



Washington Farmers Markets Data Snapshot – 2020

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Summary

By early March 2020, the severity of the new Coronavirus became clear and on March 23, 2020 Governor Inslee issued the “Stay Home, Stay Healthy” order. Farmers markets, as essential services, were allowed to continue to operate. On March 26, Public Health-Seattle-King County issued its first “Farmers Market COVID-19 Plan Requirements,” followed on April 12 by Farmers Market Guidance issued for the entire state by the Washington State Department of Health. Throughout the farmers market season, guidance from the Governor and public health experts continued to evolve. Farmers markets have been committed to safe operations – for their staff, volunteers, vendors, shoppers and other visitors. They were on the front line of essential services, ensuring neighborhoods continued to buy healthy foods from local farmers and other vendors.

The combination of reduced farmers market revenue (due to fewer vendors and fewer market days), increased costs (especially staffing, equipment, PPE, and signage), and ongoing uncertainty has placed farmers market organizations under unprecedented stress. In addition, many farmers markets have lost sponsorships as businesses have reduced funding and sponsored activities are not allowed at markets. Markets also struggle to secure volunteers, as many of their usual volunteers were in high risk categories. Vaccines were not available until after the end of the market season.

The purpose of this "data snapshot" is to inform a real-time understanding of statewide farmers market trends for the 2020 season.

Note: in addition to the COVID-19 pandemic, the 2020 farmers market season was marked by extremely poor air quality, especial after August, due to regional wildfires.

In response to COVID-19, the Washington State Farmers Market Association pivoted all programming to meet the needs of farmers markets. This included creating a “Coronavirus” resource section on its website with public health guidance, a photo gallery showing how farmers markets had adapted, examples of signage, downloadable signage in multiple languages created in partnership with the Department of Healthy, and media archives. The WSFMA also hosted webinars and 25 weekly “COVID Convos” for member farmers markets to get the latest information, ideas, and support. We are very grateful for the support of Susan Shelton at the Washington State Department of Health for her guidance throughout 2020. The WSFMA also facilitated signage stipends to farmers markets so that they could print safety signage. The WSFMA also worked with King County Agricultural Program to provide CARES Act support to farmers markets in King County.

Methodology

In November of 2020, the 110 farmers markets that are members of the Washington State Farmers Market Association were emailed a request to complete a short online survey about vendor, sales and shopper trends at their farmers market. Google forms was used for the survey data collection. Respondents were instructed to “Please provide your best information or estimates that you have at this time” and “If your market is still open, please use your best year-to-date data.” The survey closed on November 6, 2020.

Response Rate

A total of 61 farmers markets responded representing 55% of current WSFMA farmers market members. They represented farmers markets in 47 cities and 21 counties throughout Washington State. Of the 61 farmers markets that responded, 4 (7%) reported not opening in 2020.

Key Findings

Before COVID-19 hit, Washington farmers markets planned, on average, to operate for 25.9 market days in 2020. Due to COVID-19, farmers markets opened, on average, dropped to 23.6 market days or 2.3 days.

Before COVID-19 hit, farmers markets planned, on average, to have 48.8 vendors in 2020. Due to COVID-19 restrictions, the average number of vendors dropped 40% as farmers markets were able to have, on average, only 28.6 vendors. The reduction in vendors stemmed from primarily two key factors: early restrictions limiting the vendor type to only those classified as “essential”; and requirements that vendors be spaced 6 feet apart to ensure physical distancing. The latter meant that significantly fewer vendors were able to fit in the market footprint. A third factor was that vendors who opted out of the farmers market in order to avoid risks to their health or to pursue alternative market channels like online orders, farm stands, or expanded CSAs.

75% of farmers markets reported a decrease in overall annual sales for the 2020 season. Of the farmers markets reporting a decrease, most anticipated a decrease of over 25%. This decrease is likely due to the reduction in numbers of vendors and shoppers allowed at the market. The reduction in market days open is likely to be less of a factor.

Despite the decrease in overall sales at the farmers market, over 50% of farmers markets reported an increase of individual vendor sales. Of the farmers market reporting an increase, most anticipated an increase of over 10% for vendors (based on manager’s assessment).

Over 75% of farmers markets saw an increase in SNAP sales, most over 25%.

