



# ORGANIZATIONAL DIMENSIONS OF FARMERS MARKETS IN WASHINGTON STATE

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# Organizational Dimensions of Farmers Markets in Washington State

## Introduction

Farmers markets are one of the most visible cornerstones of farm-direct marketing today. Throughout the United States, the total number of farmers markets has increased dramatically. The USDA’s directory now includes 8,144 farmers markets, growing 3.6% between 2012 and 2013 alone (USDA-AMS 2013). 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, our historical research found that the number of markets in Washington State has grown significantly, quintupling in the last two decades (Figure 1).

Despite the consistent growth of direct sales nationally and in Washington State, very little has been documented about the extent or characteristics of direct marketing as a long-term strategy for farm viability. And while there is a growing literature emphasizing the role of farmers markets in community and local food systems along with a proliferation of “how to” guides, very little data is available about farmers markets’ performance and organizational characteristics from a manager’s perspective. The purpose of our research, therefore, is to address this need by documenting the current capacity of Washington State farmers markets to generate income for farmers, improve the environment, and provide assets to communities; as well as to assess their long-term sustainability by surveying market managers about their market organizations.

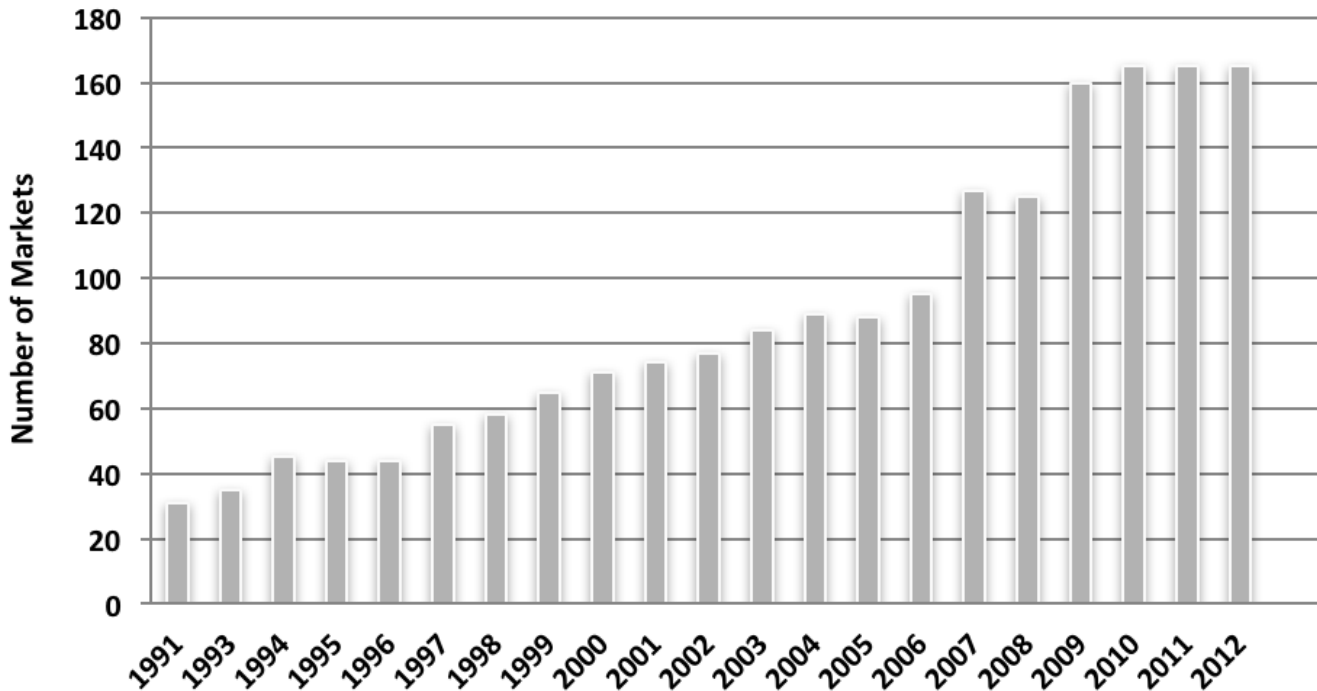


Figure 1. Annual growth in Washington State farmers markets, 1991 to 2012

## Methods

In 2010, a “Survey of Market Managers” was sent to a list of 169 unique farmers market locations in Washington State. Farmers markets were identified through multiple means including the “2010 Washington State Farmers Market Guide” published by the Washington State Farmers Market Association (WSFMA), the list of markets authorized to participate in the Farmers Market Nutrition Program, statewide networking with other market managers, the Washington State University (WSU) Small Farms Team, and WSU Extension, as well as local food directories and web searches.

In keeping with the WSFMA’s “Roots Guidelines for Member Markets,” we defined a “farmers market” as a place where at least five farmers per market day (on average) assemble on a recurring schedule to sell their farm products directly to consumers (WSFMA 2010). For the purposes of this research, each unique market location was treated as one farmers market. Following key principles from the Tailored Design Method (TDM) mixed mode survey protocol, the mail/internet contact sequence included three postal mailings, two email messages, and one telephone follow-up (SESRC 2011; Dillman 2011). A second phase of telephone interviews began on April 25, 2011 with up to 10 call attempts made for each case. The overall data collection period lasted from August 13, 2011 through July 25, 2011. In all, 127 unique farmers market locations are represented in the survey results, for an adjusted response rate of 78.5%. With such a high response rate, we believe that our survey is representative of the diversity of farmers markets in Washington State.

## General Farmers Market Characteristics

Given the need to better understand the diversity of farmers markets in Washington State, our survey collected information on general characteristics such as where markets are located, their size, and how long they had been in operation. We also documented “the market season,” including when markets open and close and the days of the week markets are in operation.

## Locations of Farmers Markets

Farmers markets from 32 out of Washington’s 39 counties were represented in the survey responses. Over a quarter (27%) of the market locations were in King County.

Over half (52%) of the markets were located in the northwestern region of Washington, which roughly corresponds with the Puget Sound and includes major metropolitan areas such as Seattle, Bellevue, and Everett. Only 27% of markets were located in non-metropolitan counties and nearly half (48%) of all markets were in counties in metropolitan areas with populations over 250,000.

## Size of Farmers Markets

While there is no standardized way to categorize the size of a farmers market, the most common approach is to create size categories based on the number of vendors (Stephenson 2008; USDA-AMS 2009). This raises the question of *which* vendors to count? In addition to farmer vendors, markets typically also have food processors, prepared food, and artisan or craft vendors (WSFMA 2010). There is also the question of *when* to count the vendors? Not all vendors who are part of a farmers market come to every market day, especially if they have products with a limited season (e.g., blueberries or cherries).

For this research, we chose to count all vendor types to be consistent with other research and because it captures the full footprint of a market’s space needs, management demands, and potential sales. We chose to focus on the total number of vendors on a “typical market day” during the summer season as this is more likely to represent the market when it is at full capacity. Given the differences between regions in Washington, we assumed the markets were in a better position to determine what was “typical” and when it was “summer” in their communities.

We realize that the size of a farmers market is dynamic. In order to compare Washington markets, we grouped them into the categories of *very small* (10 vendors or less); *small* (11–30 vendors); *medium* (31–50 vendors); *large* (51–100 vendors); and *very large* (101 vendors or more). These size categories are not meant to be definitive or deterministic, but rather provide a useful way to analyze and contrast the needs and capacities of markets.

By the categories we defined, 63% of farmers markets were “small” or “very small,” 24% were “medium,” and 14% were “large” or “very large” (Figure 2). On average, farmers markets in Washington had 32 vendors (which would be a medium-sized market), with the number of vendors at each market on a typical day ranging from 3 to 200. If aggregated, the markets responding to our survey provided approximately 4,000 vendor opportunities on a typical market day during the summer season in 2009.

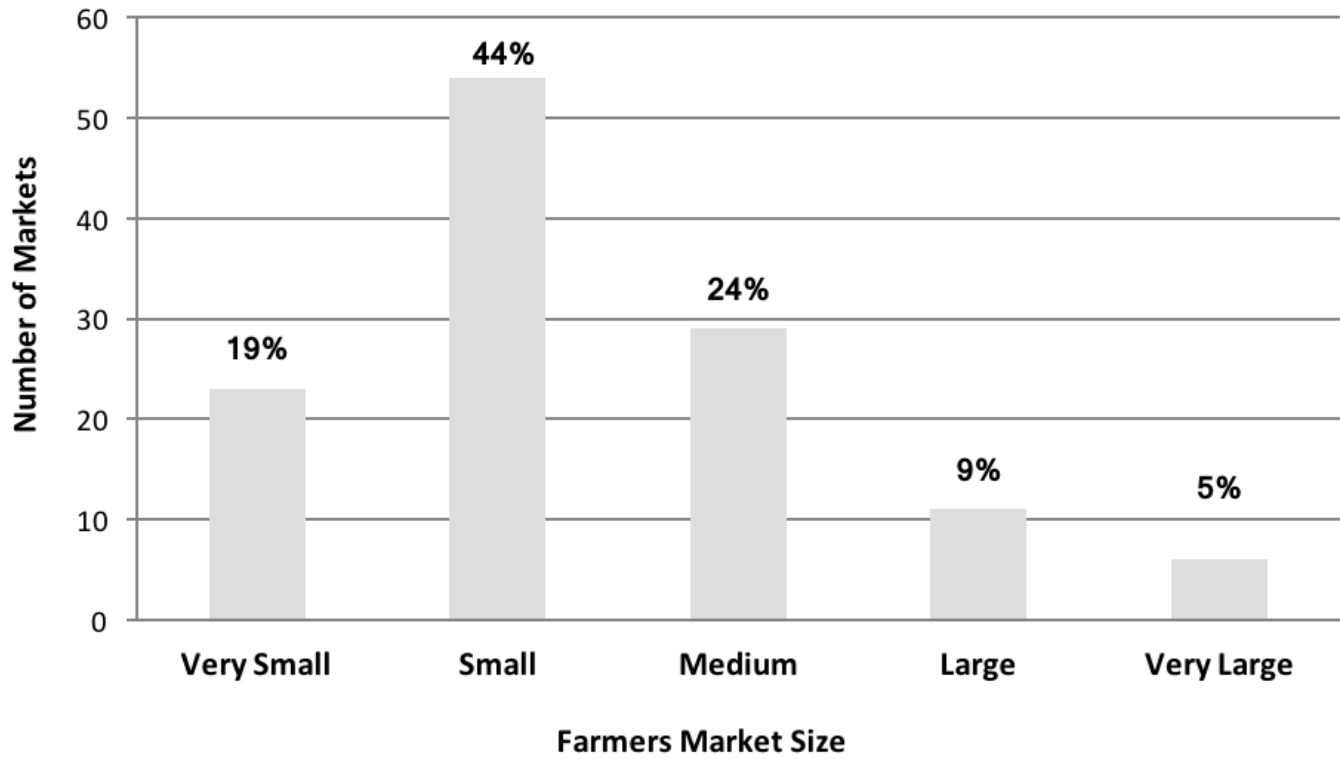


Figure 2. Size categories of farmers markets based on number of vendors on a typical market day.

