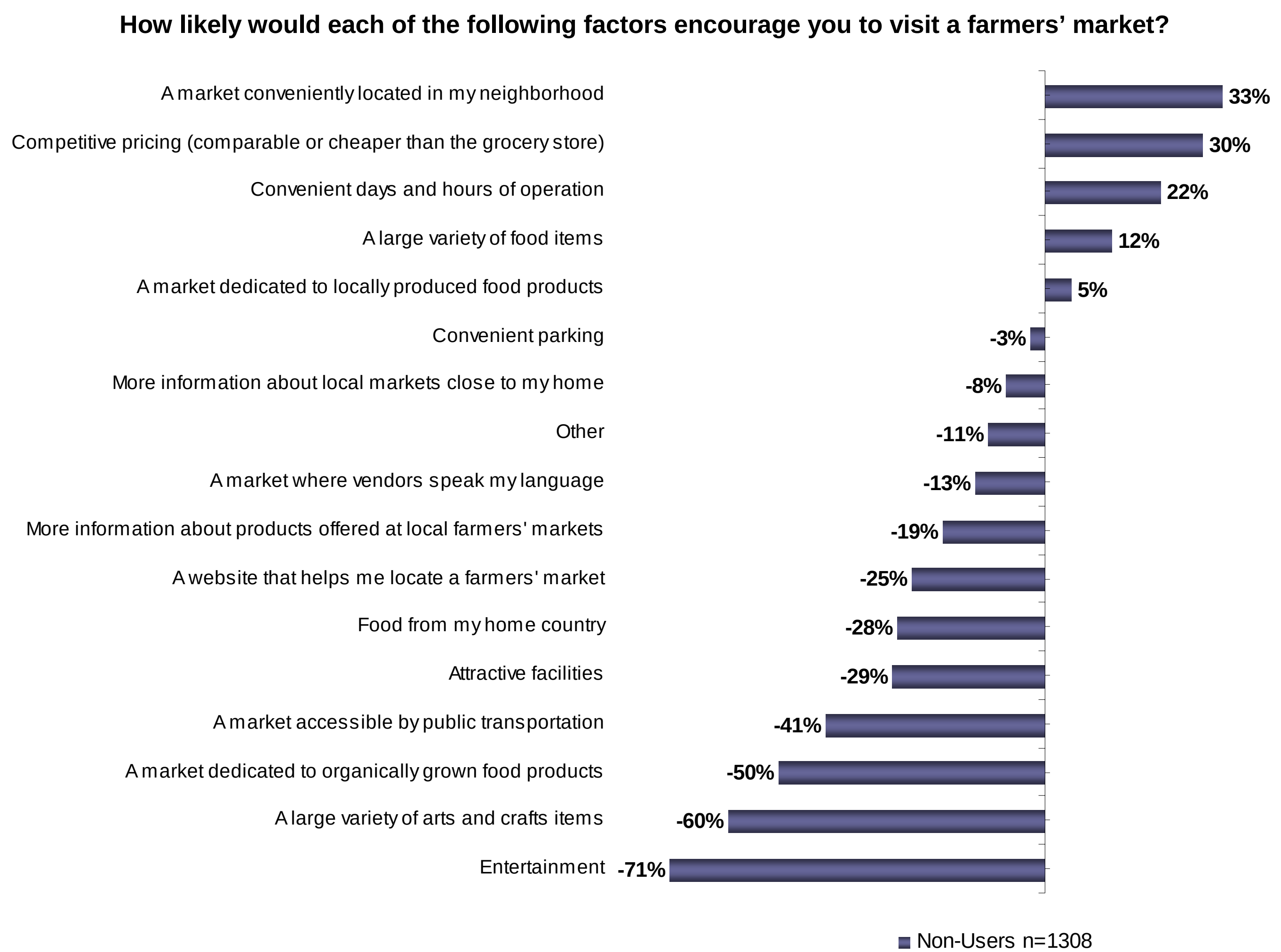
- Location, awareness and convenience are key reasons for not visiting



Source: Non-User Survey

Factors Encouraging Farmers' Market Visitation

- Location, convenience, competitive pricing and variety will attract new customers



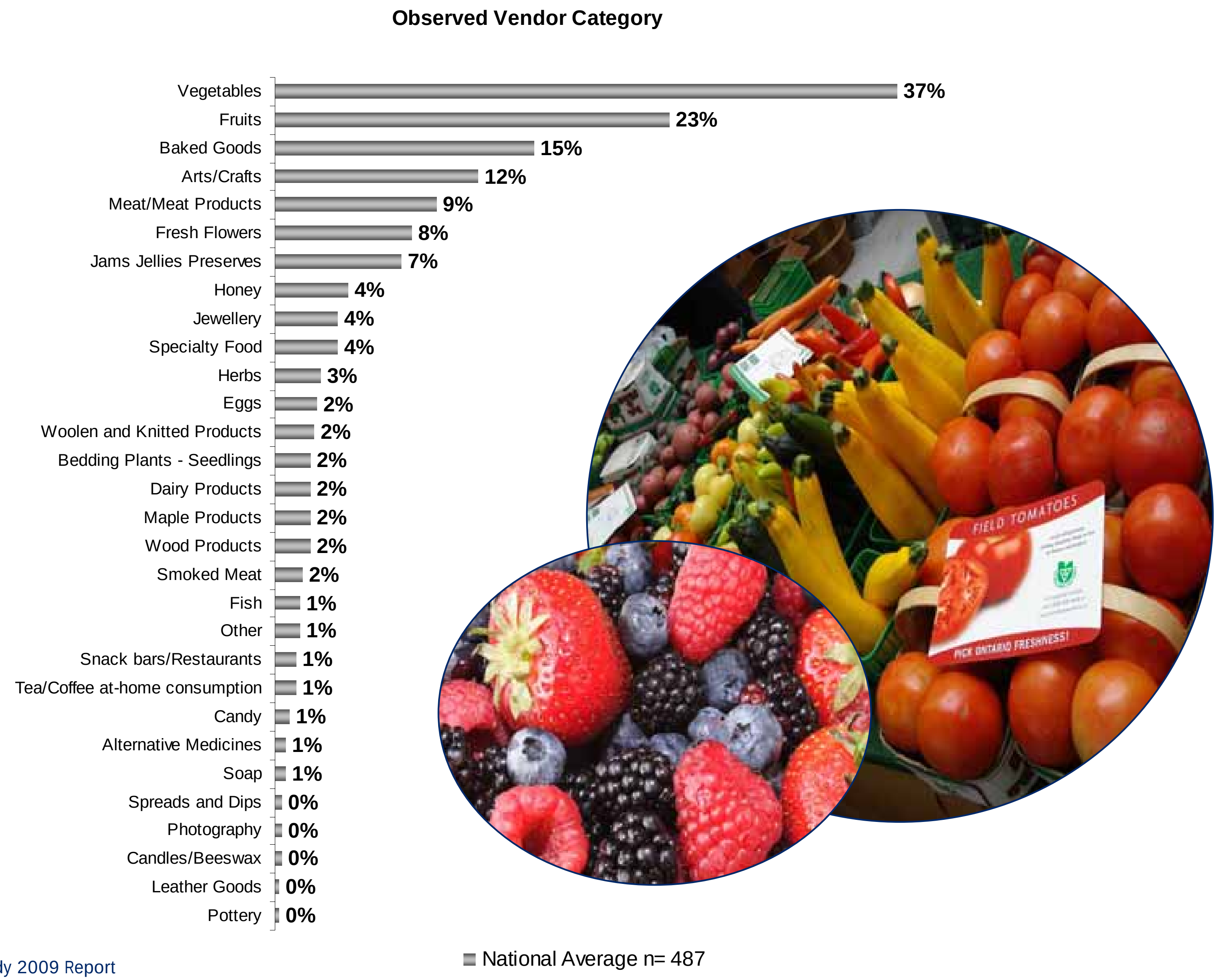
Calculated using Top 2 Boxes – Bottom 6 Boxes on a 10 point scale (removes passive respondents)

Source: Non-User Survey

Vendor Profile

Vendor Products

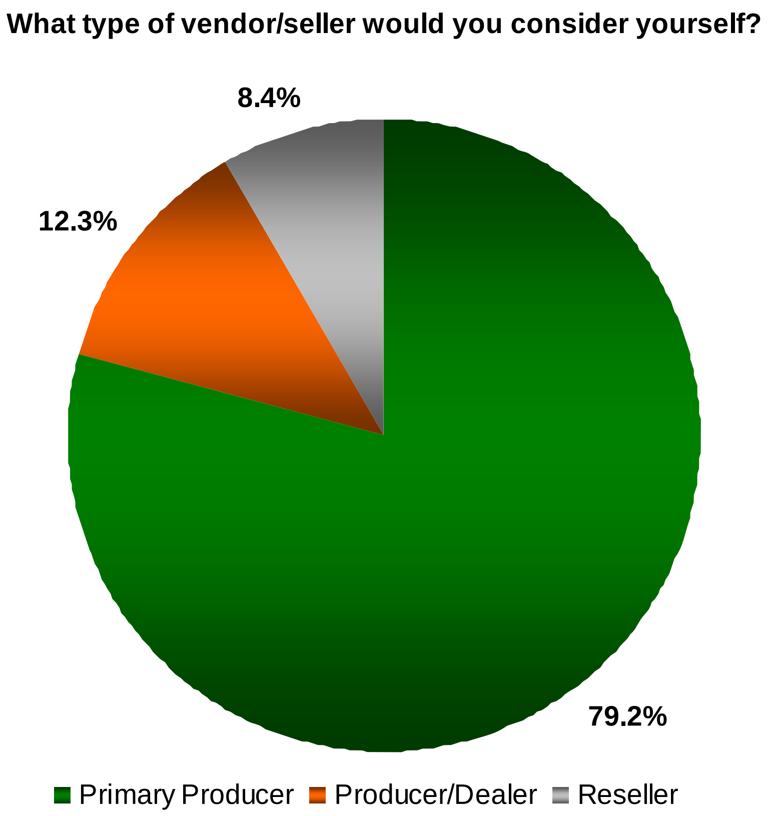
- Percent of vendors selling product categories

