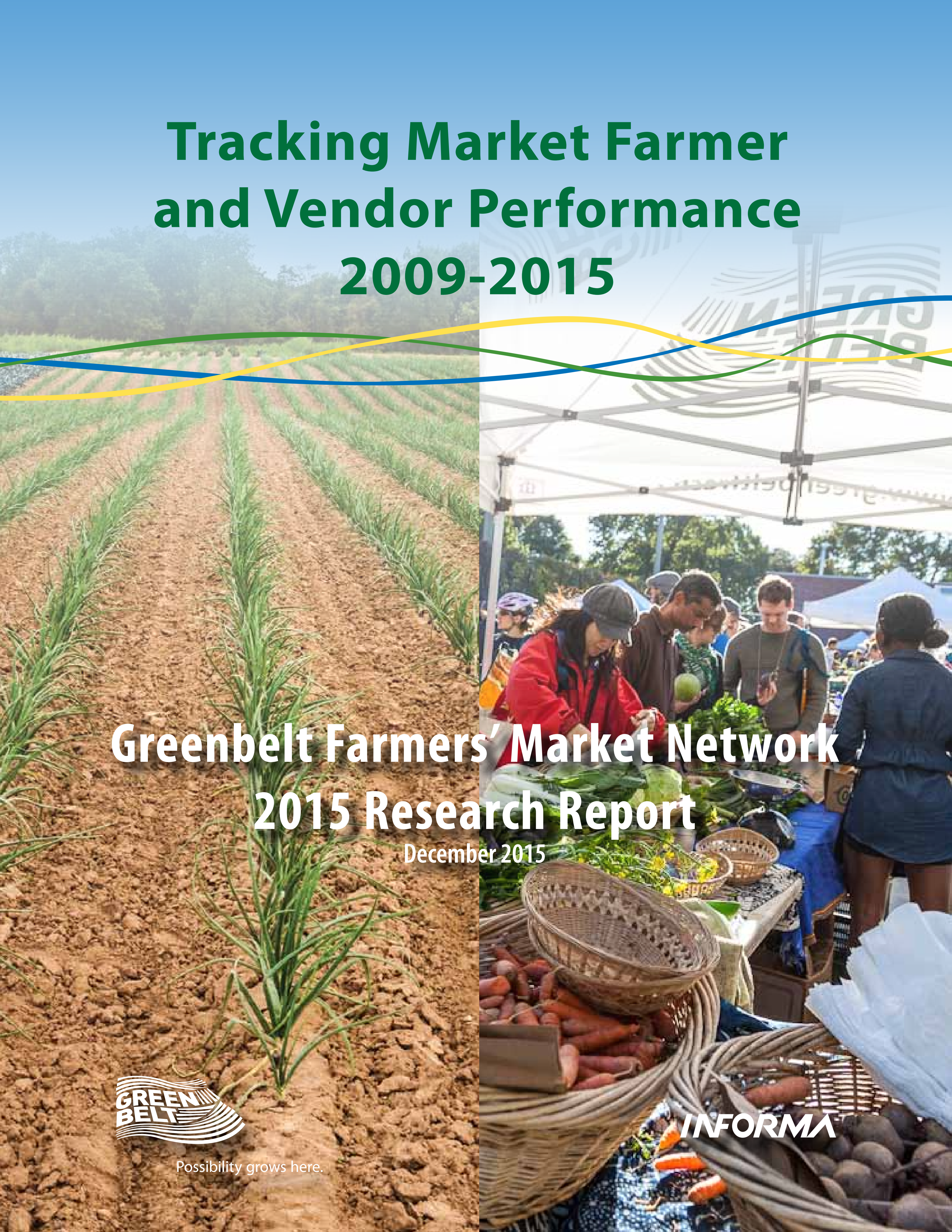
Tracking Market Farmer and Vendor Performance 2009-2015



Greenbelt Farmers' Market Network 2015 Research Report

December 2015

Possibility grows here.

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Acknowledgements

The Greenbelt Farmers' Market Network would like to thank the Friends of the Greenbelt Foundation and FoodShare Toronto for their support of this study, which is intended to assist farmers' market vendors and managers in future planning and decision making. It is also hoped that these results will inspire others to lend their support to farmers' markets as shoppers, funders, volunteers or support staff.

This study wouldn't have been possible without the participation of the 108 market vendors who kindly gave of their time and shared their information. We are also very grateful to market managers for their dedication and cooperation.

Possibility grows here.

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EXECUTIVE OVERVIEW

Introduction

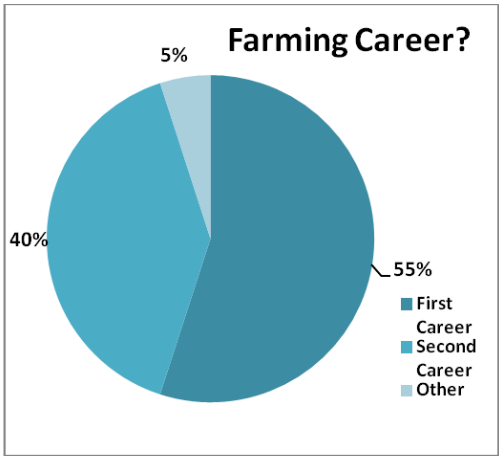
This Overview is a summary of the key findings of two measurement surveys that focused exclusively on farmers' market vendors; Other Vendors (selling crafts, value-added food/eatables) were added in the more recent survey. It distills the key changes that have occurred between 2009 and 2014/15.

It is based on two measurements; the surveys were conducted in 2009 and in 2015. Sixty (60) Farmer Vendors were interviewed in 2009; the sample was then boosted to 82 in 2015. The more recent survey (2015) was augmented to include twenty-six interviews with Other Vendors (selling crafts, value-added food/eatables. Interviews took place at approximately 30 markets in and around the Greenbelt in summer 2015 using structured questionnaires.

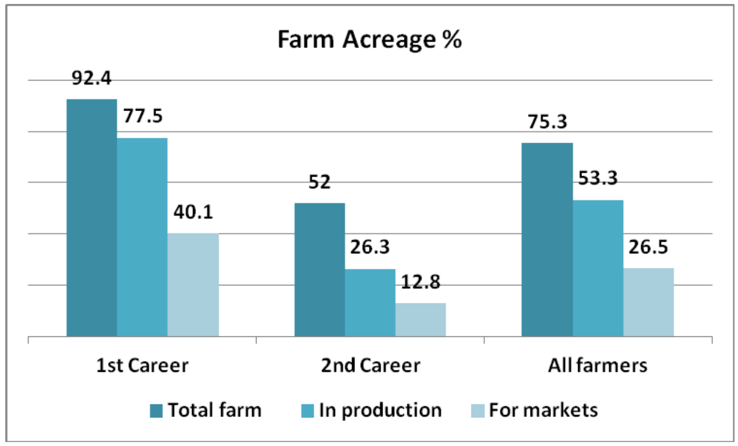
Farmer/Farm Facts

The pool of farmers who are participating in markets is growing and is being renewed by new producers who are turning to this 'customer direct' distribution and sales channel. Market farmers now include two types: people from farm backgrounds (55%) and newer 'second career' farmers (40%).

For more details see table at end of Overview.



Total farm acreages have increased - 24% of farms are now 130 acres or more, up from 10% in 2009. Overall, 50% of the land is devoted to producing for sale at farmers' markets, average 40.1 acres and 12.8 acres for first and second career farmers, respectively.

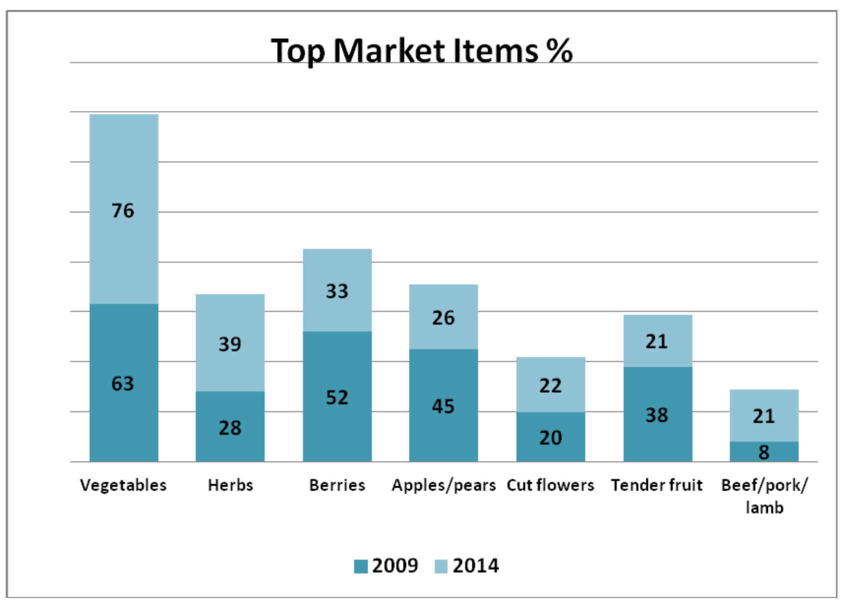


Land ownership and security of tenancy varies considerably. Older and first career farmers are much more land secure than second career farmers, particularly those growing on less than six acres.

Overall, the number of people employment numbers on farms has shrunk in the last five years in all measured categories. These declines are a function of second career farmers who tend to work on a smaller scale. Farmers indicate that they are doing more with less paid assistance full time and part time both year round and seasonally. In 2009, an average of 3.8 people were engaged full time on the farm, which dropped to 2.2 workers on average. Now 42% of Farmer Vendors have no seasonal staff, up from 28% in 2009.

Marketing/Sales

Consumer demands have shifted and expanded between 2009 and 2015 with farmers responding accordingly. Demand for fresh vegetables continues to climb and retains the top spot far ahead of other categories growers bring to market (76% of growers in 2015, up from 63% in 2009).



Vegetables, herbs, meat (beef, pork, lamb and possibly chicken), prepared foods and other food products are all growth categories in 2015. One in five farmers (21%) now offer dark meat (beef, pork and lamb) to capture demand for farm raised, 'clean', 'free from' meat (up from 8% in 2009). Overall, declines were noted in fruit vending including berries, apples and pears. Larger scale farmers who own all their land and have longer experience selling at markets are the backbone of both berry and fruit production.

Market sellers are adapting to consumer preferences and adopting terminology that resonates at point of sale. 'Conventional' and 'integrated pest management' have been edged out by more current and consumer friendly language, particularly noted among second career growers. They are much more likely than first career farmers to be describing their practice as 'non-certified organic' - now 20% of growers use this term. Meanwhile, the proportion of certified organic growers is stalled at 12%, and those producers who are in transition to organic remains low (5% in 2015).

Farmer Market Participation

The overall market participation trend in 2014 is either stability or growth. Vendors have a wide range of experience at markets. Almost half (44%) have participated for more than 10 years, and one quarter (28%) are market 'pioneers' who have been active for over 20 years. Expansion is most evident with larger scale farmers who average 3.7 markets. The small plot producer market average is 2.6 markets. Perhaps more telling is that 80% of those with less than 5 acres concentrate sales at no more than three markets, compared to only 56% with over 5 acres. (See table on next page)

No. of Markets Attending Compared to 5 Years Ago	TOTAL Vendors 2014 %	TOTAL Farmers %	
		2007-2009	2009-2014
The same number of markets	27	65	31
More markets	15	25	27
Fewer markets	4	5	15
Not applicable/started after 2008/2009	54	5	27

7c) Compared to five years earlier (2009), in 2014 were you attending:

Farmers' market sales have become more significant in generating farm business income in the 2009 to 2014 period. Most Farmer Vendors who were able to compare sales over the past five years indicated that sales were either stable (49%) or had increased (29%). In 2009, only 25% of Farmer Vendors were earning 70% or more from markets - this has leapt to 43% in 2014. The average contribution to 2009 total farm income from markets was 48% of revenue; five years later market sales accounted for 60% of farm earnings.

Market sales are trending upwards or holding firm comparing 2009 to 2014. In 2014, more than half of farmers (54%) reported increases, a significant boost compared to five years ago (only 37% had sales increases over the previous year 2008 to 2009) and a declining number experienced flat sales in 2014 - 21% in 2014 down from 40% in 2008-09. Given noted market sales growth overall, fewer Farmer Vendors experienced declines in 2013-14 - only 7%

did contrasted with 22% during the economic doldrums of 2008/09. However, better sales could also be seen as a sign that the economy is recovering following the earlier major downturn.

Farmers concur that three factors are driving growth: they are producing more variety/new offerings, consumer demand is increasing and markets are improving markets (advertising/promotion, infrastructure and locations).

Farmers' intentions vary regarding the number of markets they will attend in the future. One in four farmers is considering adding more markets (up from 15% in 2009). This expansion was particularly evident among first career and younger age farmers (40 or under years). Over half of farmers (54%) intend to continue with the same number of markets - a healthy drop from 70% in 2009. This 'hold steady' position was particularly evident among second career growers who may be at capacity. A minority (16% in 2015 and 15% in 2009) expect to shrink market participation. This sector of growers skews older and are long-term market vendors (over 10 years).

Farmers' Markets Provide Links to Other Distribution Channels

Other sales avenues are also expanding growth potential. Now farmgate/farm stalls, restaurants/food service and CSAs are proving to be sales winners. Wholesale continues to work for a steady one in four farmers. The proportion of farmers who are selling through local retailers and fruit markets is stalled at about one in five. And the Ontario Food Terminal continues to be feasible for a small number of farmers; most are first career, older producers.

Farmers' markets provide a welcome showcase, reaching out to other sales channels. Farmers agree that markets are increasingly proving to be venues for connecting to other buyers - up from 53% in 2009 to 63% in 2015. This positive trend of finding other sales opportunities from their exposure at farmers' markets is more pronounced among second career, younger farmers (40 years and younger) and the shorter term market sellers (under 10 years).

Farmers' markets are increasingly becoming one of the 'go to' sources for local food and local ingredient value-added items for food service, wholesale and retail sectors. Players in the value chain are taking note that 'local' can be a winner.

Farmers are successfully connecting with a number of different buyers/sales channels. Select chefs and restaurants are turning to markets to find local food suppliers. Farmers also report their presence at markets leads to other sales opportunities including wholesale/food service/distributors and people operating farm stands/stores.
In 2015, both Farmer and Other Vendors were asked to comment on a series of consumer and market-
related issues.

Farmers concur that consumers need facts and tips: farms and production methods, food preparation/recipes, organic food, and benefits of buying local. Price resistance/complaints have dropped substantially.

Vendor Promotion/Advertising

Farmers have become more promotion oriented and savvy. They have made significant strides in adapting to new methods of reaching their market since 2009. Now in 2015, about three quarters (74%) of farmers are maintaining websites and have a presence on Facebook; half are sending email newsletters to customers. Twitter and Instagram play a less significant role - 29% for both. Traditional static promotional methods - road signs, ads in local paper and brochures/flyers - play a role in spreading information, but second career and younger farmers are less likely to use these approaches compared to older and first career farmers.

Suggested Business Growth Supports

Suggestions on potential programs or supports that would help their business prosper include: financial Support (easier access to loans/low interest loans, subsidies and grants), business and market training and customer related (better signage and advertising, food literacy). Farmers noted satisfaction with some specific programs such as Foodland Ontario's Market program. Market manager training and promotional programs are also helpful. A small number of participants indicated that market managers shouldn't be permitted to operate as vendors.