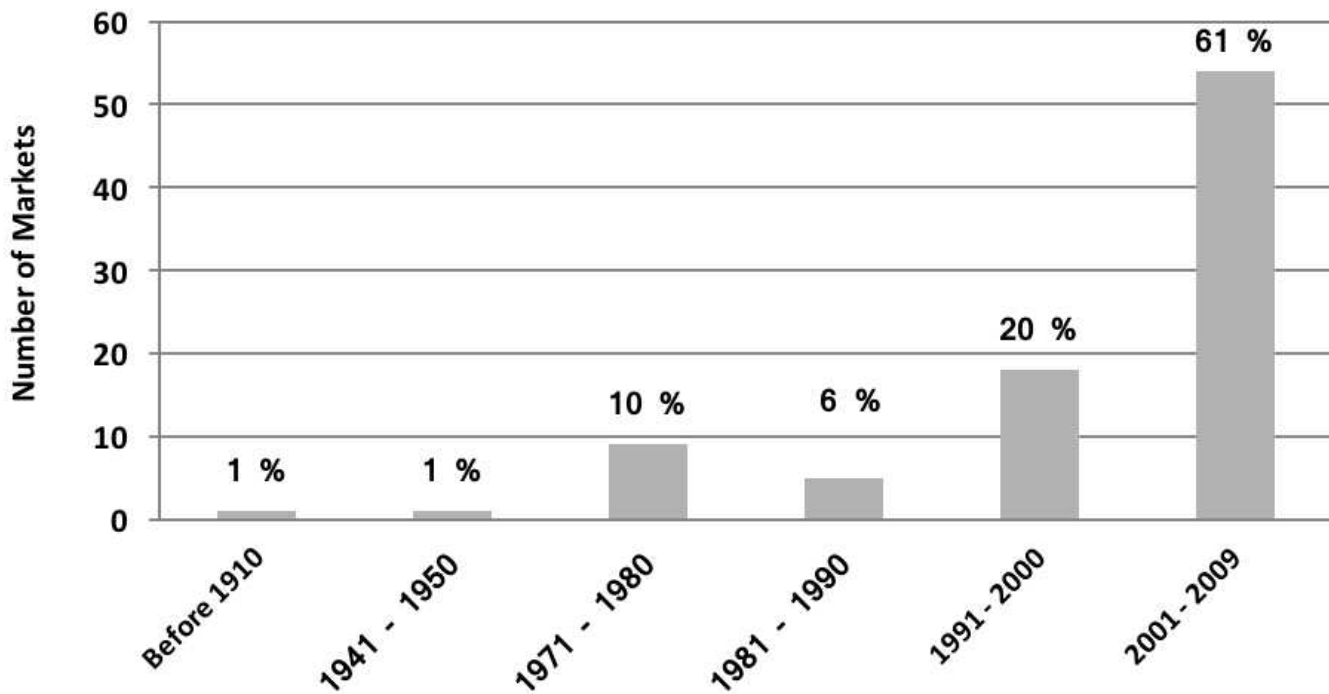


Figure 3. Farmers markets by decade opened.

## Age of Farmers Markets

Over a third (39%) of the markets in our study were less than 5 years old and 38% were over 10 years old. The age of a market, in combination with the manager’s experience, can be an important factor in a market’s success (Stephenson 2008). Most (61%) of the farmers markets in our study were started between 2001 and 2009 (Figure 3). This pattern is consistent with the history of farmers markets and national trends (USDA-AMS 2013; Brown 2001). Our study does not document the full history of farmers markets in Washington State because we did not collect data on the markets that closed prior to 2009.

(For a historical analysis of farmers markets in Oregon, see Stephenson 2008.)

## Market Day of the Week

Over a third (37%) of all farmers markets were held on Saturday, making it the most common day for markets (Figure 4). The second most common day is Wednesday (17%) followed by Sunday (15%). Pike Place Market was the only farmers market open on Monday, and it is also the only farmers market open seven days a week. The vast majority of markets (91%) are open one day per week in the same location.

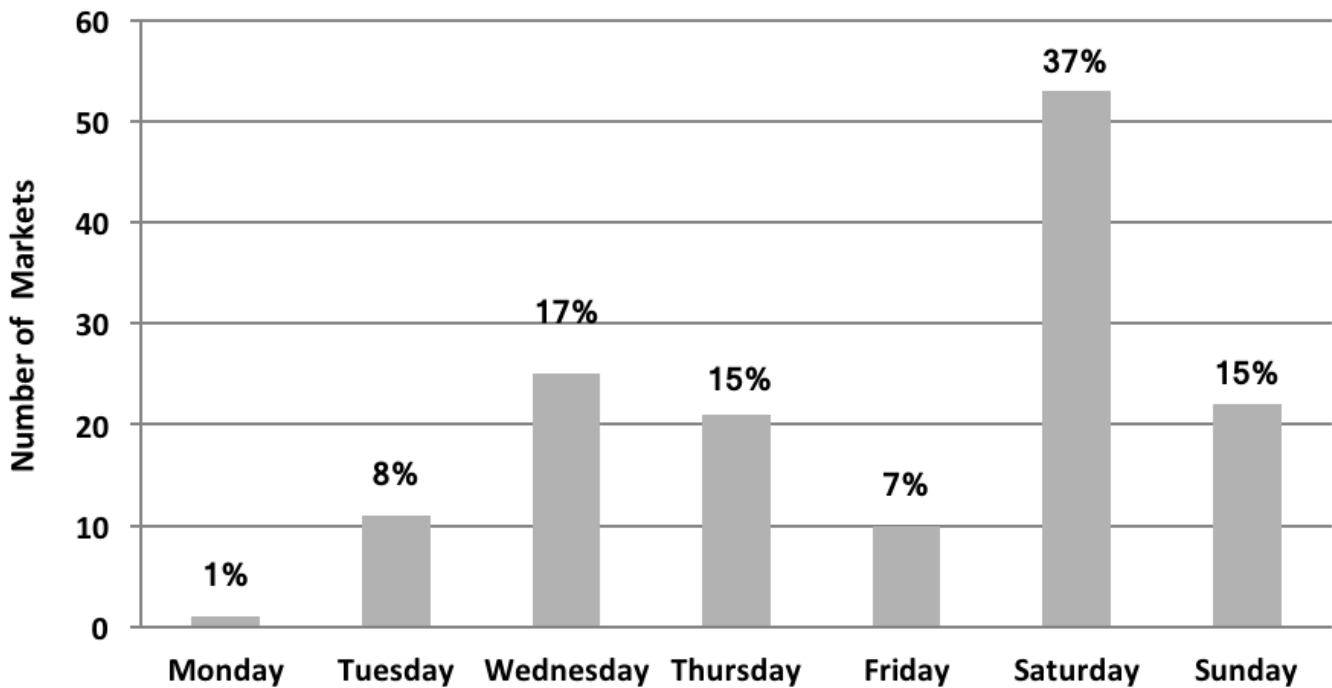


Figure 4. Days of the week farmers markets operate.

## Seasonality

Seasonal farmers markets in Washington were open for an average of 21 weeks in 2009. Most markets (82%) open in either May or June and close in September or October (91%), meaning that the primary market season is from May to October (Figure 5). However, a small percentage of markets remained open into the winter months of November and December.

In addition, our survey found five markets that operated year-round. These findings are in keeping with our observations of increasing experimentation with adding holiday and winter market days. These trends and other strategies to extend the market season will be important to track over time.

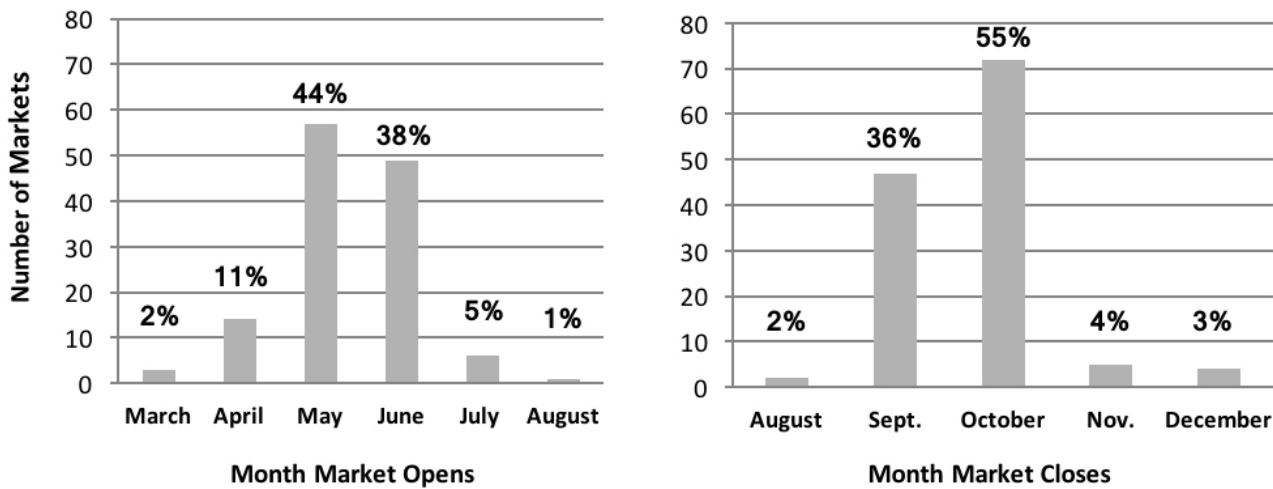


Figure 5. Month farmers markets open and close. (Includes data for Market day 1 and Market day 2; excludes year-round markets.)

In terms of the general characteristics of farmers markets in Washington, we found significant numbers of markets across all regions of the state. Market respondents represented 32 of 39 Washington counties. As might be expected, markets were concentrated in King County and other metropolitan counties. 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. We found only three markets that were open three days a week or more in the same location, with over 90% open one day per week (most frequently a Saturday or Wednesday). Most markets operated seasonally for an average of 21 weeks. Most commonly, 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.

## Farmers Market Vendors and Products

This section examines survey results from questions about the types of vendors at farmers markets and the products they sell. For the purposes of this survey, we used the vendor categories defined in the Washington State Farmers Market Association’s “Roots Guidelines for Member Markets.” For easier reference we will refer to both the categories of “farmer” and “farmer-processor” as “farmer vendors.” Farmers markets usually have policies about what kinds of vendors they allow into their market. Some markets do not allow resellers. Some choose to limit the number of prepared food and craft vendors. Each market creates its own, often dynamic, “vendor mix” depending on its mission, management, shopper base, and the availability of vendors.

**Farmers and Farmer-Processors:** Someone who raises what they sell on their own land (may be rented), including farmers who process what they raise or have their products processed; also includes seafood, wine from Washington American Viticultural Area (AVA), flowers, and ornamentals.

**Food Processors:** Someone who sells what they have personally prepared or processed, but did not raise ingredients themselves.

