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**ASSESSING THE SUCCESS OF FARMERS'
MARKETS IN NORTHERN NEW YORK: A
SURVEY OF VENDORS, CUSTOMERS, AND
MARKET MANAGERS**

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Assessing the Success of Farmers' Markets in Northern New York: A Survey of Vendors, Customers, and Market Managers.

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Assessing the Success of Farmers' Markets in Northern New York: A Survey of Vendors, Customers, and Market Managers.

Introduction:

With the increased interest in local foods and the growth in farmers' markets (FM), it is important to take the time to examine and understand customer interest and buying patterns at FMs, but also to receive input from vendors and market managers on management techniques, market operations, and ways to improve vendor and overall market performance. The purpose of this bulletin is to describe the results of a project conducted in six counties in Northern New York in the summer of 2008 to examine these issues.

In a changing landscape of production agriculture and an increased interest by consumers in having a closer connection to their food, there has been strong growth in both the output value and the number of farms selling direct-to-consumer (D2C). This is true not only in Northern New York (NNY), but also in New York State (NYS) and the United States as a whole. D2C farms are those farms that sell at least a portion of their farm output directly to individuals for human consumption, where FMs sales are one type of D2C sales.

According to the 2007 Census of Agriculture, the number of farms in Northern New York has declined by 6.6% since 2002; however, during this same time period there has been a 22.3% increase in the number of farms selling D2C (Table 1).¹ It should also be noted that, although the entire region has experienced a loss in the total number of farms, some counties in the region actually had a growth in the number of farms—specifically Franklin and Essex counties that increased farm numbers 13.5% and 3.0%, respectively.

All counties in the region have experienced growth in the number of D2C farms operating within their boundaries; however, there is considerable variation across the 6-county region. Franklin County leads in percentage terms with a 68.7% increase in D2C farms over this five-year period, as well a 13.5% increase in the number of all farms. Following next is Essex County with a 28.9% increase in D2C farms, and a 3% increase in overall farm numbers. The smallest growth rates in D2C farms were shown for Jefferson (2.8%) and Clinton (4.5%) counties. While the value of D2C represents less than one percent of total agricultural sales for the region (0.7%), nearly 15% of all farms sell at least a portion of their products in D2C markets (Table 1).

Particularly strong growth in the D2C market sector is evident in the increasing number of FMs in NYS, as well as across the U.S. In 1994, there were 1,755 FMs in the U.S., by 2008, this number increased to 4,685 (Figure 1).² As reported by Adirondack Harvest, 38 FMs are operating in 2009 in the NNY region, up from 34 the year prior³. In fact, there are more FMs per capita in this region of the state than any other area of NYS. Today, farmers' markets are an essential market mechanism linking farmers and consumers, and delivering benefits to both groups.

¹ For the purposes of this report, Northern New York is defined as the six-county region of Jefferson, Lewis, St. Lawrence, Franklin, Clinton and Essex counties.

² USDA National Directory of Farmers Markets, <http://www.ams.usda.gov/AMSV1.0/farmersmarkets>

³ Adirondack Harvest includes more than 6 counties, this number reflects only the counties identified above.

Table 1. Value of agricultural products sold directly to individuals for human consumption (D2C) and total market value of all agricultural products sold (All Ag) by Northern New York counties.*

County/Level	Type	Farms (No.)			Sales (000)			Average	Percent of	Percent of
		2002	2007	Change	2002	2007	Change	Sales/Farm	Total Farms	Total Sales
Jefferson	D2C	108	111	2.8%	\$ 460	\$ 511	11.1%	\$ 4,604	12.5%	0.4%
	All Ag	1,028	885	-13.9%	\$ 99,542	\$ 139,242	39.9%	\$ 157,336		
Lewis	D2C	67	77	14.9%	\$ 623	\$ 709	13.8%	\$ 9,208	12.5%	0.6%
	All Ag	721	616	-14.6%	\$ 72,178	\$ 112,629	56.0%	\$ 182,839		
Franklin	D2C	67	113	68.7%	\$ 134	\$ 422	214.9%	\$ 3,735	18.7%	0.6%
	All Ag	532	604	13.5%	\$ 48,003	\$ 68,097	41.9%	\$ 112,743		
St. Lawrence	D2C	160	200	25.0%	\$ 652	\$ 1,011	55.1%	\$ 5,055	15.0%	0.7%
	All Ag	1,451	1,330	-8.3%	\$ 99,715	\$ 140,151	40.6%	\$ 105,377		
Clinton	D2C	66	69	4.5%	\$ 1,224	\$ 1,178	-3.8%	\$ 17,072	11.7%	0.9%
	All Ag	604	590	-2.3%	\$ 78,437	\$ 124,200	58.3%	\$ 210,508		
Essex	D2C	38	49	28.9%	\$ 284	\$ 333	17.3%	\$ 6,796	20.2%	2.9%
	All Ag	236	243	3.0%	\$ 8,632	\$ 11,459	32.8%	\$ 47,156		
6-county region	D2C	506	619	22.3%	3,377	4,164	23.3%	\$ 6,727	14.5%	0.7%
	All Ag	4,572	4,268	-6.6%	406,507	595,778	46.6%	\$ 139,592		
New York State	D2C	4,651	5,338	14.8%	\$ 59,724	\$ 77,464	29.7%	\$ 14,512	14.7%	1.8%
	All Ag	37,255	36,352	-2.4%	\$ 3,117,834	\$ 4,418,634	41.7%	\$ 121,551		
United States	D2C	116,733	136,817	17.2%	\$ 812,204	\$ 1,211,270	49.1%	\$ 8,853	6.2%	0.4%
	All Ag	2,128,982	2,204,792	3.6%	\$ 200,646,355	\$ 297,220,491	48.1%	\$ 134,807		

***Value of agricultural products sold directly to individuals for human consumption** represents the value of agricultural products produced and sold directly to individuals for human consumption from roadside stands, farmers' markets, pick-your-own sites, etc. It excludes non-edible products such as nursery crops, cut flowers, and wool but includes livestock sales. Sales of agricultural products by vertically integrated operations through their own processing and marketing operations were excluded.

Source: 2007 U.S. Census of Agriculture

There remains strong interest by public and private sectors in promoting FMs within their communities. Community FMs are desired for a variety of reasons – from wanting to provide fresh fruits and vegetables to low income populations, improving the viability of local farms, revitalizing community perceptions and activities, and everything in between. The specific reasons are unique to each community, but are generally attributable to economic, social, and agricultural benefits that a FM brings to the communities that host them.⁴ According to the Farmers’ Market Federation of New York, a FM can be defined as a 3-legged stool – one for the farmer, one for the consumer, and one for the community. Successful markets recognize the importance of balancing all three legs and involving each component in the planning and operations of market activities.⁵

The success of a farmers’ market can be linked to a variety of factors. Research indicates that FMs can help to strengthen communities and be mutually beneficial for the vendors, consumers and communities.⁶ A particular farmer benefit includes ‘cash-in-hand’ rather than having to wait 30-90 days for payment. FMs also provide vendors a great place to test market new products or varieties and get an immediate reaction. The relative ease of entry into FMs provides a form of ‘business incubator’ for farmers interested in starting new or expanded businesses. Direct interaction with consumers can improve the farm image or brand, and act as a key form of advertising to other channels they participate in (e.g., CSA⁷ or farm stands). Many farmers claim that they have survived in business due to higher incomes resulting from FM sales.⁸

On the side of consumers, the FM provides several benefits including food direct from the farm that has been harvested at the peak of maturity only a day or even hours before it is sold. In addition, FMs can provide consumers with variety, value, and social benefits of being able to meet and know the farmer directly, which can help to strengthen rural/urban connections.⁹ The community benefits of a FM depend upon the underlying issues the community would like to address through the establishment of a FM. These benefits are truly community specific and can range from as basic as providing fresh food at a reasonable price to community members to providing an economic boost.¹⁰

Despite the strong growth in the number of FMs, recent research shows high failure rates of new FMs and that market success can vary significantly across geographic areas and differing economic and market conditions.¹¹ Studies focusing on performance find that FMs tend to be more successful in higher income locales and located in urban areas with larger vendors that

⁴ Farmers Market Federation of New York, “The Value of Farmers Markets to New York’s Communities”, November 2006.

⁵ Diane Eggert, Exec. Director, Farmers Market Federation of New York, “Farmers Markets: Economic, Social & Community Building”, presentation to National Association of Produce Managers, San Francisco, CA March 2007

⁶ Corum, V., M. Rosenzweig and E. Gibson. 2001. *The New Farmers Market: Fresh Ideas for Producers, Managers & Communities*. Auburn: New World Publishing. pp. 246

⁷ CSA is “Community Supported Agriculture” *Subscription CSA* (farmer-driven). or *Shareholder CSA* (consumer-driven).

⁸ Corum et al., pp. 21

⁹ Ibid, pp. 246.

¹⁰ Ibid.

¹¹ Stephenson, G., Lev, L. and Brewer, L. 2008. “I’m Getting Desperate’: What we Know about Farmers’ Markets that Fail”, *Renewable Agriculture and Food Systems*, 23 (3): 188-200.

develop stronger collaborative strategies, but less attention has focused on large rural areas explicitly.¹² Other studies focus on vendors' self-assessment of performance and find that vendor satisfaction with their margins depend on demographic characteristics of the farmer, types of products offered, and the growing stage of the vendor's enterprise.¹³

In summary, the success of FMs depends on a host of vendor, management, customer, and community characteristics and factors, and non-financial factors often matter in assessing performance or success. Proper FMs assessments need to consider all of these factors simultaneously. Such an assessment was desired and needed for NNY FMs, and this report describes the results of this comprehensive effort.

The Issue:

The numbers of FMs in Northern New York are increasing. There are successful, mediocre, and not so successful markets in the region. Most farmers' markets lack the information required to make effective changes and improvements. Although some research has been done on FMs in the past, there has never been a comprehensive, region-wide assessment of what works well and what doesn't in NNY. The objective of this project was to investigate the determinants of vendor success in farmers' markets. There were three key sources or factors taken into consideration in this study: the vendors, the farmers' market (managers) and the customers.

The Northern New York Direct Marketing/Local Foods Team¹⁴ saw a need for assessing the farmers' markets in Northern New York to determine what makes a successful market. The intent was to give feedback to current market managers and vendors, provide data for managers to use to apply for grants, and provide information to those who are interested in beginning a FM in the region.

Project Objectives

The primary objective of this project was to investigate determinants of vendor success in farmers' markets. Some of the key research questions that helped guide this research were:

- What are the non-economic impacts of the farmers' markets? And how can markets use this information to improve what they are doing?
- *For Managers:* What makes a successful farmers market?
- *For Customers:* How do customers find out about the market (what forms of advertising are used by the markets and which 'pay off' with more customers?) What are the key reasons customers visit the farmers' markets?
- *For Vendors:* There is a belief that farmers' markets are significant economic stimuli for communities, but are they really?

¹² Varner, T. and Otto, D. 2008. "Factors Affecting Sales at Farmers' Markets: An Iowa Study," *Review of Agricultural Economics*, 30 (1): 176-89.

¹³ Govindasamy, R., J. Italia, M. Zurbruggen, and F. Hossain. 2003. "Producer Satisfaction with Returns from Farmers' Market Related Activity." *American Journal of Alternative Agriculture* 18(2):80-86.

¹⁴ This is a regional team of CCE educators who collaborate on regional programming to farmers, outreach to customers, and research in the area of direct marketing and local foods. These educators come from a variety of backgrounds and discipline areas including rural & agricultural economic development, nutrition, community food security, horticulture, local food, farm business management, livestock production, and maple production.

Market managers, vendors, and customers were surveyed at each of the 27 markets included in the study. Survey results were compiled in aggregate and by market and distributed to survey participants. Survey data was then utilized with an econometric model to assess vendor performance based on vendor characteristics and characteristics of markets and customers they attended.

Survey Process:

Data were collected from 27 farmers' markets in six counties of Northern New York in the summer of 2008. Given that various farm, market, and community characteristics are expected to impact vendor overall performance (i.e., vendor sales and vendor satisfaction), we surveyed farmers' market managers, market vendors, and customers attending the markets within our study area. Complete copies of the survey instruments are included in Appendix I of this report.

Market managers were asked to complete a 31-question written survey that included information on current market characteristics, manager characteristics, market expenditure and promotion activities, and expectations for future growth. Of the 27 markets included in the study, 21 surveys were returned, with 19 including complete data for the analysis.

Vendors at the attended farmers' markets were asked to complete a 32-question written survey that asked a variety of questions concerning vendor operations at the markets attended, relationships with market management, products sold, customer and sales levels, other market channels utilized, farm characteristics, and self-assessments of vendor success and performance. In addition, vendors were asked which particular markets they attended such that they could be matched with the associated market data. In total, 122 individual vendor surveys were returned.

To get an accurate assessment of the customers actually attending the markets, Rapid Market Assessments (RMA) were conducted at each of the participating markets. Conducting consumer research in FMs presents significant challenges, but is critical to providing an accurate assessment of customer tastes and preferences. Traditional survey techniques, such as written questionnaires and customer interviews, are generally ill-suited to this venue as they can suffer from small sample size and selection bias issues.¹⁵ RMAs ask a limited number of multiple-choice questions displayed on easels, and customers are recruited to participate as they enter the market. Customer responses are indicated by placing adhesive stickers in the appropriate locations. This approach can significantly increase both the number of consumers surveyed and the percentage who agree to participate and, consequently, provide more accurate assessments of consumer preferences and behavior. However, given that participants can see what others have answered before them, there is potential bias introduced if responses are influenced by what is already observed. However, methods are available in the way questions are asked and in the administration of the RMA (e.g., refreshing posters regularly to reduce the number of prior answers visible) to reduce such bias.