Summary comparing First and Second Career Farmers

Differences between 1st & 2nd Career Farmers*	1st Career %	2nd Career %	TOTAL FARMERS %
Career? (5% Other)	55	40	-
Learned farming: from parents taught myself	71 31	49 79	61 49
Average total number of acres: Farm size In production Growing for markets	92.4 77.5 40.1	52.0 26.3 12.8	75.3 53.2 26.5
Land ownership: Own at least some of the land Own all of the land Own part of the land Own none of the land	93 - - 7	70 - - 30	82 63 18 18
Language used/farming practices: Conventional Practicing Integrated Pest Managementm Non certified organic Low/limited spray Other i.e. antibiotic free, fresh picked etc.	36 27 7 11 24	6 9 39 - 3	23 20 20 6 16
Number of labourers/staff: Full time, year-round Full time, seasonal Part time, seasonal	3.0 4.4 4.8	1.4 1.2 1.9	2.2 2.9 3.5
Average length of time at Markets:	16.1	6.6	11.8
Proportion of household income from all farm sales	72	50	62
Future market participation: Adding more markets	31	15	24
Other sales outlets: Farmgate/market at farm Wholesale	51 36	30 18	45 28
Advertise using a: website Roadside signs	61 58	96 19	74 40
Supports that would help: Financial/grants/loans	11	36	23
Market presence led to increased sales channels: Yes	56	76	63

*Only statistically significant differences are listed

Other Vendors

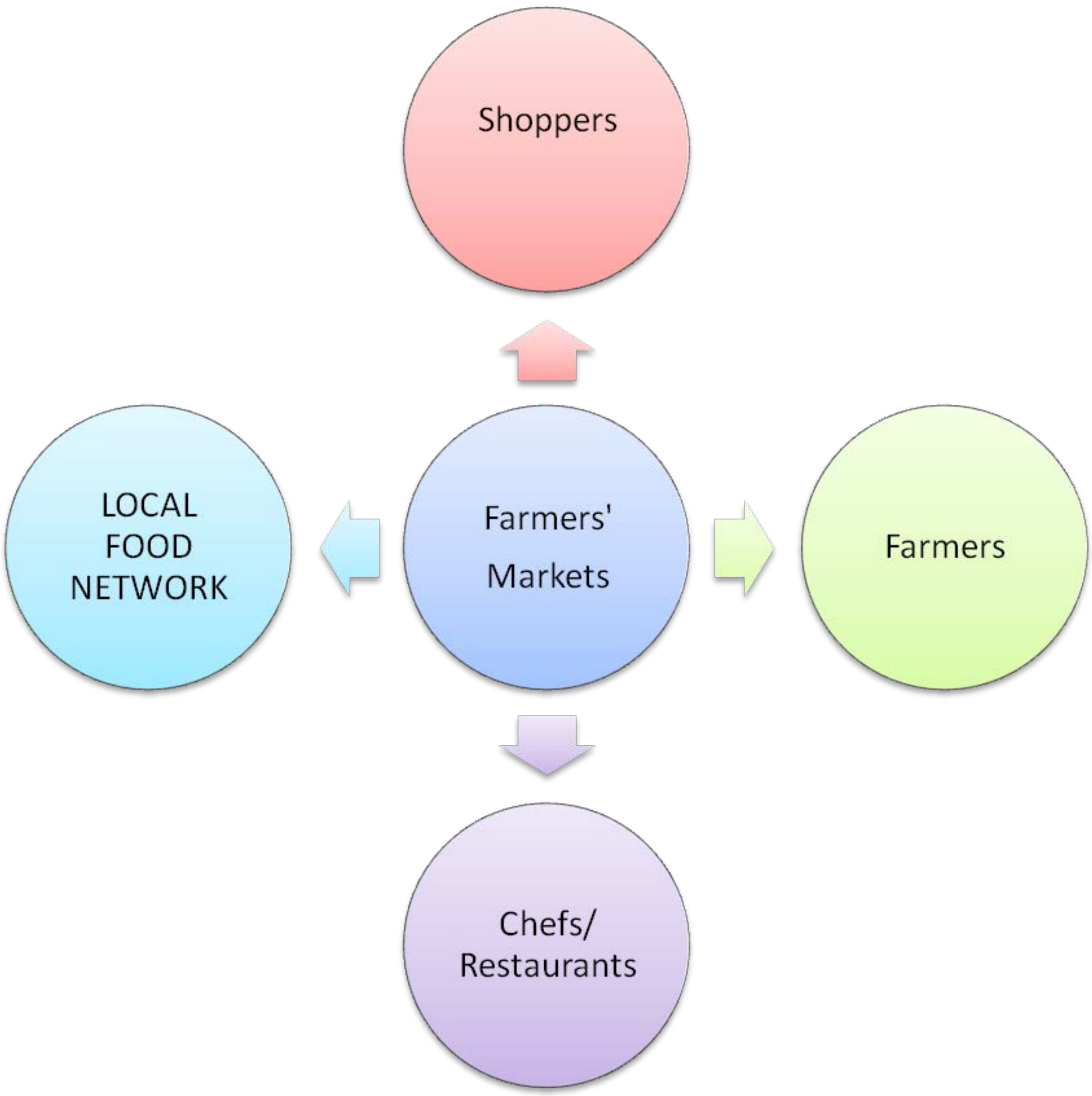
<u>They are older on average and attended fewer markets on average (2.8) in 2014</u>. Fully 70% of them focused on between one to three markets. A minority reach out to customers at four or more (27%). Yet market income can represent a significant portion of total household income. *Other Vendors* are promotion oriented but also have different perspectives on shoppers and assistance requirements. For complete details about *Other Vendors*, please see the full report.

Conclusions

These themes have emerged from this evaluation, tracking results from 2009 to 2014/15:

Growth: Based on study findings

- Overall, markets appear to be growing stronger as a destination for fresh local food. Farmers and shoppers have developed bonds of trust. Farmers have found that market shoppers want what they produce; shoppers trust this source for quality, local food.
- Farmers are deriving more of their business income from markets. Farmers have learned that markets can be secure and predictable sales channels.
- The role of markets as a hub to access other sales channels is growing.
- The evidence that local food sells is prompting farmers to grow new varieties and increase acreage for market production.
- The farmer sector is expanding with the development of new, small-scale farms geared to growing produce for the local market.
- Farmers are responding to the increased demand for local food by expanding sales channels to include farmgate/farm stands and CSA sales/distribution.
- Most farmers believe that the demand for local food is on the rise.
- New farmers appear to be upping their scope and possibly their customer engagement levels in a variety of channels: websites, Facebook, e-newsletters, roadside signs, brochures, Twitter and Instagram.
- Markets are recognized as a contributor to strengthening and growing the local food system given their role in bringing together providers (farmers) with buyers (chefs, food service, caterers, local retailers, small scale processors, etc.).


Shoppers
LOCAL FOOD NETWORK
Farmers' Markets
Farmers
Chefs/ Restaurants

Recommendations

- Assist new entrants to farming with access to loans and grants for startup costs and purchase of land so they can develop successful businesses within a reasonable distance of markets.
- Ensure that both new and established farmers have access to training in marketing and merchandising; bookkeeping/record keeping, cost analysis and production.
- Fruit is a huge draw at markets, yet local fruit production is in decline. While markets are welcoming new farmers, few of them are currently able to make the long-term investment required to produce tree fruits. Programs to support new fruit growers and avoid loss of productive orchards when older growers retire are essential for the future success of markets.
- Build on the opportunities for farmers to make connections with local buyers near their markets, including restaurants, independent grocery stores, new immigrants and food service providers, in order to maximize the value of each trip to market. In addition to outreach during the outdoor season, winter 'meet and greet' events could introduce producers to prospective buyers.
- Support market organizers, farmers and vendors in their efforts to educate shoppers. Develop food literacy materials, to be disseminated through markets, websites, newsletters and social media, on topics including: impacts and benefit of buying local food, 'farming 101', recipes, food preparation and preservation.
- Streamline organic certification for small-scale farmers so more can transition from 'uncertified organic' production to certified organic, addressing the increasing demand for organically produced food at markets.
- Support efforts to open new farmers' markets only in areas not currently served, to avoid cannibalizing the customer base and thereby requiring farmers to attend more markets to earn the same revenue.
- Farmers' markets are ideal settings for the introduction of new products. Expand production of world crops and value-added foods to attract more of our region's diverse population.
- Share the findings of this report to reinforce the confidence and commitment on the part of market farmers and vendors which it illustrates and celebrate the success of Greenbelt Network Markets.

Background & Aims

Greenbelt Farmers' Market Network (GBFMN) conducted the following primary research projects aimed to strengthening farmers' markets for vendors, market managers and shoppers. These studies were funded with the support of the Greenbelt Foundation.

> **2009/2010 Market Manager & Farmer Study** - This multi-phase study of market managers and Farmer Vendors started with 12 indepth telephone interviews followed by four focus groups and then structured telephone interviews. The study sample was 40 market managers and 60 Greenbelt-based farmers. The purpose was to learn what market managers and Farmer Vendors needed to strengthen their offerings and to contribute to information sharing and knowledge transfer.
>
> **2010 Shopper Study** - An online survey of 339 shoppers at farmers' markets in and around the Greenbelt was conducted at the end of the seasonal market cycle. The goal was to help managers and vendors strengthen their relationships with customers and the communities. Also, the intent was to identify opportunities and barriers to growth and provide benchmarks for future comparisons.
>
> **2012 Shopper Study** – An online survey with 386 shoppers at farmers' markets from 58 markets located in and around the Greenbelt. The intent was to examine the impact of farmers' markets on the shoppers' health linked to food purchasing, preparation and eating patterns. What were the food buying patterns during the winter and market off-season period, and did it affect consumption of fresh fruit and vegetables? In addition, this survey permitted comparison and updating of the 2010 survey

GBFMN represents just under 100 markets; approximately one third of the markets are located in Toronto with the bulk dispersed throughout the Greater Golden and Hamilton Horseshoe.

Now is an opportune time to revisit and expand upon the knowledge we have on the impact of markets, particularly on Farmer Vendors. The intention of this study is to build on the learning from the previous studies, providing updated data, where applicable, and yielding new information reflecting changes that have occurred between 2009 and 2015.

Research Topics

Farmers/Market Vendors

Information was gathered directly from a selection of Farmer Vendors and, to a lesser extent, Other Vendors. The following is a list of the types of data that were collected, incorporating previous survey items (as-is and revised) and augmented with new categories.

Farmer Information: Age, farm location (county/region), proportion of income from farm business, farming - first or second career, country of birth.

Farm Basics - Production, number of acres farmed, type of farming practices, number of employees (on farm, market staff, paid and unpaid positions), categories of farm products produced, percentage of total farm space used to produce for markets.

Farm Basics - Sales/Marketing - Number of markets active in 2015, other sales and distribution channels to be used in 2015. What categories of items sold at the markets? Percent of total sales derived from markets. Compared to 5 years ago amount of sales - up/down/flat?

Market Experience - Number of markets participated in 2014, compared to 2013 attending more/the same/less markets, 2014 sales - increased, stable or decreased? Business model changes over time (markets, production, innovation/valued-added).
Overall market changes in past year (sale volumes, customer interest in local food).
Impact on market participation on sales channel access.

Farmer Perspectives - Customer Behaviour - Interest in learning more about farms and production? Demand/request organic? Price complaints? Information shoppers need: about organics, preparing meals with market ingredients, etc.? Perceptions about number of shoppers this year compared to the past?

Farmer Perspectives - Limits on what vendors can sell? Sufficient vendors to meet demand? Prioritize vendors based on farm versus off-farm sales items? Markets for farmers only? Option to supplement with other items? Longer market seasons?

Impact of Market Experience - Tried growing different items or producing new value-added items? Impact on marketing/communication tools?

Other Issues?
New and emerging - organic demand.

Other Vendors

The ability to satisfy the needs of food shoppers goes beyond offering fresh, locally grown produce, and includes meat, cheese and other dairy items, eggs, freshly baked bread and sweet items, bedding plants, seeds and fresh cut flowers, honey and jam and prepared, ready-to-eat items. Markets are incomplete without an assortment of this range of items. And while the emphasis of this project was necessarily placed on Farmer Vendors, an accurate assessment of farmers' markets would be lacking without this additional information.

Here is a list of the types of information gathered among this sector:

Market/Sales Experience - Number of markets participated in 2014, compared to 2013 attending more/the same/less markets, 2015 sales - increased, stable or decreased, number of employees (on full and part time, seasonal and year round)

Business model changes over time (markets, production, innovation/valued-added)

Overall market changes in past year (sale volumes, number of vendors, advertising, customer interest in local food). Impact on market participation on access to other sales channels

Other Perspectives - Consumer Behaviour - Demand/request organic? Price: complaints, Information needed: about organics, about ingredients, etc.

Study Method

In designing this study it was essential to balance information need with reality. Understanding that market vendors are stretched for time, interviewers administered the questionnaire only when there was a lull in selling activity. The aim was not to interfere with selling. Interviewers were sensitive to the Farmer Vendors' need to serve customers.

The structured questionnaires (one for Farmer Vendors and one for Other Vendors) were prepared by the consultant in tandem with the client team. They consisted of tracking questions (2010 survey) and new ones for emerging issues (see Appendices).

The interviews were conducted by a trained staff member (one per market); responses were recorded on a paper questionnaire. Interviewer input responses in an excel spreadsheet template at a later point.

The consultant worked with a data processing expert to generate detailed cross-tabulations based on a tabulation plan. The goal was to ensure that cross-tabulation cells were statistically reliable. Then, the consultant analyzed the data, created summary tables/charts and prepared the following report.

The Sample

A total sample of 82 Farmer Vendors and 26 Other Vendors were interviewed from an estimated pool of 600 Farmer Vendors.

The Sample/Survey Period	Farmer/Vendors	Other Vendors
2009 Survey	60	n/a
2015 Survey	82	26

Three Farmer Vendors were interviewed in each of 27 farmers' markets, and one Other Vendor interview was conducted per market. Other Vendors were defined as non-Farmer Vendors who sold a variety of value-added products exclusively, not produced on farms, including crafts, baked goods and ready-to-eat/ready-to-go items.

Vendor Categories - The goal was to provide a fair representation of the market item categories. While changes have likely occurred since the 2010 survey, the mix at that point was heavily skewed to farmers selling fresh produce closely followed by fruit. Other lesser but significant market categories included: bedding plants and seeds, honey and maple syrup, meat, eggs, cheese and baking/bread. On average, vendors sold 3.38 items from the list of 18 categories. Approximately six in ten or 60 of the 70 to 90 Farmer Vendors were selling fresh produce and/or fruit. The remainder of interviews represent the other categories.

Market Location - The aim was to ensure that the sample of vendors fairly represented the market mix in terms of size and location.

Markets & Locations

Participating Farmers' Markets by Region

Dufferin: (1)
- Orangeville: Saturdays 8 am – 1pm

Guelph-Wellington-Waterloo: (2)
- Guelph Market - Sat
- Cambridge Market: Weds 8 am – 2 pm

Halton: (2)

- Milton Farmers Market: Main street Milton, Saturday 7-12noon
- Burlington Farmers' Market, Burlington Mall

Hamilton / Brant: (2)
- Waterdown Farmers’ Market: 79 Hamilton St, Saturday 8-1
- Dundas Farmers’ Market: Hatt & Miller St., Thurs. 3-7

Kawartha: (1)
- Peterborough Wednesday Market, Weds, 8:30 am – 2 pm

Niagara: (2)
- St. Catharines: Thurs. 5:30 am to 4 pm
- Grimsby: Thurs. 3-7 pm

Northumberland: (1)
- Port Hope: Wednesdays 1pm – 5 pm

Durham: (1)
- Pickering Town Centre: Tuesday, 11 am – 6 pm

York: (3)
- East Gwillimbury, Thurs 3 pm – 7 pm
- Unionville-Stiver, Sundays 10 am – 4 pm

Simcoe / Grey / Bruce: (3)

- Innisfil Farmers' Market, Thursdays 2 pm - 7 pm
- Owen Sound, Saturdays 8 am - 12 noon
- Collingwood Farmers' Market, Saturdays 8:30 - 1 pm

Toronto (9)
1. The Junction
2. Metro Hall
3. Trinity Bellwoods
4. TO Botanical Gardens
5. Sherway Gardens
6. Leslieville
7. North York Civic Centre
8. Stonegate
9. Fairmount Park

DETAILED FINDINGS

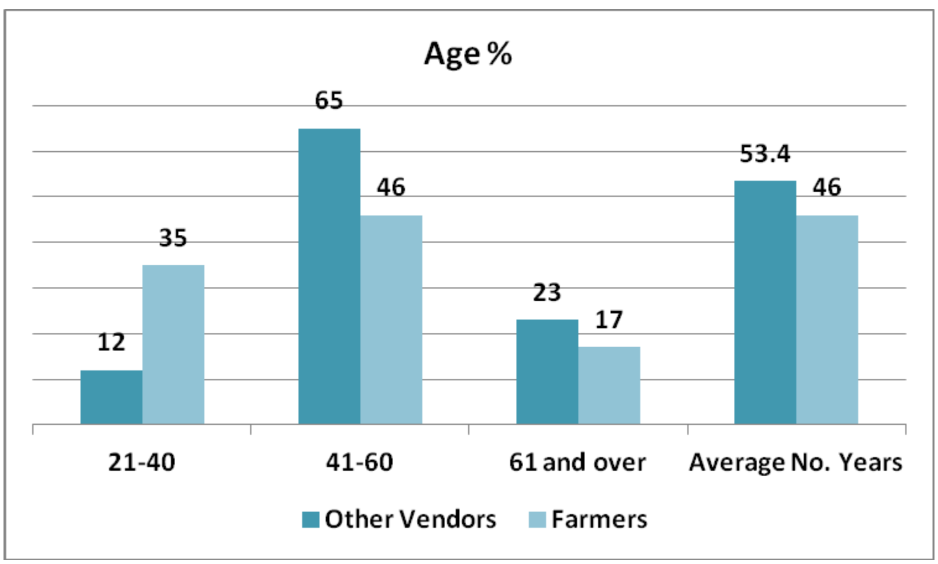
About Farmer Vendors & Other Vendors

Age

- Farmers who sell direct to consumers are on average younger, 46 years, than Canadian farmers overall who are 54 years old (2011 Census). Older farmers (41 and over) tend to be land owners/own all their land and farm on larger plots than younger producers.

- First career farmers span a wider range of age groups than the second career farmers who cluster in the 31 to 60 year sector. First career farmers mainly grew up on family farms and then graduated into farming as a way of life and business pursuit, while second career farmers appear to have moved into farming after pursuing other avenues. However, it's noteworthy that about half of them learned farming from their parents and grew up on farms. Anecdotally, the remainder came from suburban/urban backgrounds and later migrated to food production.