**Resellers:** Someone who buys produce from other farmers and brings to sell at farmers market.

**Prepared Food Vendors:** Someone who sells freshly made foods ready for immediate consumption.

**Artisans/Crafters:** Someone who creates with their own hands the products they offer for sale.

Source: WSFMA (2010)

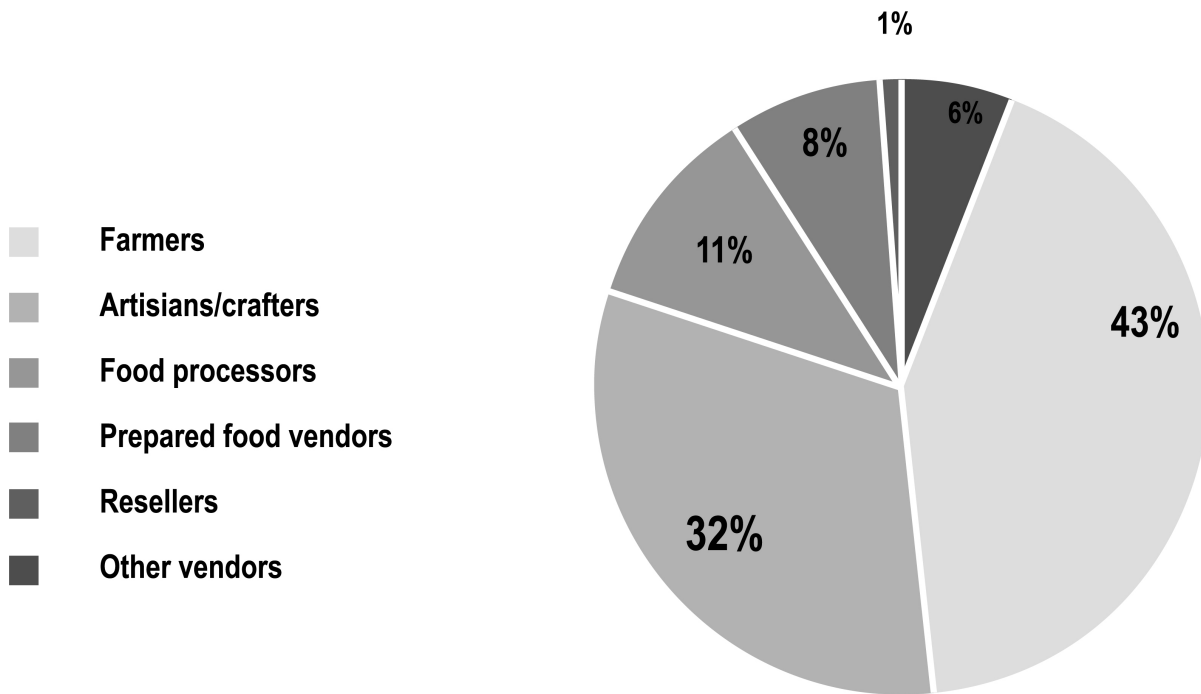


Figure 6. Aggregated vendor mix at farmers markets. (Does not total 100 due to rounding errors. This data represents the aggregation of all vendor slots at responding markets. It does not represent the unique number of individual vendors participating in markets as many vendors sell at multiple markets.)

## Vendor Mix

Collectively, 118 farmers markets reported a total of 6,328 vendor stalls in Washington State. And while this does not represent the total number of unique vendors, it does suggest the scale of sales, marketing, and other entrepreneurial opportunities that farmers markets create every year. In the aggregate, farmer vendors represent 43% of the vendor stalls in the state. By market, the proportion of the total vendor mix represented by farmer vendors varied from under 25% to 100% (Figure 6). Most farmers markets (48%) had between 26% to 50% farmer vendors and a small number (4%) of markets had exclusively farmer vendors.

## Reselling Products Produced by Other Farmers

Resellers are the smallest percentage of vendors at farmers markets in Washington. “Reselling” products grown by other farmers is allowed within the WSFMA Roots Guidelines as long as certain criteria are met; for example, not buying from wholesalers, product must be grown in Washington State, there is lack of availability from farmers, pre-approval, labeling, and signage (WSFMA 2010). Of course, markets that do not belong to the WSFMA may follow entirely different sets of guidelines and practices.

Survey results suggest that nearly half (48%) of farmers markets allow farmer vendors to sell other farmers’ products. For those markets that allow reselling, the reasons or conditions reported for allowing reselling were (in order of frequency):

- There is a need for product in market
- There is an agreement between farmers
- Manager makes an exception on a case-by-case basis
- There is proper signage
- Resellers’ product is grown locally or in Washington State

## Geographic Preference Policies

Fifty-eight percent of farmers markets reported prioritizing farmer vendors from a certain geographic region. Figure 7 shows the specific responses that were provided when this subset of respondents was questioned more specifically about their geographical preferences using an open-ended question.

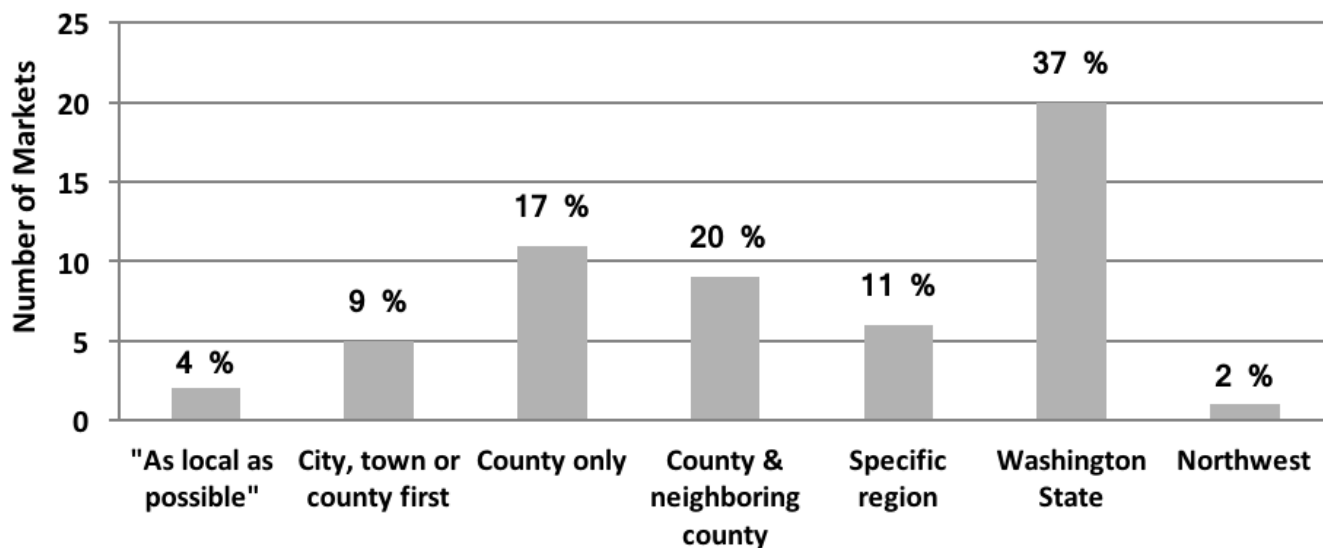


Figure 7. Farmers markets' geographic preferences for farmer vendors.

“Washington State” was the most common (37%) geographic preference named and only 2% of respondents named a broader scale beyond the state boundaries (i.e., the Northwest). This is consistent with the WSFMA’s Roots Guidelines that require all farm products to be grown and produced in Washington State or bordering counties (WSFMA 2010). However, most markets (61%) prioritized farmer vendors from a scale smaller than the state: 37% of markets named the county, and/or neighboring counties, as their geographic preference for accepting farmer vendors. Just over 11% named specific regions that were defined by the physical geography (e.g., a peninsula or island) or sub-regions such as “the south sound” or “western Washington.” In one case, an actual road was named as the boundary. Thirteen percent named their specific city, town, or county, or made more qualitative statements such as “as local as possible.”

## Immigrant and Minority Farmers

We were interested in learning more about the different types of farmers who sell at farmers markets. As such, we asked survey participants to describe the diversity of their vendors. We also asked if their markets had specific strategies for supporting and communicating with vendors with diverse cultural and linguistic backgrounds.

Most farmers markets (82%) reported having vendors who were either immigrants or minorities. Among those markets with immigrant or minority vendors, Latino/Hispanic farmers and Hmong farmers were the most common (Table 1). However, there was also a wide range of “other” immigrant and minority farmers, including vendors described as: African, African American, Chinese, East Indian, Eastern European, Filipino, German, Indian, Japanese, Korean, Native American, Pacific Islander, Polish, Ukrainian, and Vietnamese.

Table 1. Immigrant or Minority Farmers at Farmers Markets\* (Data based on 72 markets.)

Ethnicity	Total number of vendors (not unique)	Average number per market
Latino or Hispanic	212	3
Hmong	270	4
Other	93	1



Of those markets with immigrant or minority vendors, 82% reported having vendors who were not fluent in English. When asked how market managers communicated with non-English speakers, the most common responses were:

- The vendor’s children or another relative translates (59%)
- By simplifying communication and using sign language (34%)
- Relying on other vendors to translate (20%)

Only 13% of these markets had bilingual staff or volunteers available to interpret. Several managers noted that communication with non-English speaking vendors could be challenging and stressed the need for patience.

Approximately 45% of these respondents said their markets offered specific types of support to immigrant or minority farmers such as training, information, interpretation, or translation. One group of markets held a separate vendor meeting with interpreters for their Hmong farmers.

## Products Available at Farmers Markets

A wide range of products was commonly available at most markets, with over half offering baked goods, cut flowers, nursery plants, processed foods, eggs, meats, dairy, and seafood, in addition to fruits and vegetables (Figure 8). Most respondents also listed additional products that were desired or products that were in short supply at their market, including fruit, meat, dairy, and seafood. When questioned specifically about organic products, 13% of respondents said their markets prioritized farmer vendors who sold certified or exempted organic products.