¹⁵ Lev, L., L. Brewer, and G. Stephenson. 2004. "Tools for Rapid Market Assessments." Oregon Small Farms Technical Report No. 6. Oregon State University Extension Service.

To allow for comparison in responses across markets, the same six questions were asked at each of the 27 RMAs conducted. These questions looked at customer motivations for attending the markets, average purchase amounts, market characteristic evaluations, travel distance, and market advertising and promotion activities that influenced their attendance. In addition, market managers were allowed to select two or three additional questions from a list provided to them. These questions included information on the number and frequency of markets attended, preferred product offerings, impacts on overall dietary changes, impact on shopping frequencies for other local businesses, and willingness to pay estimates for farmers’ market products relative to traditional sources (i.e., grocery stores).

RMAs were conducted during the markets’ two busiest hours to ensure that we were able to survey all the markets in the region within the limited time available during the short summer season. Most of the markets are weekly markets and many occur on the weekends.

Across all three survey instruments the questions were ‘linked’ to enable researchers to capture information from all three groups on the same topic. For example: if managers and vendors were asked “How does the market advertise?”, then the customers were asked “How did you hear about the farmers’ market?”

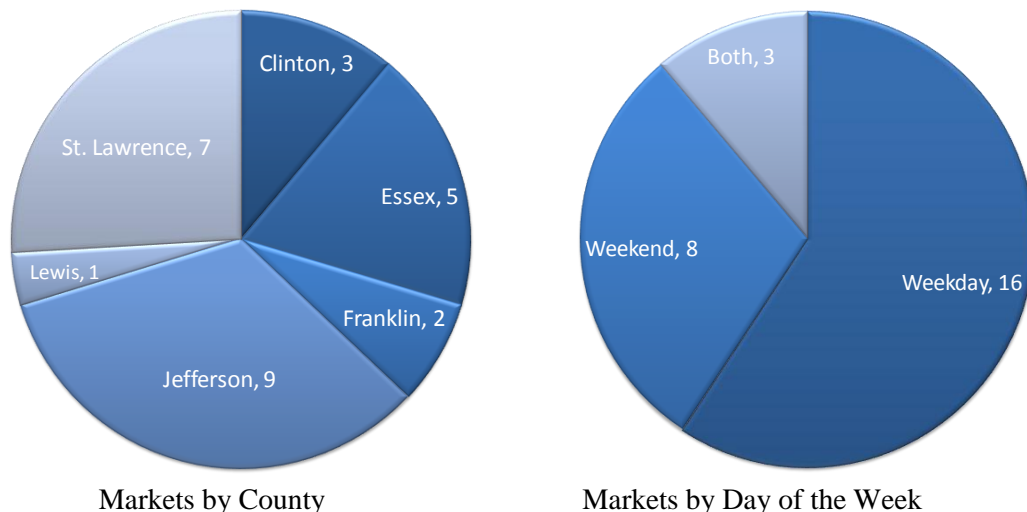
Survey Results

Below we summarize the results of the surveys for each group: markets (managers), vendors, and customers (RMA). A detailed summary of survey responses is provided in Appendix II. Summaries by market are available upon request. Based on both the reported customer purchase levels from the RMA and the reported sales from the vendor survey, the region was estimated to generate around \$1 million dollars in FM sales volume each season. This level of volume corresponds to average vendor sales per season of \$3,360.

Survey Results – Market Managers

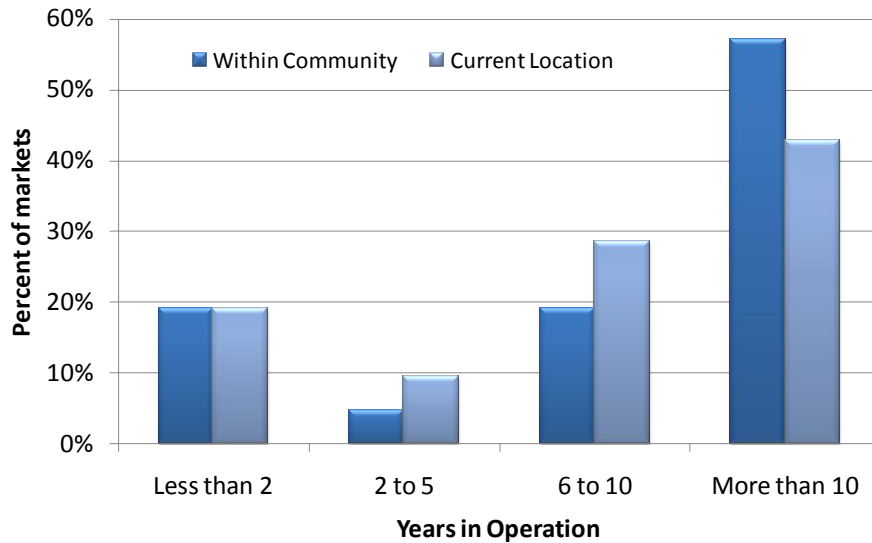
Figure 1 shows the distribution of markets attended by county. Most of the markets surveyed were weekday markets; however, 8 of the markets were conducted on the weekend and 3 of the markets surveyed operated both during the week as well as on the weekend (Figure 1).

Figure 1. Number of Markets Attended, by County and Days of Operation.



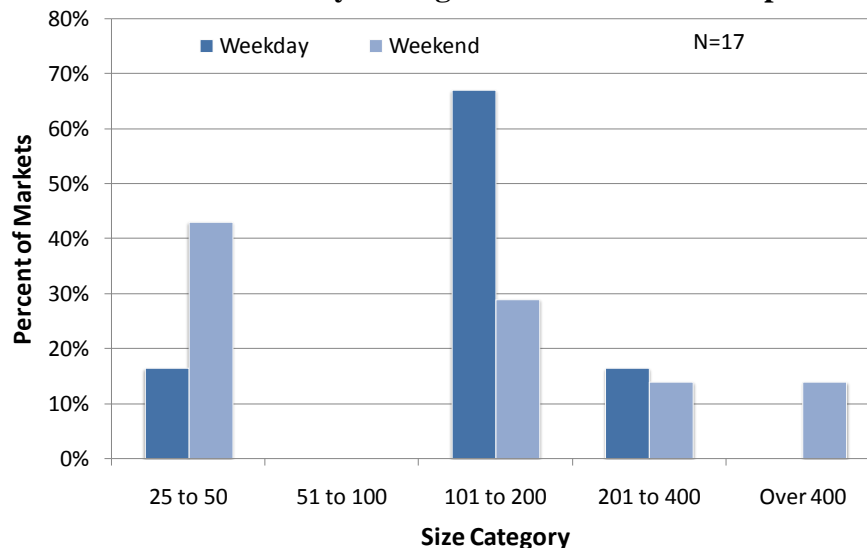
Market Age: Market age was defined as either overall within the community and at its current location. More than 55% of the markets were over 10 years of age and of those, approximately 40% had been at their current location for over 10 years. However, 25% of the markets surveyed had been in the community for 5 years or less. This is on par with the results at the national level regarding the overall growth in the number of farmers markets in the US.

Figure 2. Distribution of NNY Farmers’ Markets by Age (Years).



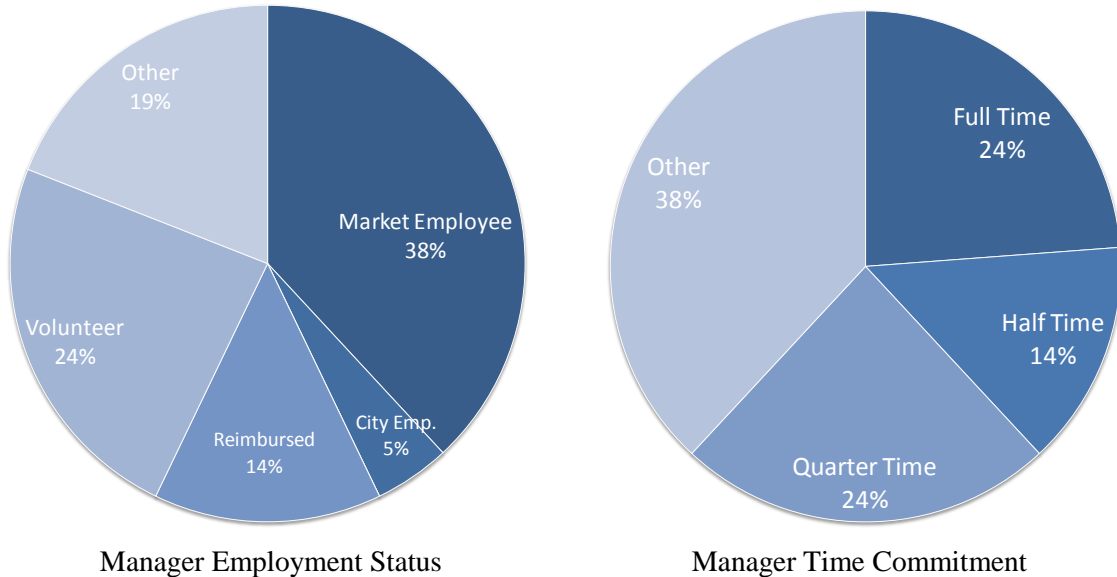
Vendor Numbers and Governance: The average number of vendors at the weekend markets (13.74) was slightly above the weekday markets (10.75). There was also a wide range in sizes of markets – from 4 to 52 vendors per market. Seventy-six percent of the 21 markets responding operated under a membership organization, with average annual dues of around \$39 (range \$30 to \$55). In addition, 62% of the markets had Boards of Directors; the average size of a board was 9 people, and ranged from as little as 3, to as many as 18. The wide range in market sizes is also evident in the average number of customers that come to the markets each day (Figure 3).

Figure 3. Market Distribution by average customer attendance per market day.



Market Managers Employment Status: Market managers can be retained in a variety of ways. For these markets, 38% of managers were employed by the market; 24% were volunteer positions, and 14% worked on a contract and were reimbursed for their time (Figure 4). Given the large variation in market size, it is not surprising that the time commitment required by the market manager varied as well. Specifically, about one-quarter (24%) indicated their manager position was a full time commitment, 14% indicated half-time, another 24% were quarter-time, and the largest class was less than quarter time (other) at 38%.

Figure 4. Market Manager Employment Status and Time Commitment.



Market Amenities: Managers were asked about the availability of various amenities and how important they thought each of them were to the operations of their market (Table 2). As expected, the top three amenities for all markets were convenient parking, ample parking and restrooms. It should be clarified that ‘convenient’ parking and ‘ample’ parking are not the same thing. Convenient parking refers to whether there is parking close to the market, of which 100% markets have this. Ample parking refers to whether there is enough parking for the busiest market times. Nearly 80% of markets had ample parking. Although this is an important amenity, as the popularity of farmers’ markets increases and customers seek to access these in greater numbers ‘ample’ parking can become an issue.

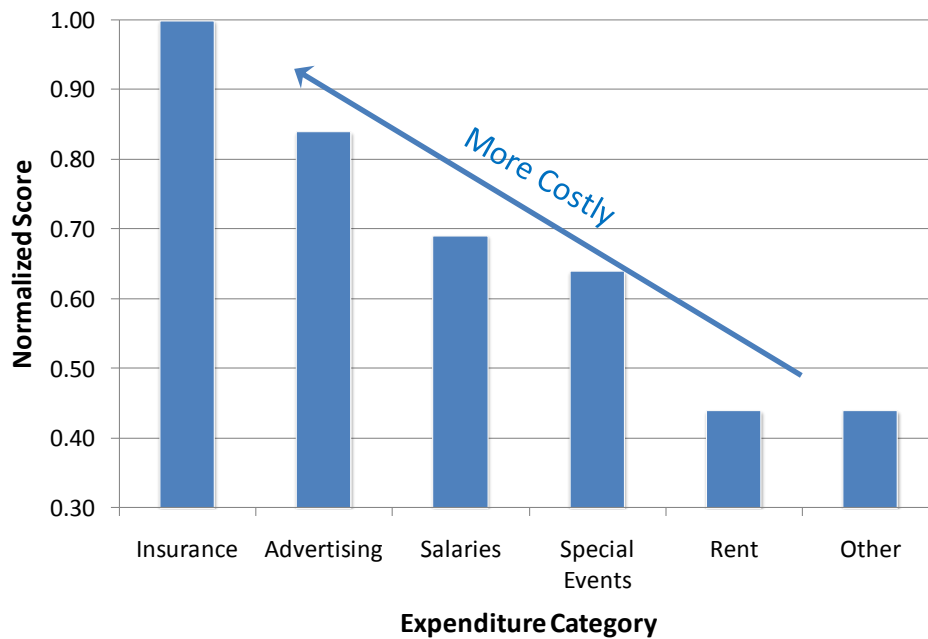
Market Expenditures: Managers were asked to rank a set of expenditure items, on an annual basis, from largest to least. The rankings were then normalized based on the level of ranking and the number of times a category was ranked (i.e., not all categories were ranked by all managers). Not surprisingly, the highest expenditure for most farmers markets was insurance (Figure 5). This will continue to be a significant expense to ensure the protection of farmers, customers, and market management at these mainly open air facilities. Advertising and salaries were ranked second and third, respectively.