Three primary areas of concern for respondents re: 2021 season: 1. Market viability; 2. COVID restrictions; and 3. Vendor retention/success.

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Farmers Market Organizations – Washington State: 2020

County where farmers market is located	Count	Percentage
Asotin	1	2
Benton	2	3
Chelan	2	3
Clallam	1	2
Clark	1	2
Grant	1	2
Grays Harbor	1	2
Island	2	3
Jefferson	2	3
King	21	34
Kitsap	4	7
Kittitas	1	2
Pend Oreille	1	2
Pierce	6	10
Skagit	2	3
Skamania	1	2
Snohomish	4	7
Spokane	3	5
Walla Walla	2	3
Whatcom	1	2
Yakima	2	3
Total	61	100

Did your farmers market operate this year? (2020)	Count	Percentage
Yes	57	93
No	4	7
Total	61	100

Market Days

Count of days farmers market planned to open pre-COVID19	Count	Percentage
10 or fewer	1	2
11 to 15	5	9
16 to 20	15	26
21 to 25	15	26
26 to 30	11	19
31 to 40	1	2
41 to 50	2	4
Over 50	7	12
Total	57	100

Note: Data categorized.

Count of days farmers market opened in 2020	Count	Percentage
10 or fewer	2	4
11 to 15	5	9
16 to 20	22	39
21 to 25	13	23
26 to 30	4	7
31 to 40	4	7
41 to 50	4	7
Over 50	2	4
Total	56	100

Note: Data categorized.

Difference in number of days farmers market planned to open and was open in 2020	Count	Percentage
-20	1	2
-16	1	2
-9	1	2
-8	1	2
-7	1	2
-6	4	7
-5	2	4
-4	3	5
-3	5	9
-2	5	9
-1	8	14
0	18	32
1	4	7
2	1	2
3	1	2
Total	56	100

Notes: a) Data does not include farmers markets that closed. b) Closures due to poor air quality and other reasons were not distinguished from closures due to COVID-19.

Vendors

Average number of vendors (per market day) planned pre-COVID19	Count	Percentage
10 or fewer	1	2
11 to 15	7	12
16 to 20	4	7
21 to 25	2	4
26 to 30	6	11
31 to 40	6	11
41 to 50	8	14
51 to 60	5	9
61 to 90	13	23
Over 90	5	9
Total	57	100

Note: Data categorized.

Actual average number of vendors (per market day) in 2020	Count	Percentage
10 or fewer	7	12
11 to 15	9	16
16 to 20	5	9
21 to 25	8	14
26 to 30	8	14
31 to 40	12	21
41 to 50	4	7
51 to 60	2	4
61 to 90	2	4
Over 90	0	0
Total	57	100

Note: Data categorized.

Difference in average number of vendors (per market day): planned vs actual	Count	Percentage
Added 20	1	2
No change	3	5
Lost 1 to 10	15	26
Lost 11 to 20	13	23
Lost 21 to 30	9	16
Lost 31 to 40	9	16
Lost 41 to 50	4	7
Lost over 50	3	5
Total	57	100

Vendor categories allowed to sell at farmers market in 2020	Count	Percentage
Farmers	57	100
Food Processors	54	95
Prepared Food	38	67
Artisans/Crafters	44	77
Resellers	7	12
Other	7	12
Total	57	--