- Other Vendors are predominantly older - almost one in four (23%) over 61 years old. There is a clear age gap between Other Vendors and farmers/producers - on average, non-Farmer Vendors are 53.4 while Farmer Vendors are 46.0 years old.



1e) Which age group do you belong to?

- Over one third (37%) of younger farmers are 30 or under; the remainder are 31 to 40 years old. Younger farmers are the most likely overall to be tenants and own none of their land. They are more likely than others to describe their farming practices as "natural/naturally grown/raised". Their market history is shorter - on average they've been attending markets 6.8 years compared to the average of 14.6 years for farmers aged 41 and over. On average, they participated in 2.7 markets (average 3.6 for older farmers). They are more likely than older farmers to attribute increased market sales to the fact that they increased production. And, they're more inclined to be planning to participate in more markets in the future than older farmers.

Farm Location

- Over six in ten Farmer Vendors (63%) who participated in this study are based in two regions: Niagara/South and GTA.

- Older farmers (aged 41 and over) are more likely than their younger counterparts (40 and under) to be based in the Niagara/south; younger farmers tend to be located in the Greater Toronto Area.

- Second career farmers are more likely than first career farmers to be growing East of Toronto with particular emphasis in Northumberland County.

2015 Base: 82 Farmers	TOTAL %
Niagara/South - Hamilton, Niagara, Haldimand, Norfolk	34
GTA - Dufferin, Durham, Halton, Peel, York, Toronto	29
East of Toronto - Northumberland, Peterborough, Hastings, Prince Edward County	11
West of Toronto - Wellington, Brandt, Oxford	10
North of Toronto - Simcoe County	4

Other Vendor Location

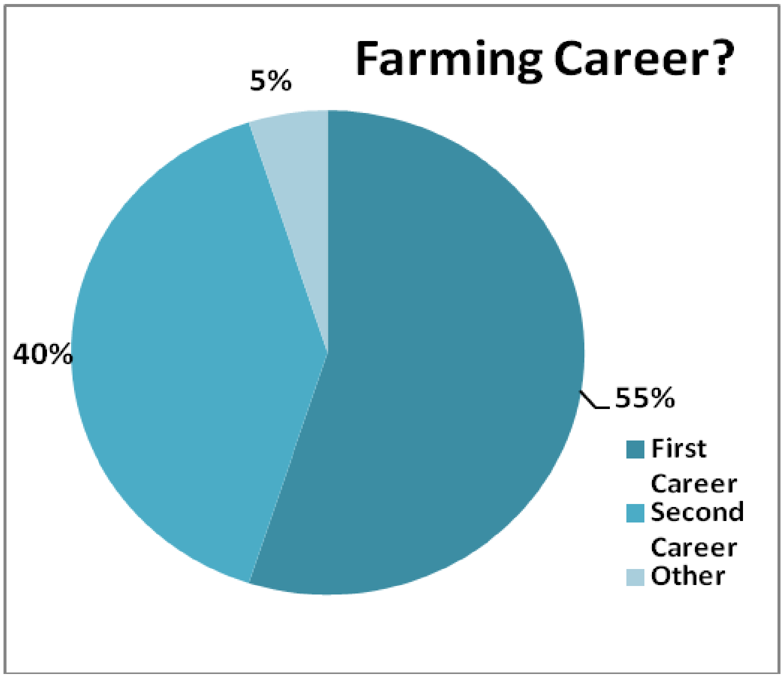
Most Other Vendors are town or city based. A minority live on farms or in rural locations.

2015 Base: 26 Other Vendors	TOTAL %
Farm/Rural Community	23
Town/City	77

Farming - First or Second Career?

- Farming has changed with the times and generations. Today, farming can be the first choice career as indicated by more than half of participants (55%). However with the evolution and shortening of the value chain, a substantial minority (40%) of market Farmer Vendors have turned to agriculture as a 'second career'.

- Farmer vendors who came from family farms and made farming their first career tend to have been at farmers' markets longer than those who are in it as a second career. They also tend to grow market-directed food on larger acreages. Over seven in ten (71%) dedicate more than five acres to this part of their operation while about two thirds (65%) of second career growers work on five or less acres.



- While the majority of market farmers came from farm families (61%) and moved straight into farming (first career), about half of those who chose farming after pursuing other career paths (second career) were raised on farms.

Country of Birth

- Canada and Ontario's agricultural scene has been dominated by generations of farmers; farms were traditionally passed from one generation to the next. However, this heritage has been eroded with significant downturns in the agricultural economy.

- The local food movement sparking increased consumer demand, though, seems to be lifting some farming sectors. As a result, farming is being seen as a viable occupation, albeit a new model of food production. One factor that is influencing new ways of food production is the changing ethnic profile of the Canadian population, thus slowly providing new jobs and opening up markets for a wider range of food.

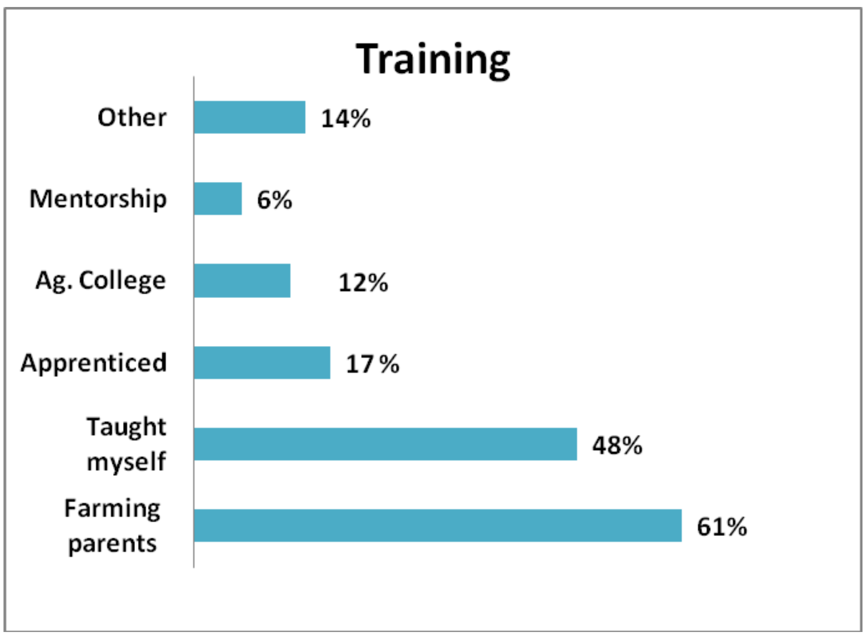
- The table below indicates that the farming population is slowly evolving to include growers from around the world. Farmer Vendors are slightly more likely in 2015 than in 2009 to have been born offshore.

2015	TOTAL Vendors	% Farmers
Canada	81*	73
Europe	-	15
USA	-	4
Africa	-	4
Asia	-	2
Not stated	-	1

*Additional data not included due to small sample size.

Farmer Training

- First career farmers who were raised on farms and remained there (61%) are less likely to seek outside training than those who came to farming as a second career.



1f) How did you learn to farm?

- Looking closer, half of second career farmers could be described as 'returning farmers' given they were raised on farms. Yet most of these second career farmers indicate that they are 'self taught' - likely their operations are different from their 'home' farm.

- Both returning and new farmers took the opportunity to acquire new skills by working on other farms/farm apprenticeships, attending agricultural colleges/community colleges with agricultural programs, mentorships and others sources. These include small, local initiatives such as Ontario's FarmStart that works with would-be farmers, providing access to plots and critical supports. The Craft Network links potential farmers to seasoned farmers committed to knowledge transfer. International WWOOF (World Wide Opportunities on Organic Farms) provides short-term placements for interested candidates of all ages.

2015 - Other Training Methods:	TOTAL Farmers %
FarmStart	4
Urban Farmer Training Program/Craft Network/ WWOOFing	4
Family (married into a farm family)	4
Short/single course	2

- Self-taught farmers are more likely than those who come from a farming background to take advantage of opportunities for expanding distribution and sales beyond farmers' markets. But they are also more recent market vendors (less than 10 years) than those from a family farm.

Training & Knowledge Transfer

Just over one in four Farmer Vendors are engaged in passing on knowledge to new farmers through a variety of opportunities.

2015	TOTAL Farmers %
Yes	28
No	72

5b) Are you involved in training / mentoring new farmers? This could be through full-season internship programs on your farm or periodic workshops, etc.

Farm Basics

Farm Acreage

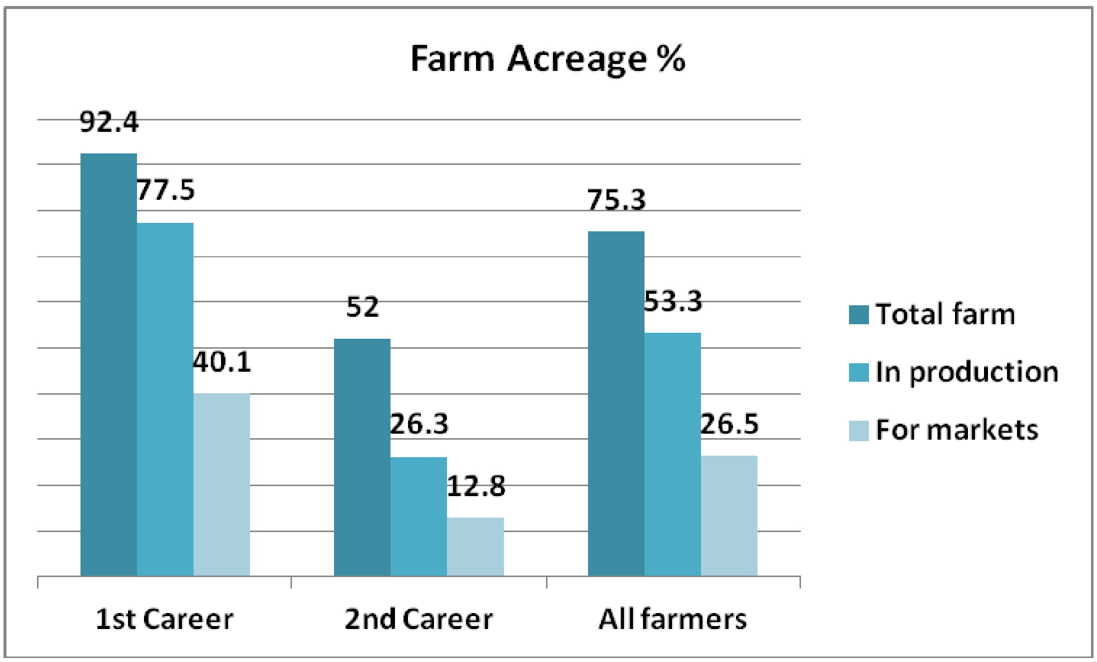
Three facts are revealed about farm sizes in 2015:

1. Market growers' farms averaged **75.3 acres,** representing a wide range of small to large acreages: one in four farms (24%) on 110 or more acres, while 39% work with 35 or less acres.

2. Production acreage averages 71% of the total farm or **53.3 acres.**

3. Half (50%) of the acres in production - average **26.5** - are dedicated to growing for markets.

The table below indicates the significant difference between the average acreages for first career farmers and second career farmers. The latter group has more limited areas for and in production in contrast to larger land production for first career farmers.



Farm Acreage & Acres in Production

- Between 2009 and 2015, total farm acreages have shifted with a larger share of farmers working large land holdings - 24% of farms are now 130 acres or more, up 10% from 2009.

- The majority of farmers (70%) are using up to 69 acres for all farming activities.

- Half of the total area in production (average 53.3 acres) is being used to produce food for farmers' markets (average 26.5 acres). First career farmers have more production capacity with an average of 40.1 acres dedicated to market production contrasted to second career farmers with an average of 12.8 acres.

No. of Acres:	Total Acres 2009 %	Total Acres 2015 %	Acres in Production 2015 %	Acres for Market Production 2009 %	Acres for Market Production 2015 %
Under 10 acres	17	18	38	50	54
10 - 69 acres	50	41	32	33	28
70 - 129	23	17	12	23	6
130 or more	10	24	17	3	5
Don't know	-	-	1	3	7
Average acreage	N/A	**75.3**	**53.3**	N/A	**26.5**

2a) Approximately how many acres in total is your farm?

2b) How many acres are currently in production?

2c) Of that, how many acres are used to grow for the markets?

Land Ownership

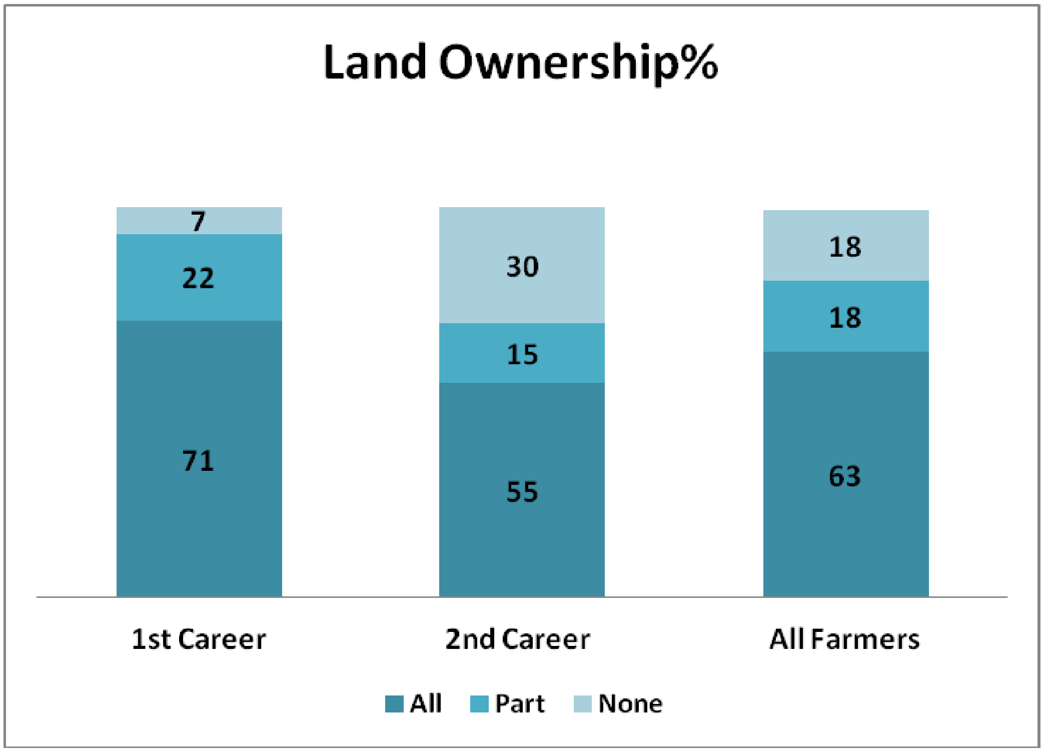
- Over six in ten market farmers are secure land owners (63%) while a minority, less than one in five (18%), are strictly renters. The remaining 18% own part of their farm acreage.

- The likelihood of owning some, all or none of their land is a function of several key factors:

  - Age - 80% of farmers 41 and over are owners (all farm acreage) compared to younger ones (33%). Conversely, one third of younger farmers (37%) are strictly land renters.

  - The majority of first career farmers own all or some of their land (93%). Very few (7%) are strictly renters. In comparison, second career farmers are less likely to own all or even some land (70%) and 30% rent all their land. (See table below for more details.)

- The picture for smaller plot market growers (5 or less acres) differs from those who are using more land to grow for markets. Half of these smaller scale farmers own all of their land compared to 79% of those with larger plots. Overall, 18% of farmers rent all their land - this figure jumps to 32% among those who are producing food on less than six acres.



3a) Now please tell me about the ownership status of the land you farm on, which of these statements applies?

Security of Tenancy

Fourteen of the 82 Farmer Vendors (18%) who rent some or all of their land for production rated their degree of security as land tenant. About half of these farmers felt very or quite secure while about a quarter felt their tenancy was fragile. The average security among renters was 6.3 out of 10 (10 was 'very secure' and 1 was 'not at all secure').

3b) As a renter of land, how secure is your access to the land you farm, using a scale of 1 to 10 (where 1 is "not at all secure" and 10 is "very secure")?

Farming/Production Practices

Farmers

Are major shifts occurring in production methods or are market farmers adapting their message to address shoppers' concerns? Has the rise of consumer awareness about production inputs, interest in how their food is grown and alarm over animal care practices moved real changes or simply bred new market-sensitive language?

Farming Practices	TOTAL Farmers 2009 %	2015
Conventional	45	23 ↓
Practicing Integrated Pest Management	67	20 ↓
Non-certified organic	-	20 ↑
Certified organic	12	12
In Transition	8	5

- In 2015, 'conventional' and 'integrated pest management' have been edged out by more current and in some cases consumer-friendly language. Wisely, farmers are avoiding terms that are meaningless to most off-farm people.