Table 2. Availability of Market Amenities and Level of Importance to the Market.

Amenity (ranked from most important to least important)	Percent Yes	Importance (Percent by Category)			Average Importance Score
		Very Important	Important	Not Important	
Convenient parking (<i>N</i> = 20)	100.00	100.00	0.00	0.00	2.00
Ample parking (<i>N</i> = 18)	77.78	84.62	15.38	0.00	1.85
Restrooms (<i>N</i> = 20)	85.00	75.00	25.00	0.00	1.75
Concessions (food or drink) (<i>N</i> = 18)	50.00	45.45	36.36	18.18	1.27
Shade from trees (<i>N</i> = 18)	66.67	30.00	60.00	10.00	1.20
Shade from structures (<i>N</i> = 17)	58.82	33.33	41.67	25.00	1.08
Building (<i>N</i> = 19)	26.32	41.67	25.00	33.33	1.08
Hand washing facilities (<i>N</i> = 20)	55.00	38.46	23.08	38.46	1.00
Electrical hookups (<i>N</i> = 20)	75.00	23.08	30.77	46.15	0.77
Picnic area (<i>N</i> = 18)	61.11	10.00	50.00	40.00	0.70
Water fountains (<i>N</i> = 20)	20.00	7.69	30.77	61.54	0.46
Refrigeration (<i>N</i> = 18)	11.11	0.00	30.00	70.00	0.30

*Importance Rating Scores: 0 = not important, 1 = important, 2 = very important
Average Number of Amenities Available = 7.27. Min = 4, Max = 11*

Figure 5. Normalized Ranking of Market Expenditure Categories.



Vendor Composition: Managers were asked to classify the number of vendors by production method. On average, approximately 62% of the vendors were utilizing conventional farming practices, 8% certified organic (CO), and 22% non-certified organic (NCO) (Table 3). (Note, some responses included “unknown” or “other” responses; as such, the numbers do not add to 100). In addition, there was a wide variety in compositions by markets. For example, the percent of conventional producers ranged from as little as 5% to all vendors at some markets. While on average, CO appears relatively low, the percentage ranged as high as 63% at some markets.

Table 3. Vendor Composition and Trends by Production Method

Category, Percent	Conventional	Certified Organic	Non-Certified Organic
Percent of Vendors:			
Average	62.27	8.00	22.06
Minimum	5.00	0.00	0.00
Maximum	100.00	63.00	88.00
<i>Number of Markets</i>	<i>18</i>	<i>18</i>	<i>18</i>
Change in Vendor Numbers:			
Decreasing	10.53	10.00	7.14
Same	42.11	40.00	50.00
Increasing	47.37	50.00	42.86
<i>Number of Markets</i>	<i>19</i>	<i>10</i>	<i>14</i>

Managers were also asked about the trend in vendor numbers by production practice. The results are generally similar across categories, with 40% to 50% of markets showing either constant or growing vendor numbers, regardless of category, and 10% or less of vendors showing decreases in numbers. Additionally, most markets in the area offer a variety of products for sale including craft products. Specifically, 86% of the markets surveyed have arts and craft vendors, and 57% have food and drink concession stands.

In a separate section of the survey, managers were asked whether, compared to last year, were the total number of vendors and vendor sales increasing, decreasing, or staying about the same. These metrics clearly highlight the growth of farmers’ markets in this region – over 60% of managers reported growth in vendor numbers and vendor sales. Around 20% of the markets were staying about the same, and 15 to 22% cited decreased numbers relative to the previous year.

Product Ownership Requirements and Quality Control: All of the markets had a minimum percentage requirement of own-produce, meaning that all markets defined a percentage requirement of products made available for sale at the market to be made, grown or raised by the farmer who is selling the product. This requirement ranged from 40% to 100%, and averaged around 70%. Notably, the Adirondack Farmers Market Cooperative that manages a number of surveyed markets (as cooperative members), has a minimum requirement of 70%. Most markets do not allow wholesalers or re-sellers to attend the markets, only 28% allowed these types of vendors.

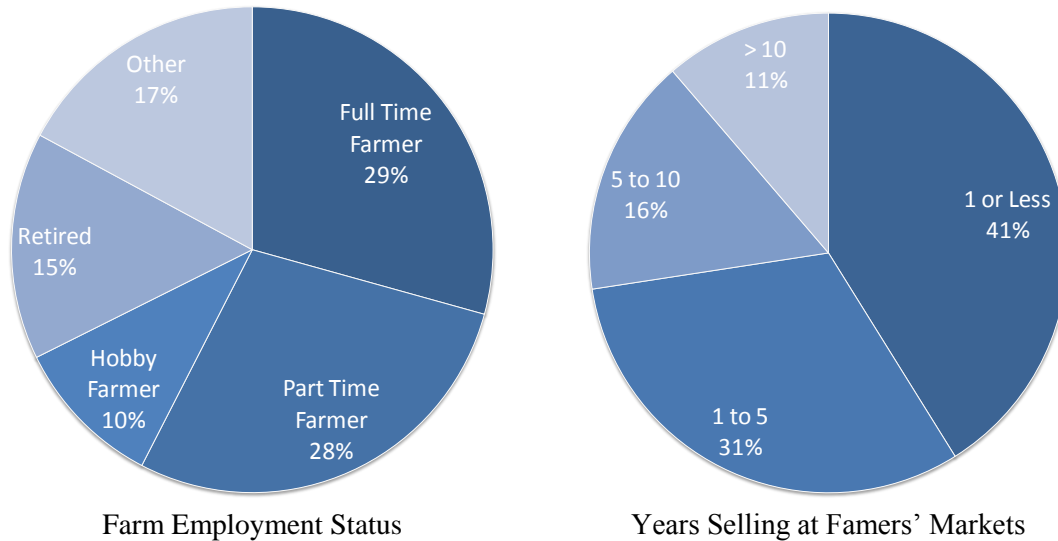
For a majority of the markets (90%), the manager has the authority over determining quality of products available for sale. While the question was relatively broad, the high number of positive responses seems to indicate that markets are identifying quality as an important standard.

Survey Results – Vendors

As mentioned above, 122 vendor surveys were returned, many of which included incomplete information (unanswered questions) in various parts of the survey. For completeness, in the discussion that follows, we note the number of vendors answering that particular question. Also note that a vendor, as defined here, may be a farmer- or non-farmer-vendor.

Employment status: The distribution of vendors by farm (or employment) status related to their FM sales show a consistent mix of vendors. Specifically, 29% of the vendors at the farmers markets were full-time farmers or growers, 28% part-time farmers/growers, and 15% classified as retired farmer/growers (Figure 6). Around 17% of vendors were classified as ‘other,’ which likely reflects non-farm vendor participation. Years of selling at FMs were equally variable. While 41% of vendors had been for only one year or less, 27% of vendors have been selling for at least five years (Figure 6).

Figure 6. Vendor Farm Employment Status and Years Selling at Farmers’ Markets.



Number of Markets Attending: With over 40 active farmers markets in the region, the opportunity for farmers to attend multiple markets is a high possibility. Although attending multiple markets provides the opportunity for increased sales, it also increases the time away from the farm and production, as well as increased travel and time costs. That said, the highest proportion of vendors attend one market (49%). Another 25% attend two markets and 15% attend three markets regularly. On average, two markets were attended per vendor (Figure 7).

Travel distance to markets is also related to the number of markets attended and, on average, the one-way travel distance was 24 miles. However, this ranged from distances less than one mile, to as high as 200 miles one-way. Vendors remarked that location was the primary factor in choosing which markets to attend (78%); however, vendors also noted that market size (38%) and time of the year (28%) were also important.

Percent of income from Farmers’ Markets: There are a number of different market channels available for vendors to sell their products, of which the FM is but one. Vendors were asked what percent of their total operation sales were from FMs each year. For only 6% of vendors did FM sales represent their sole source of revenues (Figure 8), but an additional 19% received at least 50% of total sales. A relatively high proportion of vendors (26%) received less than 10% of total sales, and around 43% of vendors received 11% to 50% of total sales from this channel.

Figure 7. Distribution of Vendors by the Number of Farmers' Markets Attended.

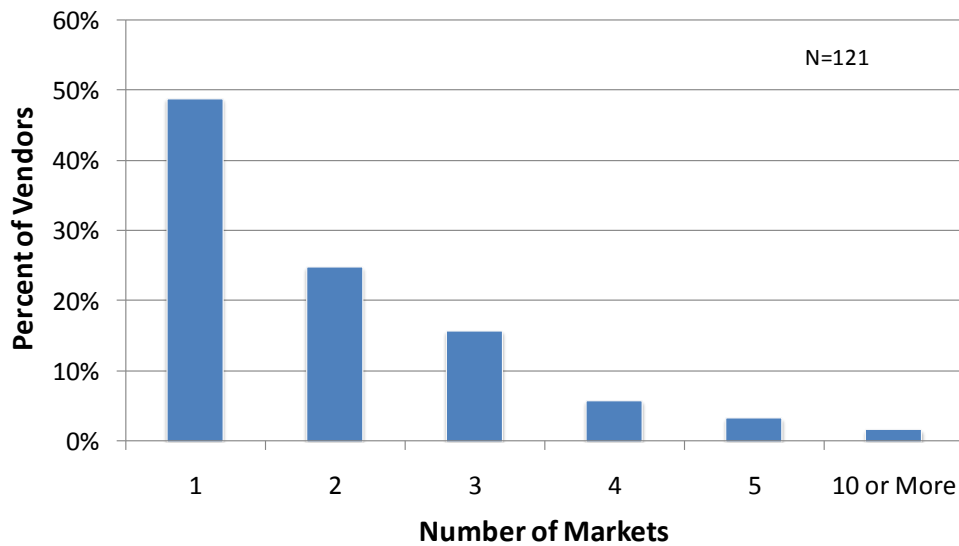
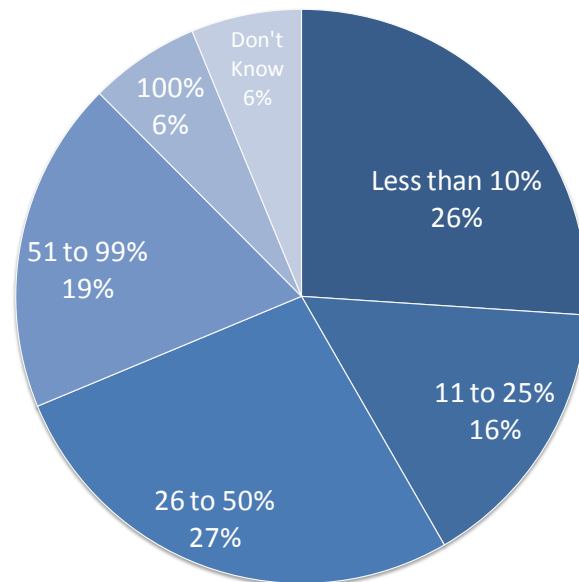
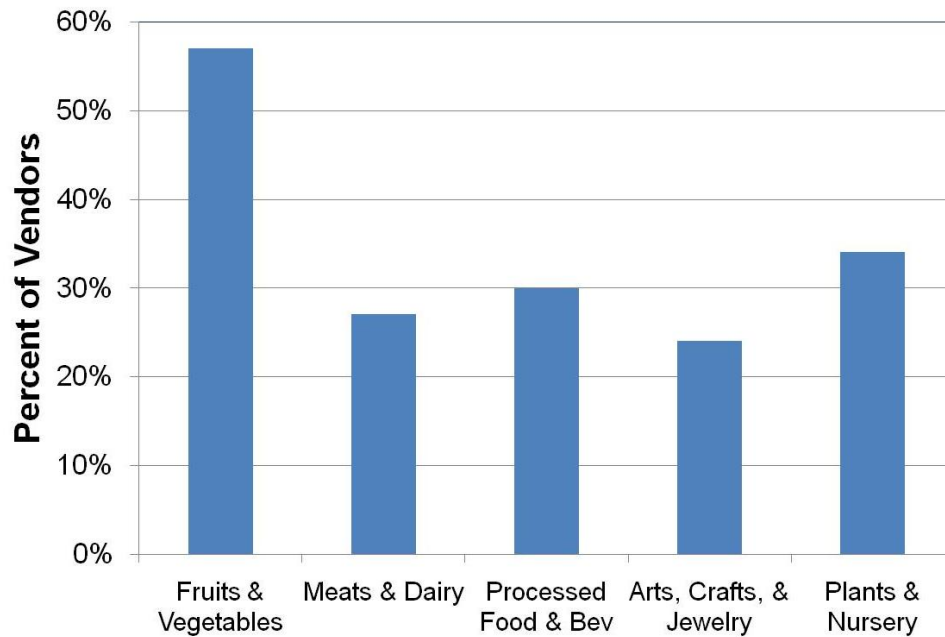


Figure 8. Farmers' Market Income as a Percent of Total Farm/Operation Income (N=98).



Vendor Product Composition: Not surprising, sales of fruits and vegetables made up largest portion of the products sold by vendors; however, the gap was not as great as expected (Figure 9). Fruits and vegetables made up 57% of all products, but plants and nursery products (33%), processed foods and beverages (29%), and arts, crafts, jewelry products (28%), represented significant amounts of products at these markets. Meats and eggs (18%) and dairy products (2%) were found in the least numbers.