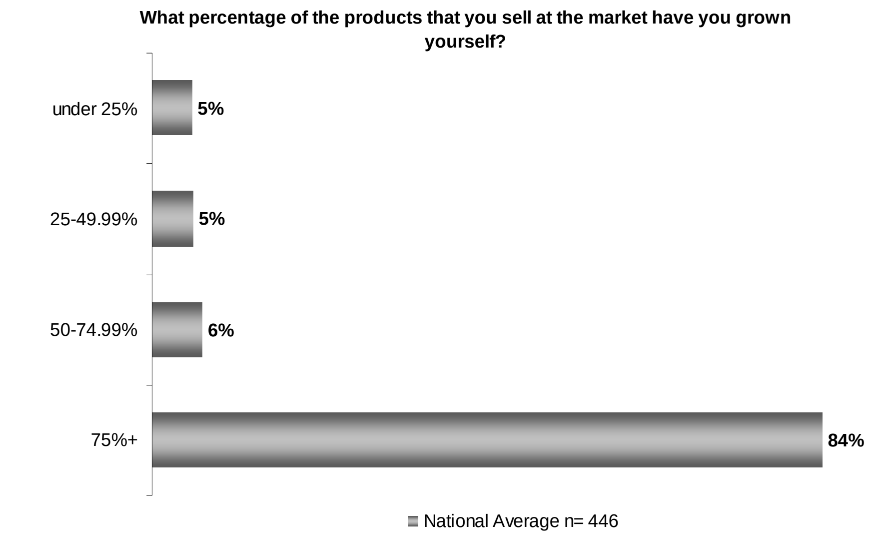


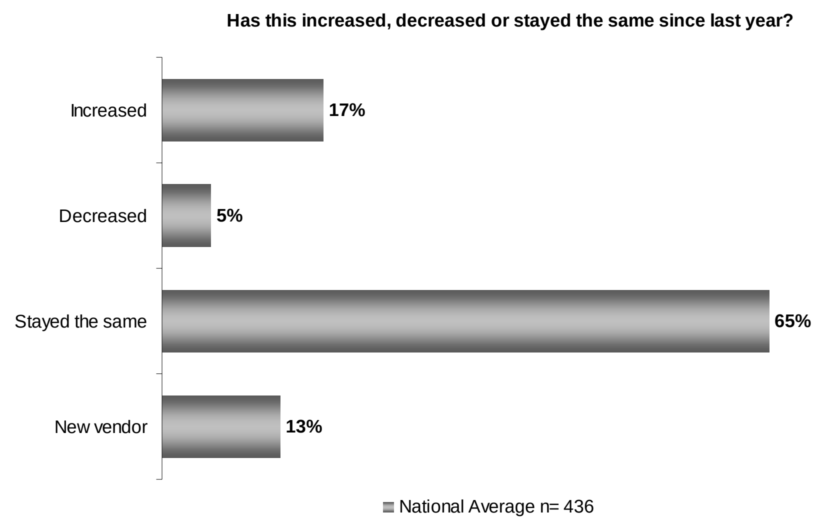
Source: Vendor Survey

Vendor Profile by Production Type

- 79% of vendors identified themselves as "Primary Producers"



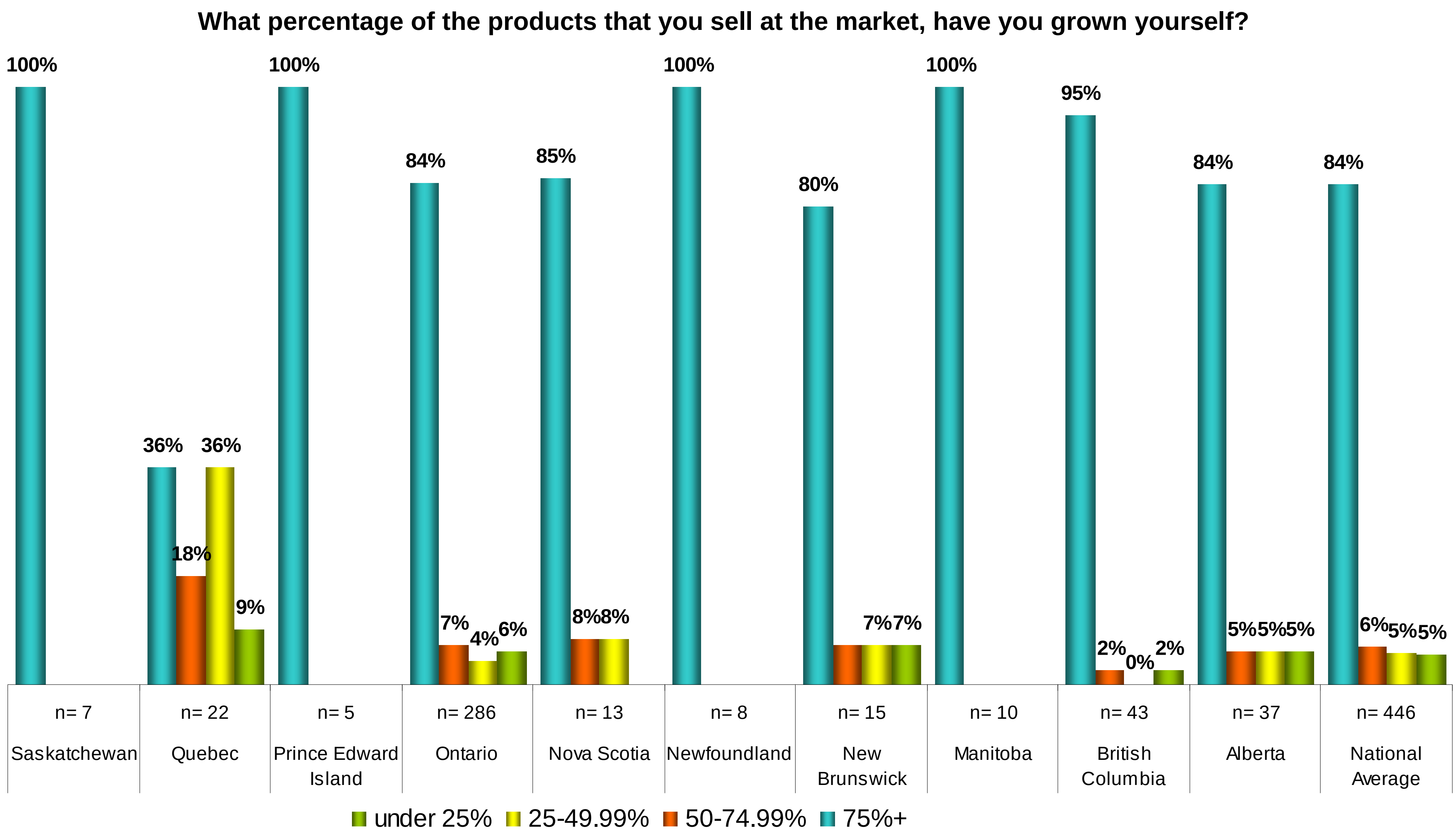




Primary Producer = A vendor who sells agricultural products, food, arts and crafts that they have produced
Producer/Dealer = a vendor who sells agricultural products, food, arts and crafts that they have produced but who often sells items bought from local producers or wholesalers
Reseller = A vendor who only sells products bought from local producers or wholesalers