- Now, one in five vendors describe their production method as 'non-certified organic' - a term which hadn't hit the radar in the 2009 survey. Interestingly, second career farmers are much more likely than first career farmers to describe their practice as 'non-certified organic' - 39% compared to 7%. Perhaps their more recent entry into farming and their smaller plots are shaping more sustainable production methods?

- The proportion of certified organic growers is stalled at 12%, and those producers who are in transition to organic remains low (5% in 2015). There are indications that shorter term market vendors (less than 10 years) are more likely to be farming organically than farmers with over 10 years of market experience.

- Other newly adopted descriptors listed below include 'low spray' or 'spray free', and their cows, pigs and chicken are 'pasture raised' and eat 'pesticide free' feed.

Farming Practices /Terminology	TOTAL Farmers 2009 %	2015
Conventional	45	23 ↓
Practicing Integrated Pest Management	67	20 ↓
Non-certified organic	-	20 ↑
Certified organic	12	12
Natural/naturally grown/raised	-	11 ↑
Low/limited spray	-	6 ↑
In Transition	8	5
Pasture raised	-	5 ↑
Spray free	-	2
Pesticide free	-	2
Other (Advanced IPM, Local Food Plus Certified, Tree Ripened, Antibiotic free, Fresh picked, etc.)	22	16 ↓
Local Food Producer (LFP) certified	50	-
None	3	-
Not stated	-	1

4. Which terms would you use to describe your farming practices? I'm going to read a list of some examples. More than one may apply. You may also add other terms after I read the list.

Other Vendor Terminology

- As with Farmer Vendors, Other Vendors develop products and marketing strategies to attract consumers' evolving preferences. Success is based on catering to shoppers' needs and desires. In keeping with the local and authentic nature of farmers' markets, the two terms used most frequently by vendors to describe their products/production methods are 'traditional' or 'artisanal'. The object is to differentiate their offerings from mass produced and imported lower cost merchandise.

- They might also describe their products by desired descriptors such as 'natural' and 'healthy'. One in four (23%) apply 'organic' to their products; however, it's unclear whether they are made with certified organic ingredients and in a certified organic facility.

- A smaller share of products made to capture sales for 'gluten free' and 'vegan' can also be found at these vendor tables, plus a plethora of other 'at the moment' marketing buzz words used to draw in shoppers including *local, yummy, authentic*, etc.

Vendor Production Terminology	Total %
Traditional	50
Artisanal	39
Natural	31
Healthy	31
Organic	23
Gluten free	15
Vegan	15
Small batch	12
Other ingredients not found in product (additives/chemicals/paraben/ LS free, no artificial perfumes / colours)	12
Hand/home made	8
Other (yummy, local, authentic, farm to table, paleo, raw, etc.)	42

Q. Which terms would you use to describe your product(s)? I'm going to read you a list of some examples. More than one may apply. You may also add other terms after we read the list.

Employment - Full & Part Time, Year Round & Seasonal

- Employment numbers have shrunk overall in the last five years in all measured categories for reasons cited below. Farmers are doing more with less paid assistance full time and part time, both year round and seasonally. In 2009, an average of 3.8 people were engaged full time on the farm – this dropped to 2.2 workers on average. Now 42% of farmer/vendors have no seasonal staff, up from 28% in 2009.

- The main reason for this employment decline is the increased number of Farmer Vendors who are working small plots and are relatively new entrants to farming. In comparison, 'career' farmers have larger acreages, longer market experience, and participate in more markets, and more need to hire staff, particularly on a seasonal basis. To illustrate the difference: larger scale/first career farmers hire on average 4.4 full-time staff seasonally compared to 1.2 for those who are newer and have smaller acreages.

FARMERS - 2015 Type of Employment:	FULL-TIME Year/Round %	Seasonal %	PART-TIME Year/Round %	Seasonal %
None	24	54	85	42
1	23	9	2	10
2 -5	44	25	7	31
6 - 10	7	9	4	10
More than 10	1	5	1	9
Average	**2.2**	**2.9**	**.07**	**3.5**

FARMERS - 2009 Type of Employment:	Farm Operation Year/Round %	Seasonal %	Market Staff Year/Round %	Seasonal %
None	18	22	42	28
1	28	8	25	10
2	33	12	20	13
3-4	10	20	13	25
5 or More	10	38	-	23
Average	**3.8**	**6.6**	**1.1**	**4.3**

Vendors

Overall, Other market vendors tend to run leaner operations requiring fewer employees. Yet the average year-round engage 2.2 workers which matches the average for year-round farm employment. This is a function of selling well beyond farmers' markets and being more likely to participate in events/shows.

VENDORS Type of Employment:	FULL-TIME Year/Round %	Seasonal %	PART-TIME Year/Round %	Seasonal %
None	35	85	73	62
1	42	4	8	12
2 -5	12	8	19	27
6 - 10	4	4	-	-
More than 10	8	-	-	-
Average	**2.2**	**0.5**	**.07**	**1.1**

5a) How many people, <u>including yourself</u>, provide labour for the farm business, including paid and unpaid staff? Please tell me the number of staff and whether they are full-time or part-time/seasonal employees.

Sales & Marketing

Farmers

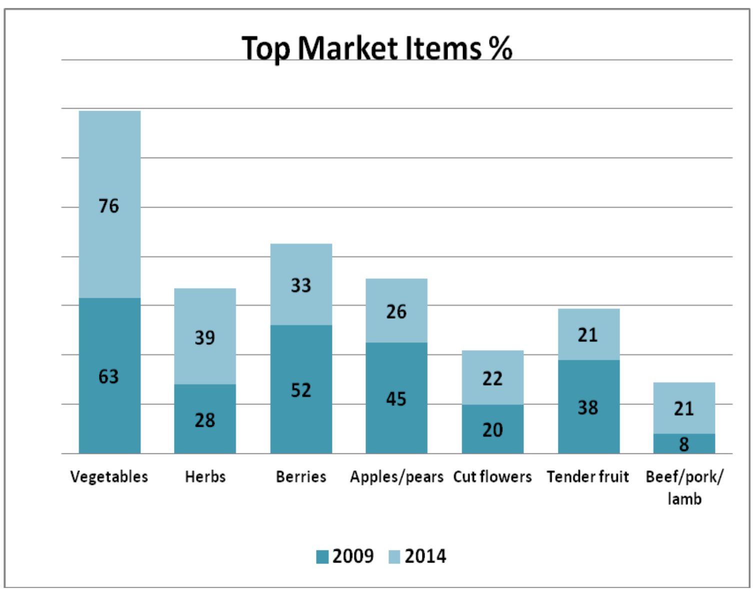
Consumer demands have shifted and expanded between 2009 and 2015, with farmers responding accordingly. This snapshot of the types of current offerings from Farmer Vendors indicates:

- Demand for fresh vegetables continues to climb and retains the top spot far ahead of other categories growers bring to market (76% of growers in 2015 up from 63% in 2009).

- One in five farmers (21%) now offer dark meat (beef, pork and lamb) to capture demand for farm raised, 'clean', 'free from' meat (up from 8% in 2009). Farmers are tapping into the growing awareness and concern about animal care practices and use of antibiotics and growth hormones. Naturally, farmers with larger acreages are most likely to be raising livestock.

- Vegetables, herbs, meat (beef, pork, lamb and possibly chicken), prepared foods and other food products are all growth categories in 2015.

- Overall, declines were noted in fruit vending including berries, apples and pears. This is a function of the increasing number of smaller scale, second career farmers who are much less likely to be cultivating fruit crops than larger acreage first career producers. Larger scale farmers who own all their land and have longer experience selling at markets are the backbone of both berry and fruit production at this point.



- Farmers have increased their offerings of popular prepared food and other food products in order to capture more demand.

Other Vendors

Other Vendors tend to concentrate their offerings in a few categories, lead by 'crafts' and followed by prepared and specialty food. A minority are offering canned items (preserves, marinades). Very few are selling horticultural items such as plants and seeds.

Other Items Sold at Markets	Other Vendors 2015 %	Farmers 2009 %	Farmers 2015 %
Prepared food	35	7	17↑
Plants and seeds	4	18	16
Bedding plants	-	18	13
Honey	-	15	13
Eggs	-	7	11
Chicken	-	5	10
Other food products	12	-	9↑
Bread & baking	-	7	7
Maple syrup	-	10	7
Canned goods/preserves/marinades	12	-	5
Crafts	54	2	4
Beverages	8	-	4
Wool/wool products/sheepskin	-	-	4
Cheese & other dairy	4	2	2
Other fruits	-	-	2
Grain products	-	-	2
Other meat products (duck, smoked, cured)/Specialty meat	4	2	2
Specialty Foods	27	-	-
Other non-food products/Other	8	10	2
Not stated	15	-	-

6. Now thinking about farmers' markets, what kinds of items do you usually sell there? I am going to read a list of categories – please tell me which ones apply.

Farmers' Market Experience

Market Attendance

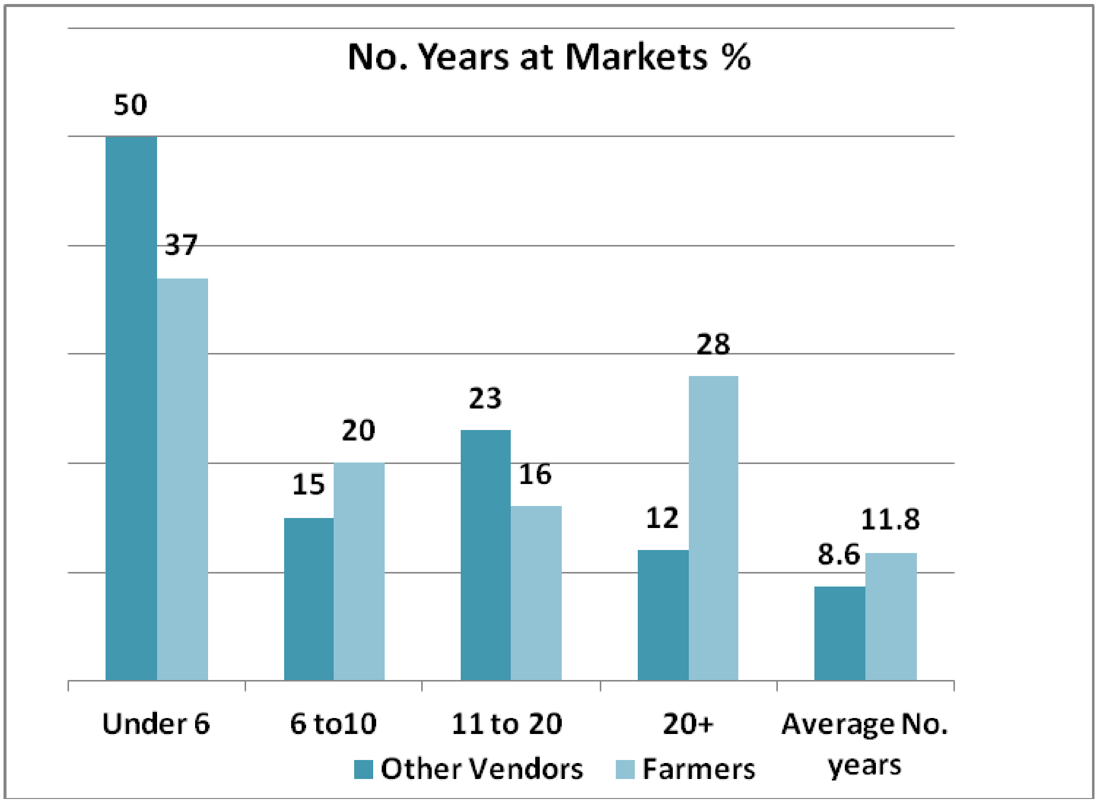
Farmers' market vendors have a wide range of experience at markets; the following patterns emerged:

- A large minority of Farmer Vendors (44%) have sold their goods at markets for more than 10 years, and one quarter (28%) are market ‘pioneers’, active for over 20 years. These longer-term growers tend to be older, own their land, farm on larger acreages, and come from farm families.

- The pool of farmers who are participating in markets appears to be growing and is being renewed by new producers who are turning to this 'customer direct' distribution and sales channel.

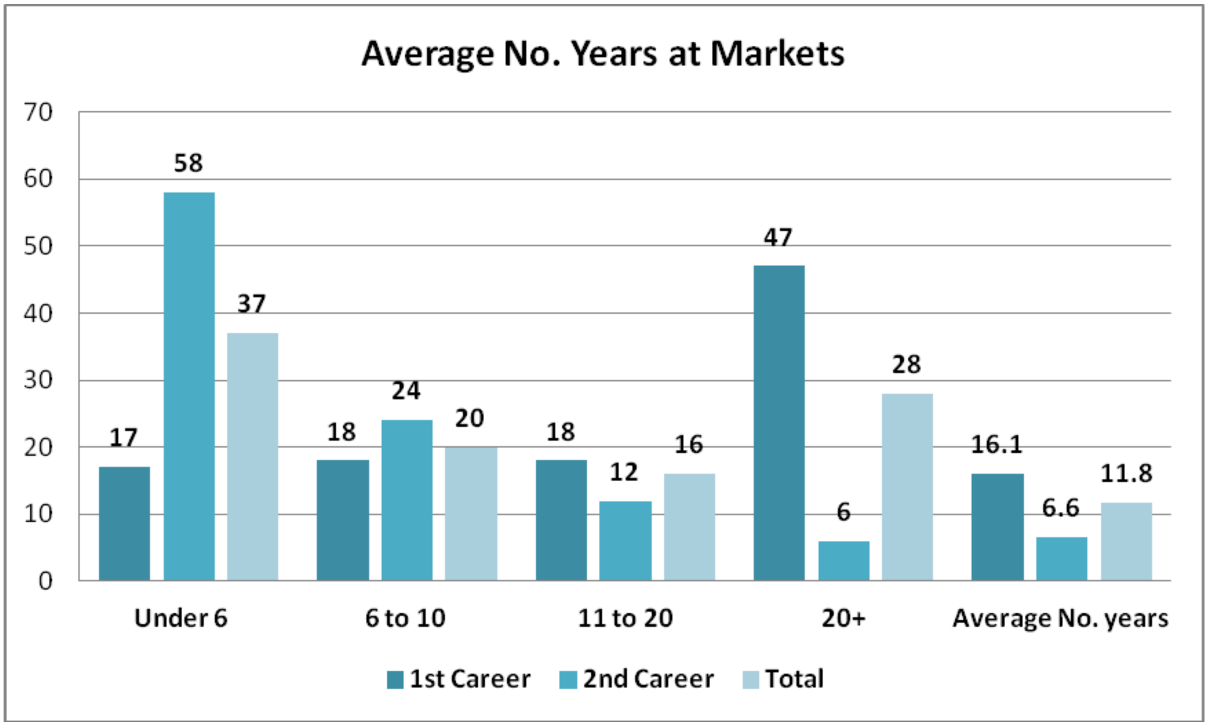
- Markets have been built on food from local farms while value-added and other categories tend to have become part of the offering later. On average, Farmer Vendors have a longer track record at markets than do Other Vendors, averaging 11.8 years compared to 8.6 years, respectively.

- Other Vendors are relatively new to the markets; they are part of the 'second wave'. Half of them (50%) started developing relationships with market shoppers in the last five years. Yet over one third (23%) indicate that they've been selling at farmers' markets for 10 or more years.



7a) How long have you been selling at farmers' markets?

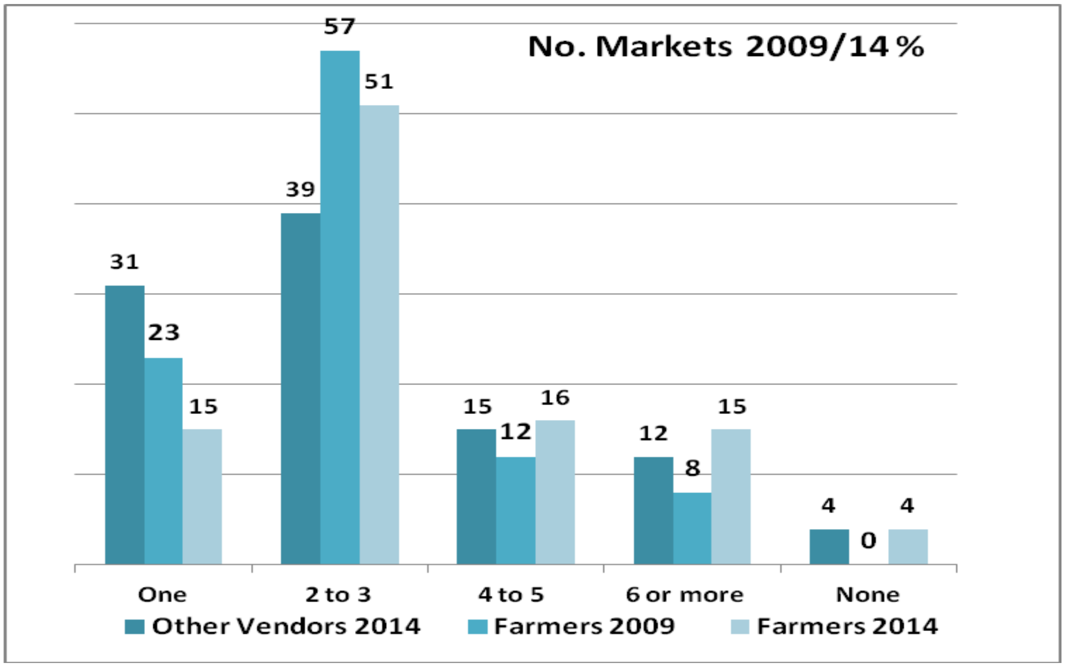
- First career farmers have a longer track record at markets - averaging 16.1 years - compared to second career growers who average 6.6 years.