Figure 9. Distribution of Vendors by the Number of Farmers' Markets Attended.



Vendor Sales: Consistent with the market manager results, vendor results indicate a wide variation in market sizes, based on the average number of customers and average gross sales per market day (Figures 10 and 11). In general, markets are relatively small with the largest percentages of vendors between 25 and 100 customers per day. On average, weekday market vendors reporting 65 customer stops per market day, while weekend market vendors saw more, around 80 customers, on average, per market day (Figure 10).

Figure 10. Vendor Distribution of Average Customer Stops per Market Day.

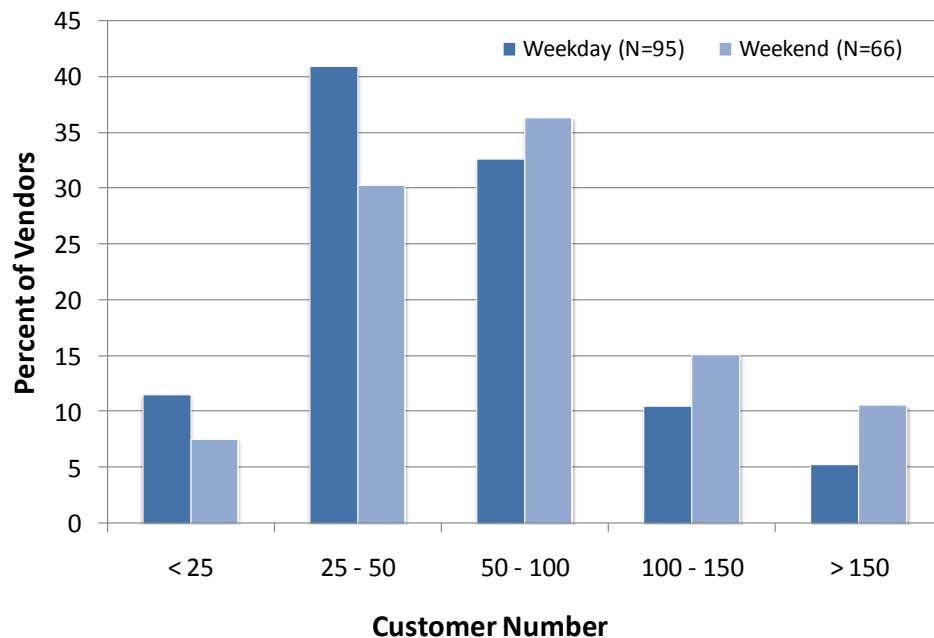
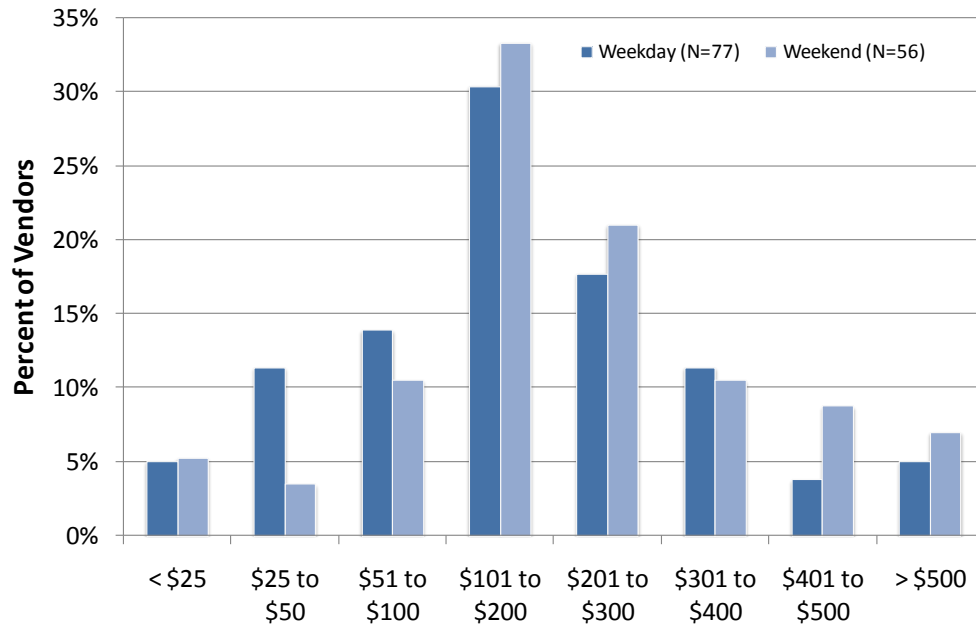


Figure 11. Vendor Distribution of Average Gross Sales per Market Day.



While average customer counts appear encouraging, reported sales are more modest. Specifically, most vendors report receiving \$100 to \$300 per day (Figure 11). Average reported weekday sales were \$195 per vendor, while weekend sales were slightly higher at \$225. Converting sales numbers into per customer equivalents implies average per customer sales of around \$3 per customer per day. The numbers appear low, but it is important to consider that the question posed to vendors was the number of customers who ‘stopped’, not necessarily the number of customers who actually purchased products.

Market Channel Utilization: As shown above, most vendors attending FMs also utilize other market channels to sell their agricultural products. To understand the degree of alternative market channels utilized, vendors were asked to identify all markets used to sell their projects, and the relative importance of those channels in terms of gross sales (Table 4). Many farmers used a variety of both retail and wholesale channels, and in certain cases provided significant sources of farm sales.¹⁶

In retail markets, vendors commonly used farm stands (31%), u-pick operations (20%), or ran CSA operations (27%). In wholesale markets, the most commonly utilized channel was grocery/specialty store sales (23%). Other channels were less common; for example, 11% wholesaled products to restaurants, while nearly 14% sold wholesale to other vendors for sale through their own direct channels. (Table 4). On average vendors utilized 2 channels (retail or wholesale), but ranged from 1 to 6 channels across all responding vendors.

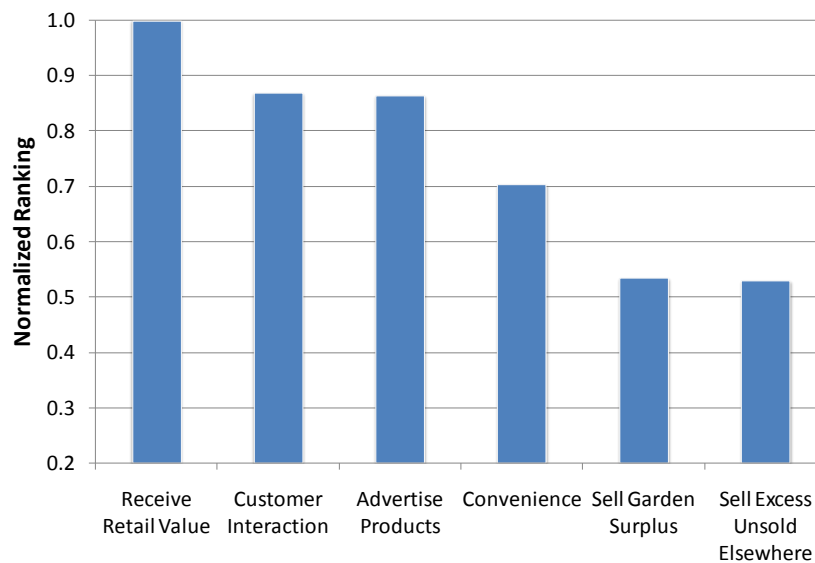
¹⁶ Note that one vendor responding to the survey reported no sales at the FMs themselves, but rather utilized the FM to advertising and promote other channels utilized. This is why the percent of vendors ‘selling’ at FMs is less than 100% in Table 4.

Table 4. Utilization of Alternative Market Channels by Farmers' Market Vendors.

Outlet	Percent Yes	Average Percent of Total Sales (if Yes)
Retail:		
Farmers' Market	98.97	64.13
Own Site (roadside stand, greenhouse, farmhouse/out building)	30.85	27.22
Pick Your Own	20.40	43.75
Community Supported Agriculture	26.66	42.17
Other	47.40	37.75
Wholesale:		
Packer	3.30	28.25
Grocery/Specialty Store	23.08	14.51
Restaurant	10.99	10.51
Direct (produce stand, greenhouse, farmers' market vendor)	13.98	6.23
Other:	5.43	34.29
<i>Number Reporting = 92</i> <i>Average Number of Retail Channels = 1.76, Min = 1, Max = 4; Average Number of Wholesale Channels = 0.56, Min = 0, Max = 4; Average Number of Total Channels = 2.18, Min = 1, Max = 6</i>		

Selling at Farmers' Market and Measuring Success: Given the number of market channels available to farmers who are interested in direct marketing, why do farmers choose to sell at the farmers' market? Previous research conducted in this region indicated that farmers who are direct marketing local foods are doing so on the basis of more than economics or financial gain.¹⁷ This study has reinforced the earlier findings. Vendors were asked to rank the reasons shown in Figure 12. Receiving retail value for products sold is oftentimes cited as top reason for participating; however, this ranking was only 13% above that of customer interaction.

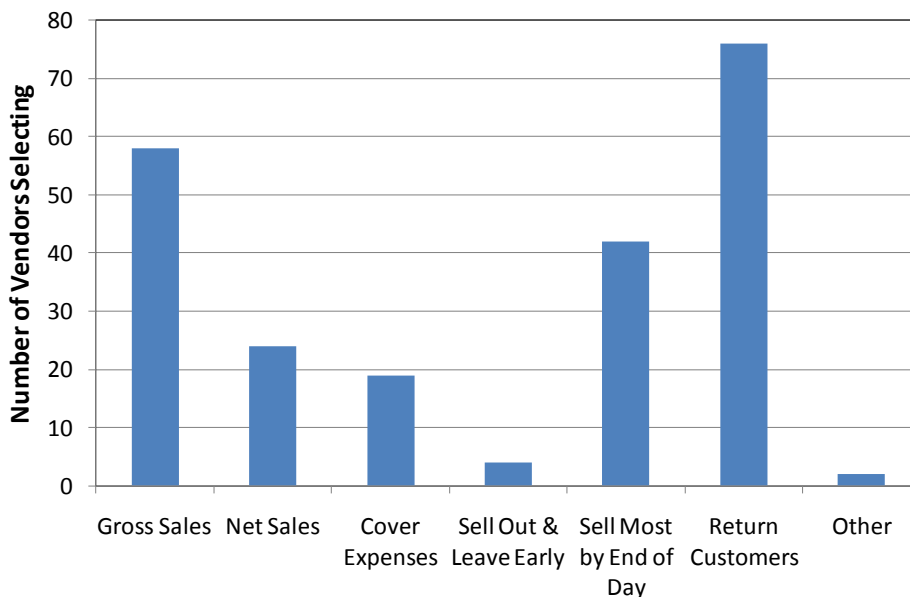
Figure 12. Ranking of Why Vendors Choose to Sell at Farmers' Markets (N=109).



¹⁷ North Country Regional Foods Initiative Final Report, June 2007-2008 www.nnyregionalllocalfoods.org

The importance of non-financial factors in FM participation is also highlighted in the ways that vendors measure success at the FM. There are many ways to measure success of a business and the choices that one makes relate to production, marketing and advertising. For this, we asked vendors the top two ways in which they measure FM success (Figure 13). The most popular choice was having return customers. While certainly return customers has implications for increased sales, the result is also consistent for the vendors' desire for customer interaction. In fact, 'gross sales' was the second-most mentioned metric in evaluating success, but well below that of return customers. To further emphasize this point, evaluating 'net sales' or 'covering expenses', were mentioned less than one-third as many times as customer interaction.

Figure 13. Methods Used by Vendors in Evaluating Success.



Product Pricing: One of the biggest challenges for anyone direct marketing a product that they grow, raise or make themselves is determining its sales price. Most accepted formulas involve a compilation of all input costs (cost of production) plus a desired profit margin (or mark-up) to establish price. When vendors were asked how they price their product, the most common choice was this method. In fact, after accounting for the number of top-three rankings, the computed normalized rankings show the cost of production plus mark-up as the clear top choice (Table 5). The second-most popular method was 'matching other vendor prices.' While recognizing competition in pricing at markets is important, simply matching others prices, does not consider individual farm costs or net returns to management.

Changes in Farmers' Market Sales: Similar to the question asked of market managers, vendors were asked about their expectations in business volume over the next three years. It was clear that, on average, expanding volume through FMs is expected. Nearly 54% of respondents expected their FM sales to increase in the next 3 years, while only 8% expected FM business volume to decrease. Roughly 40% were expecting sales at FMs to stay about the same.

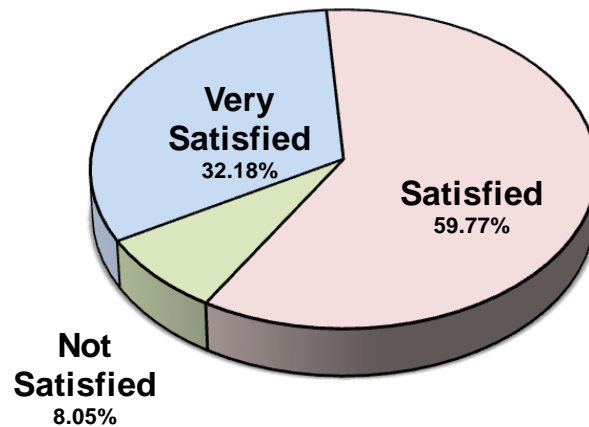
Table 5. Ranking of Methods Used to Price Products at Farmers’ Markets.