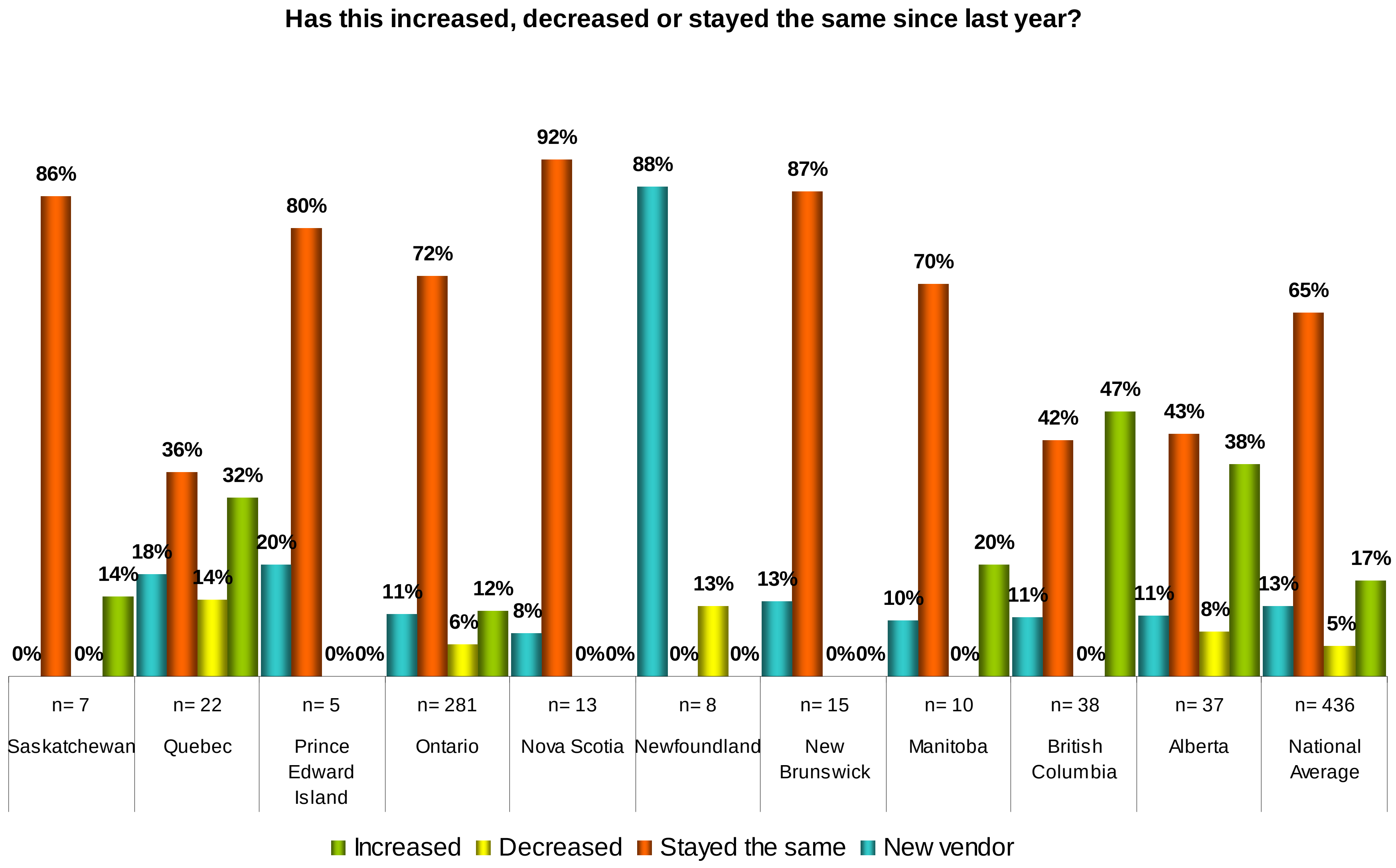
Source: Vendor Survey

Vendor Profile by Production Type by Province



Source: Vendor Survey

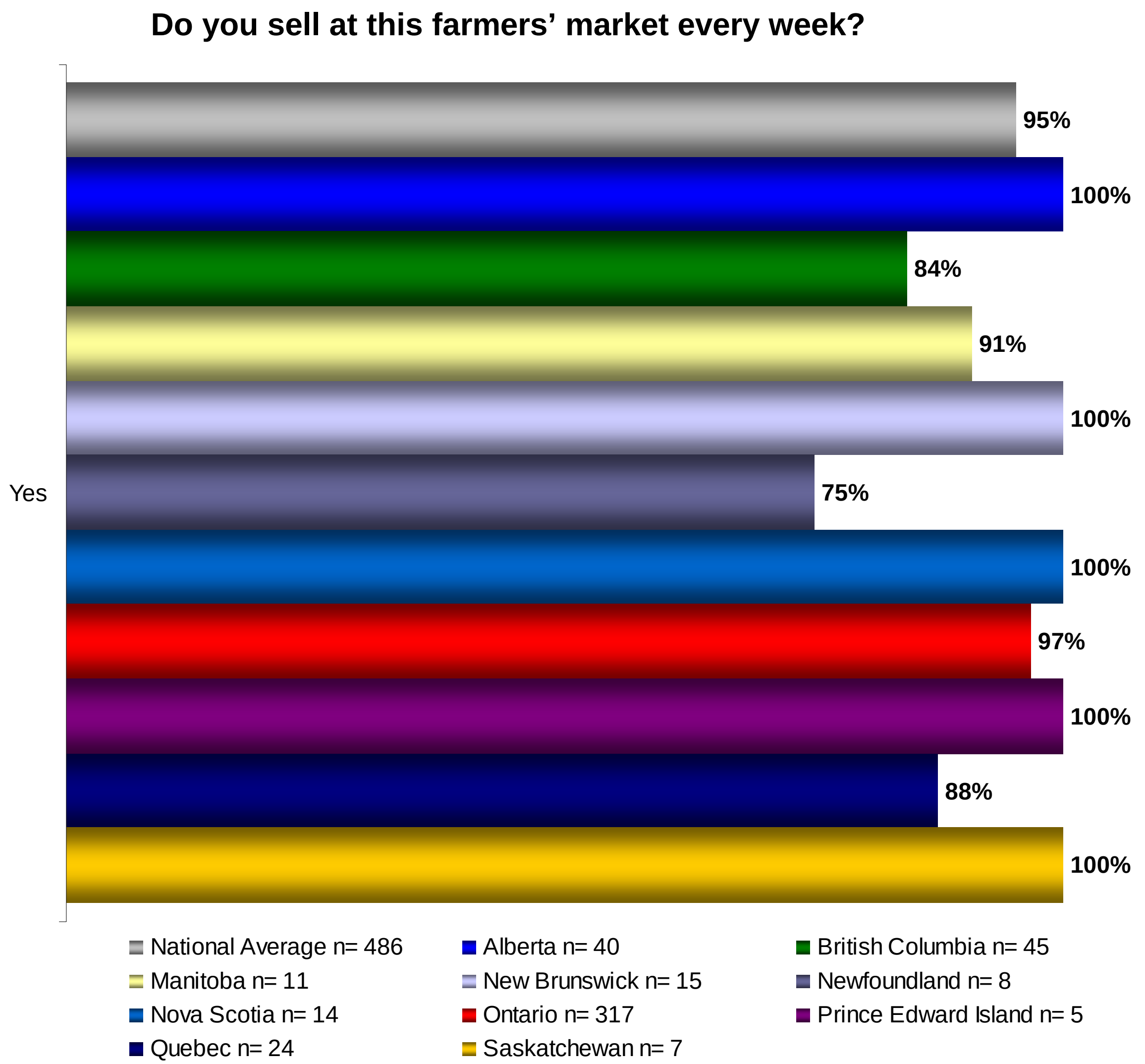
Vendor Profile by Production Type by Province



Source: Vendor Survey

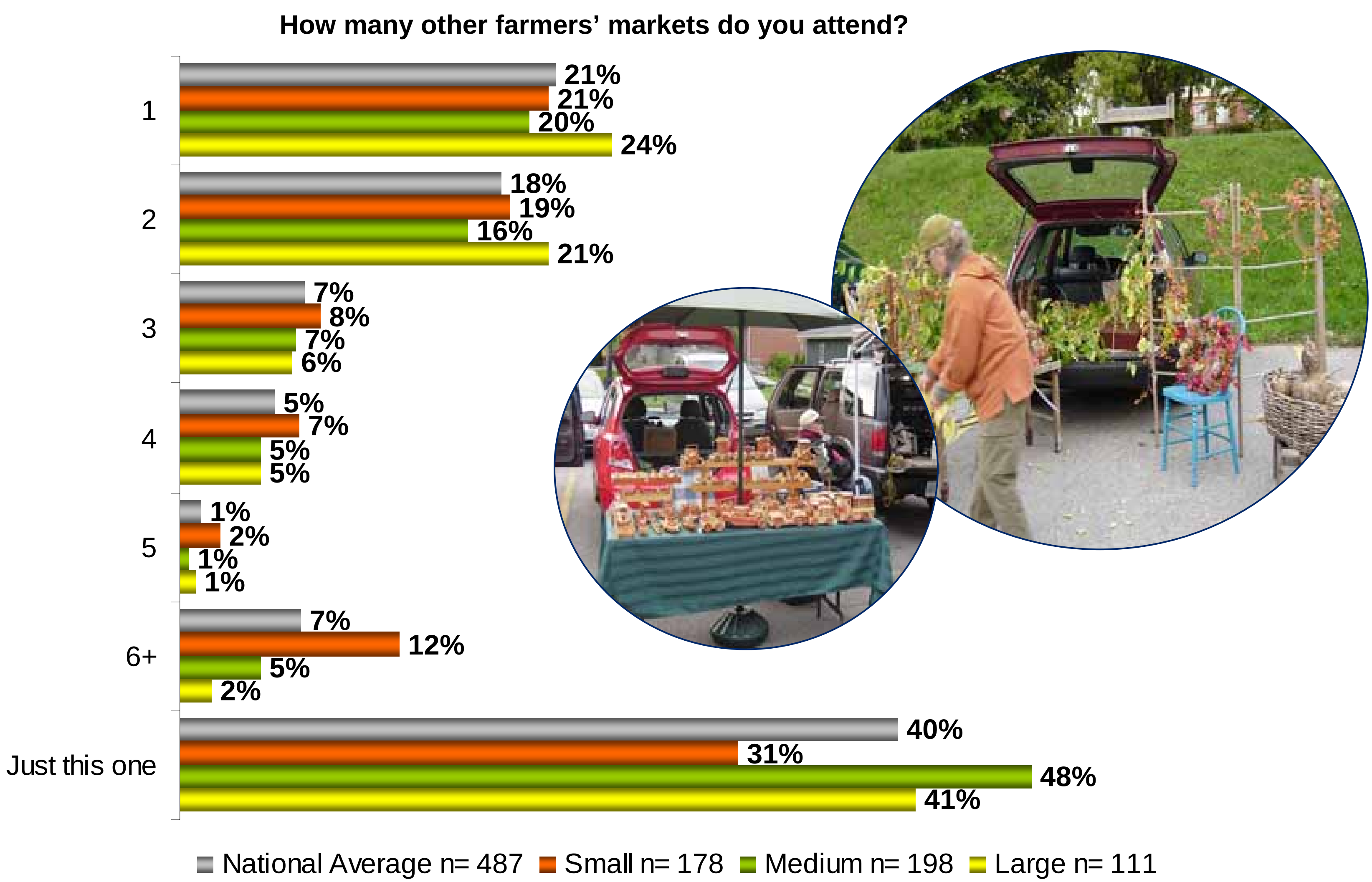
Vendor Profile by Frequency of Sales by Province

- 95% of vendors sell “weekly” while in-season



Number of Markets Attended

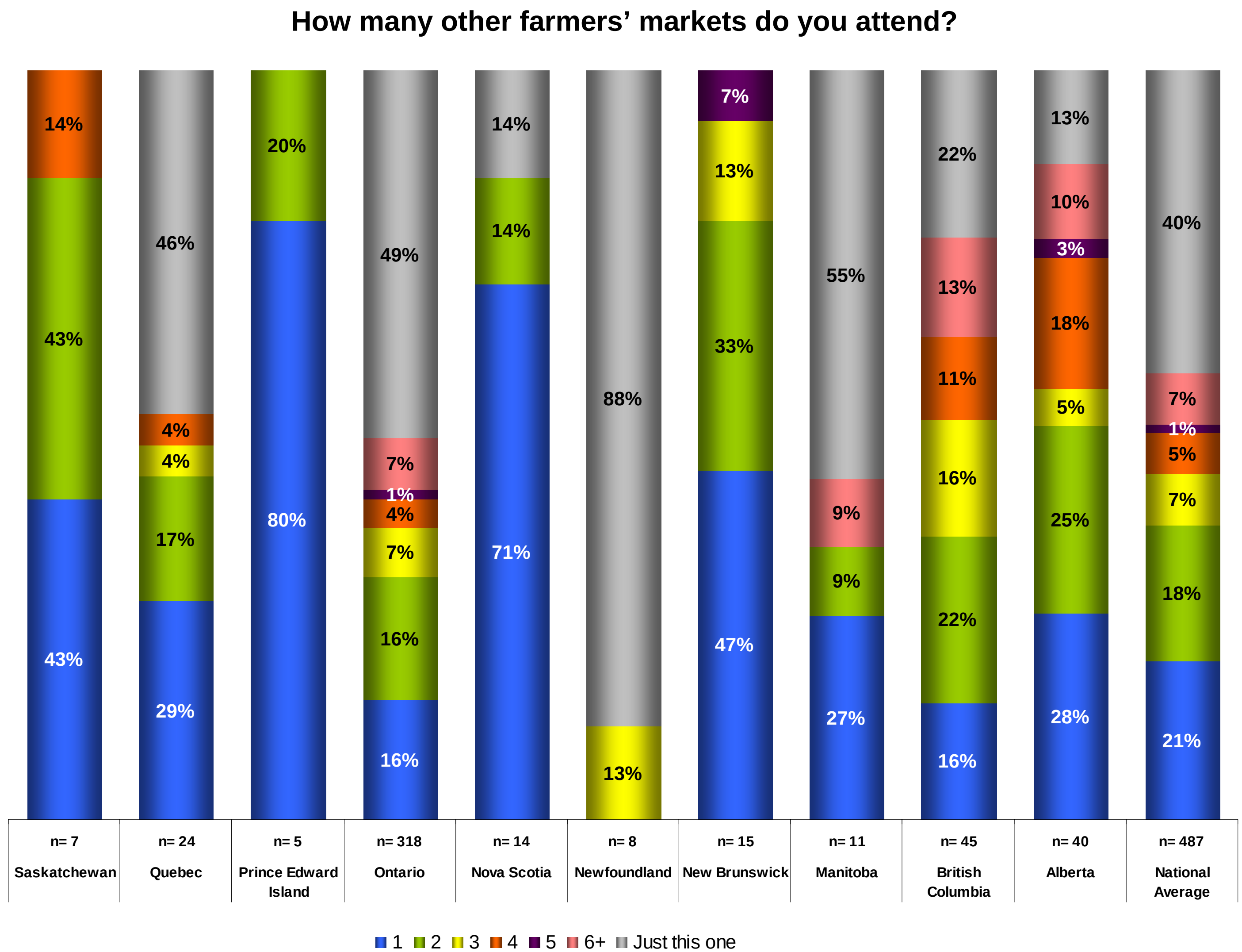
- 40% of vendors only sell at one market - - the rest attend more than one