7a) How long have you been selling at farmers' markets?

Number of Markets Attended

Farmers were attending more markets in 2014 than in 2009, averaging 3.3, up from 2.2 in 2009. In the base year, 2009, 80% of Farmer Vendors focused on up to three markets, declining to 66%. Conversely, now a notable 31% are engaged in four or more markets compared to 20% in 2009. Further, the number of farmers attending six or more markets has doubled to 15% from 8% in 2009.



Number of Markets in 2014	TOTAL - Vendors 2014 %	TOTAL - Farmers 2009 %	2014
Average No. Markets	**2.8**	**2.2**	**3.3↑**

7b) How many farmers' markets did you participate in in 2014?

- Expansion is most evident with larger scale farmers who average 3.7 markets; the small plot producer market average is 2.6 markets. Perhaps more telling is that 80% of those with less than 5 acres concentrate sales at no more than three markets, compared to only 56% with over 5 acres.

- Other Vendors attended fewer markets on average (2.8) in 2014. Fully 70% of them focused on between one to three markets. A minority reach out to customers at four or more (27%). Data for other vendors was not collected in the 2009 survey.

Number of Markets 2009 and 2014: More, the Same or Less?

Farmers

- A large proportion of Farmer Vendors who were concentrating on a fixed number of markets in 2009 has declined in the past five years (from 65% to 31%). However, the exception is older farmers (41 years and over): even though they tend to have larger plots and a longer history at markets, in 2014 they were content with their level of market participation.

- In 2014 both first and second career Farmer Vendors expanded to more markets in the last five years - at least one in four indicate they've taken on more markets.

- The longer term vendors (10 or more years) tend to participate at the same number of markets, although some are expanding their customer base to include more venues.

No. of Market Attending Compared to 5 Years Ago	TOTAL Vendors 2014 %	TOTAL Farmers 2007-2009 %	TOTAL Farmers 2009-2014 %
The same number of markets	27	65	31
More markets	15	25	27
Fewer markets	4	5	15
Not applicable/started after 2008/2009	54	5	27

7c) Compared to five years earlier (2009), in 2014 were you attending:

Other Vendors

Other Vendor market patterns vary considerably:

- Over half of vendors (54%) are new to markets since 2009.

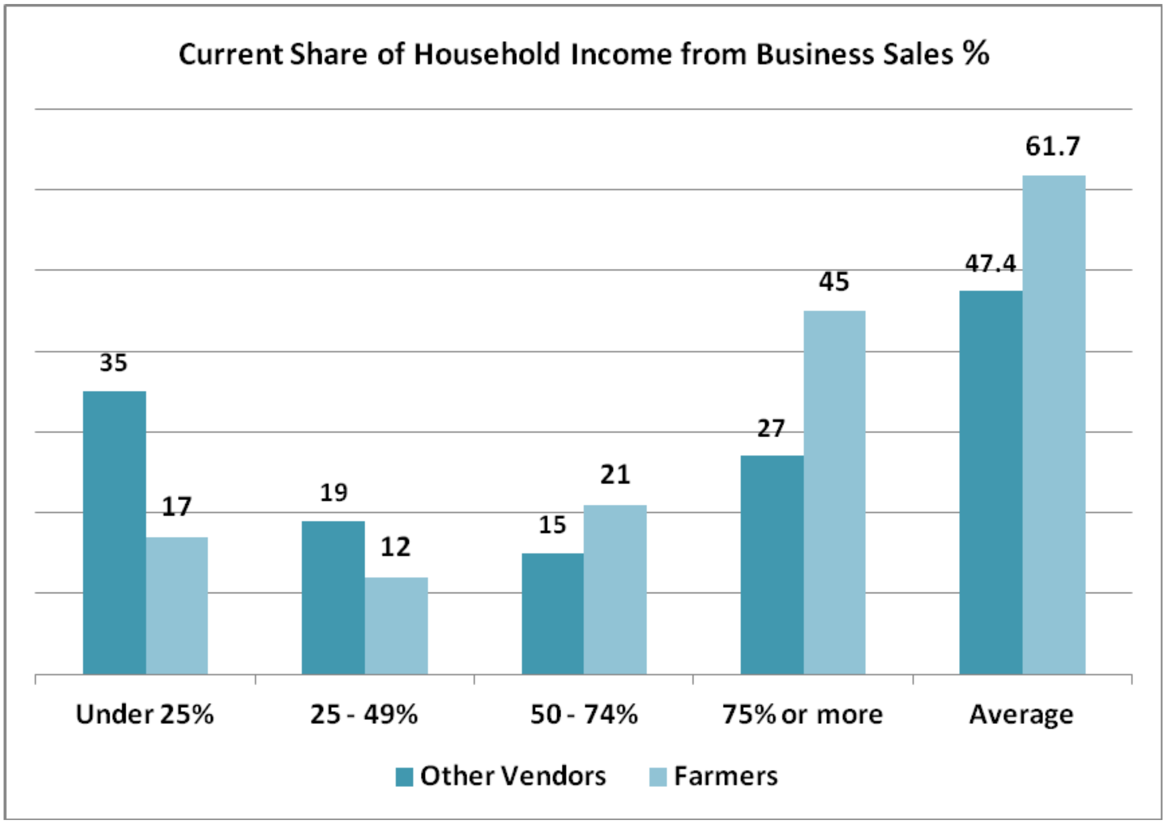
- The majority of the longer-term sellers have concentrated on the same number of markets as five years ago, while a minority have expanded to more market opportunities.

MARKET SALES REVENUE

Share of Household Income from Farm Sales

- Business sales represent on average 61.7% of total farm household income. However, this shifts depending on their history - first career farmers derived 72% compared to 50% for second career growers who are farming smaller plots.

- Second career farmers derive only half (50%) of their household income from markets contrasted with 73% for the dedicated career farmers. The same rule applies to the number of years at markets - longer term market participants earn 70% of their income from business sales compared to 55% for newer market entrants.

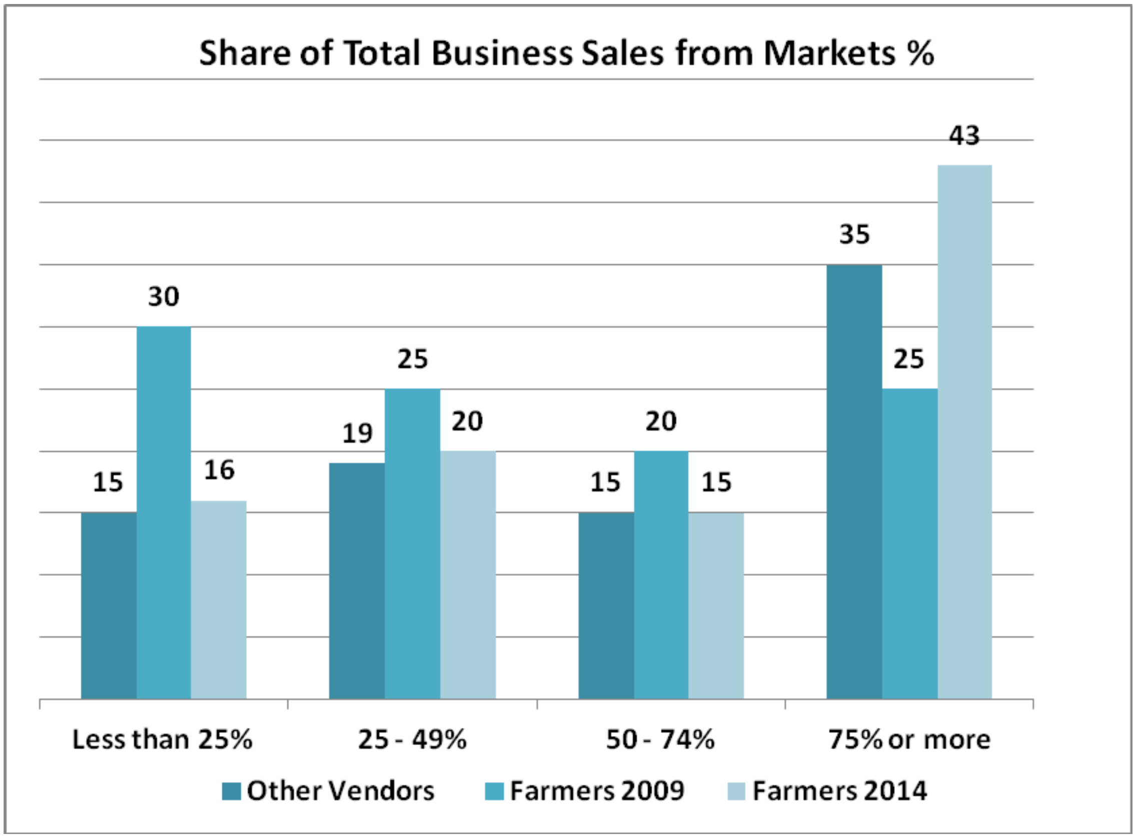


8a. Now I'm going to ask you first about your household income overall, and then about the business you do at farmers' markets.   Approximately what proportion of your household income is derived from your <u>farm business</u>?

* Vendor data is based on a small sample (26). Figures should be viewed as directional only. Overall, Other Vendors are earning less of their household income from market sales - 47% versus 62%. And while few Other Vendors are earning a lower proportion of their total household income from markets, at least one quarter (27%) say that it represents 70% of their annual income.

Share of Total Business Income from Market Sales

- Farmers' market sales have become more significant in generating farm business income in the 2009 to 2014 period. In 2009, only 25% of Farmer Vendors were earning 75% or more from markets - this has leapt to 43% in 2014. The average contribution to 2009 total farm income from markets was 48% of revenue; five years later market sales accounted for 60% of farm earnings.



8b) In 2014, approximately what percent of your total farm sales came from farmers' markets?

Other Vendors

The sales picture for Other Vendors is quite similar to that of Farmer Vendors. In 2014, about one third reported that markets accounted for less than 50% of their total business sales which parallels reports from Farmer Vendors. And a third of Other Vendors derive at least 70% of their total business revenue from markets - the comparable figure for farmers is 43%. On average, Other Vendors obtain 58% of their total business income from sales at farmers' markets.

Market Sales: 5 Year Trend

Most Farmer Vendors who were able to compare sales over the past five years indicated that sales were either stable (49%) or had increased (29%).

Market Sales as Proportion of Total Sales Past 5 years: 2009 - 2014	TOTAL Farmers* %
Increased - larger share of total revenue	29
Stable - same share of total revenue	49
Decreased - smaller share of total revenue	22
Don't know	10
Not applicable (recent market entrant)	28

8c) Compared to five years earlier (2009), in 2014 did sales at farmers' markets represent:

*Percentages are based on those farmers who were able to respond to this question and don't include don't knows and more recent market entrants.

Other Vendors

Other Vendor results are not provided due to the small sample base and the large number of new market entrants in this segment. Among those who responded to this question, about half say market revenues have increased with the other half indicated stable market income over this five-year period.

COMPARING MARKET SALES - 2013 & 2014

- Market sales are trending upwards or holding firm comparing 2009 with 2014. In 2014, more than half of farmers (54%) reported increases, a significant boost compared to five years ago (only 37% had sales increases over the previous year 2008 to 2009), and a declining number experienced flat sales in 2014 - 21% in 2014, down from 40% in 2008-09.

- Given noted market sales growth overall, fewer Farmer Vendors experienced declines in 2013-14 - only 7% contrasted with 22% during the economic doldrums of 2008/09.

- Other Vendors also were much more likely to be posting gains between 2013 and 2014 compared to those who suffered declines or experienced stagnant sales.

- A minority of farmers and Other Vendors were unable to compare market sales income from one year to the next; they either aren't tracking sales year by year or had recently started vending at markets.

Comparing Market Sales	TOTAL Vendors 2013-2014 %	TOTAL Farmer %	
		2008-09	2013-14
Increased	54	37	54 ↑
Decreased	12	22	7 ↓
Remained stable/the same	12	40	21↓
Don't know	12	2	9
Not applicable (new market entrants)	12	-	10

9a) Comparing sales at farmers' markets between 2013 and 2014, did sales in 2014:

2009 Survey Q. And, overall in 2009 have your total market sales:

Factors linked with Sales Increases - 2009 and 2014 Comparisons

In 2014, farmers linked sales increases mainly to their decisions. They played a significant role in this positive outcome as follows:

- Production related - added new varieties/value-added (93%), increased production (85%), higher crop yields (41%)
- Market related - attended more markets (36%), attended better markets (29%)

Distribution related - directed more production to markets, not wholesale (23%)

Other factors that helped drive more sales:

- Consumer demand - increasing popularity of local food (71%).
- The recovering economy and the weather.

In 2009, over one third of farmers (36%) linked increases to attending more markets. Other less significant factors were: more people interested in local food (15%), weather (13%), and more advertising/promotions (8%). Conversely, sales declines were seen to be related to the economy/recession (10%), competition from other markets (5%) and more vendors (3%).

Factors for Sales Increases - FARMERS ONLY*	Yes %	No %	Don't Know %
Adding new products, like unique crop varieties or value-added products	**93**	7	-
More people buying more local food	**85**	14	-
Increasing overall production	**71**	21	7
Higher crop yields	41	39	21
The recovering economy (and impacts on customer spending)	36	57	7
Attending more markets	36	64	-
Attending different or better markets	29	64	-
Better weather	29	43	29
Directing more product to farmers' markets instead of wholesale outlets	23	54	23

9b.Was the increased revenue the result of:

Two 'other' related reasons for increased sales in 2014 were also noted by a minority of Farmer Vendors:

-build/establish trust/loyalty/relationships with customers, regular/repeat customers

-diversified/changed/increased product line

Other reasons included:
-improved target demographics
-raised prices
-experience
-different sales outlets
-improved packaging

Other Vendors

A note of caution: Other Vendor data is directional only given the small sample size. However, there are indications that sales lifts were due to adding new products/items for sale and the perception that more people were shopping at farmers' markets compared to the previous year.

Impact of Farmers' Market Related Factors in Sales Increases

This direct focus on market related factors helps complete the picture that resulted in higher sales in 2014. Overall, market advertising/promotion, events and signage have had positive impacts. Other operational factors such as infrastructure improvements and new locations can also help.

Comparatively, Farmer Vendors believe that the main elements that can lead to greater sales are either their actions (offering different and/or more volume) and consumer behaviour.

Other Stimulus Factors:	TOTAL Farmers %
More advertising/promotions	64
More events at the market	36
Better market signage	36
Infrastructure improvements at the market	29
New market location	29
Not stated	29

9c) And, did any of the following factors related to your farmers' markets contribute to your increased sales in the 2014 season? If these factors apply at any of the markets you attended, please say so.

Other Vendors

Other Vendors concurred with Farmer Vendors to some extent, but appeared to differ substantially on the extent of the impact that increased advertising/promotions played in driving sales upwards. Other market related elements (events, signage, infrastructure and location) all helped boost sales.

Market Related Factors Leading to Higher Sales:	Other Vendors %	Farmers %
More advertising/promotions	64	34
More events at the market	36	32
Better market signage	36	27
Infrastructure improvements	29	11
New market location	29	11
Other	-	9
Not stated	29	16

Factors Linked with Sales Decreases

In 2014, only a small minority (7%) of Farmer Vendors reported sales declines over the previous year. The reasons provided included: poor weather, a stagnant economy, decreased/poor crop yields, and lack of consumer interest in local food.