Farmers Market Sales

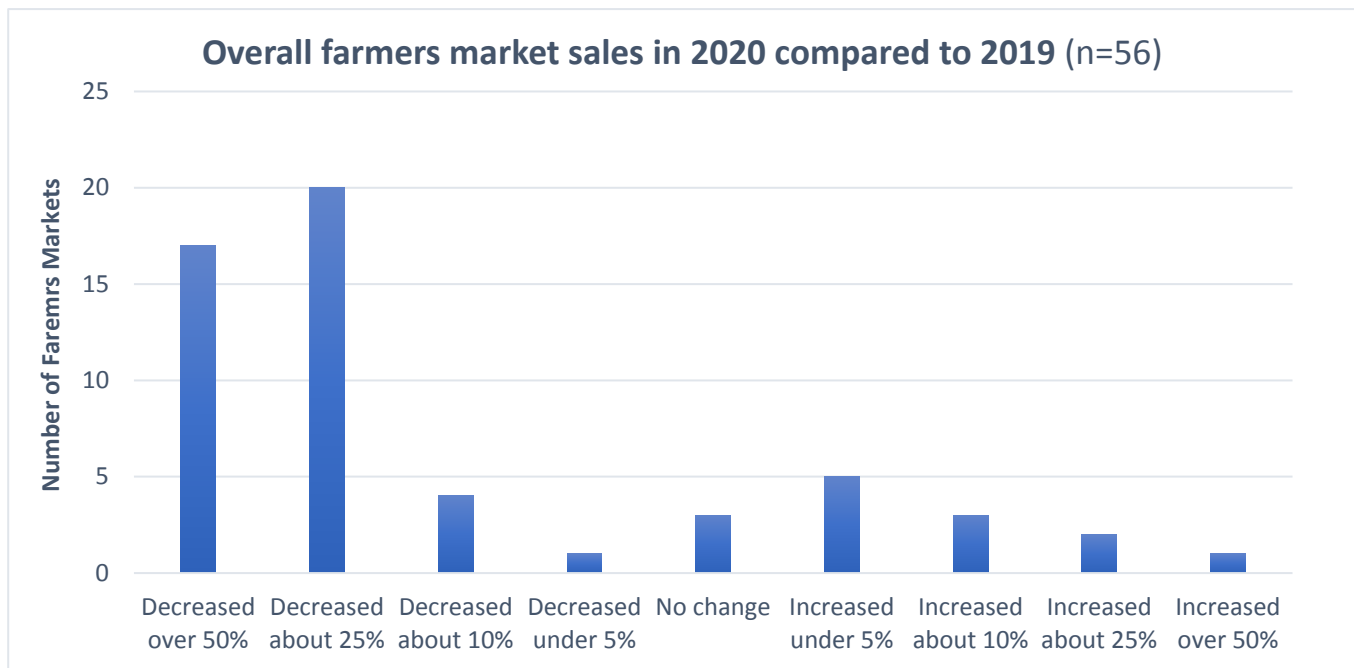
Farmers market sales adaptations to COVID19 offered in 2020	Count	Percentage
Drive-Thru, Delivery or Pick Up	8	14
Online Ordering/Pre-order and/or pre-pay	31	54
Other	7	12
None	18	32
Total	57	--

Note: Open-ended; data coded.

“Other” included:

- Central cashier for credit card processing and Community Produce sales
- Weekly market CSA
- Promoted direct sales from vendors
- Senior & high-risk shopping hours

Overall farmers market sales in 2020 compared to 2019	Count	Percentage
Decreased over 50%	17	30
Decreased about 25%	20	36
Decreased about 10%	4	7
Decreased under 5%	1	2
No change	3	5
Increased under 5%	5	9
Increased about 10%	3	5
Increased about 25%	2	4
Increased over 50%	1	2
Total	56	100



Comments

Customers said the market was their weekly social occasion, and a break from having to eat their own cooking. We are fortunate to have expansive outdoor areas.

I believe the numbers would've been the same, if not more in 2020, if more craft vendors joined back in mid-season. Traffic was also LOW, meaning customers spent MORE money.

Less shoppers, but larger average purchases

It was a struggle to get the market open this year.

Our farm sales actually increased by 5 compared to 2019

Our market moved to the waterfront, extended by an hour and advertised and put out many signs the day of as planned pre Covid. We also live in a rural conservative community. We were unaffected negatively by Covid. Our county and city imposed no extra regulations on us. We did not restrict the access. We spaced vendor booths out and asked vendors to wear masks. We supplied a handwashing station and put up a sign from the DOH stating masks were required. No other changes were made. We did not harass our customers.