Product Pricing (ranked from most to least utilized)	Number of Vendors Ranked in Top 3			Normalized Ranking
	Rank 1	Rank 2	Rank 3	
Cost of production plus mark-up	54	4	8	1.00
Matching other vendors’ prices	34	16	5	1.34
Grocery store comparison	18	15	8	1.93
Pricing above other vendors	7	2	1	2.11
Charge the same as always	13	4	6	2.27
Pricing below other vendors	6	4	2	2.47
Internet	1	3	5	3.71

Vendor Profit Satisfaction: To encompass the fact that FM vendors may use both financial and non-financial factors in evaluating performance, vendors were asked how satisfied they were the profitability of their FM sales. For example, vendors that utilize FMs as way to advertise their farm or products, may well be happy if they cover their costs or reach some minimal level of sales (if any). Also, vendors that appreciate the opportunity to interact with customers may view sales levels much less than the amount of face time they get with consumers.

Roughly 60% of all vendors surveyed were ‘satisfied’ with the level of FM profitability, and 32% were ‘very satisfied.’ The remaining 8% were not satisfied. Identifying the vendor, market and customer factors that affect the level of FM satisfaction will be evaluated in the econometric modeling later in this report.

Figure 14. Vendor Satisfaction with Level of Farmers’ Market Profitability.

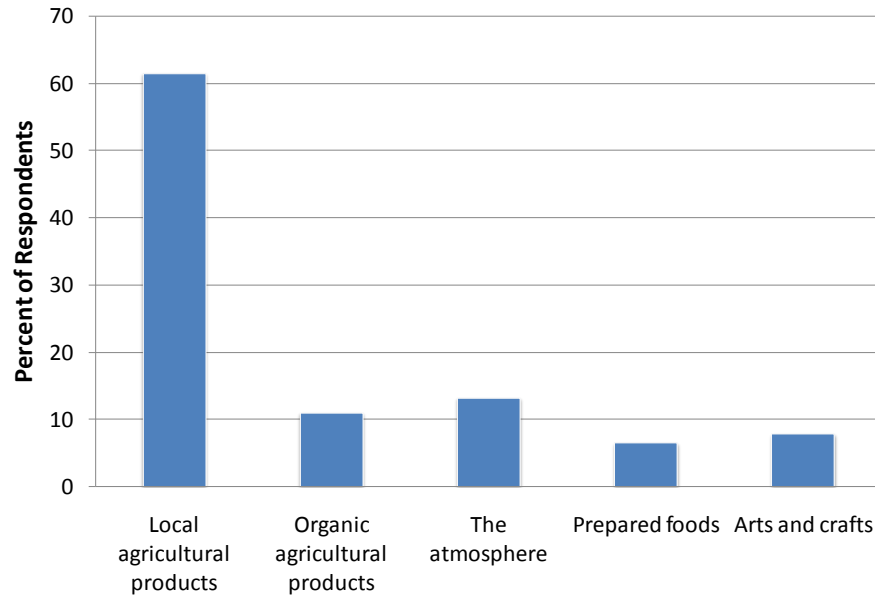


Survey Results – Customers

As discussed above, perceptions of customers at NNY FMs were ascertained via Rapid Market Assessments at each of the 27 markets studied. Below we describe the assessment results based on the questions that were asked at all study markets. Additional questions posed by a limited set of markets are included in the detailed results in Appendix II.

Market Attendance & Experience: It was clear across markets that when asked what the primary reason customers attend FMs, buying local was at the top of the list (Figure 15). Over 60% of customers said that availability of local agricultural products was their primary reason for attending, far above the availability of organic products (11%). While other resources have cited local’s popularity above organic products, local products are more limited in availability, and the FM provides a popular choice.

Figure 15. Customer’s Primary Reason for Attending Farmers’ Market.



Descriptions of customer’s experience at the FM were, however, more varied. Customers were asked to identify from a range of statements, what ‘best’ describes their FM experience. Around 30% of customers attended the market to buy the ‘freshest products possible’ (Figure 16), while 25% attended because they thought FMs helped to keep small farms viable. About 18% of respondents thought that FMs help reduce the negative environmental impacts on product distribution, while 10% to 15% thought that FMs helped provide a sense of community or supported agriculture as an important part of the rural landscape.

Purchasing and Travel Patterns: While the markets surveyed represented a broad range in sizes, per trip spending by customers was relatively modest (Figure 17). Specifically, over 40% of respondents spend \$10 or less each trip to the FM, and an additional 47% spent between \$11 and \$25. The average purchase amount per visit as \$16.94, and ranged from \$7.88 to \$63.80 across all markets.

Given the rural nature of NNY region, it is not surprising that customers, on average, traveled nearly 7 miles to attend FMs (Figure 18). While over one-half of the respondents traveled within 5 miles of the markets, it was uncommon for customers to travel over 11 miles (24%). It should also be noted that for some of the markets in this area, a segment of the customer population are tourists who travel up to visit the Adirondacks-North Country region from quite a distance

Figure 16. Best Describes Farmers' Market Experience.

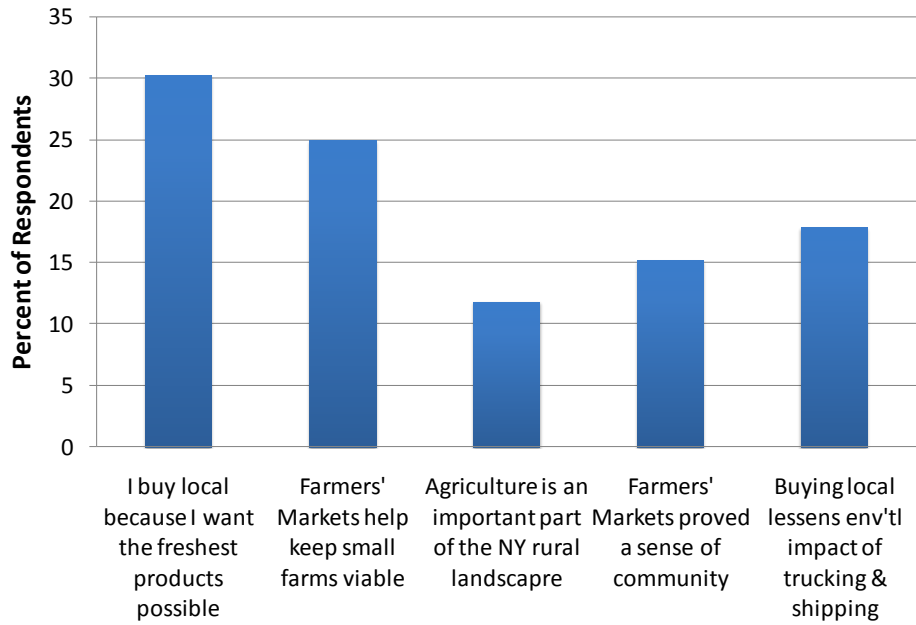


Figure 17. Customer's Average Purchase Amount per Visit.

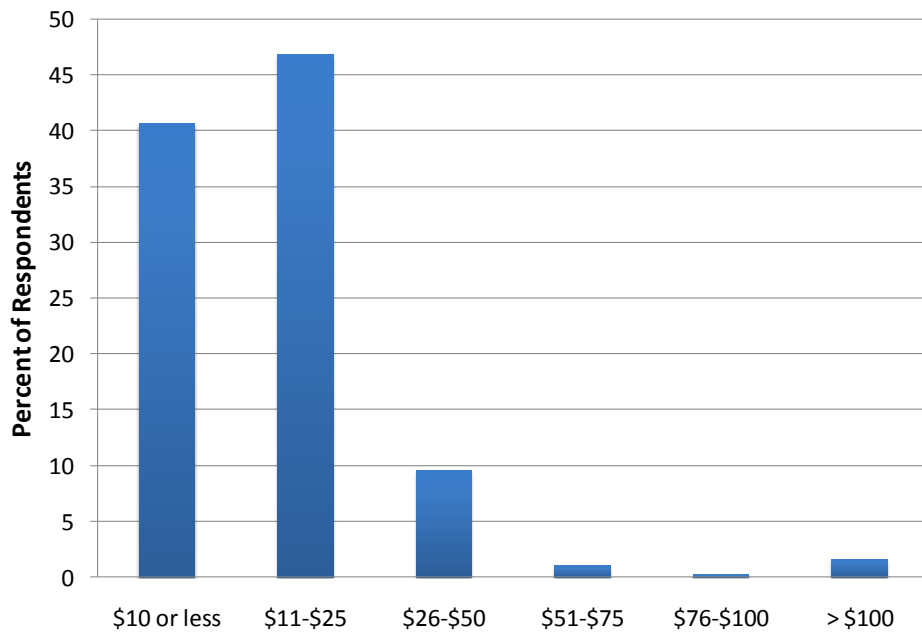
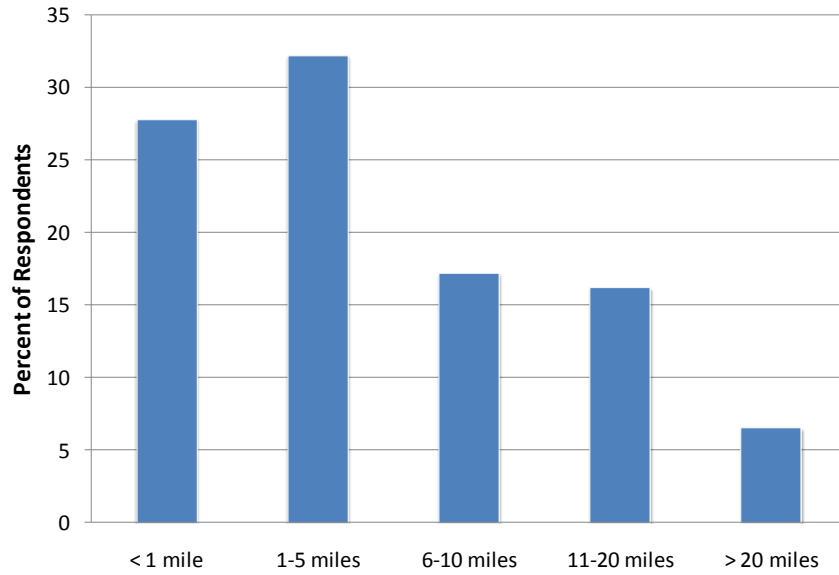
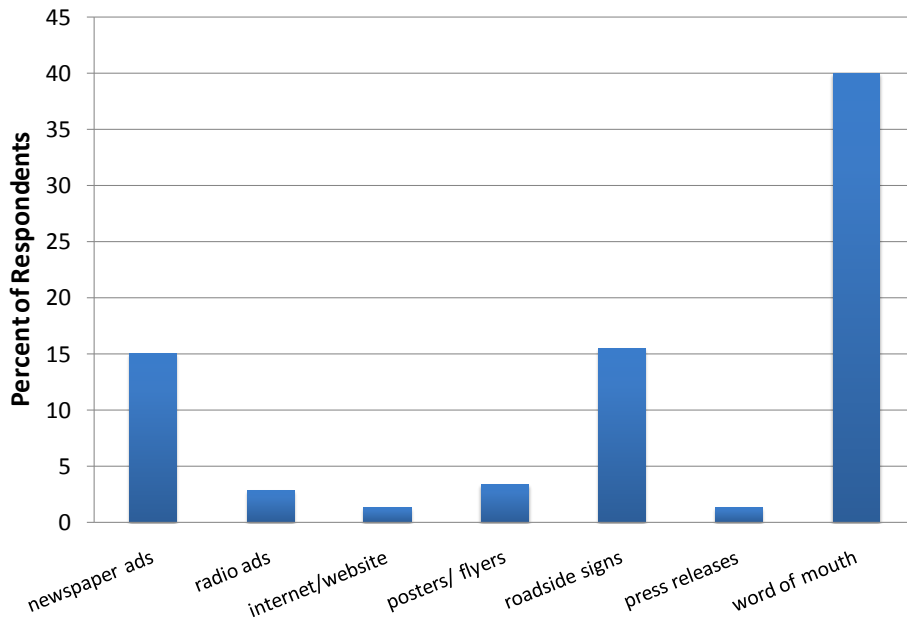


Figure 18. Average One-Way Travel Distance to Farmers' Market.



Advertising Effectiveness: In any business, knowing where to advertise and whether those advertising dollars you are investing are paying off is critical - FMs are no exception. To look at the relative effectiveness of differing types of advertising employed by our sample of markets, customers were asked what advertising influenced their decision to attend. It was clear that more informal word-of-mouth between customers was the most effective method (40%). While this is outside of the control of market managers, it does emphasize that leaving customers with a good impression of the market is crucial for return and expanded attendance. Among advertising channels within the managers control, road side stands (16%) and newspaper advertisements (15%) were shown to be the most effective.

Figure 19. Effectiveness of Advertising in Influence Customer Attendance.



Ratings of FM Characteristics: To help provide management with customers perceptions of key market characteristics, customers were asked to rate from ‘Poor’ to ‘Very Good’ market characteristics corresponding to product quality, product variety, market appearance, location convenience, vendor friendliness, market prices, and parking. As shown in Table 6, all characteristics were rated relatively high (good or very good). In particular, customers rated product quality, location convenience, and vendor friendliness above the others, with ‘very good’ ratings on average above 70% for all categories. That said, particular market results varied considerably, and particular areas may need attention in certain markets. Lower overall ratings were found for product variety, appearance of facilities, and parking, highlighting these as important areas for managers to consider.