Future Market Plans

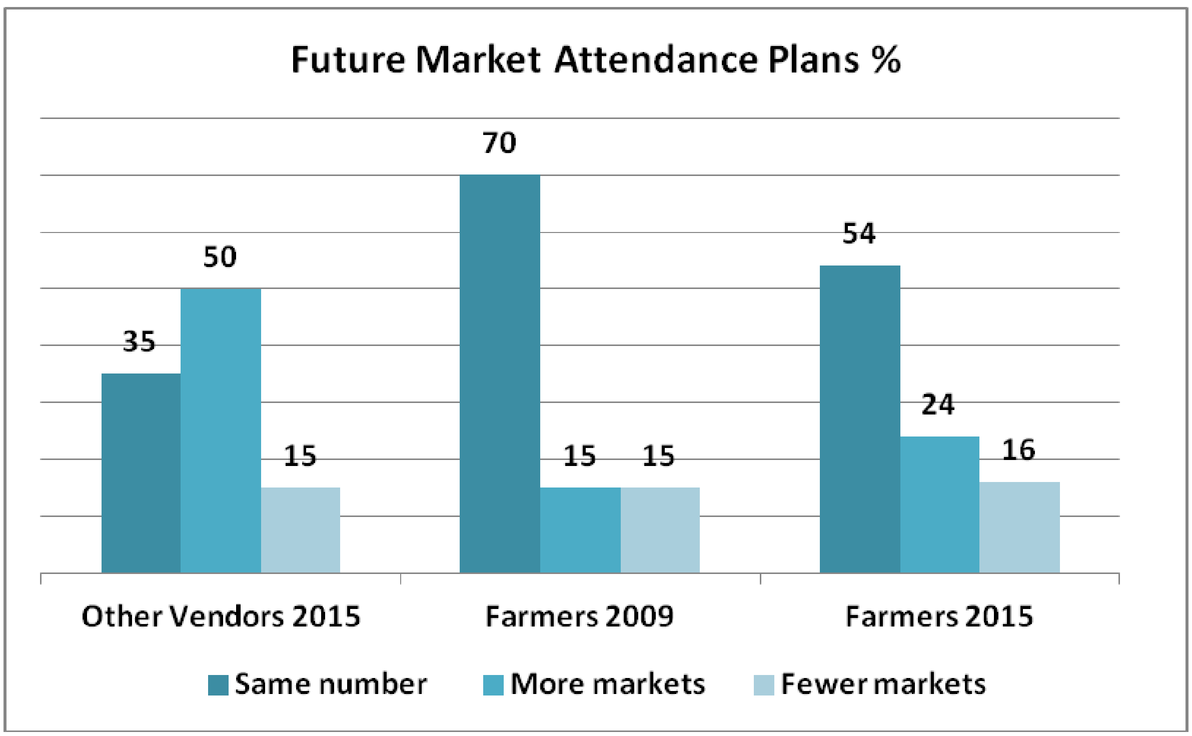
Farmers

Looking ahead in terms of their future market participation:

- Over half of farmers (54%) intend to continue with the same number of markets - a healthy drop from 70% in 2009. This 'hold steady' position was particularly evident among second career growers who may be at capacity.
- One in four farmers are considering adding more markets (up from 15% in 2009). This expansion was particularly evident among first career and younger age farmers (40 or under)
- A minority (16% in 2015 and 15% in 2009) expect to shrink market participation. This sector of growers skews older and are long-term market vendors (over 10 years).

Other Vendors

While this vendor category represents a minority of market sellers, growth is a dominant trend - half plan to increase their market penetration. Most of the remainder (35%) claim they're going to continue with their current number of locations. As above, few plan to cut back on the number of markets.



11*a) Now thinking from a business perspective, looking ahead are you considering:*

Other Alternative Sales Venues

Farmers

The majority of Farmer Vendors have substantially increased their sales-boosting opportunities since 2009, as follows:

- Now farmgate/farm stalls, restaurants/food services and CSAs are proving to be sales growth winners. Wholesale continues to work for a steady one in four farmers. However, segmentation applies with first career farmers leaning towards on-farm sales and wholesale while younger farmers (40 and under) are stronger in connecting to food service, the restaurant trade and CSAs.
- The proportion of farmers who are selling through local retailers and fruit markets is stalled at about one in five. And the Ontario Food Terminal continues to be feasible for a small number of farmers; most are first career, older producers.

Other Vendors

- This category has a more limited scope focusing sales/distribution mainly at local stores/fruit markets, wholesale, shows and special events and through their own business.

Major Sales Venues/Channels	TOTAL 2015 Vendors %	TOTAL Farmers % 2009	2015
Farmgate/farm stall/market at the farm	4	32	45 ↑
Restaurants/Food service	4	15	32 ↑
CSA/operate a CSA/community share agriculture	-	10	31 ↑
Wholesale	35	25	28
Local store/small fruit markets	50	23	22
Ontario Food Terminal	-	8	10

As the list below demonstrates, there are many potentially lucrative sales channels for farmers and, to a lesser degree, Other Vendors.

It's worth noting that 18% of Farmer Vendors indicate that they aren't finding other outlets in addition to markets to sell their production. These farmers are long-term market vendors.

Other Sales Venues/Channels	TOTAL 2015 Vendors %	TOTAL Farmers 2009 %	2015
Orders for individuals	8	-	4
Farmer Cooperative		-	4
Shows and special events	23	-	2
Online orders	-	-	2
Sell through their own business	19	-	1
Other (private label)	4	35	1
None	-	12	18
Not stated	12	-	2

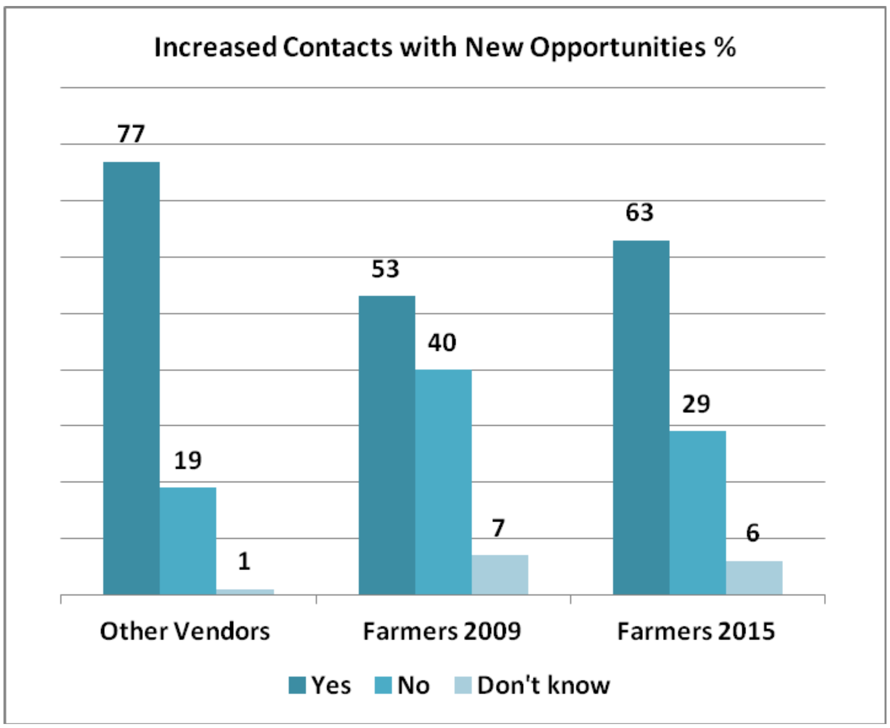
10b) In addition to selling what you produce on your farm at farmers' markets, what other outlets do you have?

Markets Provide New Sales Opportunities

- Farmers' markets can provide a welcome showcase, reaching out to other sales channels. According to farmers, they are increasingly proving to be venues for connecting to other buyers - up from 53% in 2009 to 63% in 2015.

- This positive trend of finding other sales opportunities from their exposure at farmers' markets is more pronounced among second career, younger farmers (40 years and younger) and the shorter-term market sellers (under 10 years).

- Other Vendors are even more likely than farmers/growers to note that their exposure at markets is leading to new sales channels. Almost eight in ten (77%) claimed that this is the case.



11a) Has attending markets led to increased contacts with other sales channels such as chefs, stores near the market, CSA customers?

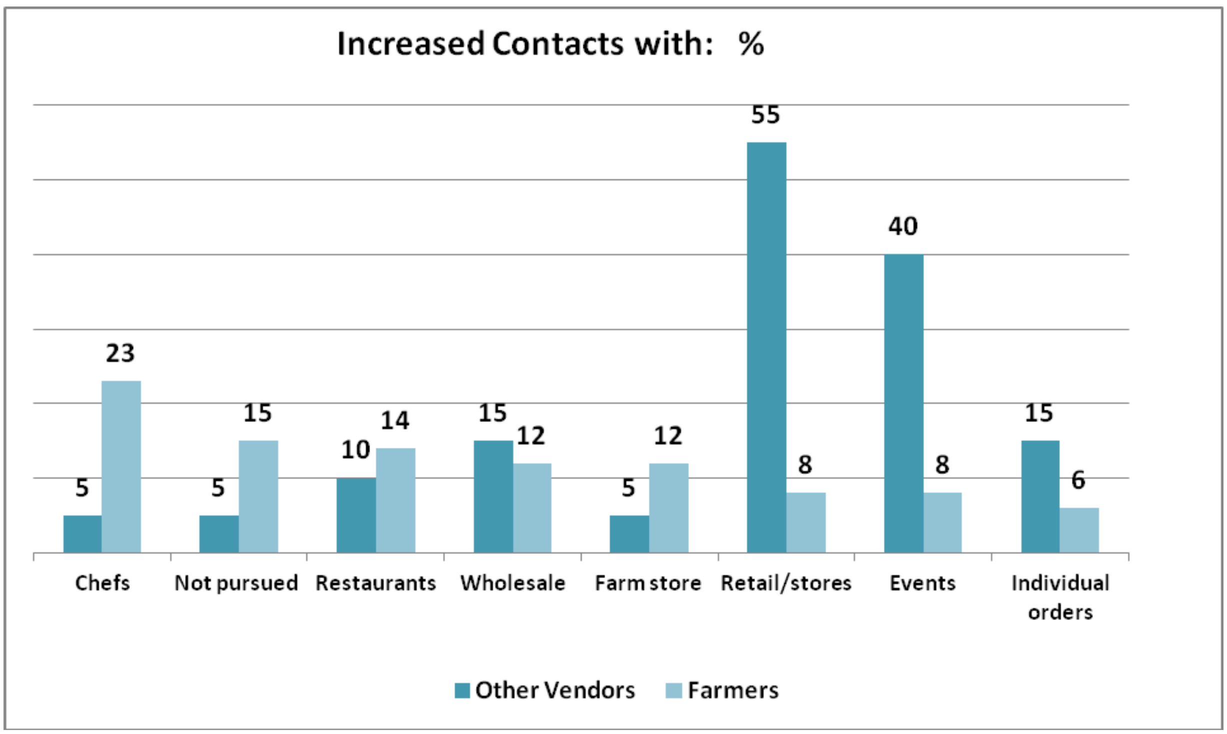
New Sales Channels

- It's encouraging to see that farmers' markets are increasingly becoming one of the 'go to' sources for local food and local ingredient value-added items for food service, wholesale and retail sectors. Players in the value chain are taking note that 'local' can be a winner.

- Farmers indicate that they're having success in connecting with a number of different buyers/sales channels. Select chefs and restaurants are turning to markets to find local food suppliers. Farmers also report their presence at markets leads to other sales opportunities including: wholesale/food service/distributors and people operating farm stands/stores.

- Other Vendors indicate that markets help them make contact with people seeking items for retail/stores and for special events/catering/workshops. Also, less significantly, they meet restaurant owners and people who are making individual purchases beyond the market.

- A minority of farmers (15%) indicate that they didn't pursue these potential sales opportunities, but it's unclear why.



11b) Which sales channels?

Consumer Perspectives

Farmers and Other Vendors were asked for their opinions and insights about consumers and market operations. Data is available for both types of vendors in 2015 and for farmers only in 2009. Comparisons are discussed where they apply.

Consumer Behaviour & Needs

In 2015, both farmers and Other Vendors were asked to comment on a series of consumer- and market-related issues.

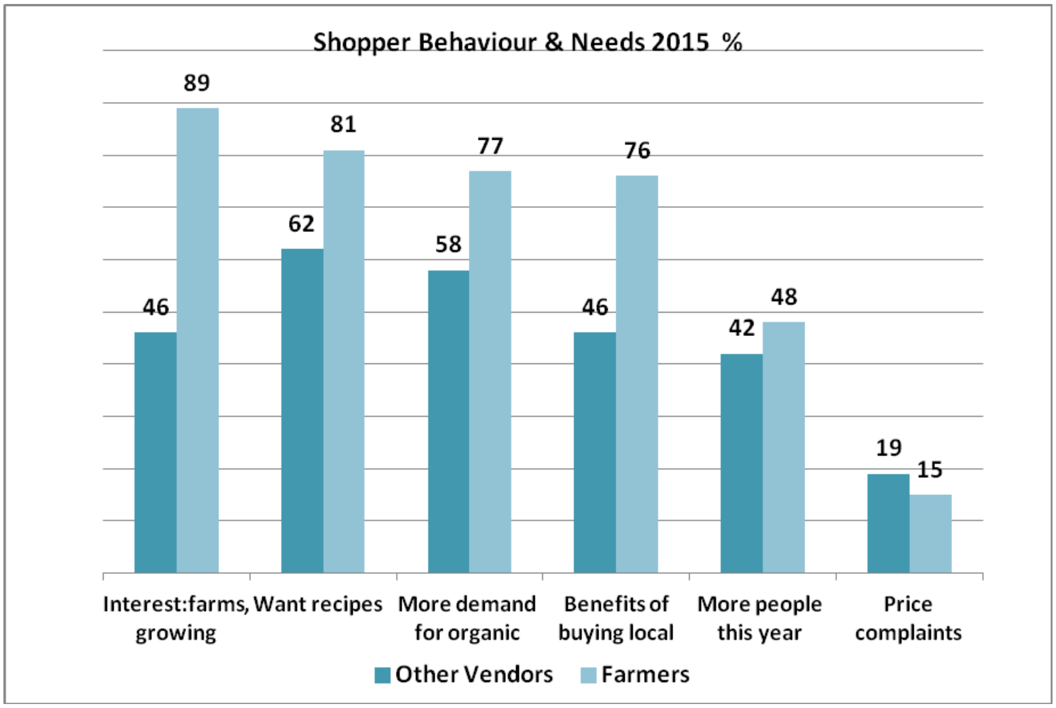
- Strong farmer agreement:
  - high consumer interest in farm and production methods, food preparation/recipes, and organic food
  - benefits of buying local need to be promoted
  - infrequent price complaints/resistance

- Moderate farmer agreement:
  -more market shoppers in past year. 67% of younger farmers agree compared to 37% of older farmers

Overall, Farmer Vendors and Other Vendors concur on some points and differ on others:

- Same Opinion: Pedestrian traffic at markets has increased and infrequent price complaints.

- Different Opinions: Farmers are much more inclined than Other Vendors to think that shoppers need information: about farms/food production and benefits of buying local.



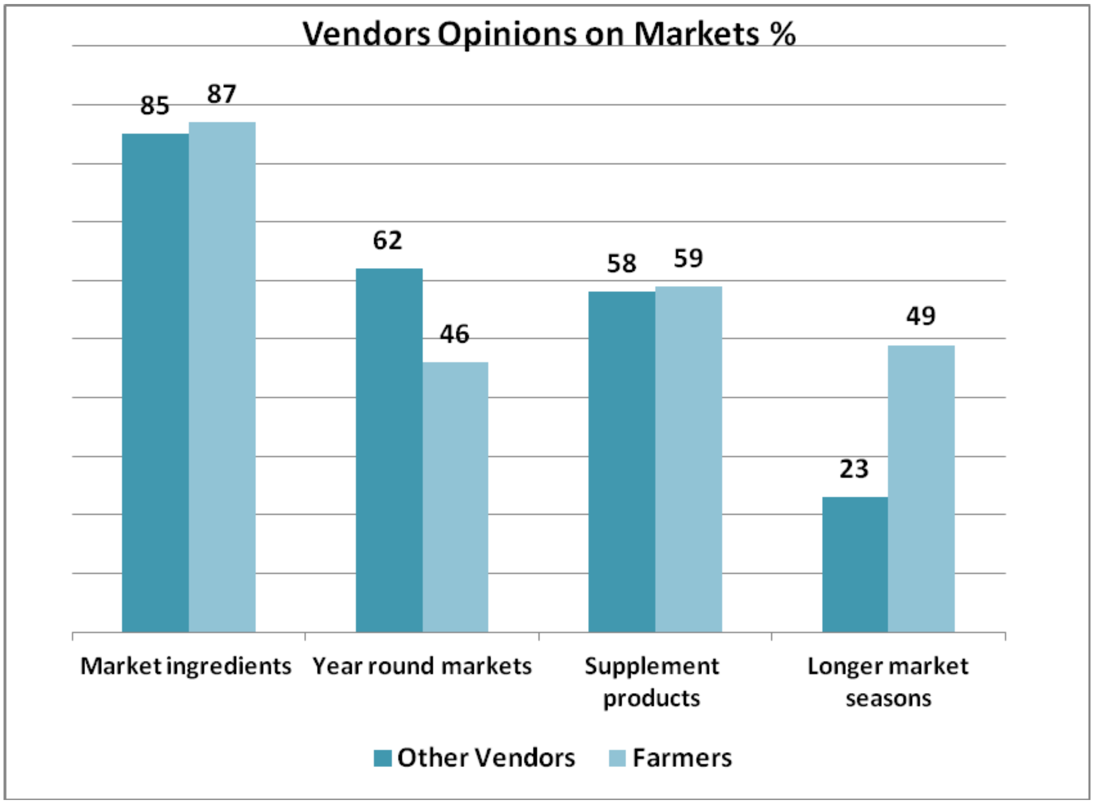
Market Related:

Again, Farmers and Other Vendor opinions are similar and different, depending on the issue.