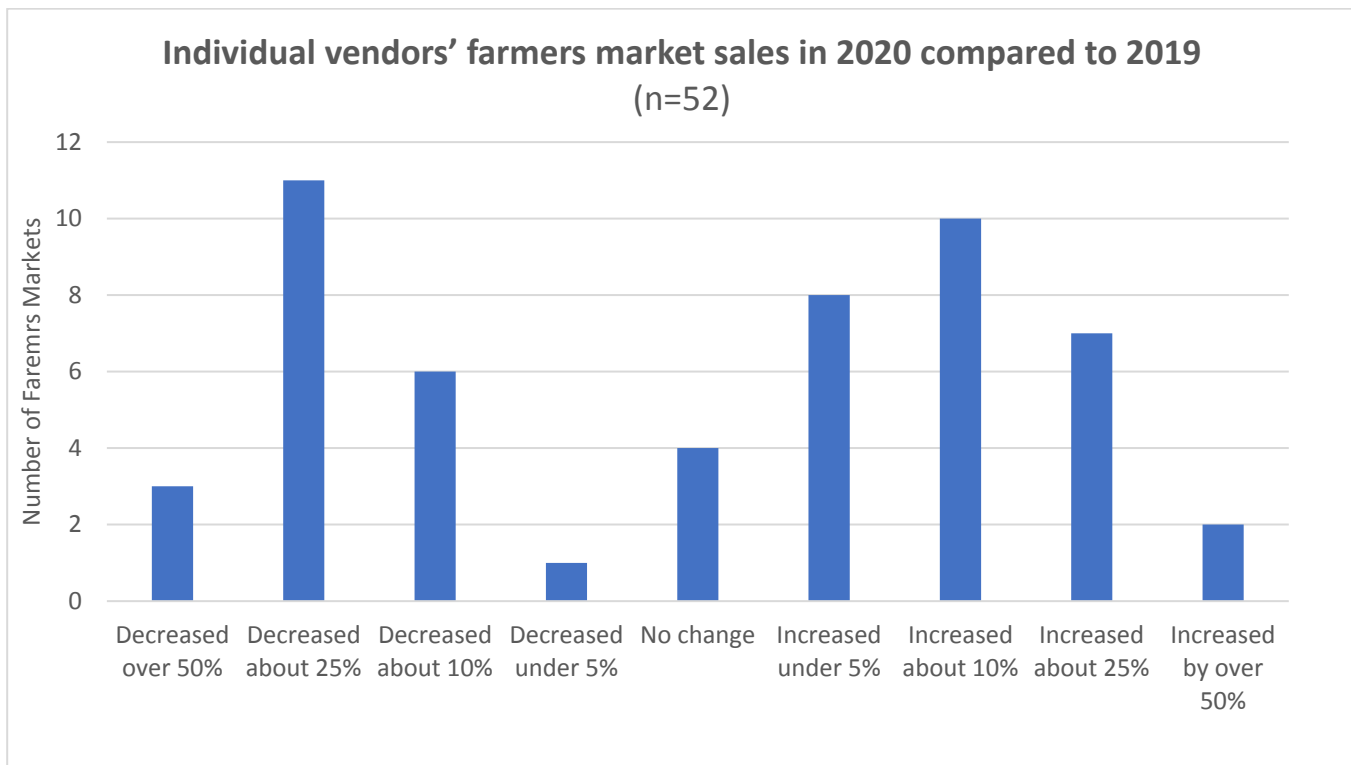
Our overall sales decreased by 16 to be exact, but this can be almost entirely attributed to the loss of Hot Prepared Food vendors due to our county not issuing any new permits for catering locations. If you don't include those sales, our total was down by only 4!

Our season was impacted by COVID as well as organizational changes, which included loss of paid staff

Prepared food was take-out only and for the last month or so of market operations - was a vendor that had been and continued to offer his meat pies as 'processed'.

We consider ourselves blessed with our overall numbers during the season.

Individual vendors' farmers market sales in 2020 compared to 2019	Count	Percentage
Decreased over 50%	3	6
Decreased about 25%	11	21
Decreased about 10%	6	12
Decreased under 5%	1	2
No change	4	8
Increased under 5%	8	15
Increased about 10%	10	19
Increased about 25%	7	13
Increased by over 50%	2	4
Total	52	100



Comments

35. increase among vendors that were with us last year. We started 2019 late at our new location at week 13. These vendors had 16 lower sales in 2020 compared to 2018 which was a full season.

Average per vendor was only down 18; despite attendance down 78

Craft vendors did remarkably well, compared to last year. One produce vendor was down about 10 as she does a lot of reselling and juggles her new business with meeting multiple market sites.

Depends on vendor category - farmers decreased about 10, prepared foods by 25-50, processors by 25

Farmers all were up which was a positive.

Farms did well enough, prepared food did poorly, no crafters wanted to come

Of the vendors that attended last year and this year, there was a .11 decrease in sales. Farmers:18 decrease, Crafters: 40 increase, Processors: 6.67 increase.