Source: Vendor Survey

Number of Markets Attended

- National Comparison – wide variation between provinces

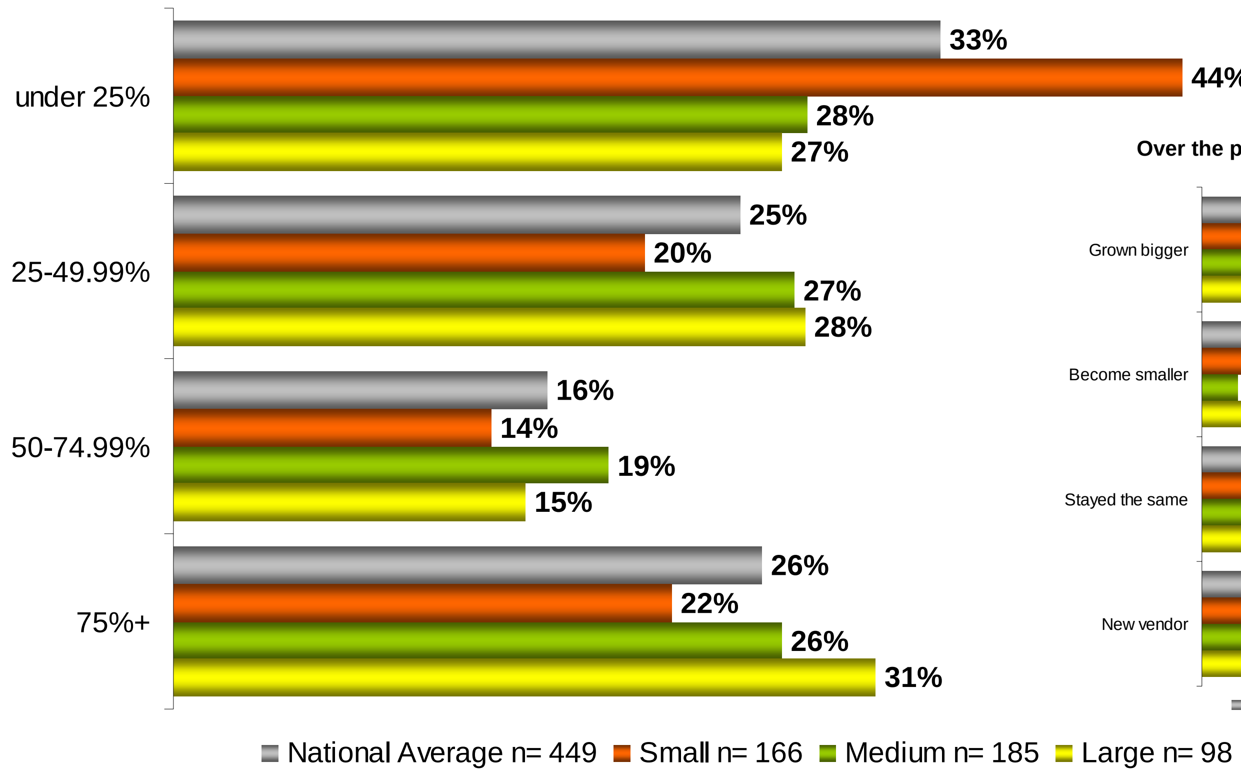


Source: Vendor Survey

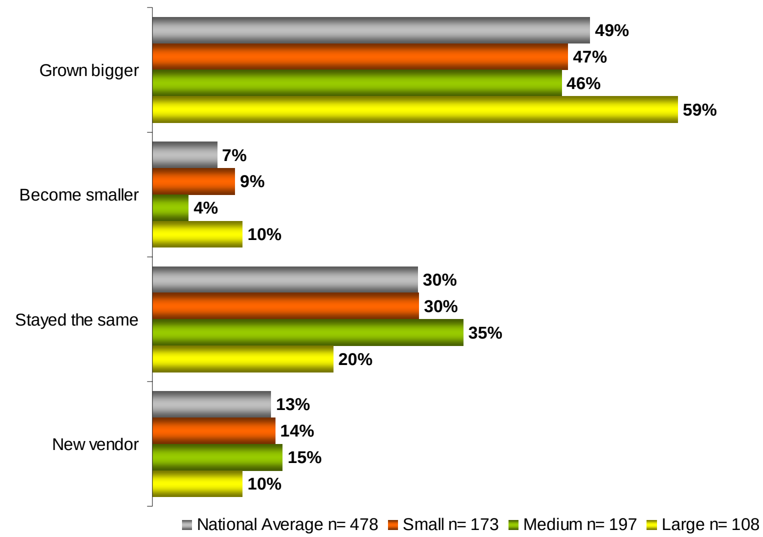
Vendor Income Trending

- Most vendors state that their business is increasing; a positive sign since vendors are deriving a significant portion of their income from farmers' market activities.

In broad terms, can you estimate the percentage of your total farm income that is derived from your participation in farmers' markets? Is it …



Over the past year, has your business at farmers' markets …

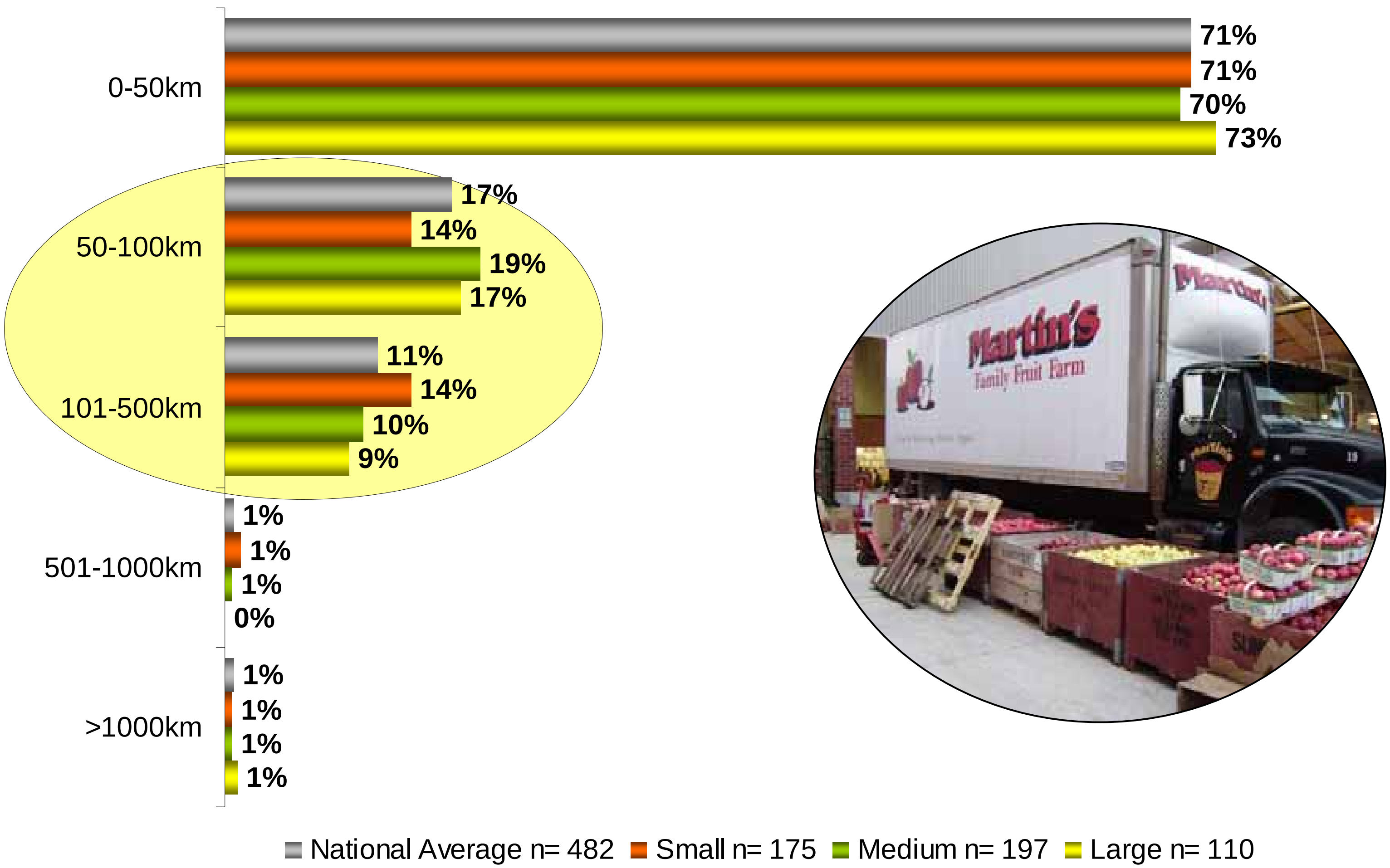


Source: Vendor Survey

Distance Travelled to Market

- 71% of vendors travel less then 50 km but many vendors are traveling large distances to participate

What is the typical distance you travel to get to this farmers' market? (in kms)

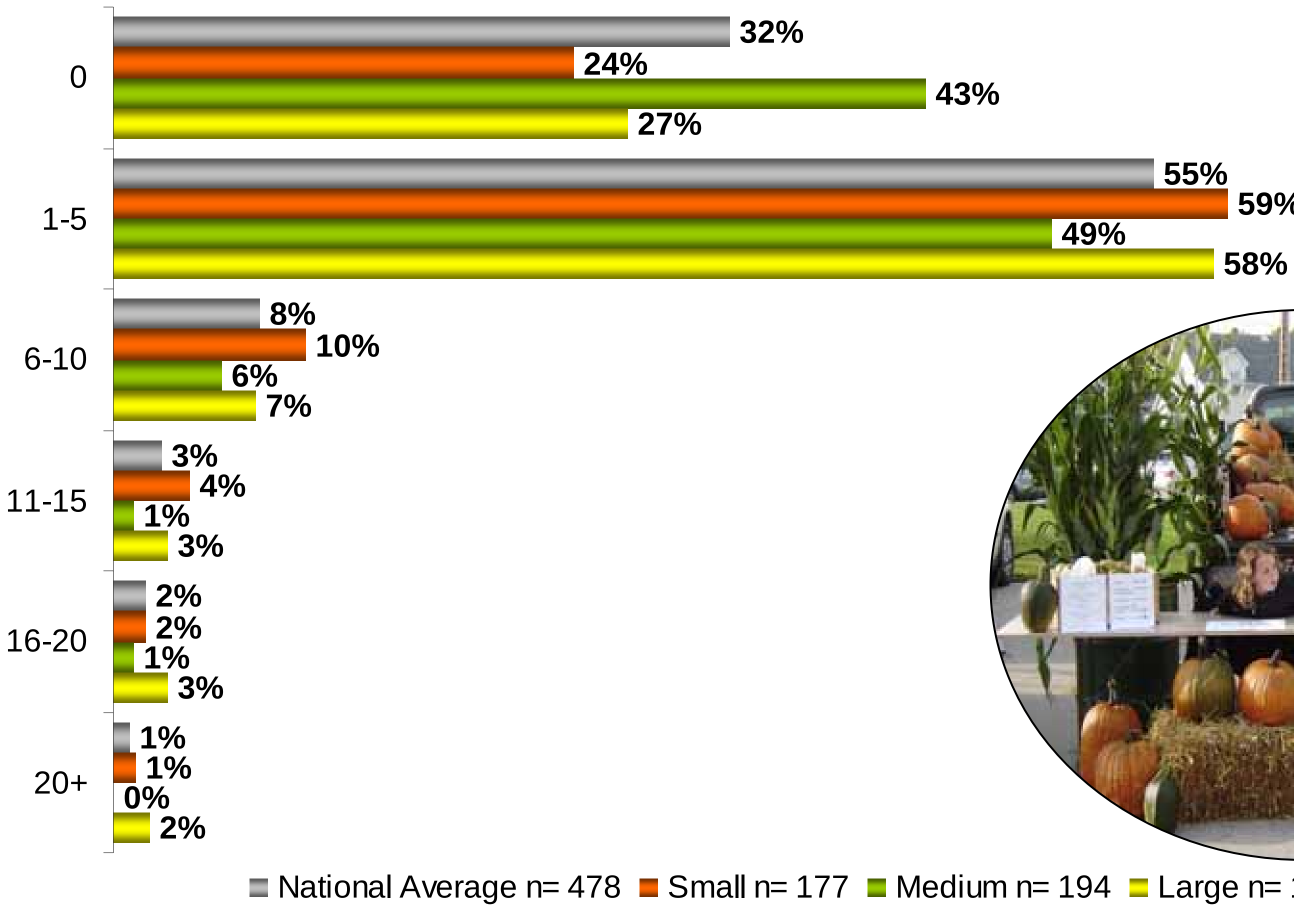


Source: Vendor Survey

Job Creation

- 55% of vendors report the creation of up to 5 jobs as a result of market participation