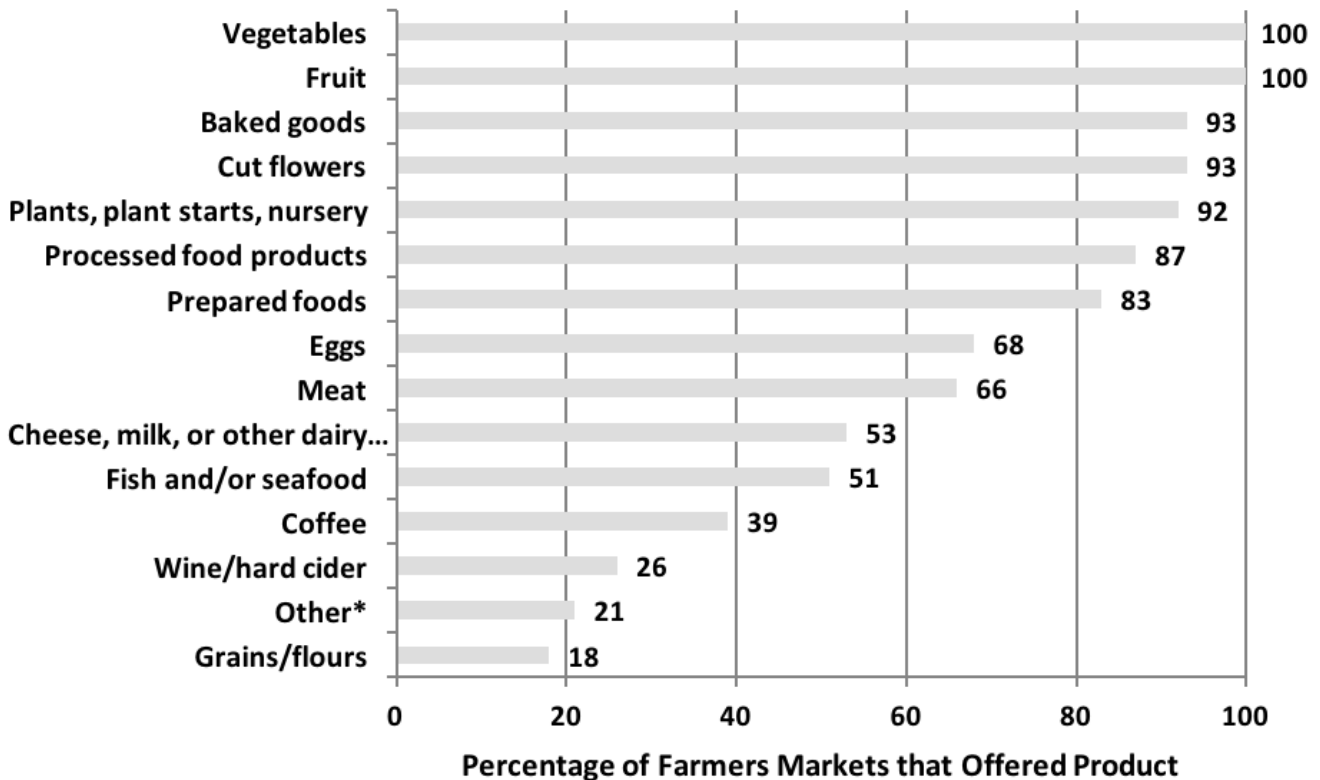


Figure 8. Products offered at farmers markets. (\*Honey was the most frequently cited “other” product.)

We asked respondents to identify specific fruits and vegetables that they would like to offer at their market in the future or would like to have in greater supply. The top three products listed were all fruit:

- **Berries**, including strawberries, blueberries, raspberries, blackberries, marionberries, goji berry, and huckleberries
- **Stone fruit**, including peaches, cherries, nectarines, plums, and apricots
- **Apples and pears**

These products were followed (in order of frequency) by melons, tomatoes and peppers, figs and kiwi, mushrooms, and broccoli. In addition, ten respondents expressed a desire for more produce in the market earlier or later in the season.

Respondents were also asked to list other products (besides fruits and vegetables) that they would like to offer or increase the amount offered at their market. The top three other types of products were:

- **Meat**, including beef, grass-fed beef, poultry (chicken, turkey, and duck), rabbit, and charcuterie
- **Dairy**, including cheese, milk, cream, butter, and ice cream
- **Seafood**, including fresh fish and shellfish

These products were followed (in order of frequency) by value-added products (e.g., canned goods, pickles, jams, and jellies), eggs, grains (especially local grains), prepared foods, and wine, beer, and hard cider.

Overall, Washington markets were found to be quite diverse in terms of their vendor characteristics, their vendor mix, and the types of products sold. However, some common themes emerged: most markets had a mix of farmer vendors and other types of vendors, under half of markets allowed reselling, and 82% of markets had vendors who were either immigrants or minorities. When all markets were combined, farmer vendors were the most common type of vendor, although this was not necessarily true for individual markets. More than half (58%) of the markets prioritized vendors with products from within a specific geographic area. Only a minority of respondents said their markets prioritized vendors with organic products. Lastly, fruits and vegetables were present at all markets, followed closely by cut flowers and baked goods. Other items, such as eggs, meats, dairy products, and grains, were not available at all markets.

## Farmers Market Sales, Customers, and Business Development

This section examines the total, annual farmers market sales, market shoppers, market competition, and the role of farmers markets in incubating new businesses. We also explore the impact of the recent economic downturn on farmers markets and use of new point of sale (POS) technologies to accept credit and debit cards at farmers markets.

### Farmers Market Sales

Farmers market sales are the total of all purchases that shoppers make from vendors. Farmers market organizers often collect sales data from vendors and use them as a measure of the market's economic impact and overall performance. However, there is no standardized method for collecting or tracking vendor sales. Independent farmers market organizations have a range of philosophies and practices regarding the collection of sales data. Likewise, vendors have varying opinions and practices regarding sharing sales data. And, as vendors are independent businesses, their revenue amounts are proprietary information. As a result, market sales data are based on figures informally reported by vendors to managers or estimated by managers. Further, because vendors have many disincentives to sharing the full value of their sales, the figures reported may not reflect the actual extent of a farmers market's sales. This is an important consideration when doing research on farmers markets.

Just over 70% of the market representatives were able or willing to provide their market's vendor sales data. Among the 88 unique farmers market locations that reported their total sales for the 2009 season, the average was \$347,941. The median was \$137,773. The total sales reported per market ranged widely from \$1,000 to \$5,000,000 (Figure 9). The combined farmers market sales for the 88 responding markets were \$30,618,836. The sales of the top ten markets alone account for 58% of this total; these top ten markets were located in five different counties.

A recent USDA Food and Nutrition Services study found that nationally only 20% of farmers markets require producers to report sales (Dixit-Joshi et al. 2013). The fact that so many Washington State farmers markets collect sales data is a significant asset to research on direct marketing.

Despite the economic downturn in 2009, over half (52%) of farmers markets reported that their total market sales were higher in comparison with the past five years.

Vendor sales data for Pike Place Market’s daystalls is not included due to a 1999 agreement with the Seattle City Council stipulating that sales data cannot be collected from farmer or crafter daystalls.

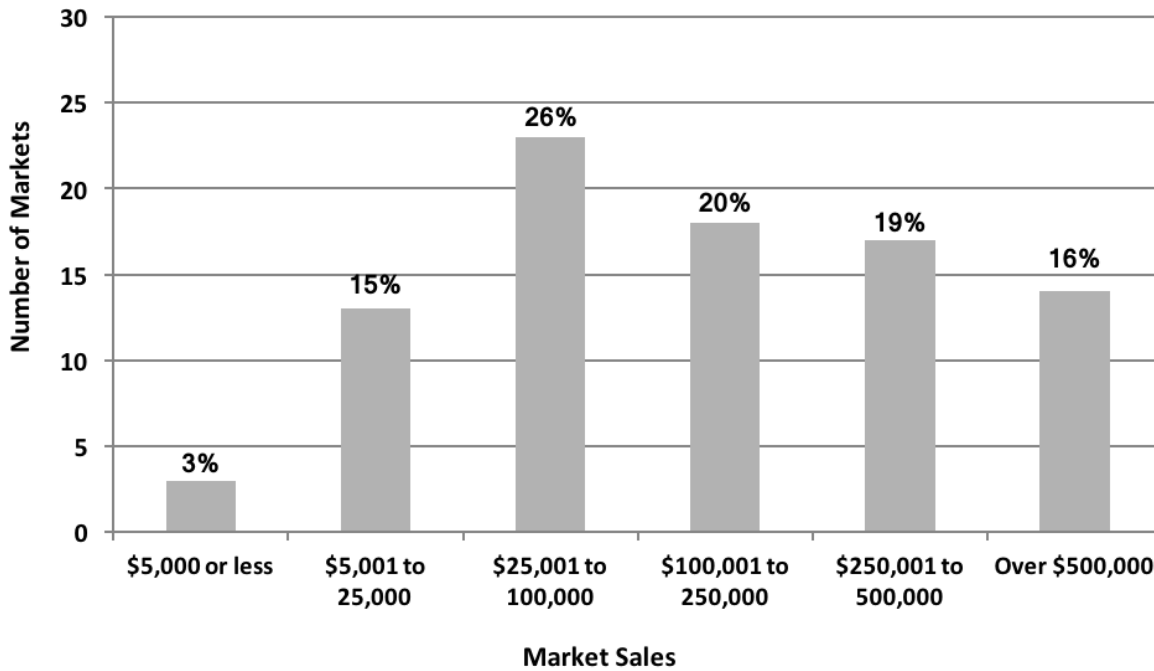


Figure 9. Farmers markets by total annual sales.

## Credit and Debit Card Sales

In the 2009 market season, farmers markets were experimenting with offering credit and debit card purchasing options as a way to increase their sales. At that time, we found that 31% of farmers markets reported that they were equipped to accept credit, debit, or both types of cards. For these markets, as shown in Figure 10, the reported impact on market sales ranged from small increases in sales (42%) to large increases in sales (35%).

Since the survey period, there has been significant growth in this arena. Wireless Point-of-Sales technology and smartphone apps offer new ways for farmers markets (and vendors) to accept credit and debit cards. According to information available from the WSFMA, 53% of its member markets accepted credit card, debit card, or both in 2012.

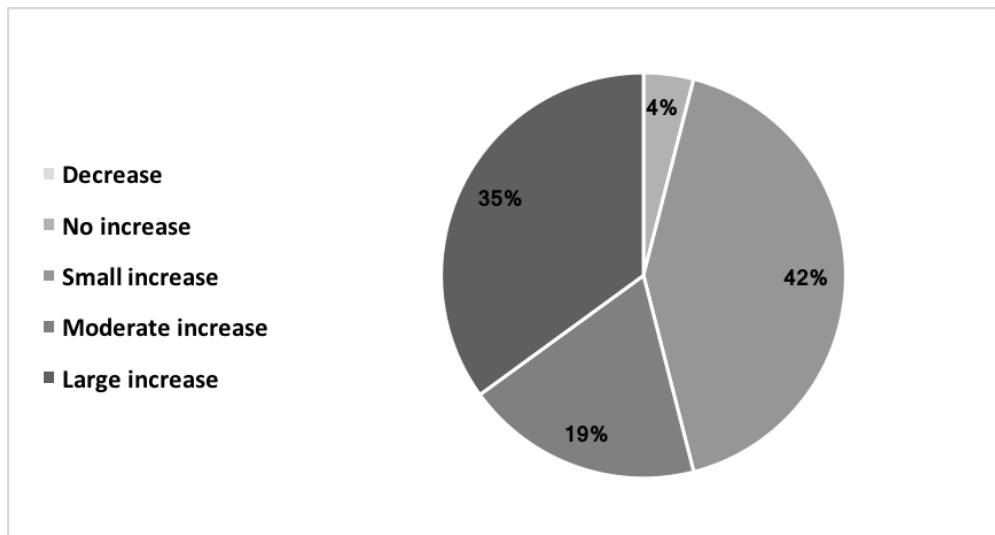


Figure 10. Impact of accepting credit and/or debit cards on farmers market sales. (Data based on 26 markets.)