Table 6. Customer Ratings of Famers’ Market Characteristics.

Answer, % (Market Min, Max)	Very Good	Good	Fair	Poor
Quality of Products <i>N = 785 responses (27 markets)</i>	73.31 (16.67, 100.00)	25.29 (0.00, 83.33)	1.15 (0.00, 10.34)	0.25 (0.00, 10.53)
Variety of Products <i>N = 716 responses (27 markets)</i>	28.63 (0.00, 90.00)	48.74 (0.00, 77.27)	19.97 (0.00, 88.24)	2.65 (0.00, 100.00)
Appearance of Facilities <i>N = 670 responses (27 markets)</i>	48.96 (0.00, 100.00)	44.78 (0.00, 88.00)	5.37 (0.00, 34.62)	0.90 (0.00, 15.38)
Convenience of Location <i>N = 712 responses (27 markets)</i>	71.84 (35.71, 100.00)	23.88 (0.00, 55.17)	3.16 (0.00, 28.57)	1.12 (0.00, 20.00)
Friendliness/ Attitude of Vendors <i>N = 711 responses (26 markets)</i>	83.05 (50.00, 100.00)	16.24 (0.00, 50.00)	0.70 (0.00, 7.69)	0.00 (0.00, 0.00)
Prices <i>N = 710 responses (27 markets)</i>	43.59 (7.69, 100.00)	47.11 (0.00, 80.77)	8.87 (0.00, 26.92)	0.42 (0.00, 3.85)
Parking <i>N = 674 responses (27 markets)</i>	59.50 (0.00, 100.00)	24.48 (0.00, 57.14)	10.98 (0.00, 77.78)	5.04 (0.00, 40.48)

Modeling Vendor Performance

As mentioned above, the overall performance of vendors at FMs depends on a host of vendor, market, and customer characteristics. In addition, evaluating vendor performance in terms of just dollars-and-cents, may preclude other important non-financial factors and give misleading recommendations on how to retain and attract vendors to FMs. Accordingly, we developed econometric models that estimate the important factors affecting vendor performance, both in terms of sales per customer and vendor self-reported profit satisfaction.

We relate the level of each measure of vendor performance to a set of explanatory variables that encompass market, vendor, and customer characteristics. Market-level factors included the manager employment status (employed at least half-time), market size (number of vendors), market age (years within the community), number of amenities (a simple sum of the number amenities listed in Table 2), vendor composition by production practice (Table 3), and market policies/regulations (minimum own-product requirement). Vendor characteristics considered were years of selling experience, the number of FMs attended, the percent of total sales from FMs (a measure of market channel diversification), farm or operation employment status, and the types of products sold. Finally, as a proxy for customer disposable income level, we included the average purchase amount per visit (by market) from the RMA. Similarly, as a proxy for population density around the FMs, we include the average travel distance to market.

The survey data described above was combined to form a database of unique vendor-market observations. Specifically, as some vendors attended more than one market in study area, each unique vendor-market combination was included in the statistical data sample. After accounting for missing observations in the merged data, the final dataset included observations for 19 markets, 59 vendors, and 88 individual vendor-market observations.

An Ordinary Least Squares (OLS) regression model was used to model sales per customer. In this way, we can then estimate the change in sales per customer given a unit change in the independent variables. Given that the vendor satisfaction variable is categorical, an ordered logit model was used to model the impact of the independent variables on the level vendor satisfaction. The resulting coefficients then measure the change in the predicted logged odds of a vendor's satisfaction category for a unit change in the independent variables.

For completeness, the full empirical results are included in Appendix III. Generally, the model results differ in both the number of significant variables and the impacts those variables have on sales or satisfaction. The implication of this is that vendor satisfaction depends on more than just sales performance (as measured by the level of sales per customer), and that when considering changes in market or vendor operations, both factors should be considered. For ease of exposition, we summarize the significant findings below.

Empirical Results

Figures 20 and 21 show the relative impacts on sales per customer and vendor satisfaction, respectively, of the variables that were statistically significant (10% significance level). For variables listed above, but not shown in the figures, they had no statistically significant impact on the dependent variables (i.e., the effect was 0).

Figure 20 reports computed sales elasticities (evaluated at the sample means) for the continuous variables and marginal effects for the binary (1/0) product-type variables. The elasticity estimates measure the percentage change in sales per customer for each one-percent change in the independent variable. For example, a one-percent increase in years of vendor selling experience leads to a 0.59% increase in average sales per customer. Elasticities greater than one are said to be 'elastic'; i.e., changes in sales are more than proportional to changes in the level of the independent variable. Conversely, elasticities less than one, are said to be 'inelastic'; i.e., changes in sales are less than proportional to changes in the level of the independent variable. The binary product-type variables are interpreted as the change in average sales per customer if that particular type of product is sold, relative to all products sold on average.

Figure 21 reports the computed odds ratio estimates from the ordered logit model on vendor satisfaction. It is easier to interpret the odds ratios for the estimated coefficients, and they are estimated by taking the exponential of the estimated coefficients from the logit model. A positive logit coefficient implies an odds ratio greater than one and that the odds of observing a higher level of vendor satisfaction category increase with a higher value of the independent variable. Negative coefficients correspond to an odds ratio estimate between zero and one, which decreases the odds when that variable increases.

Figure 20. Elasticities or Marginal Effects of Significant Factors on Sales per Customer.

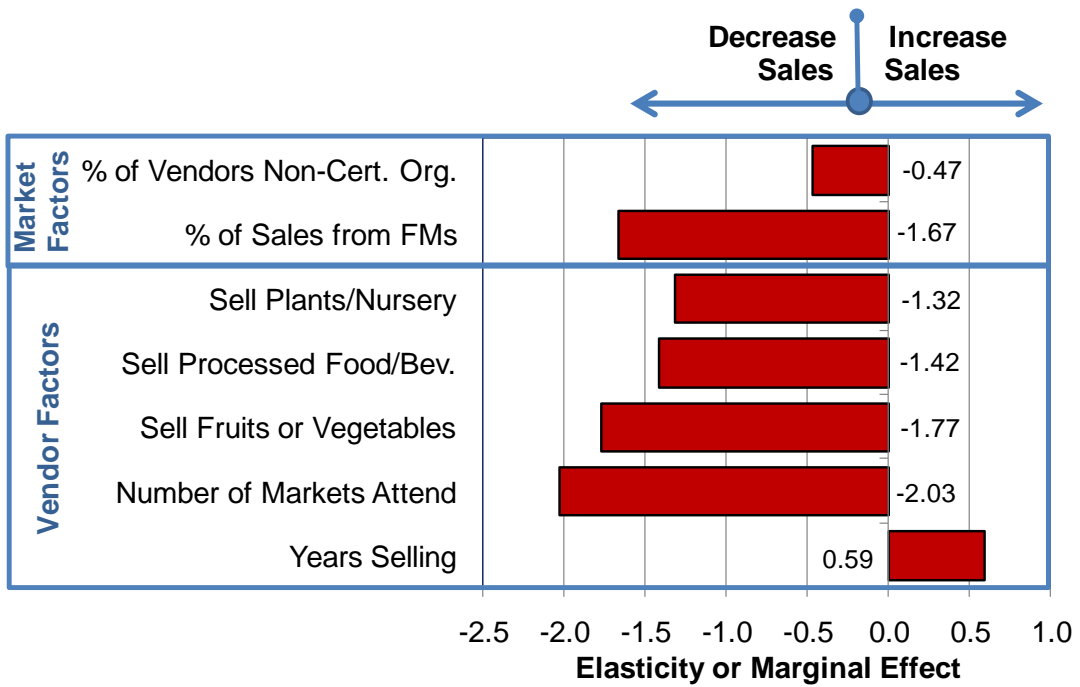
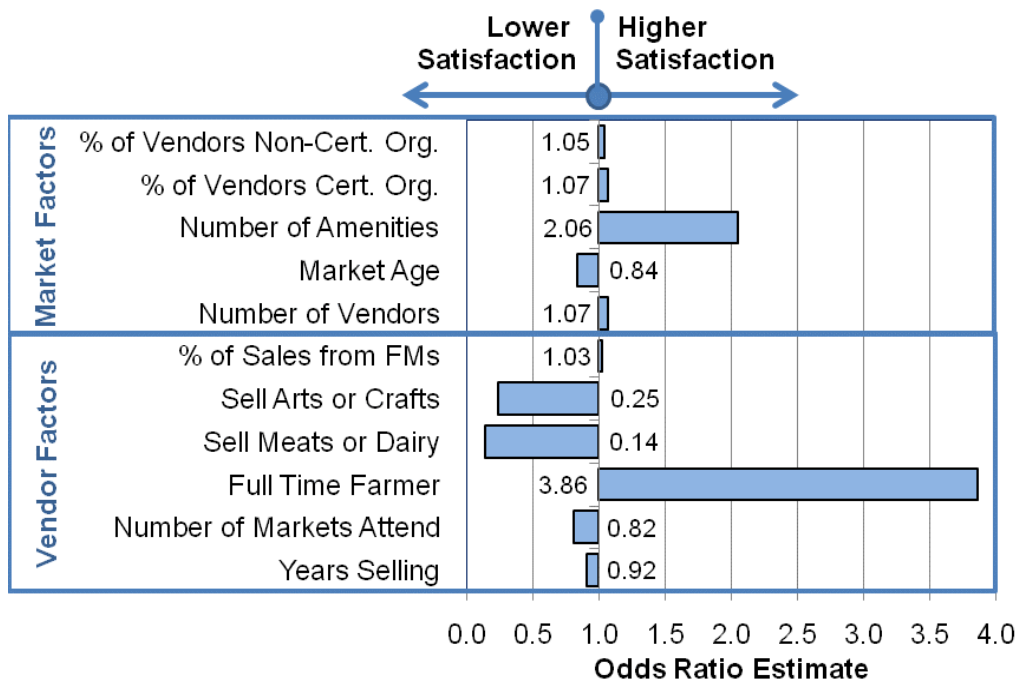


Figure 21. Odds Ratios of Significant Factors on Profit Satisfaction.



Empirical Results – Vendor Factors

Years of Selling Experience: While the years of selling experience was positively associated with the level sales per customer, vendors' profit satisfaction decreases with experience. A ten percent increase in years selling improves vendor sales by 5.9%, but for each additional year of selling the odds of being in a higher satisfaction category decrease by 8% (1-0.92). In other words, while experience matters; i.e., more experienced vendors have higher sales on average, less experienced vendors tend to be more satisfied with the overall level of performance. Such a result is consistent with the general finding that dollars and cents are not all that matters to vendors, particularly for newer FM vendors.

Number of Markets Attended: Both measures of performance are negatively related to the number of markets attended. Specifically, for each additional market attended, the odds of improving vendor satisfaction drops by 18% (1-0.82), and, for a 10% increase in markets attended sales per customer drop 20.3%. At first glance, the objective measure seems counter-intuitive. For example, vendors attending more markets are likely to be larger producers, so one might expect that as farm size grows, so should sales. However, larger farm sizes may not translate into more products for sale specifically at FMs given that other marketing channels may be utilized, and also vendor space at FMs tends to be relatively uniform, regardless of farm size. More appropriately, however, the amount of product a vendor has to sell can be assumed to be fixed regardless of the number of markets attended and, as such, as the number of markets increases, the amount sold at each market must necessarily come down. Since the odds of being satisfied with performance decreases with the number of markets attended, vendors would seem to prefer selling at a limited number of larger markets.

Farming Status: While full-time farmers were much more satisfied with their performance at FMs (i.e., the odds of full time farmers being satisfied with their performance are 3.86 times as large as the odds for part-time/hobby famers), this does not significantly translate into higher sales per customer. Similar to the number of markets attended, full-time farmers are likely to operate larger operations, but this does not mean that more product is necessarily targeted for this channel. In addition, to the customer, the level of farming status is not necessarily important to their overall purchase decisions. In general, however, it appears that full-time farmers do see the FM channel as a productive one in which to market at least a portion of their goods.

Vendor Products Sold: Relative to other vendors, vendors selling arts and crafts products or meats and dairy products were much less satisfied with their level of profitability at FMs. Even though sales per customer were actually lower for fruits and vegetable (\$-1.77), processed food and beverage (\$-1.42), and plants/nursery (\$-1.32), the odds of arts and crafts and meats and dairy vendors being satisfied were only 0.25 and 0.14 times that of the odds of all vendors, respectively. Since the goods sold by the arts and crafts and meats and dairy tend to be more expensive on a per unit basis, the objective result is not surprising. The subjective results indicate that perhaps the overall level of their performance is less than where they would like it to be.

Percent of Sales from FMs: The percent of sales from FMs can be interpreted as a proxy variable for the vendor's level of market channel diversification. One hundred percent would indicate a vendor who sells exclusively at FMs, while 50 percent would indicate that one-half of

sales are from FMs, and the other one-half is from alternative market channels (retail or wholesale). Less diversification away from FMs is associated with higher levels of vendor performance satisfaction; i.e., for a 1% increase in the percent of sales at FMs, the odds of being in a higher satisfaction category increases by 1.03. While the odds ratio is modest, a wide range in this variable is observed within the data (5 to 100%) so the cumulative effect over a large range can be substantial. Conversely, as the percentage of sales from FMs increases, sales per customer drop. That is, all else held constant, vendors focusing their selling more predominantly to FMs have lower sales. Without a precise control for farm size, this may be indicative of smaller sized overall operations with less products to sell.