Our Farmers did quite well and their sales were up close to 50 our other vendors sales were up 10 to 25; We had less vendors and still had terrific days. More money for each individual vendor.

Our produce vendors all improved this year

Produce vendors had a reduction in sales apparently, but craft vendors saw no change or slight increases. We also were not able to have any prepared/processed food due to lack of permits by vendors who had been selling illegally in the past.

Some vendors did not as good as a normal season, and some did better than a normal season.

The customer base is pretty fixed where we are. Greater interest this year in local, fresh food, farm products, etc. With those 2 factors at play, fewer vendors meant greater sales for each vendor.

The farmers and food artisans that were in attendance actually gained sales activity.

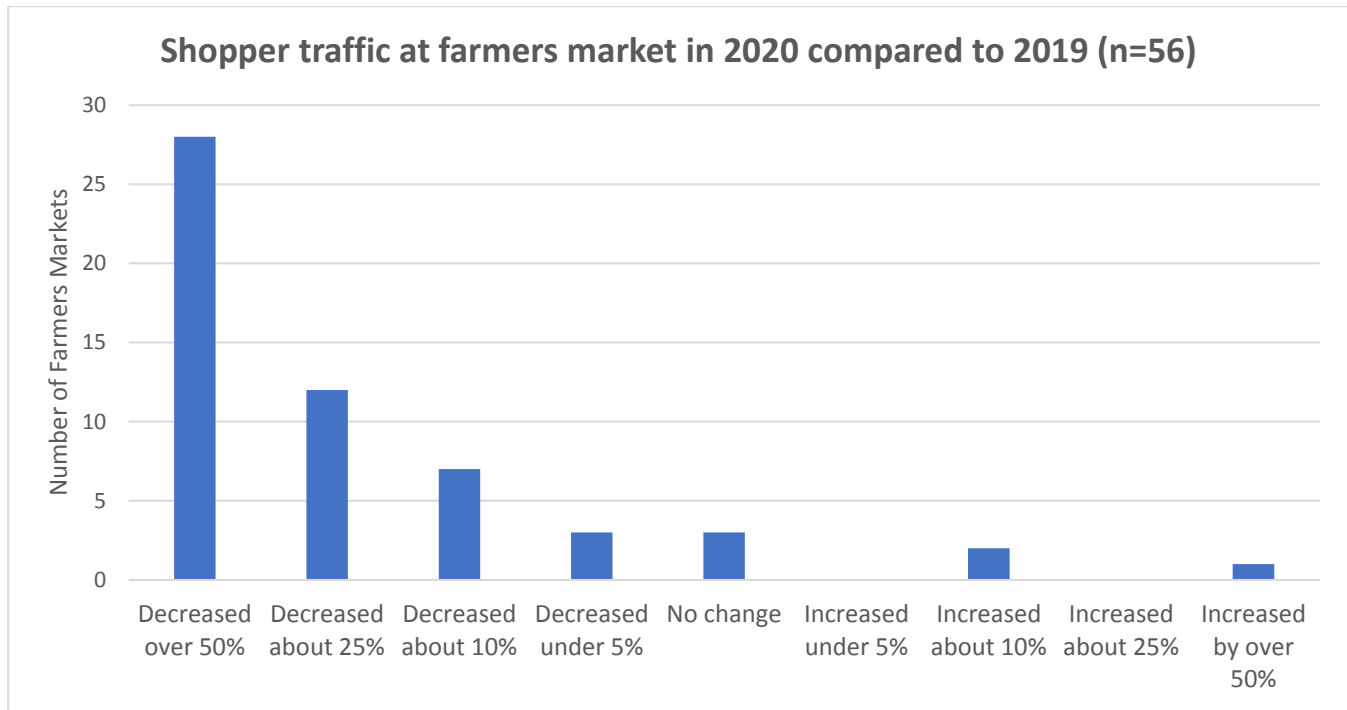
This was more that sales were very consistent and on the higher end of usual. We did have a slow down starting end of July - which was a little later than usual but common for the sales to tail off then,.

Typically food trucks make up a bulk of the gross revenue at our market, and without them other vendors found an increase in typical sales compared to past years at our market.

Varies by product and vendor. Some odd things, such as mushrooms, saw an increase.