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## Market Shoppers

Promoting the market and attracting shoppers is a core function of farmers market organizations. Without shoppers, it is difficult to recruit vendors. (And, likewise, without vendors it is difficult to attract shoppers.) We asked respondents to estimate the number of shoppers at their market on a typical market day during the summer season and for the full season. Some markets had systematic ways of estimating shoppers through periodic counts, while other market estimates were more informal. Note that in all cases the number of shoppers refers to “shopper visits” and not unique, individual shoppers.

The total number of reported shopper visits at farmers markets for the 2009 season is 7,953,852—more than the population of the entire state. This number excludes Pike Place Market, a unique kind of market, which estimated 2.5 million shopper visits to their farmers and crafters for the year. If Pike Place Market is included, then the total number of shopper visits to farmers markets in 2009 rises to 10,453,852.

Pike Place Market in downtown Seattle is the oldest farmers market in Washington State and one of the largest tourist attractions in the Pacific Northwest. This is a permanent, indoor market that is open seven days a week, 362 days a year, as part of a larger historic Public Market Center that includes restaurant, retail, and service businesses. Within Pike Place Market, a distinct, seasonal “farmer-only” street market is operated on the cobblestones. We treated this as a separate market.

## Perceived Competition from Other Outlets

To try to understand the nature of competition faced by farmers markets, our survey asked respondents to consider the impact of other types of retail outlets on their farmers market sales (Table 2). Perceptions about the sources of competition were mixed. In general, the most significant competition for sales was viewed as coming from other farmers markets, supermarkets, or supercenters. In contrast, Community Supported Agriculture (CSA), community or home gardens, and food co-ops/natural food stores were seen as enhancing more than hurting farmers market sales.

Table 2. Perceived Impact of Other Retail Outlets on Farmers Market Sales

Retail Outlet	Hurts sales (%)	No impact on sales (%)	Helps sales (%)
Other farmers markets	28	46	20
Supermarkets or supercenters	23	70	6
Community Supported Agriculture (CSA)	19	45	36
Farm stands or U-pick operations	18	69	13
Food co-ops or natural food stores	14	58	28
Community or home gardens	13	56	31

## Vendor Business Incubation

Beyond the direct impacts of vendor sales, another potential economic impact of farmers markets is their role in incubating new businesses (Gillespie et al. 2007). Eighty-two percent of survey respondents affirmed that their market vendors had developed or expanded their food, farm, craft product, or business beyond the farmers market within the past three years.

When asked to specify the ways their markets had helped to expand or incubate vendor businesses, the most common responses provided were: opening a “brick and mortar” storefront, opening a restaurant, or starting a farm stand. These were followed in frequency by selling online, selling to grocery stores, co-ops, restaurants, wholesale distributors, and starting a CSA.

In summarizing the findings, total market sales for 2009 varied dramatically among farmers markets. At the extremes, there were 14 farmers markets reporting annual vendor sales over \$500,000 and nearly 20 with annual vendor sales under \$25,000. Average annual vendor sales among farmers markets surveyed were \$347,941 and the median was \$137,773. Washington State farmers markets were a huge draw for shoppers with several markets drawing over 5,000 shoppers on a typical market day. Most farmers markets that had developed the capacity to accept credit card, debit card, or both saw at least some increase in sales.

## Organizational Structure of Farmers Markets

This section examines the ways farmers market organizations are incorporated, their organizational management tools and strategies, organizational revenue and expenses, and issues associated with market siting or location. These questions are particularly of interest in terms of determining what program and policy support is needed to sustain farmers markets and what models seem to work best in particular communities and contexts (Stephenson 2008).

## Organizational Incorporation of Farmers Markets

Most markets (74%) were formally organized as a non-profit or as a project of another non-profit. Among non-profits, 44% were incorporated with the State of Washington and 50% had a federally tax-exempt 501c status (primarily 501c3).

Fourteen percent of markets were incorporated as a business or operated as a project of another business. Among the markets that were incorporated as businesses, most (40%) were sole proprietorships. Lastly, 9% of markets were operated as a project or department of a government entity. The latter may include being run by a city, a department such as Parks and Recreation, or having the market incorporated as a Public Development Authority.

## Organizational Management Tools

A market’s organizational structure and use of management tools vary in accordance with the markets’ needs and size (Stephenson 2008). In our survey results, over 95% of markets said they had vendor rules and guidelines and 75% had market by-laws. Almost two-thirds of farmers markets had a board of directors. The vast majority (72%) of farmers markets with a board of directors were non-profit organizations or projects of non-profit organizations. However, over a quarter (26%) of markets that were incorporated as businesses or projects of businesses or run by a government entity also had boards of directors.

## Single-Market and Multi-Market Organizations

Nearly two-thirds (65%) of farmers markets in Washington are managed by “single-market” entities, meaning that the organizing non-profit, business, or government-affiliated program manages just that one market. Over one-third (35%) of farmers markets are managed by one of fourteen “multi-market organizations.” These organizations managed from two to seven unique farmers market locations.

## Farmers Markets’ Organizational Revenue

In contrast to the market or vendor sales, “organizational revenue” refers to the operating funds that the market organizers raise for its management, administrative functions, and any additional programming it might provide to vendors or the community. Markets raise operating revenue through a variety of means, usually including sources listed in Figure 11.

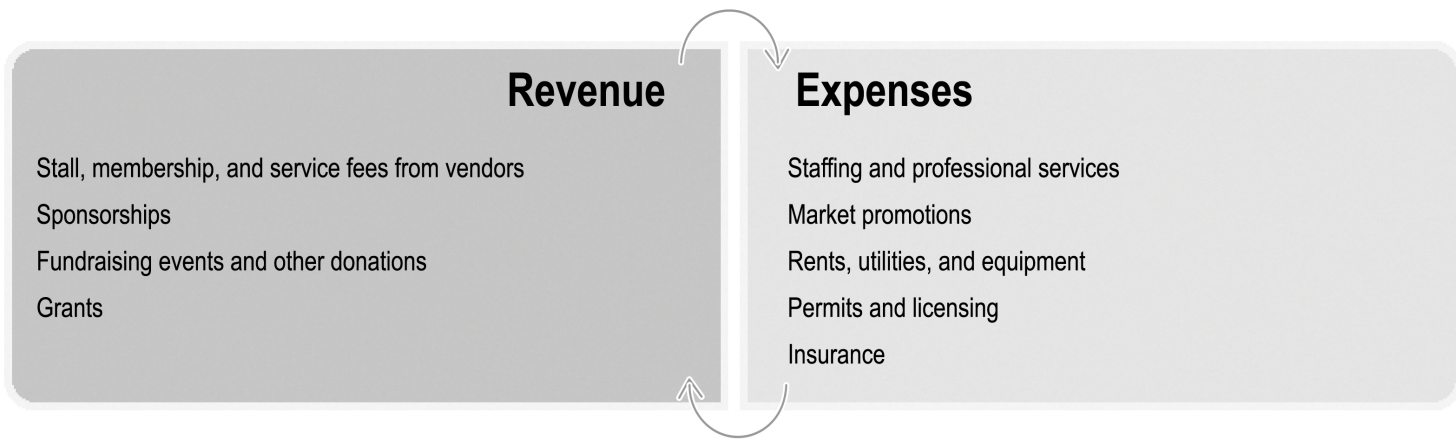


Figure 11. Typical farmers market revenue and expenses.

The amount of organizational revenue reported by farmers markets in this study ranged widely, from under \$1,000 (4%) to over \$100,000 (9%). Just under a third (31%) were in the \$5,001 to \$25,000 category and just over a third were in the \$25,001 to \$100,000 range. The average reported revenue per market was \$48,342 and the median was \$15,255. Fees from vendors such as stall, application, and membership fees, were by far the most common means of raising market revenue. Markets also successfully secured a variety of grants, donations, sponsorships, and in-kind support. Seventy-five percent of markets were supported by volunteers.

## Vendor Fees

As the farmers markets’ primary “customer,” vendors pay for booth space and other services (e.g., market promotion, token programs, and security). We investigated the different ways that markets collected fees from vendors and to what degree this revenue was sufficient to cover all of the costs of doing business for the farmers market (Table 3). We also looked at the ways market organizations were garnering the additional financial and in-kind resources needed to operate.

Table 3. Methods, and combinations of methods, that farmers markets use to charge vendors for stall space.

Vendor Fee	Number of Markets	Percentage
<b>Flat fee</b>	30	27
<b>Flat fee (variable)</b>	14	13
<b>Flat fee <u>and</u> percentage of sales</b>	4	4
<b>Flat fee <u>or</u> percentage of sales</b>	10	9
<b>Flat or flat variable fee plus application, membership, registration, or other one-time market fee</b>	27	24
<b>Percentage of sales plus application or membership fee</b>	8	7
<b>Combination of flat fee and/or percentage of sales and/or membership fee</b>	19	17
<b>Total</b>	<b>112</b>	<b>100</b>

Approximately 42% of markets charged vendors an annual membership, application, registration, permit, or other one-time market fee. These fees ranged from \$10 to \$100 and the average amount charged was \$32.00.

## Farmers Markets' Organizational Expenses

The variety and amount of expenses incurred by organizations operating a farmers market in Washington State are often difficult to recognize and quantify. The total expenses reported on our survey for each market were highly varied, from under \$1,000 (11%) to over \$100,000 (9%). On average, Washington markets had operating expenses of \$44,837 and the median was \$10,812. The most significant operating expense for most markets was personnel, followed by marketing and promotion. We found that a quarter of the markets' personnel was zero percent of their budget, implying that they had no paid staff. For another 37% of markets, these costs only constituted 50% or less of their operating expenses. For the remaining 37% of markets, personnel and staff costs were more than 50% of their expense budget. The variation in funding spent on marketing, promotion, and special events was striking, with 32% spending less than \$1,000 a year, while 13% spent \$10,000 or more annually. Four percent of markets had annual marketing budgets over \$25,000.

## Balance of Farmers Market Revenue and Expenses

The balance of operating revenues and expenses among Washington State farmers markets is an important aspect of long-term financial stability. According to the numbers reported in the survey, the majority (79%) of markets were breaking even or coming out ahead with their revenue generated relative to their costs. However, fifteen markets (21%) appeared to have insufficient revenue to cover their expenses. When asked about the long-term economic sustainability of their markets in a different question, 86% of respondents were positive, 3% answered negatively, and 11% were uncertain.

## Relationship between Farmers Market Sales and Revenue

There is often an assumption that farmers markets with greater vendor sales will also have greater revenue for their operational budget.

Given the variety of ways that markets charge vendors for stall space, membership, and other services, it is important to look more closely at this assumption. For the 63 markets that reported both total revenue to the *market organization* and total *vendor sales* on our survey, their market revenue, on average, was 14% of their reported vendor sales. Figure 12 shows a linear relationship between increasing vendor sales and the organizational revenue generated for the market itself. However, for each individual market, there is a great deal of variation in the proportion of revenue generated relative to vendor sales. Markets with similar amounts of vendor sales may differ substantially in the amount of revenue available to meet operating expenses.