Empirical Results – Market Factors

While a number of vendor factors significantly influence vendor satisfaction, fewer are significantly correlated with actual sales volume per customer.

Number of Vendors: As a proxy for market size, larger markets contributed to higher levels of vendor satisfaction, even though actual sales per customer are indifferent to market size. Specifically for a one vendor increase in the size of the market, the odds of improving vendor satisfaction are only 1.07 times as great. However, as cited above, vendor numbers vary significantly across markets (from 5 to 52) so the cumulative affect can be relatively large. Intuitively the results makes sense; i.e., given no difference in sales performance (limited competition effect); vendors are generally satisfied at markets with a higher number of vendors – a positive, perhaps altruistic grouping effect.

Number of Amenities: A similar argument can be made with the number of market amenities. While having no effect on sales per customer, for each additional market amenities, the odds of being more satisfied are improved over 2 times. Initially, it was hypothesized that increases in market amenities could lead to a larger draw at the market or longer length of stay by customers attending, and that should increase sales. While a larger draw may increase total sales, sales per customer would not necessarily be affected. In addition, the specific type of amenity added to the market could have very different effects; e.g., a picnic area versus a building or restrooms. Our simple count of amenities likely disguises this affect. Regardless, amenities strongly influence vendor satisfaction and, likely, market selection by vendors.

Vendor Composition: Both the percentage of total vendors that provide certified organic and non-certified organic products contribute positively to vendor satisfaction. For each percent increase in these portions, the odds of improving overall vendor satisfaction are improved 1.07 and 1.05 times. For conventional vendors, this may be viewed positively as they have a distinctly different (and likely lower-priced) product that can differentiate them from other vendors, while organic producers may feel more satisfied at markets with other vendors that follow and believe in organic practices. In any event, average vendor sales per customer are not statistically different with higher levels of certified organic growers, and actually are lower at markets with higher numbers of non-certified organic growers. For the latter case, it may be the case that differentiation of products is confusing to consumers when comparing the difference between “certified” and “non-certified” products, and leading to overall reduced market sales per customer.

Market Age: Interestingly, vendors at older markets tend to be less satisfied than those at more recently established markets, even though sales per customer are no different. Specifically, for each one year increase in the age of the market, the probability of improving vendor satisfaction drops 16% (1-0.84). This may be explained by a couple of factors. First is the competition effect – older markets have witnessed the strong growth in the number of FMs and new markets may well be drawing customers away from markets already established. Further, with increased consumer demand for local foods and popularity of FMs, new markets may have a ‘halo’ or ‘glow’ affect being new or these markets may more actively promote themselves to secure a steady customer base. This may imply additional importance for marketing activities at more-established markets

Empirical Results – Customer Factors

While higher average customer purchase amounts and shorter travel distances seemed to support vendor satisfaction, the results were not statistically significant. The results, if significant, would be consistent with prior research that shows FM performance is generally higher in higher income and more urban populations. The fact that these effects were not significant here may be due to the distinct differences in FMs in NNY relative to these other studies. In addition, neither effect was significant in the sales per customer model. However, these customer statistics are for only one point in time at each market, and may not be representative of general patterns seen throughout a market season.

Conclusions

Several implications can be drawn from the empirical results discussed above. First, vendor success was clearly shown to depend on more than just ‘dollars and cents’ and, as such, it is vital to consider alternative metrics when evaluating success and ways to improve market performance. Second, the distinct differences in satisfaction and sales performance across products sold highlights the difficulty for managers in providing a wide range of products to customers, while maintaining diverse vendor satisfaction.

Third, overall vendor performance would appear to be enhanced by considering farmers’ markets within a broader marketing strategy, and concentrating on a limited number of larger markets, with sufficient amenities, and a variety of production-based vendors. Finally, growth in new farmers’ markets in the region appears to have a competitive effect on established markets, emphasizing the need for effective market advertising and consideration of new market features or activities to maintain and improve market attendance.

This study provided a wealth of information to individual markets to utilize in recruiting vendors and adjusting operational and marketing procedures in response to vendor and customer comments. In addition, vendors can review the results presented here as benchmark relative to their own operations and, as such, be a useful planning tool for future FM operations. Finally, understanding customer perceptions and preferences provides useful information to both vendors and market managers, on ways to improve their operations and more effectively meet growing consumer demand.

APPENDIX I(a). 2008 NNY Farmers' Market Vendor Survey

FARMER'S MARKET FARMER/VENDOR INTERVIEW

You are being asked to participate in a 6-county research project in Northern New York focused on the identification of factors that lead to successful farmers' markets and farmer vendors. Your participation in this interview will be kept strictly confidential. No individual survey responses will be reported. A copy of the project results will be sent to you upon completion.

Interview Number: _____

Q1 . Approximately, how long have you been selling at farmer's markets? (months, years)

Q2. How many markets do you/your farm attend? Number: __

Please list market, days attending, season, and travel distance (miles).

Description	Market 1	Market 2	Market 3	Market 4
Name				
Location				
Days attending (circle)	Sun Mon Tue Wed Thu Fri Sat	Sun Mon Tue Wed Thu Fri Sat	Sun Mon Tue Wed Thu Fri Sat	Sun Mon Tue Wed Thu Fri Sat
Season (circle)	Spring Summer Fall Winter	Spring Summer Fall Winter	Spring Summer Fall Winter	Spring Summer Fall Winter
Travel distance (miles, one way)				

Q3. How do you choose which markets you will attend?

__ Location __ Market Size __ Time of Year __ Other (please list)

Q4. Overall, how satisfied are you with the managers at your market(s)?

Very satisfied	Satisfied	Neither satisfied nor unsatisfied	Unsatisfied	Very unsatisfied

Q5. What are the characteristics of a good manager? Please list.

Q7. Do you feel you can approach the manager and be listened to about concerns or suggestions about the market?

Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree

Q7. Approximately what percent of your farm income is from farmers' market sales? (Give number or select range)

< 10%	11% - 25%	26% - 50%	51-99%	100%	Don't know

APPENDIX I(a). 2008 NNY Farmers' Market Vendor Survey

Q8. I am a full time grower/farmer, part-time grower/farmer, hobby grower/farmer, retired grower/farmer, other (select one).

Full-time grower/farmer	Part-time grower/farmer	Hobby grower/farmer	Retired grower/farmer	Other

Q9. What do you like best about selling at the farmers' market? Please list/describe.

Q10. How do you rate your direct marketing skills?

Successful	Average	Needs Improvement	Don't know

Q11. List the types of products you sell, and rank them by total sales.

Product	Sales Rank		Product	Sales Rank

Q12. Approximately how many customers stop by your booth each market day?

Day	Less than 25	25 - 50	50 - 100	100 - 150	More than 150
Weekday					
Weekend					

Q13. What are your average gross sales each market day?

Day	< \$25	\$25-50	\$50-100	\$100-200	\$200-300	\$300-400	\$400-500	\$500 +
Weekday								
Weekend								

Q14. Do you have a written business plan of any kind for your farmers' market enterprise?

Yes
 No
 Don't know

Q15. Describe the size of your operation based on the metrics below (select all that apply). How does the size of your operation compare with 3 years ago (larger, smaller, ~same)?

	Employee Count	Output value/sales	Acres	Livestock head
Size / Level				
Size Change				
Don't know				

APPENDIX I(a). 2008 NNY Farmers' Market Vendor Survey

Q16. Select all of the marketing outlets through which you normally sell your farmers' market-type products. In the column next to each outlet, estimate the percentage of total retail sales coming from that outlet.

Outlet	Sell – Yes/No	Percent of total sales	Don't know
Retail – Farmers' Market			
Retail – Roadside Stand			
Retail – Greenhouse / Nursery			
Retail – Pick Your Own			
Retail – Farmhouse or Out-Building			
Retail – Community Supported Agriculture			
Retail – Other:			
Wholesale – Packer			
Wholesale – Grocery Store			
Wholesale – Produce Stand			
Wholesale – Restaurant			
Wholesale – Greenhouse / Nursery			
Wholesale – Specialty Store			
Wholesale – Farmers' Market Vendors			
Wholesale – Other:			

Q17. What percent of all products sold at the farmers market is grown or prepared by you and your operation (not resold)?

< 25% 25% – 50% 51% – 75% 76% - 100% Don't know

Q18. Do you sell value-added products such as baked goods, preserves, dried flowers, etc. at the farmers' market?

Yes No Don't know

Q19. Do you sell organically grown or made products at the market (including certified organic, non-certified organic, or transitioning to organic)? If so, what percent of your total product sold is organic? Is the percent increasing, decreasing, or staying the same?

Sell Organic?	% sold organic?	Change in percent of product sold organic		
		Increasing	Decreasing	About the same

Q20. Rank the following reasons why you choose to sell your products at a farmers market.

Reason	Rank
Convenience	
Receive retail value for products sold	
Customer interaction	
To advertise your products	
To sell excess products unsold through other outlets	
To sell surplus produce from your garden	
Other:	

APPENDIX I(a). 2008 NNY Farmers' Market Vendor Survey

Q21. Indicate methods used to promote the sale of your product at the farmers' market? For each indicate how effective it was for you.

Promotion Method	Have used (yes/no)	Level of Effectiveness		
		Very Effective	Somewhat Effective	Not Effective
Signs indicating your price				
Signs for product information				
Recipes				
Taste testing/samples				
Bulk discounts				
Other:				

Q22. Rank the top 3 methods that best describe how you normally determine your prices at the farmers' market?

Pricing method	Rank
Grocery store comparison	
Matching other vendors' prices	
Pricing below other vendors	
Internet	
Cost of production plus mark-up	
Pricing above other vendors	
Charge the same as always	
Other:	

Q23. How do you measure your success at the farmer's market you attend? Select any two.

Measuring Success	Use
Gross sales	
Net sales	
Selling enough to cover expenses	
Selling out enough products to go home early	
Selling most of your products by the end of the market day	
Having return customers	
Other:	

Q24. How do you see your business at farmers' markets changing over the next 3 years? I expect my business to:

___ Expanding ___ Decreasing ___ Staying the same.

Q25. How satisfied are you with the profitability of the farmer's market portion of your sales?

Very satisfied	Satisfied	Neither satisfied nor unsatisfied	Unsatisfied	Very unsatisfied

APPENDIX I(a). 2008 NNY Farmers' Market Vendor Survey

Q26. What items would you like to see changed at the farmers markets you attend and in what direction?

Item	Increase	Decrease	No Change
Market hours			
Days open for business			
Length of market season			
Market location (move or no change)			
Market area (size)			
Availability of shade			
Stall fee			
Membership dues			
Amount of advertising			
Number of customers			
Number of produce vendors			
Number on non-produce vendors			
Quality of market management			
Other:			

Q27. Which of the following do you feel your market more often needs: more produce, more non-produce products, or more customers? If produce or non-produce products, is it quantity or variety?

- | | | |
|--|--|---|
| <input type="checkbox"/> More produce | <input type="checkbox"/> More non-produce products | <input type="checkbox"/> More customers |
| <input type="checkbox"/> More produce variety | <input type="checkbox"/> More non-produce variety | |
| <input type="checkbox"/> More produce quantity | <input type="checkbox"/> More non-produce quantity | |

Q28. From your perspective as a vendor, would you agree with the statement that your Farmers' Market is "successful", for the market, for the vendors, and for the local community?

Success Focus	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Market					
Farmer Vendor					
Community					

Q30. What do you consider the greatest strength of your market?

Q31. What do you consider the greatest threat to your market?

APPENDIX I(b). 2008 NNY Farmers' Market Manager Survey

FARMER'S MARKET MANAGER INTERVIEW

You are being asked to participate in a 6-county research project in Northern New York focused on the identification of factors that lead to successful farmers' markets and farmer vendors. Your participation in this interview will be kept strictly confidential. No individual survey responses will be reported. A copy of the project results will be sent to you upon completion. If you agree to participate in this interview, please sign below next to your printed name. Thanks!

Date: _____
Name: _____
Address: _____
Phone: _____
Fax: _____
Email: _____
Web: _____

Q1 . On average how many customers come to your market per market day?
 __ < 25 __ 25 – 50 __ 51 – 100 __ 101 – 200 __ 201 - 400 __ > 400 __ Don't know

Q2 . On average how many vendors come to your market per market day?

Market	Number	Don't know
Weekday		
Weekend		

Q3 . How long has your market existed at its current location and community?

Time Frame	Current Location	Within Community
Less than 2 years		
2 to 5 years		
6 to 10 years		
Over 10 years		

Q4. What are the busiest market hours (weekday and weekends)?

Market Hour	Weekday	Weekend
1 st hour of market		
2 nd hour of market		
Middle of market day		
Last hour of market		
Other:		

Q5. . Does your market operate as a membership organization? If yes, are there dues and how much are they?

Membership Organization: __ Yes __ No __ Don't know
 Level of Dues, and time period: _____; __ Don't know

Q6. Does the market have a governing board, e.g., board of directors? If yes, how many members and how elected?