We had about 3-4 new farmers this year whom did fairly well due to the SNAP program. Vendors from the previous year made less this year.

Shopper traffic at farmers market in 2020 compared to 2019	Count	Percentage
Decreased over 50%	28	50
Decreased about 25%	12	21
Decreased about 10%	7	13
Decreased under 5%	3	5
No change	3	5
Increased under 5%		
Increased about 10%	2	4
Increased about 25%	0	0
Increased by over 50%	1	2
Grand Total	56	100



Comments

2019 we had 112,813 shoppers, 2020 had 24,361. We chalk that up to asking one shopper per household to attend and the lack of prepared food options at market.

Dollars spent per customer increased significantly.

Even for a 30 minute visit to the market, customers seemed to want to get out of their homes for an outdoor experience. Lots of tourists from neighboring counties as well.

Ferry Service to Canada lands directly next to the Market location so we definitely observed a dip in attendance due to border closure

Hard to say exactly! But I would guess we were down by 25-50

lots of window shoppers at this market...

no change for numbers; however, it is not comparing same customer counts as we had a dedicated entrance and exit for market this year. The actual customer count was more real rather than in 2019 it was an average.

No counts from previous years- started out strong over 350 and ended in the 200 range. Early attendance was due to extreme boredom we think.

Normally over 250,000 shoppers in a year. This year less than 100,000

Counts are not really comparable for us. With restricted entry, every shopper is counted. In previous years, we have used clicker counts done in the market area at timed intervals as shoppers can enter from multiple areas. In any case, shopper counts were down but every shopper came to buy rather than browse.

Our local customers held back during the tourist season. Usually we get both a strong local crowd and a tourist crowd. The lack of a ferry during the summer and the fear of folks from out town kept our numbers down. Our average day was around 800; We are a tourist and a locally driven market. The locals stayed away on big holiday weekend. We were also down a ferry during the summer and this affected our customer count.

Our location change meant a little confusion for about 5 of our regular customers.

Our visitors spend on average \$20.12 at each market. We did not keep an accurate count this year, but since our visitor count is tied to sales, I would estimate that the visitor count also declined by about 16.

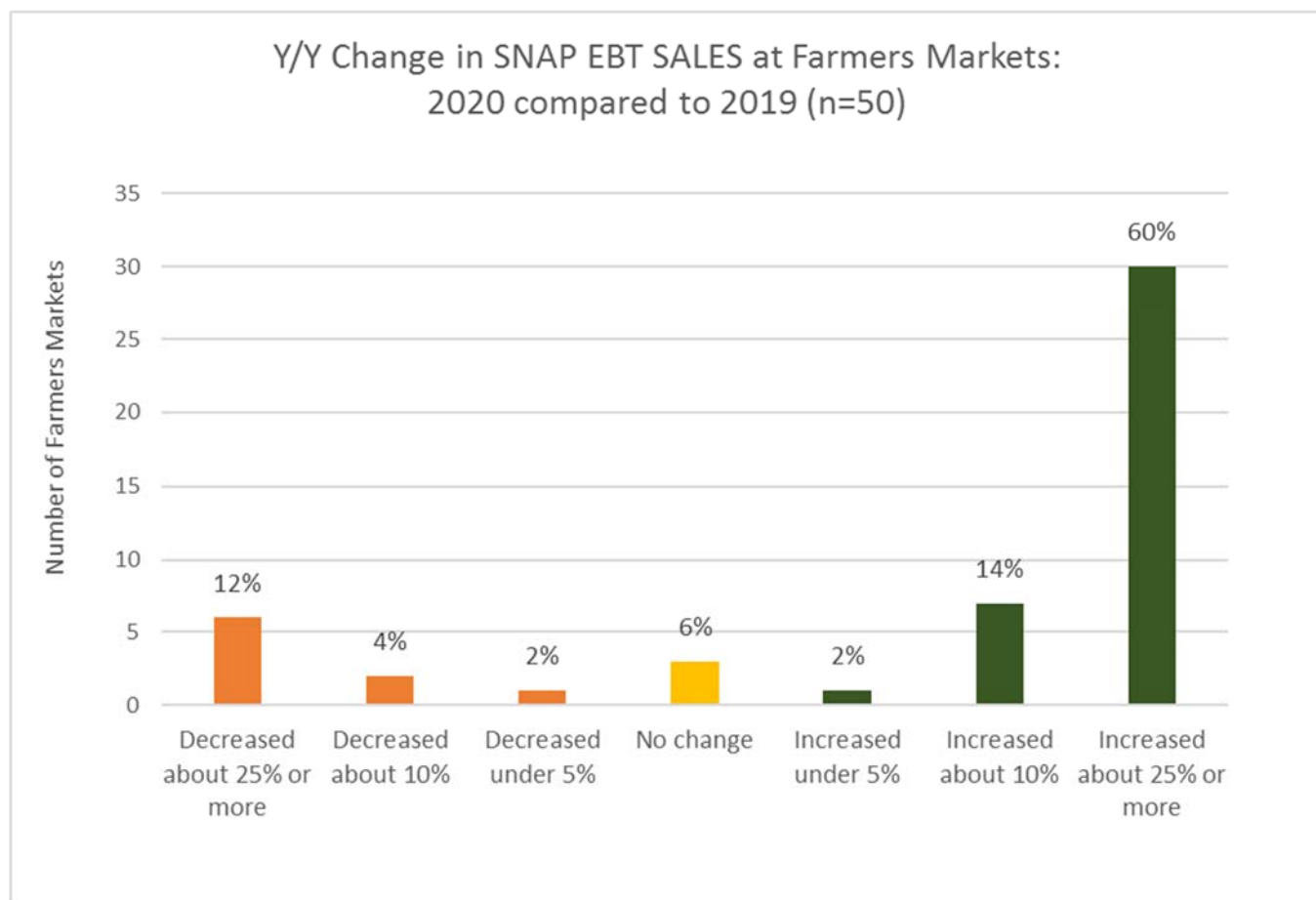
Thankfully people still came to market. However, our Port Townsend Farmers Market usually has 2,500-3,000 people on sunny summer days. Our busiest day this season we have 700 shoppers through the market.