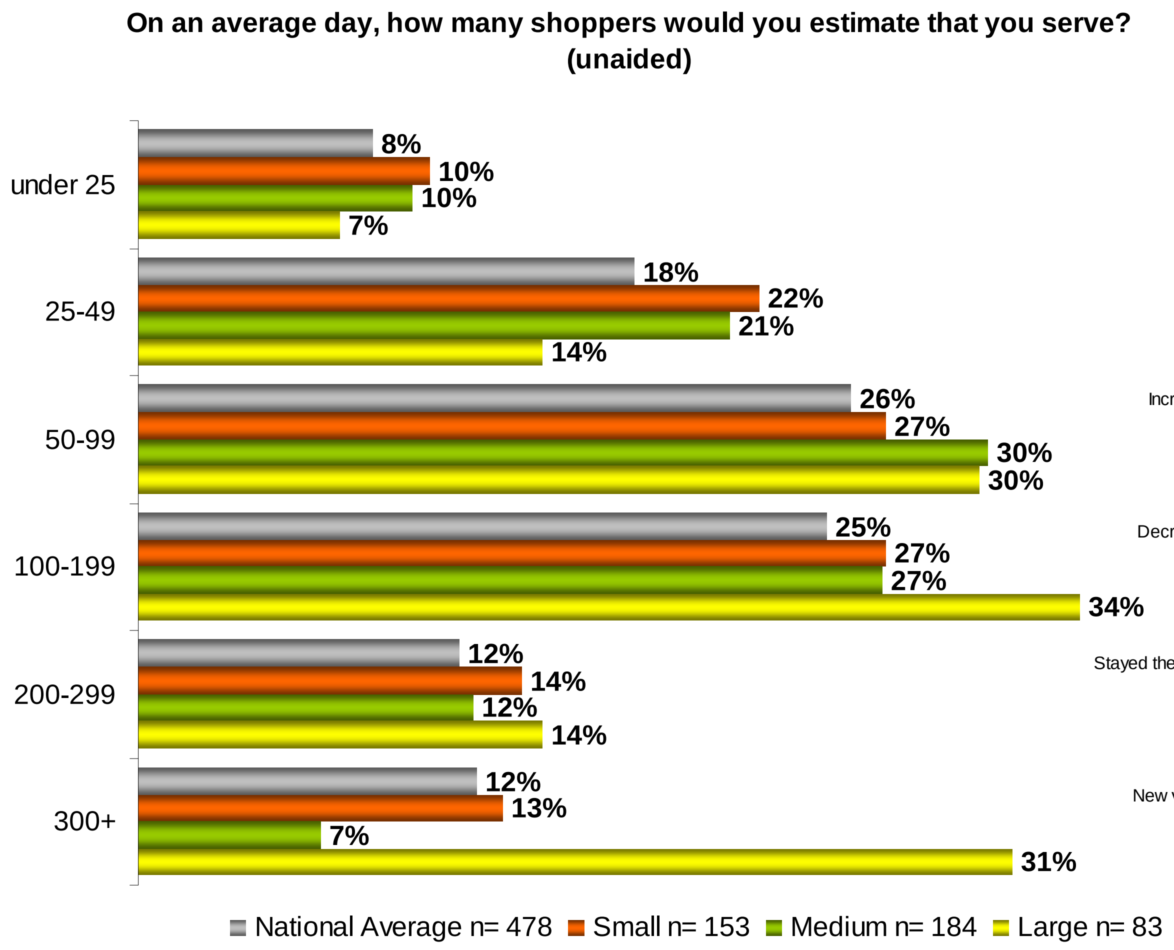
How many jobs have been created from your participation in this farmers' market?

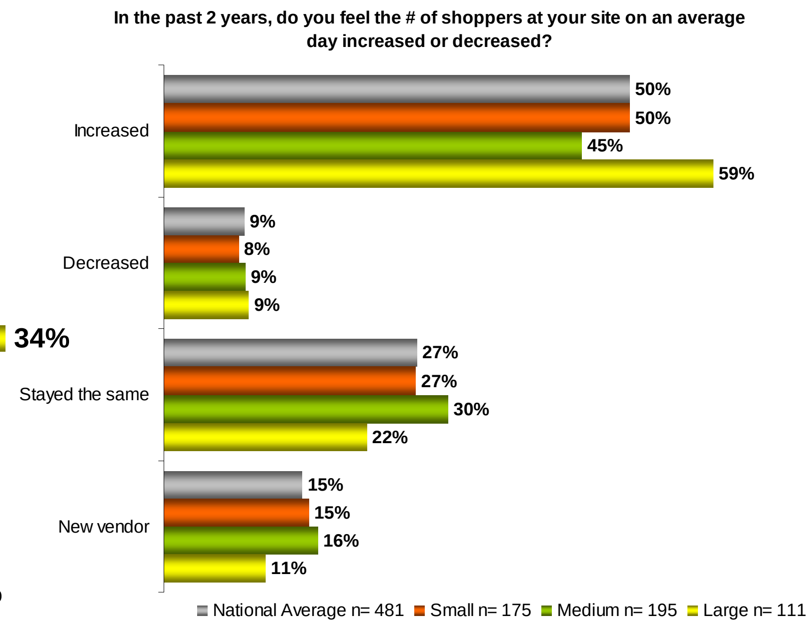


Source: Vendor Survey

Customers Served/ Growth

- 51% of vendors serve between 50 and 199 shoppers each market day, a number which vendors believe is increasing!

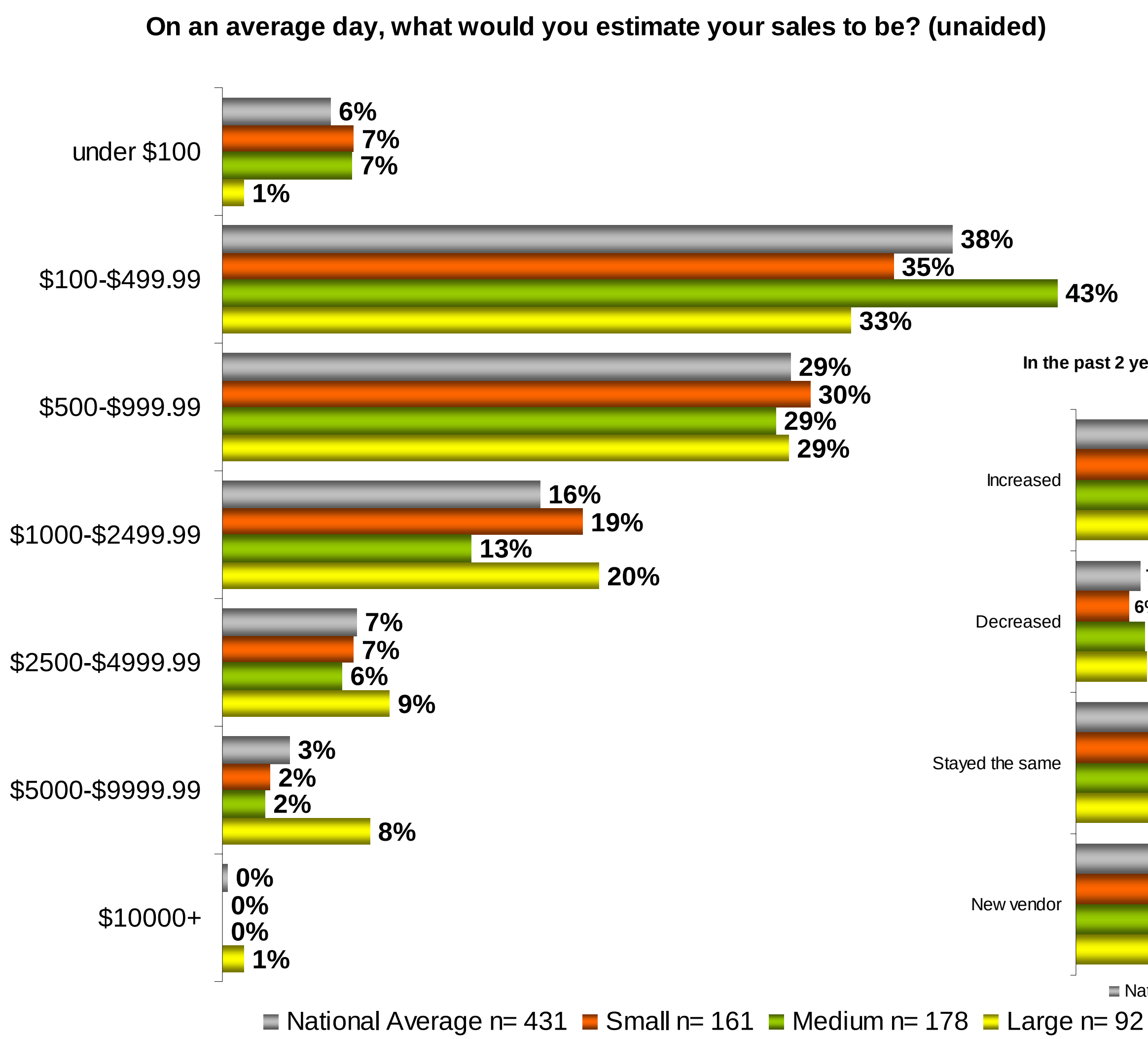


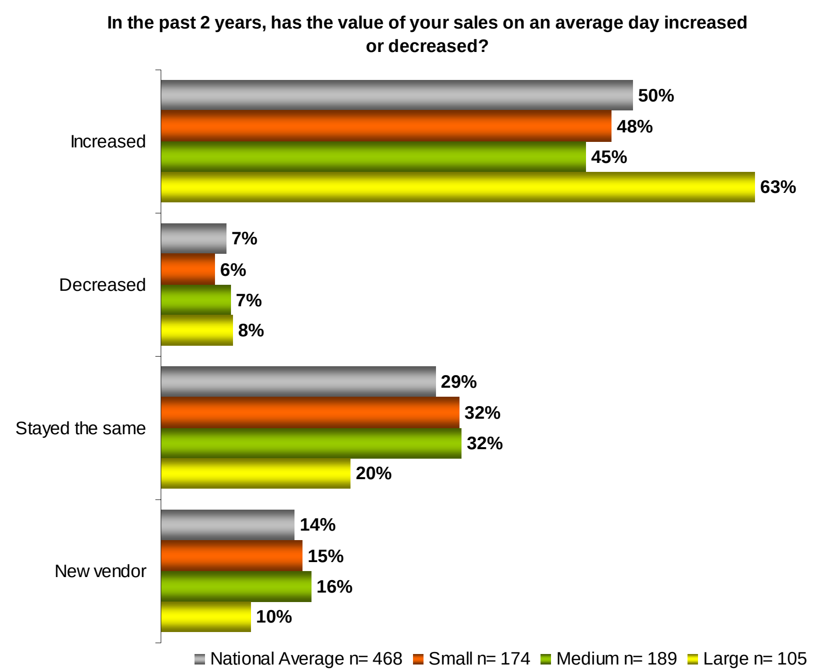


Source: Vendor Survey

Average Daily Sales Trending

- 26% of vendors sell over $1000 worth of product each market day
- 67% of vendors sell between $100 and $999 worth of product each market day