- Both types of vendors strongly support the notion that ingredients for prepared foods should be sourced locally/from the market. And they agree to a lesser extent that vendors be granted permission to supplement their offerings with other products. Nonetheless, a sizable minority disagree with this latter proposition.

- Farmers and Other Vendors diverge on extending the markets for a month - half of farmers like the idea while only one in four Other Vendors endorse it.

- Oddly, Other Vendors are much more positive about year-round markets - 62% support it compared to just under half of farmers (46%). However, younger Farmer Vendors (40 and under) are much more supportive of maintaining a year-round schedule - 60% endorse it versus 39% of farmers 41 and over.


Vendors Opinions on Markets %
85
87
62
46
58
59
23
49
Market ingredients
Year round markets
Supplement products
Longer market seasons
Other Vendors
Farmers

Perspectives about Consumers - Comparing 2009 and 2015

Results can be compared for those statements that were included in both the 2009 and 2015 surveys. Overall, opinions that were measured in late 2009 remain stable today, with one notable difference - price complaints.

On the positive side, farmers across the board concur on these shopper related factors:

1. consumers are interested in food origin/the farm and production facts
2. shoppers are keen for food preparation tips and recipes
3. demand is increasing for organically grown/produced food
4. need to educate consumers on the benefits of buying local, although this has significantly declined since 2009.

The one positive and important shift has occurred in five years. Most farmers claim that price complaints have sharply dropped - 15% in 2015 down from 40% in 2009.

	AGREE - Farmer 2009	2015
	%	
Our shoppers are interested in learning more about farms and how the produce is grown.	82	89↑
Customers are interested in information about how to prepare meals with market ingredients.	78	81
I'm finding that more shoppers are asking for organic produce/items.	67	77↑
Customers need more information about the benefits of buying local.	93	76↓
As far as I can tell, the number of people who shop at the market has increased in the last year.	53	48
Many customers complain about prices at the market.	40	15↓

12a) Now thinking about the people who shop at the market, here is a list of statements. For each would you tell me if you agree or disagree.

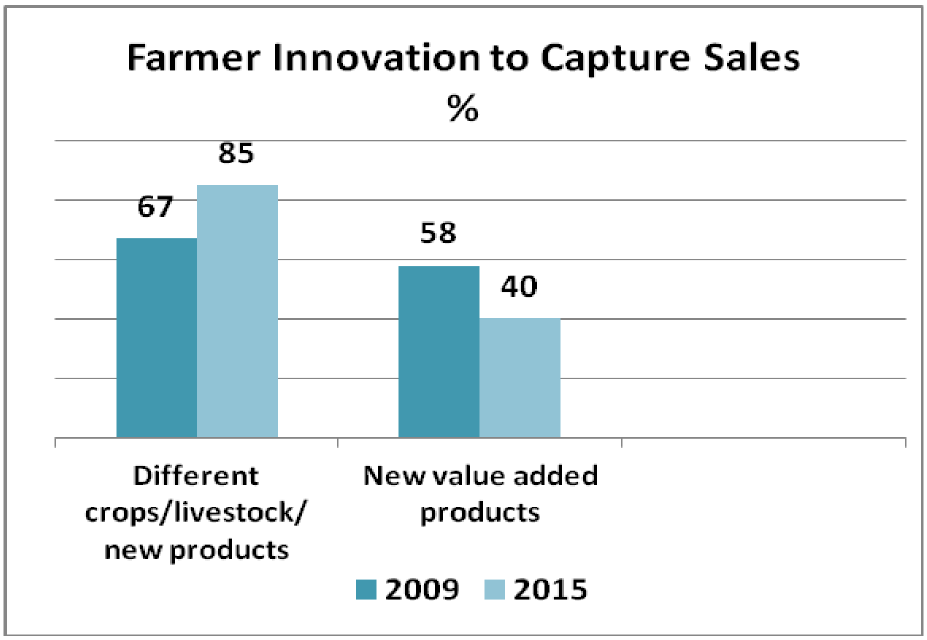
Responding to Consumer/Market Influences

Farmers

Farmers continue to seek new ways of capturing more sales, regardless of age, acreage or number of years at farmers' markets. However, they have shifted strategies in the past five years, as follows:

- The leading method now is to offer greater variety and possibly lead or follow current consumer trends. This could mean growing new crop varieties/heirloom crops or venturing into heritage livestock. In 2009 two thirds of farmers were innovating - this figure has leapt to 85% in 2015. Evidently, farmers have been rewarded for innovating in the past.

- Enthusiasm with introducing new value-added products has dimmed somewhat - now only 40% have made this move compared to 58% in 2009.



12b) Based on your experience at farmers' markets, have you:

Other Vendors

Adding new products is the prime way that Other Vendors innovate in order to increase sales – 92% are doing it – but this sector is less likely to make changes to existing products (54%).

Other Vendors: 2015	Yes %
Tried growing different crops/raising different livestock or adding new products	92
Changed my products.	54

Farm Promotions

- Farmers are adapting to consumer driven demand for information and stories. In 2015, they are more likely than they were in 2009 to promote their farm beyond their presence at the market - up from 58% to 76% in 2015.

- The age of the farmer is a strong predictor of the use of promotion. Almost all farmers 40 years and under (97%) promote compared to 64% of older farmers. It follows then that the shorter-term market participants (10 years or less) are more likely to try to increase awareness and stimulate sales than the longer-term market farmers.

- On this score, farmers have a slight edge over Other Vendors to reach out to potential consumers with promotions/messages, nonetheless over two thirds of Other Vendors are doing it.

Promote their farm/business?	Total 2009 Farmers %	Total 2015 Vendors %	Farmers
Yes	58	69	76
No	42	31	23

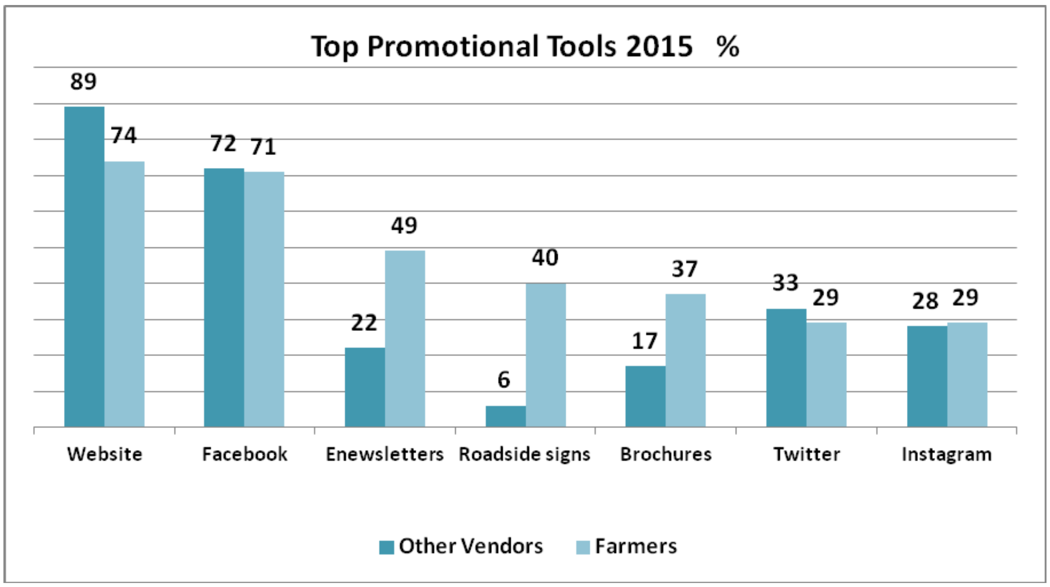
13a) Now looking at promoting your farm, do you advertise or promote it in any way, aside from onsite at the farmers' market(s)?

Promotional Tools - Farmers

- Farmers have made significant strides in adapting to new methods of reaching their market since 2009. They have made huge strides since 2009. At that point, ads in local papers, websites and brochures were the main outreach methods. (See table on the next page for 2009 data.)

- Now in 2015 about three quarters of farmers are maintaining websites and have a presence on Facebook; half are sending email newsletters to customers. The primacy of websites is remarkable; evidently, farmers have learned that they can deepen their connection with shoppers via this tool (74% up from 46% in 2009). Twitter and Instagram play a less significant role - 29% for both.

- Traditional static promotional methods - road signs, ads in local paper and brochures/flyers - play a role in spreading information, but second career and younger farmers are less likely to use these approaches compared to older and first career farmers. They are more inclined to newer, electronic rapid response ways of keeping their shoppers in the loop.



Other Promotional Tools :	Total 2015 Vendors	Farmers %
Ads in local newspapers	6	18
Other (business cards, events, food events, etc.)	11	8
Other online sites (Google ads, Yelp, Farm Fresh, YouTube channel, Linked In, Pinterest)	11	7
Speaking events, giving public talks, special events	6	5
Newspaper coverage	6	2
Not stated	6	3

13b) What does that include?

Farm Promotions: 2009	%
Ads in local newspapers	51
Website	46
Brochure/flyer	31
Roadside signs	23
Email to customers	6
Other	49

Promotional Tools - Other Vendors

Other Vendors also are actively promoting their products; the methods they use are similar to farmers, to some extent. They tend to focus their efforts on building and reinforcing customer relations using social media with particular emphasis on having a website (89%) and Facebook postings. As with farmers, they are less likely to use Twitter and Instagram. And they are even less likely to stay in touch with shoppers using an email newsletter - possibly a function of the somewhat fixed nature of what they are selling.

Ideas for Programs & Other Business Development Ideas

All vendors were asked to provide suggestions on potential programs or supports that would help their business prosper. Perspectives and related needs differed depending on their operation (Other Vendor or farmer) and farmer age and first career/second career. Responses fall into these categories:

- **Financial Support** - Top category. New, second career and small scale growers dominated, indicating need for easier access to loans/low interest loans, subsidies and grants to help them buy land and/or equipment. Other Vendors too indicated they need financial assistance via loans and grants. More programs (unspecified).

- **Knowledge/Training** - Both Farmer and Other Vendors indicated they need business and marketing training. New entrants require training. Vendors would benefit from training: pricing, signage, displays and veggie care.

- **Customer Related** - Farmers' markets need more/better signage and advertising. Food literacy needed for consumers.

- **Current Programs -** Farmers noted satisfaction with some specific existing programs including Foodland Ontario's Market program, "My Pick", Bauta Family Seed Initiative.

- **Market Management** - Market managers, special showcase days, incentive based on vendor presence at the markets. Note that market managers shouldn't be permitted to operate as vendors. Good market organization and policies shaped by farmer input.

- **Other -** Less government regulation/oversight - particularly for Other vendors. Farmer suggestions for a tool-sharing program. More volunteers and internships needed.

Ideas for Programs & Business Supports	Total Vendors %	Total Farmers %
<u>NET: Financial Support/Grants/Loans</u>	**15**	**23**
Other funding/grant/loan mentions (small producers, more for start-up, market fee subsidies, easier mortgage access etc.)	8	10
Support for equipment purchases/investments	4	4
Infrastructure grants/grants with lower interest rates	-	5
Grants/support for new farmers/entrants	-	4
Wage subsidies/tax breaks/internships for employers/employees	4	2
<u>NET: Training/Education/Workshops</u>	**19**	**13**
Business/marketing education/website consultant	8	6
Customer/school/food literacy education	12	4
Education/training/sourcing information for new entrants	4	2
Vendor workshops (product pricing, signage, displays, veggie care)	-	2
More advertising/promotion/signage for farmers' markets	8	13
Specific mentions of help for new farmers (i.e. market recognition, education, grants, market spaces, etc.)	4	9
More/better programs	12	5
Satisfaction expressed with specific existing programs (i.e. "Nourish", Foodland Ontario Market Program, "My Pick", Bauta Family Seed Initiative, etc.)	-	7
Market manager suggestions - special showcase days, consideration for farmers who stick it out to the end of the season, manager shouldn't be a vendor	-	5
Good market organization, policies must reflect farmer input	8	3
Critical comments regarding existing programs	-	4
Other misc. suggestions (ideas, competition, regional tool-sharing program, more volunteers, internships, etc.)	-	4
Other (want government to leave us alone, close the border, manure testing, less strict regulations)	15	6
Nothing/none	39	31
No answer	-	4

14a) What programs or supports would help to build the success of your business? Anything else?

Thoughts on the Future of Farmers' Markets

Opportunities, Challenges/Changes Ahead

This open-ended question invited Farmer and Other Vendors to provide their thoughts on the challenges, potential changes and the opportunities they see ahead. The majority of participants provided their thoughts; farmers were more likely to respond than Other Vendors (88% versus 73%). It's noteworthy that farmer input was consistent across all categories examined.

Opportunities

These five opportunities were mentioned, four are interlinked and consumer related:

1. Consumer education is needed (farms, farming practices) to solidify and amplify perceptions that market food is authentic, healthy and can be trusted.

2. Market vendors believe that consumer demand will continue to grow for local food and handmade eatables and crafts. This market hasn't been saturated.

3. Telling the story through a variety of promotional methods is needed.

4. Building authenticity and trust are based on standards; likely a reference to signage indicating that items are grown/produced on local, Ontario farms and potentially could apply to organic certification and labels.

5. Market manager related: a few vendors noted the critical role of hands-on market managers. (See 2010 report for details).

Suggested Opportunities	Total Vendors	% Farmers
Importance of education of customers about real food/farms, farming practices	8	16
Lots of opportunity, demand is there, a growth industry, room for huge growth, etc.	23	15
More advertising/promotion	**15**	**15**
Customer trust re local labelling and/authenticity of origin of produce	4	5
Importance of market managers (more involved - much better market, hard-ass, etc.)	4	2

Challenges/Changes

The remaining nine categories of responses have been grouped under this heading. Most relate to operational matters. Farmer input dominated responses in this category:

1. The number of markets now potentially exceeds demand.
2. Lack of authenticity and disconnect with local food and producers due to resellers.
3. More shoppers are needed.
4. Town/City based Other Vendors don't belong with farm-based value added and crafts.
5. Markets need to be centrally located where shoppers can access them.
6. Farmer Vendors should play a strong market management role.
7. Markets need an injection of younger vendors to carry on the momentum.
8. Funding supports required to help farmers and market operators. Municipal support key.

Challenges	Total Vendors %	Total Farmers %
Too many markets already	8	13
Resellers are the main/big/huge problem	4	12
Need better attendance/more customers.	4	9
Less non-farm vendors (crafts, bakers, etc.) more Farmer Vendors	12	7
Good/central/accessible market locations are needed	4	7
Need more funding (market fee subsidies, for indoor markets, tax write offs)	4	6
Farmers' markets need to be managed/influenced by farmers	-	6
Need more new/young people, good opportunity for them	4	4
Need better/more city/town support	-	4

14b) Finally, would you like to make any comments about the future of farmers' markets? What do you think about the challenges, changes or opportunities ahead?

Appendices

Appendix 1 - QUESTIONNAIRES

FARMER/VENDOR QUESTIONNAIRE

INTERVIEWER INSTRUCTIONS IN CAPITALS

About the Farmer

1a) What county is your farm located in?

____

1b) Is farming your first or second career? **READ/RECORD**

First 1

Second 2

OTHER (Please specify) _____________________________

1c) Were you born in Canada?

Yes 1

No 2 **IF NOT ASK Q.** 1f Where were you born?