## Farmers Market Sites

Information was gathered on the kinds of sites used by farmers markets, ranging from parking lots and streets to public parks, churches, and other privately owned properties. We also asked about who owned the site, the costs to use the site, the permitting and regulations encountered, and the long-term security or permanence of the site. The most common types of locations were parking lots (39%), streets (22%), and parks (16%). Correspondingly, two-thirds of sites were owned by government entities (Figure 13).

Perhaps indicative of the frequent reliance on publicly owned sites, 71% of markets reported that they paid no rent. (This includes one market that reported paying \$1.00 per year for rent.) Of the markets that did pay rent, 48% paid by year with rents ranging from \$50 to \$100,000. While many markets were not charged rent, 60% of markets were required to get a combination of permits, fees, and licenses, including a right of way permit, farmers market right of way use permit, event permit, street closure permit, parks department permit, fire department permit, general business license, and city-specific business license. In addition, markets described needing to secure approval or a written agreement from a range of agencies including the board of a Park District, City Council, or Town Council for either the market site or the use of a parking lot.

The long-term availability of the market site was reported as poor by only 13% of respondents. However, over two-thirds (68%) of farmers markets that were ten or more years old have had to move at least once. On average, markets ten years or older had moved 2.2 times. This includes one market that moved nine times.

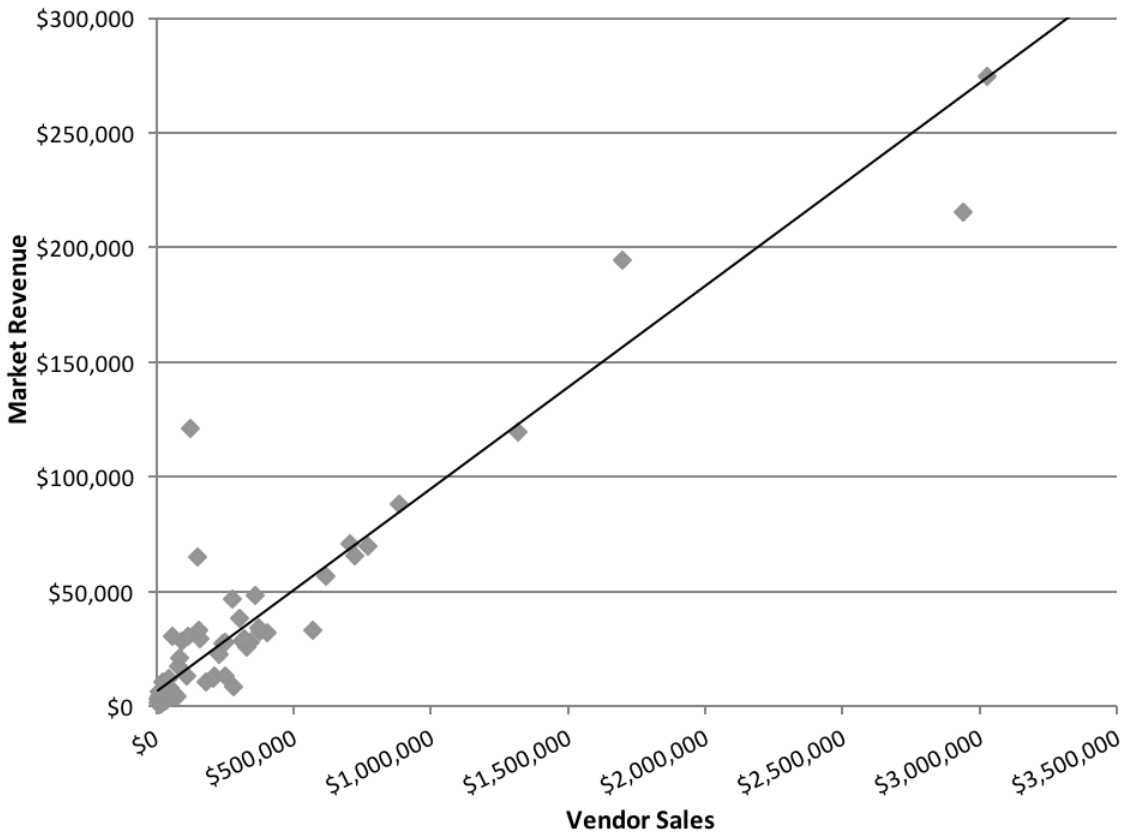


Figure 12. Farmers market revenue relative to total vendor sales.

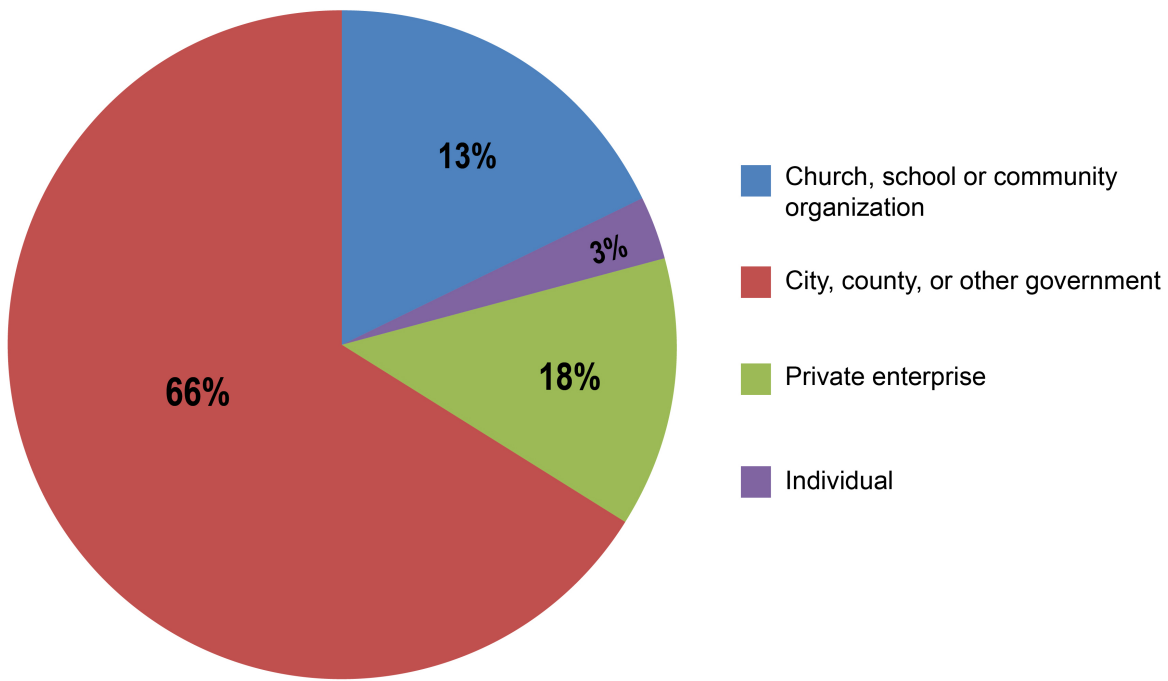


Figure 13. Owners of farmers market sites.



## Long-Term Goals and Challenges Facing the Market Organization

When asked about their long-term aspirations in an open-ended question, market representatives expressed a wide variety of goals and a strong sense of service. The most frequent themes included organizational development goals that would enhance financial and personnel management; improve vendor recruitment, quality, and sales; and increase community engagement with the market.

Other goals centered on improving sales through attracting and educating customers. Goals to improve the market location were also significant for some respondents. Only three respondents said they did not have any long-term goals.

### What is your long-term goal for your market?

#### Key Themes

#### Market stability and growth (53%)

Goals included making the market self-sustaining financially, paying the manager more, growing the market, and keeping the market going.

#### Community (42%)

Goals included increasing community participation in the market and reaching out to non-profits, schools, local businesses, and city officials. Other goals focused on educating the community to eat locally, shop locally, and increase their knowledge of food and farming. Being a “community hub” and contributing economically were also noted.

#### Vendors and products (41%)

Goals included increasing sales, especially for farmers, expanding the market’s vendor base, and improving the product mix and quality.

#### Customers (32%)

The predominant goal was to increase the number of market customers and to get more of the community to shop at the market.

#### Market location (17%)

The predominant goals were to get a permanent location or larger space for the market.

*Some respondents described multiple goals.*

On the theme of market stability and growth, financial sustainability was mentioned repeatedly. For example, one respondent explained that the goal for their market was to “increase market size to the point where there is a full-time person that runs it with a professionalism that really keeps it going” and another hoped their market would “stay a viable business within the area.” One respondent linked market sustainability to policy.

Other stability and growth-related goals focused on larger food security needs with dreams such as to “keep building until we get a supermarket out here.”

On the theme of community goals, many respondents expressed a strong commitment to improving life in their community through the market, stating that they wanted to “continue serving our neighbors and community with healthy food” or “provide fresh produce to the public and make it more accessible.” Others also noted goals to maintain a “relationship with the city and downtown core businesses” and make connections with the schools.

In terms of vendor-related goals, some respondents stated simply that they wanted “continued success for farmers” or for “sales to farmers to go up.” Another respondent wanted to “support farmers anyway that I can” and saw “having space for them as a way to help them economically.” Other comments were centered on attracting more farmer vendors with high-quality products to their market.

Goals related to attracting more customers recognized that farmers market shoppers currently constitute only a very small fraction of overall food consumers. As one market representative stated, “there are a whole lot—90% or more—of eaters to get to.” Respondents had goals for consumer education in order to expand their base of informed and regular shoppers. Some saw the growing awareness of farmers markets as an opportunity.

When survey participants were asked about the challenges facing their markets, several issues rose to the top, ranging from regulatory barriers to the difficulties of attracting sufficient numbers of shoppers and the desired types of vendors. Over half (54%) of market representatives indicated that they faced regulatory barriers. Most (70%) of these respondents described challenges with their county health department and 39% listed regulatory challenges with specific products sold at their market. The lack of commercial kitchens and processing infrastructure were also identified as regulatory barriers.

When asked about challenges more broadly, most market representatives commented on the challenges associated with attracting more shoppers and the right quality and mix of vendors. The market location was the third most common challenge described by respondents. Other challenges described by managers included being able to effectively advertise with limited budgets, overall funding constraints, working with the city government, staffing, managing a new market, managing market growth, competition from other markets, market location, and the weather.

What has been the most significant challenge for your market? Key Themes
<b>Shoppers (30%)</b> Attracting more market customers and getting them to buy more from vendors.
<b>Vendors (27%)</b> Recruiting or attracting vendors to the market, especially farmers, and getting the right mix of vendors.
<b>Location (21%)</b> Having to move the market and other location challenges such as construction, parking, and finding a permanent site.
<i>Some respondents described multiple challenges.</i>

In reviewing the top market goals and challenges provided by survey respondents, several recurrent themes were interrelated. Most notable were the goals and challenges associated with attracting more shoppers and the right kinds of vendors, as well as the related management goals of strong vendor sales and financial sustainability for the market. Other significant challenges were regulatory and permitting requirements and location or site issues.