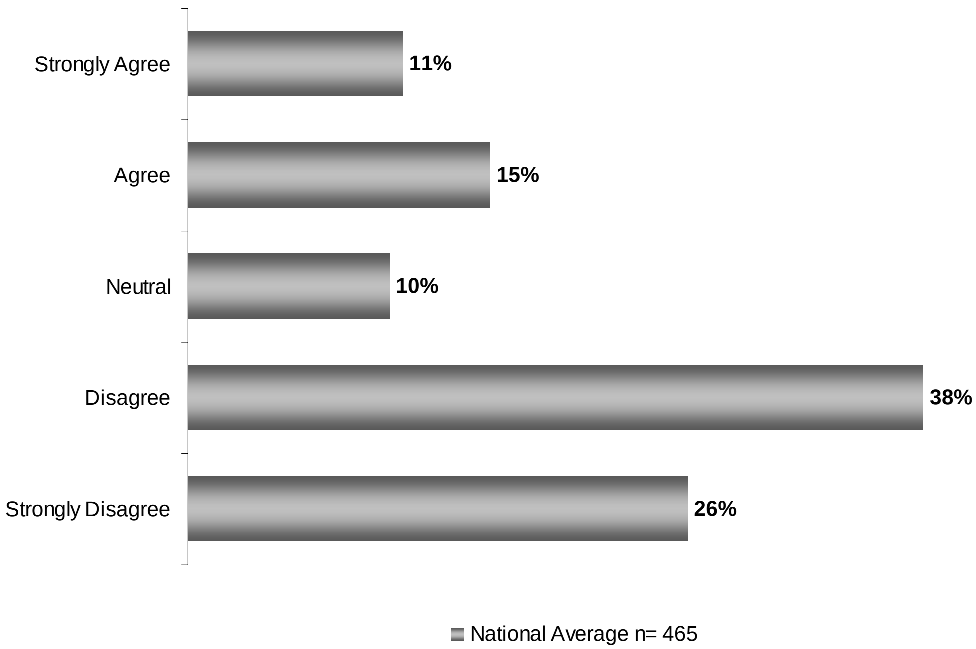


Source: Vendor Survey

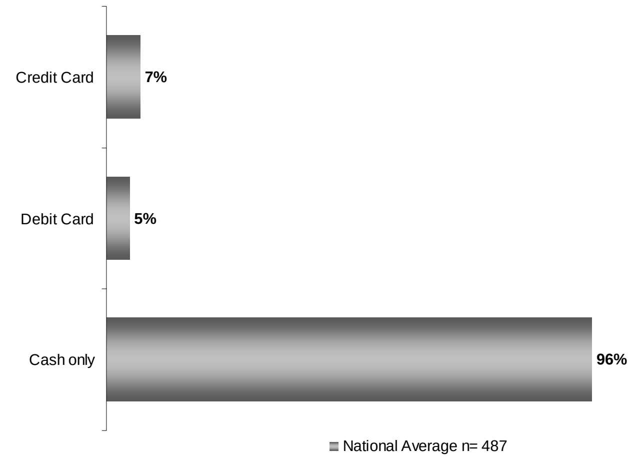
Debit/Credit/ATM Interests

- 7% of vendors take credit cards, 5% debit cards. 27% of vendors believe they would sell more if they had a credit/debit facility
- 53% of vendors believe that an ATM in or near the market would lead to higher sales

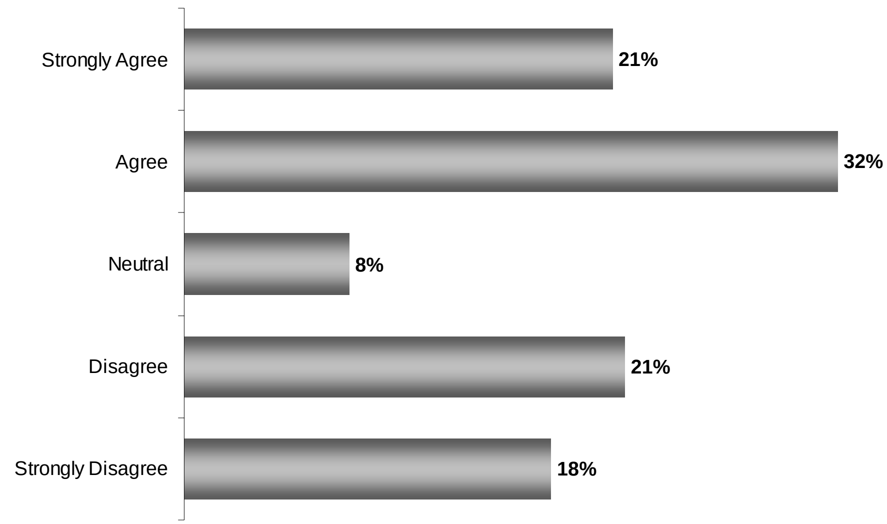
I would have sold more products if there was a debit/credit card machine available for each vendor



Do you accept credit or debit cards for purchases? (unaided)



I would have sold more products if there was an ATM machine available at this farmers' market



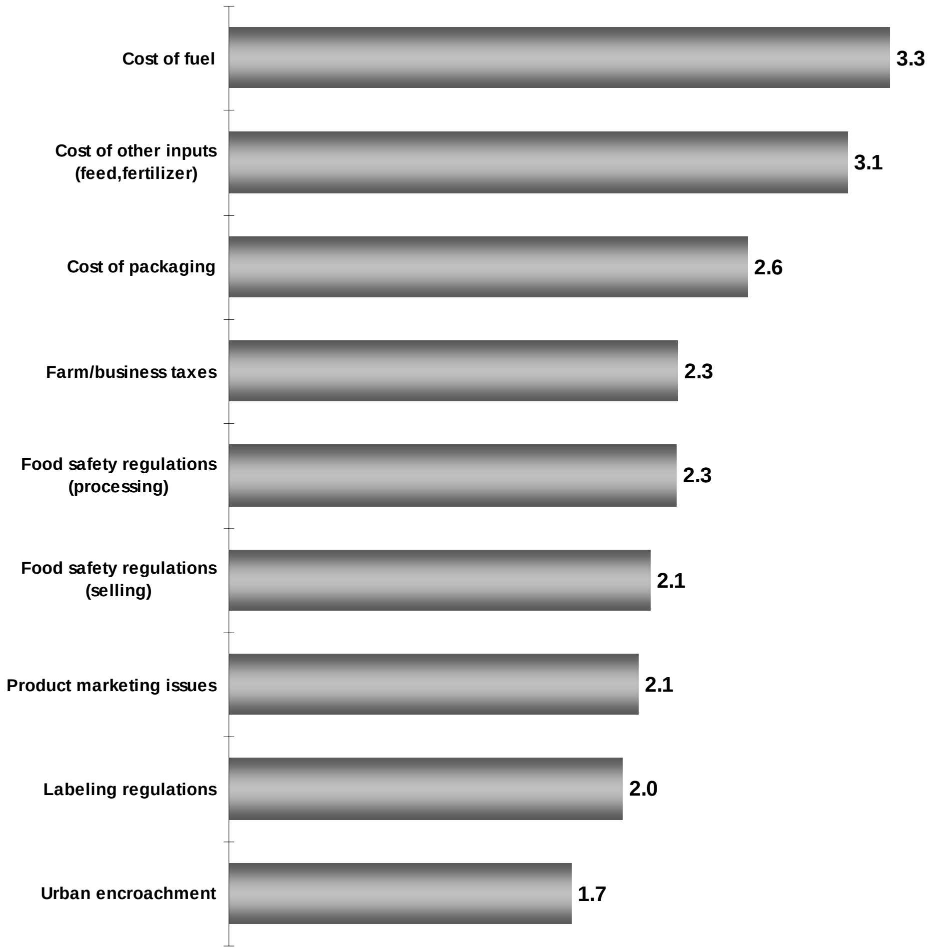
National Average n= 336

Source: Vendor Survey

Negative Factors Impacting Vendors

- Cost of fuel and other inputs are negative factors impacting vendors – shortage of labour was also frequently mentioned

To what extent are each of the following factors negatively impacting your business
(on a scale of 1 to 5 where 1 is not impacting and 5 is very significantly impacting - averages)

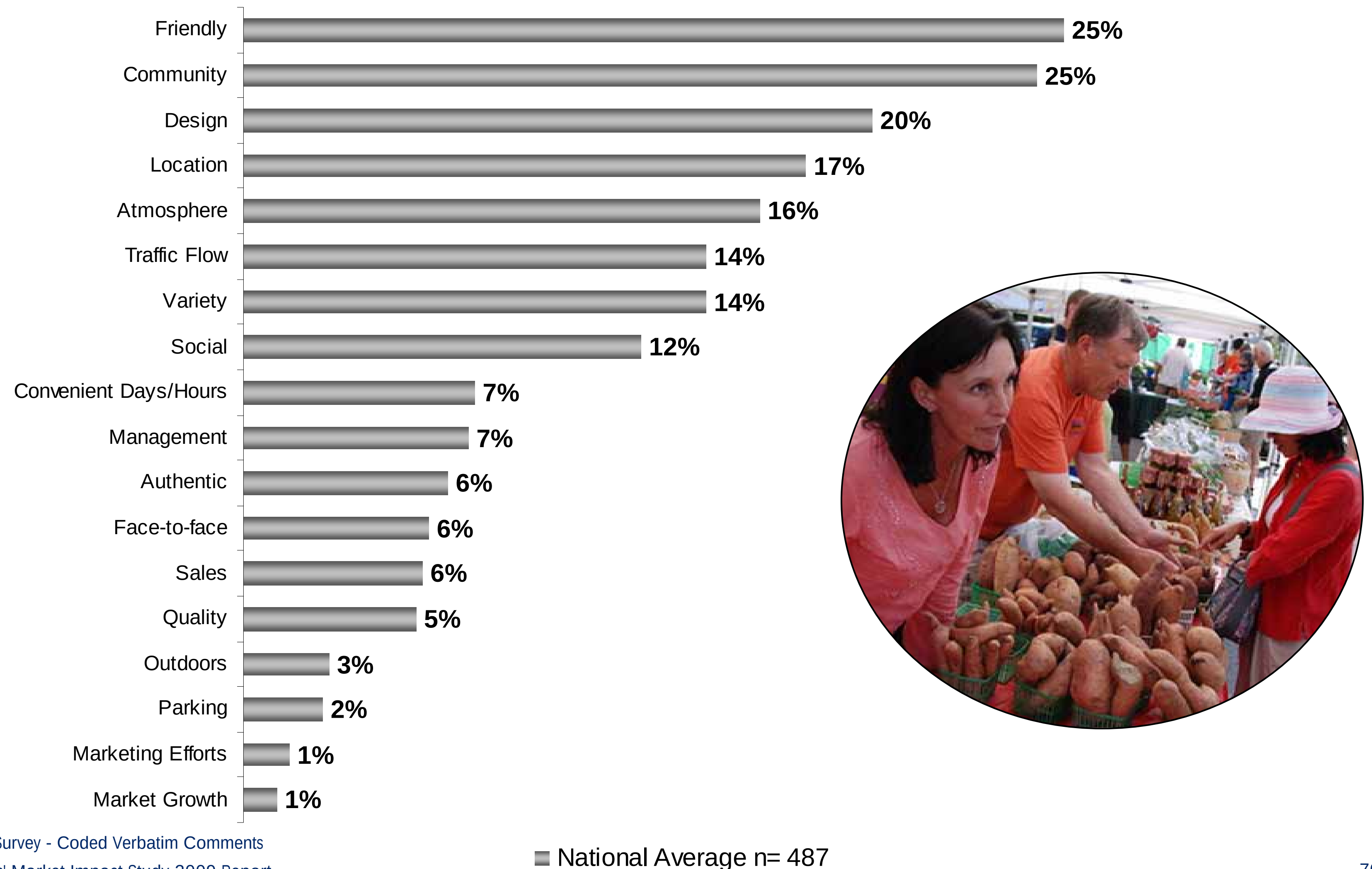


Source: Vendor Survey

Vendor Pleasure Points

- Vendors are attracted to the community and social aspects of farmers’ market participation

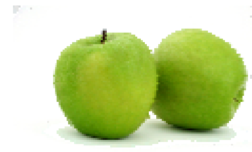
What do you like best about this market? What do you think works well?