____

1d) Which age group do you belong to? **READ/RECORD**

Under 21 1

21 - 30 2

31 - 40 3

41 - 50 4

51 - 60 5

61 - 70 6

71 and over 7

PREFER NOT TO ANSWER 8

1e. How did you learn to farm? **READ/RECORD**

My parents are/were farmers 1

Attended an agricultural college 2

Apprenticed on another farm 3

Taught myself 4

OTHER (PLEASE SPECIFY)

____

1f) What proportion of your household income is derived from your farm business? **READ/RECORD**

Less than 25% 1
25% - 49% 2
50% - 74% 3
75% or more 4
DON'T KNOW 5

About your Farm& Farmers' Markets

2a.Approximately how many acres is your farm? **READ/RECORD**
2b.Of that, how many acres are used to grow for the markets? **READ/RECORD**

No. of Acres	2a. No. of Farm Acres	2b. No. of acres for markets
5 or under		
6 - 9		
10 - 35		
36 - 69		
70 - 129		
130 or more		
Don't know		

2c.Approximately what percent of your total farm sales comes from farmers' markets: **READ/RECORD**

Less than 25% 1
25-50% 2
51 to 75% 3
76% to 100% 4
REFUSED 5
DON'T KNOW 6

2d. Just looking over the past 5 years, are sales at farmers' markets representing: **READ/RECORD**

A larger share of total revenue 1
The same share of total revenue 2
A smaller share of total revenue 3
DON'T KNOW 4
REFUSED 5

3a. Now please tell me about the ownership status of the land you farm on, which of these statements applies: **READ/RECORD**

Own all of the land 1
Own part of the land 2 **ASK Q 3B**
Own none of the land 3 **ASK Q 3B**
DON'T KNOW 4

3b. Thinking about your tenure security as a land renter - how would you rate the security using a scale of
1 to 10 where 1 is Not at all secure to 10 Very secure? **REPEAT QUESTION IF HESITATION**

_____________ DON'T KNOW 1

4. Which terms do you use to describe your farming practices? I'm going to read a list of some examples. More than one may apply. You may also add other terms after we read the list. **READ/RECORD**

Practicing Integrated Pest Management 1
Conventional 2
Certified Organic 3
In transition 4

Other (Please Specify)____

5a. How many people including yourself are employed for the farm operation and market staff, including paid and unpaid assistance? For each would you please tell me the number and whether they are full time or part-time/seasonal employees. INSERT ANSWERS BELOW

Type of Employment:	Farm Operation	Market Staff
Full time		
Part-time/Seasonal		

5b) Are you involved in training / mentoring new farmers? This could be through full-season internship programs on your farm or periodic workshops, etc. **READ/RECORD**

Yes 1
No 2
DON'T KNOW 3

Farmers' Market Related

6.Now thinking about farmers' markets, what kinds of items do you usually sell there? I am going to read a list of categories – please tell me which ones apply.
READ/RECORD ALL CATEGORIES

Vegetables	1	**Cheese & other dairy**	9

		products	
Berries/strawberries/blackberries	2	Bread & baking	X
Tender fruits/peaches/plums	3	Crafts	Y
Apples and pears	4	**Cut flowers**	Z
Herbs	5	Bedding plants	XX
Meat, beef, lamb, pork	6	Plants & seeds	YY
Chicken	7	Prepared food	ZZ
Eggs	8	Maple syrup	00
		Honey	000
OTHER:			

7a.How many farmers' markets did you participate in in 2014? **DO NOT READ/RECORD**

One 1
2-3 2
4-5 3
6-7 4
More than 7 5
None 6 **SKIP TO Q. 7a**
OTHER (PLEASE SPECIFY)

____

7b.Compared to five years ago, in 2014 were you attending: **READ/RECORD**

The same number of markets 1
More markets 2
Fewer markets 3
NOT APPLICABLE/STARTED AFTER 2009 4

8a. Comparing sales between 2013 and 2014, did sales in 2014: **READ/RECORD**

Increase 1 **ASK 8B & 8C**
Decrease 2 **ASK 8D & 8E**
Remained stable/the same 3 **SKIP TO Q 9A**
REFUSED 4 **SKIP TO Q 9A**
DON'T KNOW 5 **SKIP TO Q 9A**

8b. **<u>FOR SALES INCREASES</u>**: Was the increased revenue the result of: **READ/RECORD**

Factors	**Yes**	**No**	**Don't Know**
Attending more markets			
Attending better markets			
Increasing overall production			
Selling same amount of product but at a higher price			

Moving into new products, like value-added			
Higher crop yields			
Other: PLEASE SPECIFY			

8c.**<u>FOR SALES INCREASES</u>**: And, what factors related to your <u>farmers' markets</u> contributed to the increased sales **READ/RECORD**

Improvements to this market 1

New location 2

More advertising/promotions 3

Events 4

Better signage 5

Weather 6

More people interested in local food 7

The recovering economy 8

OTHER (Please specify) ____

8d. **<u>FOR DECREASED SALES</u>**: Was the decreased revenue the result of**:**
READ/RECORD

	Yes	**No**	**DON'T KNOW**
Attending fewer markets			
Decreased overall production			
Selling the same amount of product but at lower prices			
Stopped selling some items/selling fewer items			
Lower crop yields			
Other: PLEASE SPECIFY			

8e. **<u>FOR DECREASED SALES</u>** And, what factors related to your farmers' markets contributed to the decline? **READ/RECORD**

The stagnant economy	1
More competition from other vendors	2
New location	3
Weather	4
Fewer shoppers	5
Lack of promotion	6

OTHER: Please Specify

9a. Now thinking from a business perspective, **looking ahead** are you considering:

READ/RECORD

Adding more markets	1
Reducing the number of markets	2
Attending the same number as 5 years ago	3
DON'T KNOW	4
NOT APPLICABLE	5

9b. In addition to selling what you produce on your farm at farmers' markets, what other outlets do you have: **READ/RECORD**

Farm gate/Farm stall/market at the farm	1
CSA/operate a CSA/community shared agriculture	2
Restaurants/Food service	3
Ontario Food Terminal/OFT	4
Farmer Cooperative	5
Local store(s)/small fruit markets	6
Wholesale	7
None	8

OTHER (PLEASE SPECIFY)____

10. Has attending markets led to increased contacts with other sales channels such as chefs, stores near the market, CSA customers?

Yes 1

No 2

DON'T KNOW 3

11a Now thinking about the people who shop at the market, here is list of statements. For each would you tell me if you agree or disagree. READ /RECORD /ROTATE

	Agree	**Disagree**	**DK**
Our shoppers are interested learning more about farms and how the produce is grown.			
I'm finding that more shoppers are asking for organic produce/items.			
I often hear complaints about prices at the market.			
Many of the shoppers expect that the market prices should be the same as those at supermarkets.			
Customers need more information about the benefits of buying local.			
Customers are interested in information about how to prepare meals with market ingredients.			
Food items sold at markets should be made with local or market ingredients.			
As far as I can tell, the number of people who shop at the market has increased in the last year.			

11b. Here is a list of statements, would you please tell me if you Strongly Agree, Agree Somewhat, Disagree Somewhat or Disagree Strongly or with each: **READ REPEAT SCALE IF HESITATION**

	Strongly Agree	Agree Somewhat	Disagree Somewhat	Strongly Disagree	DK
There shouldn't be limits on what vendors are allowed to bring.					
There aren't enough vendors to meet the demand at markets.					
More markets should be open year-round.					
Farmers' markets should provide some flexibility to farmer-vendors supplementing what they produce with other products for sale.					
Markets should consider longer seasons, e.g. adding a month overall in the fall.					

11c. Based on your experience at farmers' markets, have you: READ BELOW

	Yes	No	DK
Tried growing different crops/raising different livestock or adding new products.			
Produced new value-added items			

12a. Now looking at promoting your farm, do you advertise or promote it in any way, aside from onsite at the farmers' market(s)?

Yes 1 ASK Q.11B
No 2 SKIP TO Q.15
DON'T KNOW 3 SKIP TO Q.15

12b. What does that include? **READ/RECORD**

Website 1
Email to customers 2
Brochure/flyer 3
Roadside sign(s) 4
Ads in local paper 5
Social Media: Facebook 6
Twitter 7
Instagram 8
OTHER (Please Specify)____

13a. What programs or supports would help to build the success of your business? **PROBE** Anything else?

13b.Finally, would you like to make any comments about the future of farmers markets? What do you think about the challenges, changes or opportunities ahead? **PROBE** Anything else?

Thank you very much for your valuable assistance!

IF A RESPONDENT HAS INQUIRIES THEY SHOULD CONTACT Hillary Barter at 647 637 1927 OR EMAIL greenbeltfarmersmarketnetwork@gmail.com

NON FARMER VENDORS QUESTIONNAIRE

INTERVIEWER INSTRUCTIONS IN CAPITALS - DO NOT READ

About the Vendor

1a) Thinking now about where the items you sell at farmers' markets are made, would that be on a farm or rural community or is it a town/city? **READ/RECORD (CIRCLE THE ANSWER CODE)**

Farm/rural community 1
Town/city 2
Both 3

1b) Were you born in Canada? **RECORD**

Yes 1
No 2 **ASK Q. 1c**

1c) Where were you born? ______________________________

1d) Which age group do you belong to? **READ/RECORD**

Under 21 1
21 - 30 2
31 - 40 3
41 - 50 4
51 - 60 5
61 - 70 6
71 and over 7
PREFER NOT TO ANSWER 8

About the Business

2. How many people, <u>including yourself</u>, provide labour for this business, including paid *and unpaid* staff? Please tell me the number of staff and whether they are full time or part-time/seasonal employees. **INSERT ANSWERS BELOW**, **REPEAT IF HESITATION**

Type of Employment:	No. of Employees
Full time	
Part-time/Seasonal	

3. Which terms would you use to describe your product(s)? I'm going to read a list of some examples. More than one may apply. You may also add other terms after we read the list.
READ/RECORD ALL CATEGORIES

Organic	1
Artisanal	2
Natural	3
Healthy	4
Traditional	5

OTHER (Please Specify)

____

About Your Farmers' Markets

4.Now thinking about farmers' markets, what kinds of items do you usually sell there? I am going to read a list of categories – please tell me which ones apply. **READ BELOW/RECORD ALL CATEGORIES**

Bread, baking	1
Plants and seeds	2
Prepared food	3
Beverages (coffee, tea etc.)	4
Specialty foods	5

OTHER (Please specify)____

5. How long have you been selling at farmers' markets? **DO NOT READ/RECORD**

1 year or less	1
1-5 years	2
5-10 years	3
10-20 years	4
More than 20 years	5
DONT KNOW	**6**

6. How many farmers' markets did you participate in last year in 2014? **DO NOT READ/RECORD**

One	1	
2-3	2	
4-5	3	
6-7	4	
More than 7	5	
None	6	**SKIP TO Q. 8**

OTHER (Please specify)

____

7. Compared to five years earlier (2009) in 2014 were you attending: **READ/RECORD**

Same number of markets	1
More markets	2
Fewer markets	3
NOT APPLICABLE/STARTED AFTER 2009	4

8. Now I'm going to ask you first about your farm business overall, and then about the business you do at farmers' markets. What proportion of your household income including <u>all sales of your products</u> is derived from this business? **READ/RECORD**

Less than 25%	1
25% - 49%	2
50% - 74%	3
75% or more	4
DON'T KNOW	5
NOT APPLICABLE	6

9. In 2014, approximately what percent of your total business sales came from farmers' markets? **READ/RECORD**

Less than 25%	1
25-50%	2
51 to 75%	3
76% to 100%	4
REFUSED	5
DON'T KNOW	6

10. Compared to five years earlier (2009), in 2014 did sales at farmers' markets represent: **READ/RECORD**

A larger share of total revenue	1
The same share of total revenue	2
A smaller share of total revenue	3
DON'T KNOW	4
REFUSED	5

11a) Comparing sales at farmers markets between <u>2013 and 2014</u>, did sales in 2014:

READ/RECORD

Increase	1	**ASK 11b & 11c**
Decrease	2	**ASK 11d & 11e**
Remained stable/the same	3	**SKIP TO Q 12**
REFUSED	4	**SKIP TO Q12**
DON'T KNOW	5	**SKIP TO Q 12**

11b) **FOR SALES INCREASES:** Was the increased revenue the result of:
READ/RECORD/ROTATE

Factors	**Yes**	**No**	**DON'T KNOW**
Attending more markets			
Attending different or better markets			
Increasing overall production			
Directing more product to farmers' markets instead of wholesale outlets			
Adding new products			
More people buying more local products			
Better weather			
The recovering economy (and impacts on customer spending)			
OTHER: Please specify			

11c) **FOR SALES INCREASES**: And, did any of the following factors related to your farmers' markets contribute to your increased sales in the 2014 season? If these factors apply to *any* of the markets you attended please say so. **READ/RECORD**

Infrastructure improvements at the market 1

New market location 2

More advertising/promotions 3

More events at the market 4

Better market signage 5

OTHER (Please specify) ____

11d) **FOR SALES DECREASES:** Was the decreased revenue the result of:

READ/RECORD/ROTATE

Factors	**Yes**	**No**	**DON'T KNOW**
Attending fewer markets			
Decreased overall production			
Moving away from market sales and towards wholesale markets			
Stopped selling some items/selling fewer items			
A seeming lack of interest among people in buying local regularly			
Poor weather			
A stagnant economy and its impacts on consumer habits			
OTHER: Please Specify			

11e) **FOR SALES DECREASES:** And, did any of the following factors related to your farmers' markets contribute to your decreased sales in the 2014 season? If these factors apply at *any* of the markets you attended please say so. **READ/RECORD**

More competition from other vendors1
New market location 2
Fewer shoppers 3
Lack of market promotion 4
Deteriorating infrastructure at market 5

OTHER: Please Specify

____

12. Now thinking from a business perspective, looking ahead are you considering:
READ/RECORD
Adding more markets 1
Reducing the number of markets 2
Attending the same number as 5 years ago 3
DON'T KNOW 4

13. In addition to selling what you produce at farmers' markets, what other outlets do you have?
READ/RECORD ALL
Home sales 1
Local store(s)/specialty store 2
Wholesale 3
Online/web based sales 4

OTHER (Please specify)____

14a) Has attending farmers' markets led to increased contacts with other sales channels/opportunities?

Yes 1 **ASK Q.14B**
No 2
DON'T KNOW 3

14b)Which sales channels?

____

15. Here is list of statements concerning farmers' markets. For each would you tell me if you agree or disagree. **READ /RECORD /ROTATE**

	Agree	**Disagree**	**DK**
Our shoppers are interested in learning more about farms and how the produce is grown.			
I'm finding that more shoppers are asking for organic produce/items.			
Many customers complain about prices at the market.			
Customers need more information about the benefits of buying local.			
Customers are interested in information about how to prepare meals with market ingredients.			
Food items sold at markets should be made with local or market ingredients.			
As far as I can tell, the number of people who shop at the market has increased in the last year.			
More markets should be open year-round.			
Farmers' markets should offer flexibility to farmer-vendors supplementing what they produce with other products for sale.			
Markets should consider longer seasons, e.g. adding a month overall.			

16. Based on your experience at farmers' markets, have you: READ/RECORD

	Yes	No	**DON'T KNOW**
Tried adding new products			
Changed your products			

17. Now looking at promoting your products and business, do you advertise or promote in any way, aside from onsite at the farmers' market(s)?

Yes 1 **ASK Q.18**
No 2 **SKIP TO Q.19**
DON'T KNOW 3 SKIP TO Q.19

18. What does that include? **READ/RECORD**

Website 1
Email to customers 2
Brochure/flyer 3

Roadside sign(s)	4
Ads in local paper	5
Facebook	6
Twitter	7
Instagram	8

OTHER (Please Specify)

19. What programs or supports would help to build the success of your business? **PROBE** Anything else?

20.Finally, would you like to make any comments about the future of farmers markets? What do you think about the challenges, changes or opportunities ahead? **PROBE** Anything else?

Thank you very much for your valuable assistance!

IF A RESPONDENT HAS INQUIRIES THEY SHOULD CONTACT

Hillary Barter at 647 637 1927 OR EMAIL greenbeltfarmersmarketnetwork@gmail.com

Appendix 2 - Vendors Interviewed

Trillium Organic Farm
Chick-a-biddy Acres
Matchbox Gardens
Monforte Dairy (non-farm)
Millcreek Flower Farm
Blyleven Farms
Thorne Farms
27 Country Market -meats (non-farm)
Simpson Farms
Forsythe Farms
James Murray Honey
Pat-a-Cake Bakery (non-farm)
Mulberry Moon Farm
Bryan Farm
Spirit Walk Farm
Pangea Homemade Pasta (non-farm)
Woolderdale Farm
Ashburnham Farm
Barley Gardens
Ferguson Farm
Jess' Kitchen (non-farm)
Boyle Bros Market Garden
Potager duKanada
Irene, livestock farmer (didn't want to give business name)
Molly B's Gluten-Free (non-farm)
Bizjak's Fruit Farm
Fiddlehead Farm
Sunnydale Cookies (non-farm)
Barry's Farm
Cho Wing Farm
South African Naturally Sundried Fruit/Nuts (non-farm)
Norma's Edible Flowers & Herbs (non-farm)
Peter from Scotview Orchards
Marg Saltarski
Annie's Sugar and Spice
Etienne Avouampo Earth to Table Farm
Spirit Tree Estate Cidery
Akachi Farms
Nutri-Sprout

Rumar Farm
Neufeld Family Farm
Blossom Bakery (non-farm)
Pheonix Farm
Portpiglia Farm
Viniki Farm
Mark Houty Farms
Hinty's (non-farm)
Cedar Hedge Farm
Wicklow Way Farm
Fresh City / UFEED
Manning Canning (non-farm)
Honest Field Farm
Hendry Farms
Drummond Farm
Clover Roads Farm
Gigi's salad dressing (non-farm)
Joyfully Organic
Pheonix & Arnold (livestock farm)
Echo Muse Farm
Waffl Huis (non-farm)
Doug's Honey
Daniels Farm
Nature's Way Organics
Mississippi Queen Foods (non-farm)
Willowtree farm
La Primevera farm
Fresh & Tasty Mushrooms
Waterhall Farms
Chanoki Cheese
Manu Run Farm
The Village Bakery (non-farm)
Thames River Melons
Thiessen Farms
Mcguire's Naturals (non-farm)
Wool 4 Ewe
Hy Hope Farm
Rob's Good Food (non-farm)
Everything Maple
Big John's Farm
Lakeview Gardens

Hutchinson Farm
Smedyl Farm
Garlic King
Lauray Farm
Oliviera Farms
Sherlea Acres
Roberts Farm