We encouraged one shopper per household, which lowered shopper counts

We lost a lot of tourist traffic

We were strictly limited by the City and Health Dept about number of shoppers allowed in the markets at any one time.

How SNAP EBT SALES at farmers markets in 2020 compared to 2019.	Count	Percentage
Decreased over 50%	5	10
Decreased about 25%	1	2
Decreased about 10%	2	4
Decreased under 5%	1	2
No change	3	6
Increased under 5%	1	2
Increased about 10%	7	14
Increased <i>about</i> 25%	8	16
Increased <i>over</i> 25%	12	24
Increased over 50%	10	20
Total	50	100



Comments

Availability of match made big difference (previously not a part of FINI program)

EBT and SNAP were introduced late in our 2020 season.

First year to offer SNAP/EBT

More EBT shoppers, more money due to gov. making everyone have 500 per mo.

Our SNAP sales this year were a bright spot in this otherwise challenging season.

SNAP Market Match helped significantly! Also, people's awareness of our market's SNAP offering in addition to more people qualifying for SNAP.

The SNAP Market Match currency was really popular and we had many new SNAP customers.

This year the SNAP program really took off. We sold close to \$2000 as compared to \$200 from 2019.

Was not able to get set up for SNAP due to COVID and organizational challenges

We did a lot better this year with EBT than we have in years prior.

We had a HUGE increase in SNAP EBT Sales this year! Nearly double!

We had intended to add SNAP, but only were able to add WIC/Senior.

We saw more folks using the system this year.

Biggest concern about the 2021 farmers market season, given what is known now. (N=60)

1. MARKET VIABILITY

Mkt having finances to operate; decrease in revenue. Lack of sponsorships; donors (35)

Getting shoppers to come back; shopper fear (12)

Extra staffing; staff retention; keeping morale up (12)

Volunteer burn out; recruitment (5)

2. COVID RESTRICTIONS

More COVID restrictions/policy; conditions. (22)

COVID escalation; moving backwards in terms of phases. (12)

Enforcing restrictions, masks with shoppers, social distancing, counts (8)

Bringing back music and entertainment (5)

3. VENDORS

Vendor profitability (20)

Vendor retention; recruiting (18)

Vendor spacing; limits (12)

Limits on non-essential vendors; bringing back crafters, prepared food (8)

No sampling (3)