To summarize, three-fourths of all markets were formally organized as non-profits or under non-profits, while the rest were organized as private businesses or under government entities.

Local sources such as fees from vendors were the most common source of market revenue, with additional support provided by volunteerism, reduced or free rent, and grants. The revenue generated per market varied widely, from under \$1,000 to over \$100,000. While average market revenue was \$48,342, the median was only \$15,255, indicating that many markets were subsisting on extremely low budgets. Revenue generally increased in relationship to market sales; however, markets with similar sales sometimes captured vastly differing amounts of revenue. This was especially evident among markets with lower sales. Staffing and marketing were the largest expenses reported. Over 86% of markets were positive about their market’s five-year economic outlook, while 14% were uncertain. Long-term goals and challenges included organizational development, attracting vendors and shoppers, and addressing regulatory and siting issues.

## Community and Environmental Dynamics

The business model of a farmers market is without an easy analogy. On the one hand, they are centered around commerce on behalf of a collection of vendors.

This sometimes leads farmers markets to be compared to “shopping malls,” as both farmers markets and shopping malls aggregate independent businesses in one physical location. However, this analogy does not account for market seasonality and the variability of vendors. Likewise, and perhaps more crucially, the shopping mall analogy fails to account for critical dynamics such as the social mission, volunteer commitment, and community and environmental goals of many market organizations.

Our study looked broadly at the nature of the interactions between farmers markets and their surrounding communities. We also wanted to examine the extent to which market organizations had developed specific goals or missions related to community development, community food access, social justice and environmental sustainability.

## Farmers Market Mission

We asked respondents about the primary motivation for starting their farmers market. Thirty-six percent selected “to support farmers” (Table 4). The next most frequently selected motivations were “to improve community access to fresh farm produce” (24%) and “to improve community access to healthy foods” (9%). Taken together, improving community access to fresh and healthy foods constituted a third of the responses.

Table 4. Primary Motivation for Starting a Farmers Market

Primary Motivation	Number of Markets	Percentage
To support farmers	32	36
To improve community access to fresh farm produce	22	24
To improve community access to healthy foods	8	9
To create a fun community event	7	8
To promote economic development	4	4
To help local business district	2	2
To support/incubate small businesses	1	1
Other*	14	15
<b>Total</b>	<b>90</b>	<b>100</b>

## Serving Low-Income Shoppers

The importance of serving low-income community members emerged as a strong value of many market organizations. Nearly one-half (48%) of respondents believed “serving low-income community members” was “very important” to their market mission, while only 2% believed this was “not important.” Up to 88% of farmers markets developed strategies for serving low-income community members, with common practices such as working with the Federal Farmers Market Nutrition Program (FMNP) to accept checks from the “Women, Infant, and Children” (WIC FMNP) and low-income Senior FMNP programs, arranging transportation, and donating produce.

Forty-five percent of markets said they had Electronic Benefit Transfer (EBT) card readers to accept Supplemental Nutrition Assistance Program (SNAP) benefits (formerly food stamps). Of these markets, 81% said that having the EBT card readers had increased their sales by a small amount. In addition, over a third of markets reported donating significant amounts of food to food banks and other food assistance programs.

Other strategies used by markets to serve low-income shoppers include cooking and chef demonstrations emphasizing affordability, providing booth space to service organizations, providing discounts for seniors and military, providing market bucks or free tokens to increase purchasing power at the market, cash donations for the food bank, and education around food production and gardening.

## Perceived Shopper Characteristics

Our survey asked respondents to estimate the percentage of shoppers at their markets that fit into different income and racial/ethnic categories. Note that these are only estimates based on the personal observations and perceptions of the survey respondents. While the responses to our questions suggest certain patterns, we cannot reach definitive conclusions without further empirical research that directly and systematically investigates shopper demographics. Based on the limited information that could be gathered from our survey, it appears that the shoppers at most Washington State farmers markets are perceived to be fairly diverse in terms of socioeconomic status with roughly 40% of markets estimating that at least 25% of their shoppers were low income. They were perceived as somewhat less diverse in terms of the racial/ethnic background of shoppers, with only around 20% of markets estimating that 25% or more of their shoppers could be described as Latino or Hispanic.

## Volunteers

Another measure of a farmers market’s connection with its community is the degree of volunteer support it receives. Nearly three-fourths (73%) of the respondents reported that their markets had volunteers. Among the markets that used volunteers, the average number of volunteer hours donated annually per market was 338.

## Community Impacts

When asked an open-ended question about the specific ways in which their farmers markets impacted their communities, all survey respondents answered in a positive way.

Significant themes focused on how farmers markets:

- Support local or small businesses
- Draw in tourists
- Enable people to buy direct from farmers, connect directly with growers, ask questions, and build trust and transparency, especially around food safety
- Educate people about local foods and agriculture
- Provide space for non-profit groups
- Serve low-income people by providing affordable food and access to the FMNP or EBT programs

The farmers market representatives who answered the survey saw their markets as both an integral part of the fabric of their communities and a tool that could be used to make those communities stronger.

## Environmental Impacts

Respondents were questioned about their market’s environmental practices and impacts. Most market organizations have selected locations that are highly accessible to alternative forms of transportation. Markets did not receive as many high marks for their waste management programs, with just over half the markets implementing recycling and only 19% practicing composting. When we asked an open-ended question about the ways in which farmers markets help the environment, many of the responses were quite detailed, indicating that the respondents had given this issue significant prior consideration. The top three themes that emerged were the environmental benefits of reduced transportation distances, incentives for good environmental farming practices, and public education about good environmental practices, including modeling sustainable waste management at the market.

Other significant themes included the role that farmers markets play in providing markets for environmentally minded local farmers and shoppers, consumer education about eating seasonally and locally, reducing the amount of packaging that is used, being located in a site that is within walking distance, protecting farmland, inspiring gardening, and offering environmental non-profits space at the market.

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. The majority of survey respondents could point to a variety of ways that their markets were making significant community and environmental contributions.

## Farmers Market Personnel

Farmers market organizations juggle a diverse mix of responsibilities. In addition to the core functions of providing stall space for vendors and actively promoting the market to attract shoppers, most farmers market organizations are also responsible for:

- Assessing shopper demand for farmers market vendors
- Envisioning and establishing an ideal vendor mix to draw in shoppers and recruit vendors
- Guiding vendor policies (application process, rules, etc.)
- Determining the market’s niche in terms of seasonality, day of the week, and hours
- Securing a location (and permitting) with adequate parking, public safety, and shopper accessibility
- Recruiting and supervising a market manager and volunteer labor
- Understanding and meeting all local, state, and federal regulations related to health and safety, direct sales, and arranging police and fire protection and waste management
- Developing appropriate organizational policies and practices
- Managing the market’s finances, raising sufficient revenue, securing insurance, and paying taxes
- Providing public amenities, such as access to bathrooms and seating
- Creating a festive atmosphere on market day (typically including music and signage) and organizing events to draw in customers (Stephenson 2008; Ostrom and Lyons 2012)

If a farmers market chooses to participate in food assistance programs such as FMNP or SNAP, then the market is required to obtain additional permitting, staffing, accounting, program management, reporting, and outreach.

This work is typically accomplished by a combination of paid staff, the market’s owner-operators, vendors, board members, and volunteers. It is usually the farmers market manager who represents and coordinates everyone at the market. The actual scope of duties, time demands, and job positions vary greatly among market managers. In our survey, we wanted to understand the current norms of these positions and the larger picture of farmers market personnel. The wide diversity of personnel policies among markets, seasonality of markets, and the tendency to subsidize formally paid manager duties with volunteer duties make this a challenging and complex task. In addition, high market manager turnover has been associated with greater risk of farmers market failure (Stephenson 2008).

## Farmers Market Staffing

We asked how many employees a market had based on the four employment categories (Figure 14). The survey did not define “employee” and the implication is that an employee is a paid position. We did not specify whether or not to count contract positions. Also, volunteer positions or owners who function as a manager may or may not have been counted. Given the wide range of farmers market seasons, we did not define “seasonal.” For our immediate purposes, “seasonal” is assumed to mean anything less than year-round. Likewise, “full-time” and “part-time” were not defined in the survey and left to interpretation by the respondent. The results show that markets employ relatively few full-time, year-round employees and, instead, rely heavily on part-time and seasonal employees.

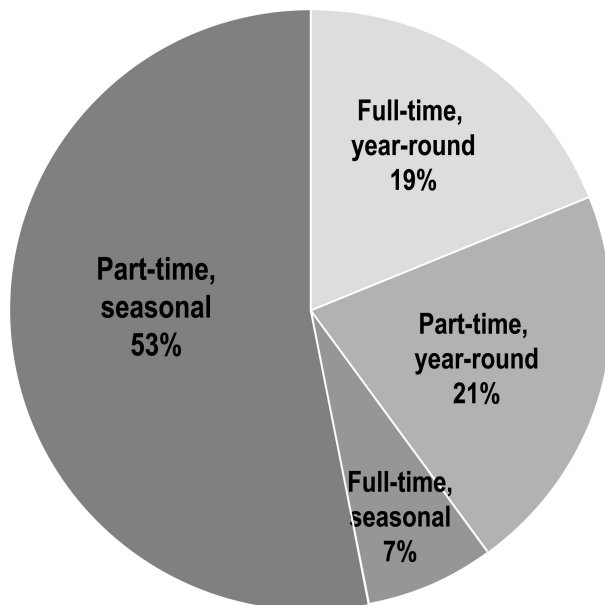


Figure 14. Farmers market employees by type.

## Farmers Market Manager Compensation

Over three-quarters (78%) of the farmers markets in our survey had one market manager position filled by one person. However, one in five markets (22%) had either more than one manager position or had one position shared by two people, suggesting some flexibility in staffing.

Overall 65% of all farmers market manager positions were paid. If analyzed by market size, the percent of paid managers increased with market size. Of the unpaid managers, over 90% were at small or very small markets.

If analyzed in relation to the total annual market sales categories, the percent of paid managers increased with market sales. There was also a distinct increase in paid managers at markets with sales over \$100,000; over 91% of unpaid managers were at markets with sales of \$100,000 or less.

If analyzed by how the market was incorporated organizationally, distinct patterns emerge again. Non-profit farmers markets were more likely to have paid managers; however, if the market was a project of a non-profit, then managers were less likely to be paid. If the market was incorporated as a business, there was an even split between paid and unpaid managers. And, finally, if the market was a project of a government agency, 100% of managers were paid.

If analyzed by geographic region, a notably higher percentage of managers in Northwest and Southwest Washington were paid. In the North Central and South Central regions, well over half of the managers were unpaid.

The precise amount paid to managers was difficult to ascertain. A complicating factor was that managers (as well as co-managers and assistant managers) were paid by various terms: by hour, by week, by month, by season, or by the year. The most common method (41%) was to pay a manager per hour (Figure 15). The average hourly rate for managers was \$16.00.