Source: Vendor Survey - Coded Verbatim Comments

Vendor Pleasure Points

- “In their own words”


Community

‘”[The market] attracts a lot of people, [has] lots of events, musicians, community. [It’s] consistent, well-organized. The location [and] vendor spots can be reserved.” Medium Market, British Columbia

“There is a limit on each category. Everyone comes out in the community and the market is located in a good location.” Medium Market, British Columbia

“You get to market your product to people you would not normally see. I like being around the other vendors; I can talk to people and share ideas.” Small Market, Alberta

“Parking is great. it is a nice market and in a way it is good we don't have tourists, locals coming on a regular basis, supply is great convenient demand and size of market. it is fun for the most part.” Small Market, Ontario

Design

“I don't have to set up a tent - the awning is permanent. [There are] lots of friends here and getting to meet people.” Small Market, Saskatchewan

“That I can leave my stuff set up all week.” Large Market, New Brunswick

“There is lots of parking. I can unload everything easily, there is plenty of room between the vendors, the customers are also family oriented and the management is good.” Medium Market, British Columbia

Location

“I like that it is open year round and that it is open indoors and that I only work 3 days a week.” Large Market, Alberta

“I love the location, lots of amenities, [and] eclectic group of people. The group of farmers that are there stay true to the ideology of farming.” Small Market, Ontario

‘”The location is great; located near natural surroundings. And there is lots of open space.” Medium Market, Ontario

Friendly

“Storage and [the] help with table set-up.” Small Market, Alberta

“Atmosphere – [it’s] like a small village where friends can get together. The close relationships that are built with customers.” Large Market, British Columbia

“Friendliness, quality of products - organic, local. The support from the community, and the location.” Medium Market, British Columbia

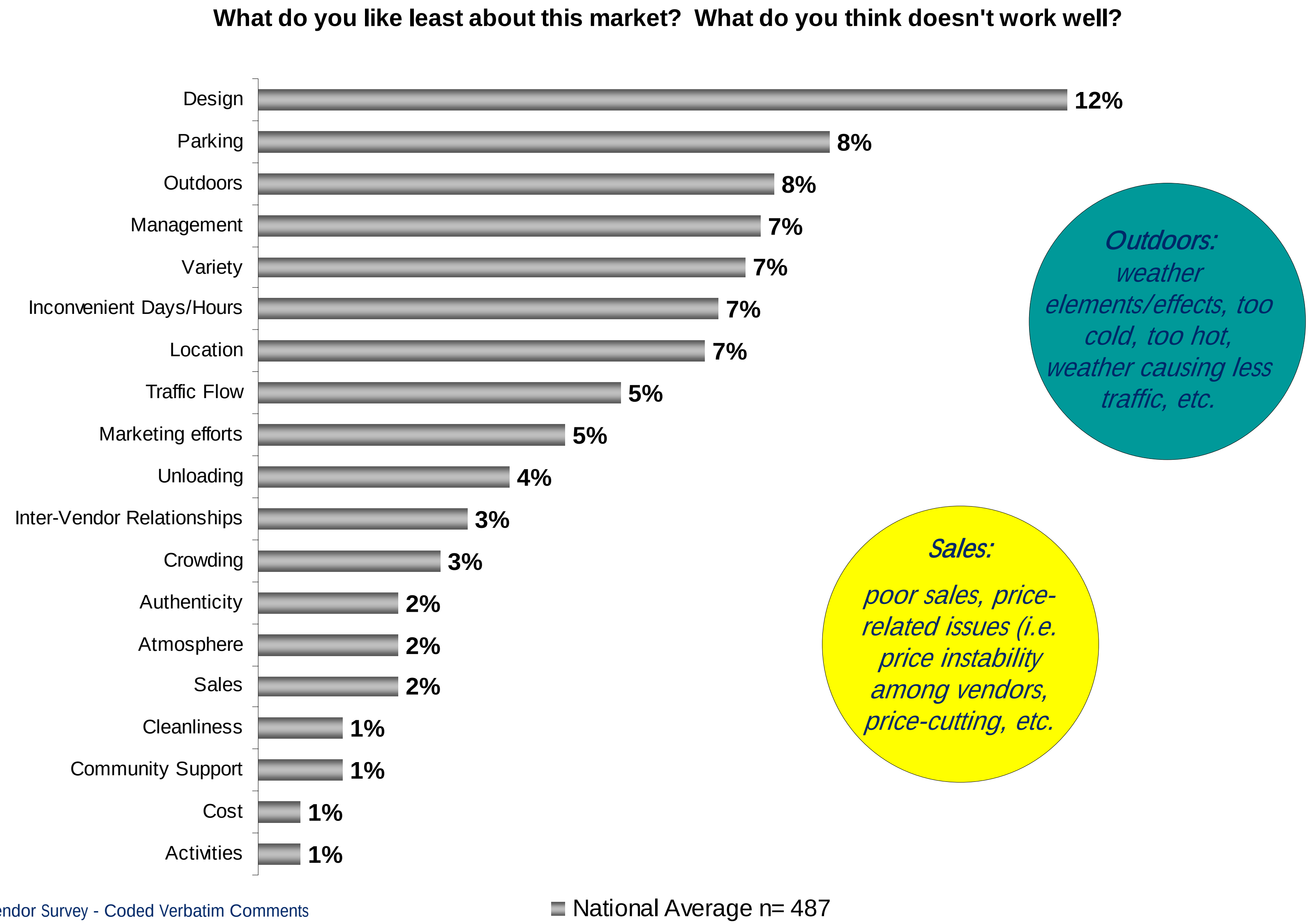
“I enjoy the one on one time i get to have with my customers.” Large Market, Alberta

‘”I like the signage to get here. It was very easy. Volunteers were here ready to help and the market manager walks around giving all vendors water.” Medium Market, British Columbia

Source: Vendor Survey

Vendor Pain Points

- Market design and parking are key issues for vendors



Source: Vendor Survey - Coded Verbatim Comments

Vendor Pain Points

- "In their own words"



Design

"[It] needs a seating place. We need to have a permanent site, more vehicles (out-of-market site). Power and water should be available to everyone." Small Market, Alberta

"Too many browsers just having a 'Sunday outing'." Medium Market, Alberta

"Not owning this space. 2 or 3 times a year they would have other events at this spot and we could be forced to stop. I would prefer a permanent space." Medium Market, Ontario

"Money is not accessible in that there is no cash machine." Medium Market, Quebec

"We don't have our own building. It looks like crap. We need our own building." Large Market, New Brunswick

Outdoors

"[It] could use security because there is a chance that booths left unattended could experience theft. [An] indoor area would be nice for the Fall." Medium Market, British Columbia

"I wish it was in a park - concrete just kills the mood. Allowing people to come even if they haven't grown everything themselves." Small Market, Ontario

"More food vendors - balance the market out better with craft vendors. I would like to see a indoor/year-round market." Large Market, British Columbia

Parking

"Parking is bad for driving customers. Hours are long; if I've sold out early than waiting until 3pm is too long." Large Market, Manitoba

"I do not like how poor the parking facilities are." Medium Market, British Columbia

"Loading is troublesome at times. There is a lot of carry when you can't pull up." Large Market, Ontario

Management

"Management has not done a good job of enforcing their own rules. The stalls are not consistently far enough. You don't get a nice straight line. It chokes traffic." Small Market, Alberta

"The hours of operation for the markets are suited for the vendors and not the customers." Medium Market, Quebec

"BCFA rules that we can only sell what we grow personally. Why can't we share the growing and the selling of let's say carrots (local produce)?" Medium Market, British Columbia

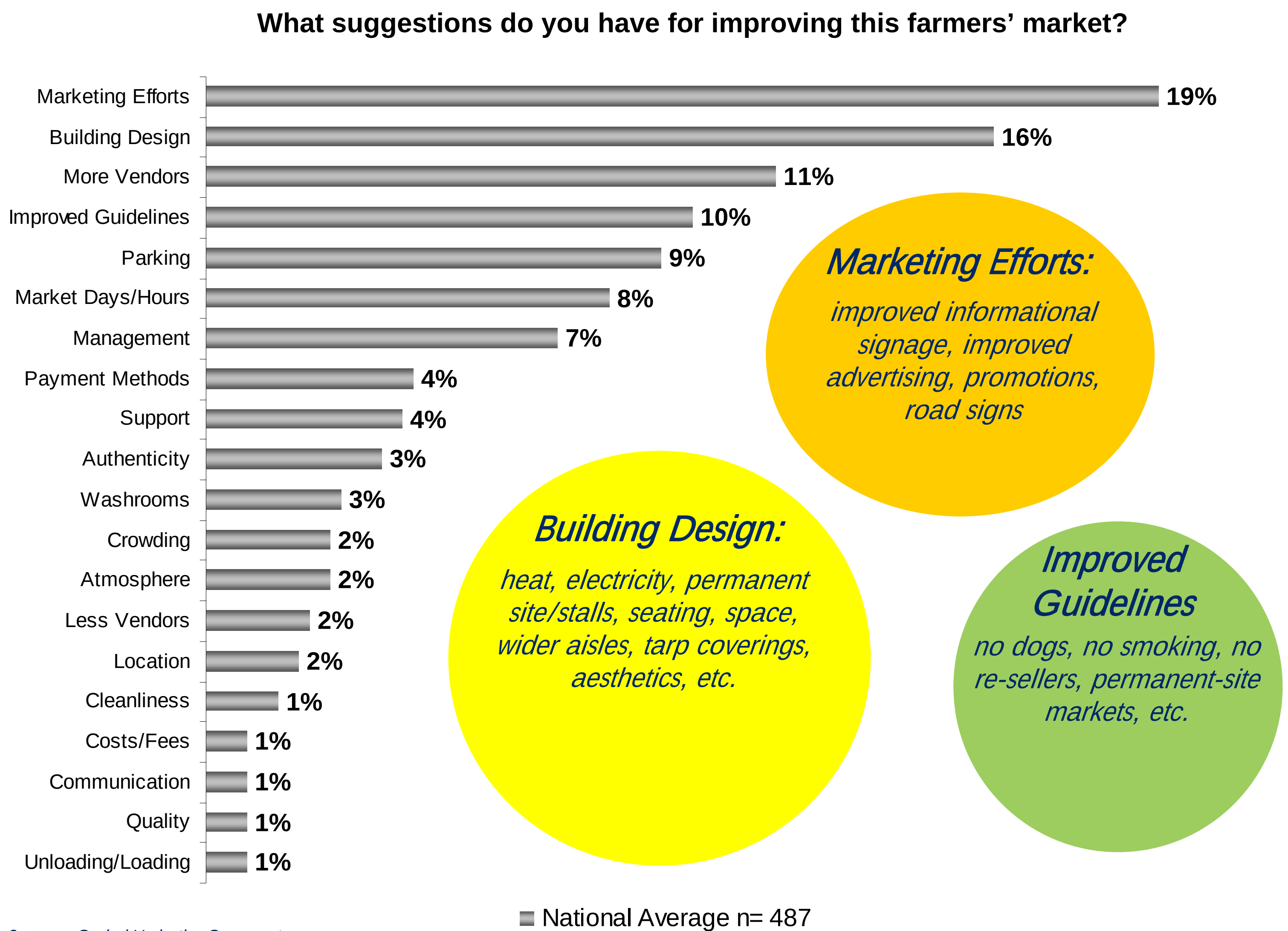
"Enforce the [no] dog rule - they don't and it's a safety issue." Medium Market, Ontario