## Market Manager Turnover

Given the demanding roles and responsibilities of farmers market managers in conjunction with the inconsistent compensation patterns, market manager turnover is a serious concern and risk factor for market success (Stephenson 2008). Our survey results show that markets reported having from one to eight managers in a ten-year period (1999 to 2009). The overall average for 77 farmers markets was 2.3 managers. There was a dramatic variation in the amount of manager turnover across markets of the same age, with a significant percentage in each age category that had the same manager during the same ten-year period. In contrast, at the upper end of the spectrum, some of the younger markets have had a new manager every 1–2 years.

## Manager Reflections on Farmers Markets and the Role of a Manager

In an open-ended question, we asked managers to reflect on the farmers market manager position, staff, and volunteers. Being a farmers market manager appears to be a very demanding position associated with a range of challenges from juggling multiple competing demands, to low pay, to feeling underappreciated by vendors and market organizations.

While market managers were clear about the challenging aspects of this demanding position, it was also obvious that many had a passionate commitment to the larger ideals of farmers markets. They talked about how opportunities such as supporting farmers, creating a community gathering place, working collaboratively, and bringing healthy foods to their communities brought meaning to their work and were a great source of personal reward.

Thus the roles played by market managers and, consequently, their experiences are multi-faceted and complex, eliciting both positive and negative reflections and comments.

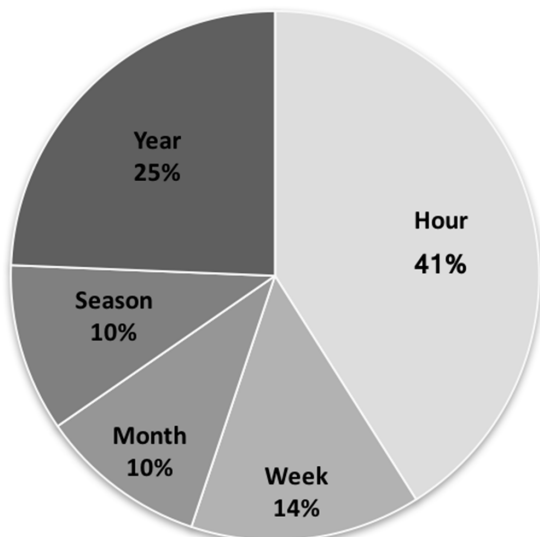


Figure 15. Term of payment for market managers.

## Characteristics of Market Managers

Among the farmers markets that participated in the survey, 92% of respondents were “market managers” including current market managers, past managers, directors of farmers market associations, market staff, or some combination of roles. The remaining respondents were primarily market board members.

Among these market managers, almost three-quarters (73%) were female. Ages ranged from 22 to 74 years old, with an average age just over 50. Managers had a wide range of formal education, from high school (2%) to graduate or other professional degrees (11%). Almost half (49%) had at least a two- or four-year college degree. On average, respondents had 5.6 years of experience managing farmers markets and 35% had 6 or more years of experience (Figure 16).

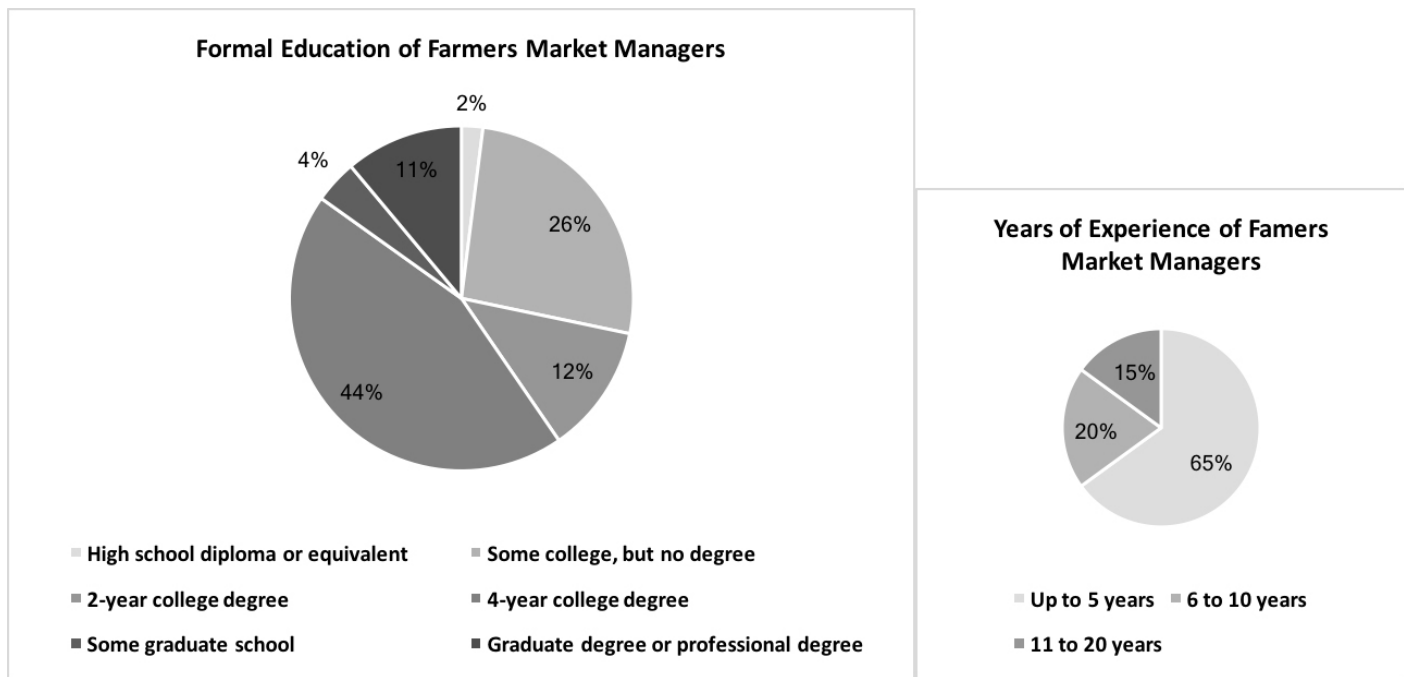


Figure 16. Formal education of farmers market managers (left); years of experience of farmers market managers (right).

In summary, beyond the fundamentals of providing vendor stalls and promoting the market, market organizations also have myriad responsibilities related to developing market bylaws and policies, staffing, siting, product mix, scheduling operating hours, budgeting, regulations and permitting, holding events, providing public amenities, etc. Our survey results showed that this work was primarily being carried out by a combination of part-time, seasonal, and volunteer labor. Despite the wide extent of farmers market activities and commerce in Washington State, our survey only identified 29 full-time market employees. Manager turnover rates varied significantly across markets from very low to very high, indicating a need for further research on the organizational characteristics that lead to higher retention rates. When asked to provide comments on their roles, many market managers expressed a deep commitment to the ideals of improving their communities through farmers markets, yet also acknowledged the challenging nature of the work.

## Summary

The 127 farmers markets that participated in our survey constituted the majority of farmers markets in Washington at that time. They appeared to be representative of the rich diversity of geographical locations, ages, sizes, climate zones, and unique community character of the markets found in the state. Because it required such a significant time investment and cooperation from so many market organizations to be successful, a research project of this caliber could not have been possible without the strong leadership and commitment of Washington State market managers and their supporting organizations. Largely as a result of the early creation of the Washington State Farmers Market Association (WSFMA) in 1979, many markets in Washington developed an early emphasis on tracking sales data and collaborating with other markets, making for a particularly rich participatory research environment.

Nevertheless, this is the first statewide survey of all Washington State farmers markets that we know of, and we hope it contributes to the overall understanding of the diversity of farmers markets, a holistic view of their benefits, the complexity of their challenges, and how to enhance their capacity.

The results of this survey indicate that Washington State farmers market organizations have grown rapidly in number and accomplished a great deal over the past decade, yet still have keen ambitions and room for future growth and improvement. Over a third of the markets in the study could be considered well-established, having operated for a decade or more. The rest were relatively new, with almost 40% having started up in the past five years. The average number of vendors selling at Washington State farmers markets on a typical market day was 32; however, markets reported a broad range from 3 to 200 vendors. The majority of markets (63%) were small or very small, with less than 30 vendors per market.

Markets reflected the unique character of their community and their region and each had a distinctive vendor mix. Most regions of the state have a rich farming heritage to draw upon and many have a growing base of direct market and immigrant farmers. The vast majority of markets (82%) had immigrant or minority farmer vendors participating in their markets. All the markets in the study combined provided a total of 6,328 vendor opportunities in the year of the study. The statewide mix of market vendors was proportionately 43% farmers, 32% artisans/crafters, 11% value-added processors, 8% prepared food vendors, and 1% resellers. Nearly half the markets allowed some form of reselling, however most had placed significant conditions on this activity.

Nearly all markets gave a preference to products coming from within Washington State, and many expected their farm products to come from an even closer distance, such as from within their county, their island, a nearby county, or a particular region of the state. Depending on management approaches, shopper numbers, and local availability, market managers had varying degrees of success in attracting their desired mix of vendors. Most managers were able to offer a fair amount of product diversity, yet many expressed a desire to obtain a greater supply of berries, fruits, meats, dairy products, specific vegetables, and extended seasons for popular items.

Every market is at the same time its own dynamic business and a collection of unique vendor businesses. As such, they contribute to regional economic development in multiple ways.

Most obviously, they ideally provide a marketplace that connects vendors with a shopper demographic interested in obtaining distinctive local products and supporting local farms and businesses. Markets in the study reported nearly 10.5 million annual shopper visits (including Pike Place Market). Among the 88 markets in the study that reported sales data, annual total market sales ranged from \$1,000 to \$5,000,000, with an average of \$347,941 per market. All of the markets in the study combined reported a total of \$30.62 million in sales for vendors. More than half of respondents said that their average farmer vendors' sales had increased in recent years despite the economic downturn. Further, 82% of survey respondents reported that their vendors had developed or expanded their business beyond the market within the last three years, demonstrating the key role of markets in business incubation. Besides creating economic opportunities for thousands of vendors, when combined, the farmers markets in the study employed 150 full- and part-time workers.

Finally, less tangible community and environmental assets were widely reported on the survey, such as making fresh foods accessible to consumers from a variety of economic backgrounds, creating a focal community gathering point and building a “local culture” around food, farming, and support for independent, locally-owned businesses. For example, 90% of respondents said their markets worked with the federal Farmers Market Nutrition Program to provide shopping opportunities for low-income community members. Over 93% provided examples of how their markets helped the environment.

Significant challenges to overcome were perceived competition from other markets and supermarkets, regulatory barriers, issues with location, generating sufficient organizational revenues, and attracting the right vendors and customers. When asked about future goals for their markets, most respondents aspired to improve their market organization's long-term stability through increasing community engagement, attracting key vendors, and expanding their shopper base. Some respondents observed that improving their administrative budgets would allow them to improve manager compensation, reduce manager turnover, and enhance overall market management thereby helping ensure the long-term success and sustainability of their markets.

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