"I don't like it when they sound a horn to start and end a market. Vendors should be able to sell whenever the market is open." Medium Market, British Columbia

Source: Vendor Survey

Vendor Suggestions for Improvement

- Improved marketing efforts top vendor suggestions



Source: Vendor Survey – Coded Verbatim Comments

Vendor Suggestions for Improvement

- "In their own words"

Marketing Efforts

"If OFA could do radio advertising during months of July and August and take clips of markets for promos on TV (i.e. public service announcement for tourism)." Medium Market, Ontario

"Each stand should be equipped with water electricity and shade and some more advertising." Medium Market, Ontario

"Fridays need more entertainment or something to draw the people in." Medium Market, Nova Scotia

Building Design

"Location issues [although] police presence has really improved the situation. [I] would like to extend the growing season!" Large Market, British Columbia

"Year-round indoor facility with expansion outside in the summer. A seminar for vendors for reducing crime at tables." Large Market, British Columbia

"Year-round market. And support from the city (i.e. access to building). Indoor/outdoor market in the summer." Large Market, British Columbia

"We could utilize the outside better, clean up more and advertise more." Small Market, Prince Edward Island

More Vendors

"Open it up to crafters to fill the building. There is a pool of talented craft makers that need a place to call home." Small Market, Saskatchewan

Improved Guidelines

"The definition of 'seasonal products' should be enforced. FMO sets down a number of definitions for 'seasonal'. There is a problem with part-time crafters. FMO should act as a fair arbitrator. Set-up an arbitration committee." Medium Market, Ontario

"Food safety is a little over the top. [We need] consistency in food safety inspectors. More adequate power available." Medium Market, British Columbia

"I would like to sell eggs but am not currently allowed to by the egg marketing board. MB chicken producers is discouraging small chicken farmers." Large Market, Manitoba

"There should be more parking. The government should promote and support local producers and provide clearer regulation of Organic Certification." Small Market, Saskatchewan

"Standardize the layout, extend the hours of the market. Some vendors get 2 tables instead of 1 for the same amount of rent." Medium Market, Ontario

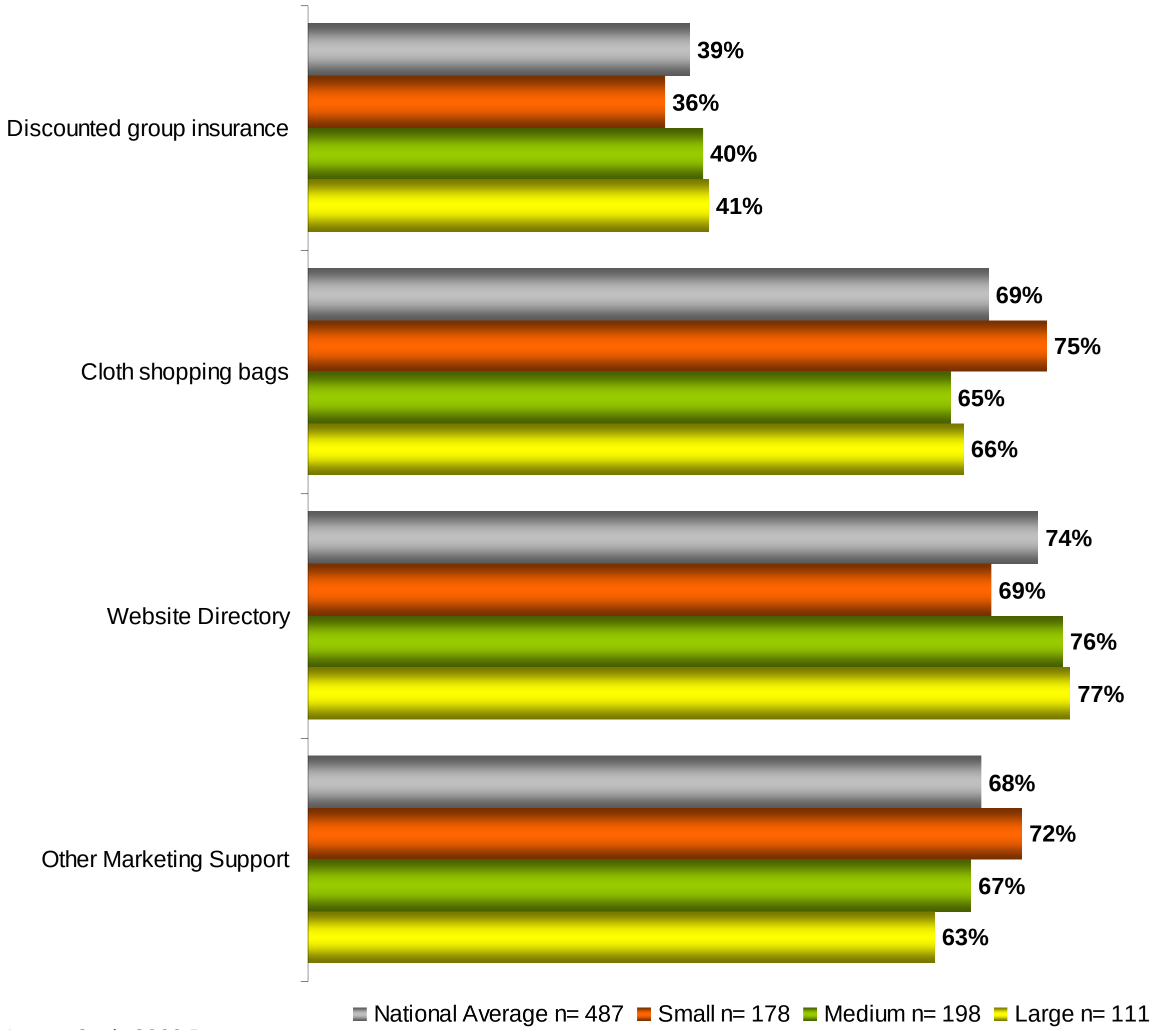
"There should be credit/debit on-site (shared cost). There should be assigned spots for full time vendors and this should repeat over the years." Medium Market, British Columbia

Source: Vendor Survey

National Farmers' Market Interests

- Marketing support (including website and bags) are strong vendor interests
- Insurance is of interest to 39% of vendors

Would you find value in the following services if they were offered by a National Farmers' Markets Association?



Source: Vendor Survey

Market Manager Insights – Market Profile

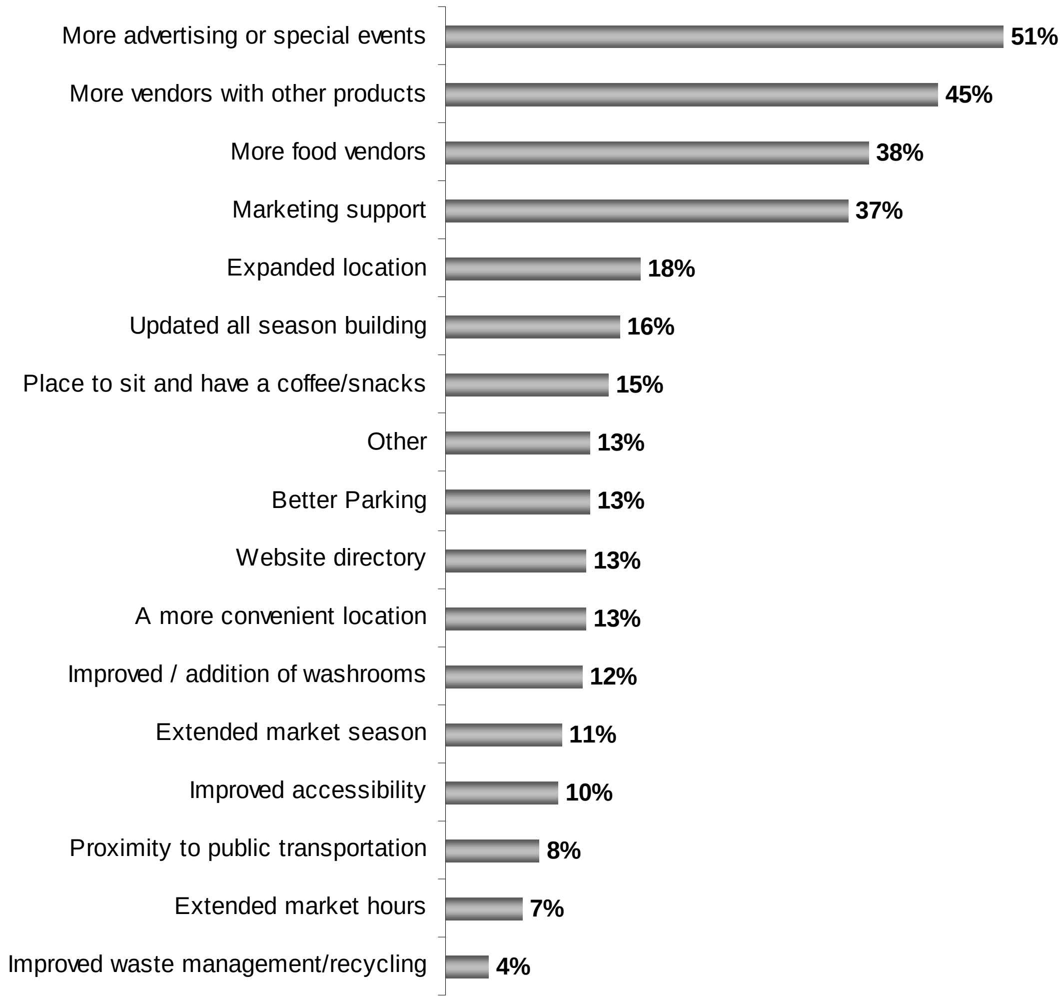
Market Manager Insights – Market Profile in 2008

- Please see detailed market manager database and profile book for detailed findings by market

- 57 % of markets are open Saturdays; 24% Fridays; 17% Thursdays; 2% other days
- 34 % of markets are open more than 26 days per year; 40% of markets are open between 16 and 25 days
- August is the peak sales month
- 56 % of markets are outdoor; 20% indoor; 24% both indoor and outdoor
- 46 % of markets serve municipalities with populations below 10,000
- Market managers classify 68% of their vendors as “primary producers”
- 80 % of market managers report that the number of shoppers has increased (56%) or stayed the same (24%)
- 81% of market managers report that the number of vendors at their markets have increased (48%) or stayed the same (35%)
- 81% of market managers report that the number of “primary producer” vendors has increased (33%) or stayed the same (48%)
- 91% of markets are funded by vendor/booth rentals
- 68% of market managers report no financial support from governments or associations in the past 5 years
- 86% of markets have not had an economic impact assessment
- At markets reporting insurance policies, the average market premium is $1123 annually; 93% of markets have no claim history

Market Manager Insights – Suggested Growth Factors

In your opinion, what factors would contribute to the growth of your market?



- Market managers suggested four major factors that would contribute to their market's growth
  - More advertising and special events
  - More vendors with other products
  - More food vendors
  - Marketing support
- Other factors related to:
  - Physical improvements
  - Extended market season / hours
  - Website directory

Economic Impacts

Economic Impact Assessment

Summary

- There are 508 known farmers' markets in Canada, some of which are represented by provincial farmers' markets associations.
- Economic impacts of farmers' markets were estimated using detailed methods employing traffic count and shopping expenditure data from 70 markets visited (14% of known markets) and from survey reports from 282 market managers (56% sampling).
- Direct sales for farmers' markets in Canada are estimated at $1.03 billion, with economic impacts ranging from $1.55 to $3.09 billion, based on a multiplier range of 1.5 to 3.0.