Governing Board: __ Yes __ No __ Don't know
 Number of members: _____ How elected: _____

APPENDIX I(b). 2008 NNY Farmers' Market Manager Survey

Q7. Does the market operate under a set of by-laws or regulations? If so, may we have a copy?

By-laws Regulations Both Neither Don't know

Q8. How would you describe your position as a market manager/coordinator?

Employed by market Employed by city Employed by county
 Contract/Reimbursed Volunteer Other _____

Q9. As a market manager, which best describes amount of time allocated to these duties?

Full time Half time Quarter time Other

Q10. Have you received any specialized training as a market manager?

Yes No Don't know

Q11. Do you feel you would benefit from specialized market manager training?

Yes No Don't know

Q12 . What amenities are available at your market, you wish were available, and the level of importance of each?

Amenity	Availability		Amenity Importance			
	yes /no	If no, desired?	Very Important	Important	Not Important	Don't Know
Restrooms						
Electrical hookups						
Convenient parking						
Ample parking						
Hand washing facilities						
Water fountains						
Refrigeration						
Concessions (food or drink)						
Building						
Shade from trees						
Shade from structures						
Picnic area						
Other: _____						

Q13. Rank the following expenses your market incurs each year, ranking from largest to lowest expense

Rent Utilities Salary Advertising Insurance
 Special Events Other Don't know

Q14. What is the stall fee for vendors?

Weekday: _____ Weekend: _____ Season: _____ Don't Know _____

APPENDIX I(b). 2008 NNY Farmers' Market Manager Survey

Q15. Do you receive any kind of support from other organizations? If so, from whom and what level/type of support?

Organization	Yes	No	Level/Type	Don't know
Chamber of Commerce				
County Extension (CCE)				
Municipal (city, town, county)				
Local Businesses				
Churches				
NY Dept. of Agriculture				
NY Farmers Market Federation				
Other:				

Q16. What types of advertising and promotions does your market do and how important is each?

Advertising / Promotion	Utilize?		Level of Importance		
	Yes / No	Don't know	Very	Some-what	Not
Newspaper ads					
Radio ads					
Internet / website					
Posters and flyers					
Signs, signage					
Press releases					
Church or volunteer donations					
Other:					

Q17. How do vendors choose their spaces at the market location, does it vary by weekday or weekend?

Category	Weekday	Weekend
Seniority		
First come, first serve		
Random drawing		
Product volume		
Assigned		
Other:		

Q18. Do you provide training or mentoring for new vendors on how to display their products?

Yes No Don't know

Q19. Do you feel that rivalry among vendors is a problem at your market? If so, is it related to price, venter location, or other?

Yes No Don't know
 Price
 Location
 Other:

APPENDIX I(b). 2008 NNY Farmers' Market Manager Survey

Q20. Does your market sell crafts? If so, what is the proportion of total vendors?

Yes No Don't know
 Proportion of vendors

Q21. Does your market have food and drink concessions? If so, what is the proportion of total vendors?

Yes No Don't know
 Proportion of vendors

Q22. What percent of vendors sell the following types of produce?

Percent of Vendors	Conventional	Certified Organic	Non-certified Organic	Transition to Organic	Organically made or processed	Certified Natural	Certified Humane	Other
None								
Less than 10%								
11% to 25%								
26% to 50%								
51% to 75%								
76% to 99%								
All								
Don't know								

Q23. Is the number of vendors selling various types of produce increasing, decreasing, or staying the same?

Vendor	Increasing	Decreasing	Staying the same	Don't know
Conventional				
Certified organic				
Non-certified organic				
Transitioning to organic				
Organically made or processed				
Certified Natural				
Certified Humane				
Other				

Q24. Does the market specify a certain percentage of produce that must be grown by the vendor? If so, what is the minimum percentage how do you enforce it?

Yes No Don't know
 Minimum percent: _____
 Enforcement mechanism: _____

Q25. Are wholesalers or resellers allowed to sell at the market you manage?

Yes No Don't know

Q26. Do you have authority to deal with product quality concerns at your market? If so, how?

Yes No Don't know
 How? _____

APPENDIX I(b). 2008 NNY Farmers' Market Manager Survey

Q27. Compared to last year, are vendor numbers and average sales growing, declining, or staying about the same?

Vendor Numbers			Annual Sales		
Growing	Declining	~ Same	Growing	Declining	~ Same

Q28. Which of the following do you feel your market more often needs: more produce, more non-produce products, or more customers. If produce or non-produce products, is it quantity or variety?

- | | | |
|--|--|---|
| <input type="checkbox"/> More produce | <input type="checkbox"/> More non-produce products | <input type="checkbox"/> More customers |
| <input type="checkbox"/> More produce variety | <input type="checkbox"/> More non-produce variety | |
| <input type="checkbox"/> More produce quantity | <input type="checkbox"/> More non-produce quantity | |

Q29. From your perspective as a market manager, would you agree with the statement that your Farmers' Market is "successful", for the market, for the vendors, and for the local community?

Success Focus	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Market					
Farmer Vendor					
Community					

Q30. What do you consider the greatest strength of your market?

Q31. What do you consider the greatest threat to your market?

Q32. What would you like to see happen that would help your market if you had the money?

APPENDIX I(c). 2008 NNY Farmers' Market Rapid Market Assessment Survey

FARMERS' MARKET CUSTOMER RAPID MARKET ASSESSMENT

General Information

Rapid Market Assessments (RMA) will be conducted at farmers' market in six Northern New York counties (Jefferson, Lewis, Essex, St. Lawrence, Clinton, and Franklin). The RMA will consist of two components: market attendance counts and dot poster customer surveys. A complete description of the dot poster survey procedure is included in the attached document, *Tools for Rapid Market Assessments* (Lev, Brewer, and Stephenson, 2004).¹⁸ Below we briefly describe how the attendance counts will be conducted and a list of potential questions for display at the farmers' markets. Given space and staff constraints, 3 to 6 questions will be asked at each market.

Attendance Counts

Attendance counts will be used to estimate vendors' potential sales, estimate potential spillover sales to neighboring businesses, and document to community leaders the market's role as a social center.

Since counting everyone entering the market is difficult, we will use the accepted procedure in Lev, Brewer, and Stephenson (2004). A dedicated staff member will use hand-held tally counters to count every adult entering the market during a specified 10-minute period each hour during regular business hours. Re-enters will not be counted. While specific to that particular day, the procedure will provide an acceptable estimate of total attendance by multiplying each 10-minute count by 6 and summing over all hours.

Potential Dot Poster Survey Questions

From the list of questions below, a group of 3 to 6 questions will be on display at each market. Customers will be asked to participate as they enter the market. See Lev, Brewer, and Stephenson (2004) for a complete operational procedure.

Q1. What is your average purchase amount per visit to the Farmers' Market?

Day	\$10 or less	\$11 - \$25	\$26 - \$50	\$51- \$75	\$76 - \$100	More than \$100
Weekday						
Weekend						

Q2. On average, if a specific item costs \$1.00 in the grocery store, how much would you be willing to pay in the farmers' market for a similar product produced locally?

< \$1 \$1 \$1.01 - \$1.50 \$1.51 - \$1.99 \$2 > \$2

Q3. How has shopping at this farmers' market affected your frequency of shopping at other local businesses and restaurants?

More Often Less Often No Effect

Q4. Do you find you eat *healthier* as a result of attending the farmers' market?

Yes No Don't know

Q5. As a result of attending the farmers' market, has you or your family's consumption of fresh fruits and vegetables changed?

Increased Decreased Stayed the Same

¹⁸ Lev, L., L. Brewer, and G. Stephenson. 2004. "Tools for Rapid Market Assessments." Oregon Small Farms Technical Report No. 6. Oregon State University Extension Service. Available online at www.oregonfarmersmarkets.org/create/Rapid%20Market%20Assessments%20DEC.21%202004version%20With%20cover%205.pdf

APPENDIX I(c). 2008 NNY Farmers' Market Rapid Market Assessment Survey

Q6. Which of the following best describes your farmers' market experience? Select one.

Farmers' Market Experience	Select one
I buy local because I want the freshest products possible	
Farmers' Markets help keep small farms viable	
Agriculture is an important part of the NY rural landscape	
Farmers' Markets provide a sense of and improve my community	
Farmers' Markets improve my connection between farmers and to my food	
Buying local foods lessens the environmental impact of trucking and shipping	

Q7. What is your primary reason for coming to the market today? Select one.

Primary Reason	Select one
Local agricultural products	
Organic agricultural products	
The atmosphere	
Prepared foods	
Arts and crafts	

Q8. How far do you travel to get to the farmers' market?

< 1 mile 1 – 5 miles 6 - 10 miles 11 to 20 miles > 20 miles

Q9. Approximately, how often do you shop at this market?

> 1X/per week 1X/week 2-3X/month 1X/month < 1X/month

Q10. How does the number of visits compare to last year?

More Less About the Same

Q11. What market advertising, if any, influences your attendance at this market? What approaches are most effective to you? Check all that apply.

	Influential?	Effective?		
	Yes	Very	Some-what	Not
Newspaper ads				
Radio ads				
Internet / website				
Posters and flyers				
Roadside signs				
Press releases				
Word of mouth				
Other:				

Q12. On average, how often do you prepare meals at home?

0X/week 1-3X/week 4-7X/week 8-14X/week >14X/week

Q13. When you have a choice between organic and non-organic produce at the farmers' market, which do you choose?

Organic Non-Organic About the same for each

APPENDIX I(c). 2008 NNY Farmers' Market Rapid Market Assessment Survey

Q14. How many farmers markets do you regularly visit? Select one. Has this number been increasing, decreasing, or staying about the same over previous years?

Number of farmers' markets regularly visited	Select one	Number attending has been:		
		Increasing	Decreasing	About the same
1				
2				
3				
4				
More than 4				
None				

Q15. To increase your spending, the market should offer more (choose only one):

- Organic Produce Cheese Prepared food Meat (beef, pork)
 Poultry Crafts/Clothing/Art, etc.

Q16. Rate the farmers' market characteristics (very good, good, fair, poor): quality of products, appearance, convenience of location, friendliness/attitude of vendors, prices, parking.

Characteristic	Very good	Good	Fair	Poor
Quality of products				
Variety of products				
Appearance of facility				
Convenience of location				
Friendliness/attitude of vendors				
Prices				
Parking				

Q17. From your perspective as a customer, would you agree with the statement that your Farmers' Market is "successful", for the market, for the vendors, and for the local community?

Success Focus	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Market					
Farmer Vendor					
Community					

APPENDIX II(a) 2008 NNY Farmers' Market Manager Survey Summary

PART ONE:

Market Manager Survey Summary, NYS North Country Farmers' Markets, Summer 2008

Market Breakdown by Days of Operation

Market Day	Number	Percent
Weekday	16	59.26
Weekend	8	29.63
All Days	3	11.11
<i>N = 27 markets</i>		

Market Surveys Returned?

Farmers' Market	Yes/No		Farmers' Market	Yes/No
Alexandria Bay	No		Ogdensburg	Yes
Brasher Falls	No		Paul Smith's	Yes
Canton	Yes		Plattsburg Green	No
Cape Vincent	Yes		Plattsburg FC	Yes
Carthage	Yes		Potsdam	Yes
Chateaugay Lakes	Yes		Saranac	Yes
Clayton	No		Saranac Lake	Yes
Elizabethtown	Yes		Stone Mills	No
Gouverneur	Yes		Watertown CCE	Yes
Keene	Yes		Watertown Fairgrounds	Yes
Lowville	Yes		Watertown Jeff Bulk	Yes
Malone	No		Watertown SOB	Yes
Massena	Yes		Wilmington	Yes
Norwood	Yes			
<i>Number Reporting: N = 21 out of 27</i>				

APPENDIX II(a) 2008 NNY Farmers' Market Manager Survey Summary

1. On average how many customers come to your market per market day?

Answer, %	Weekday	Weekend	All
Less than 25	0.00	0.00	0.00
25 - 50	20.00	60.00	29.41
51 - 100	0.00	0.00	0.00
101 - 200	70.00	20.00	52.94
201 - 400	10.00	0.00	11.76
More than 400	0.00	20.00	5.88
<i>Number of Markets</i>	<i>10</i>	<i>5</i>	<i>17</i>
<i>Weighted Average Customers/day</i>	<i>143</i>	<i>153</i>	<i>155</i>

2. On average how many vendors come to your market per market day?

Answer, Number	Average	Minimum	Maximum
Weekday (<i>N</i> = 11)	10.75	4.00	52
Weekend (<i>N</i> = 8)	13.74	4.00	27
All Days (<i>N</i> = 17)	12.61	4.00	52

3. How long has your market existed at its current location and community?

Answer, %	Current Location	Within Community
Less than 2 years	19.05	19.05
2 to 5 years	9.52	4.76
6 to 10 years	28.57	19.05
Over 10 years	42.86	57.14
<i>Number of Markets</i>	<i>21</i>	<i>21</i>

4. What are the busiest market hours (weekday and weekends)?

Answer, %	Weekday	Weekend
1 st hour of market	53.85	40.00
2 nd hour of market	7.69	10.00
Middle of market day	23.08	50.00
Last hour of market	0.00	0.00
Other:	15.38	0.00
<i>Number of Markets</i>	<i>13</i>	<i>10</i>

5. Does your market operate as a membership organization? How much are the dues?

Answer, %, \$	Percent Yes	Dues Average	Dues Minimum	Dues Maximum
Membership Organization	76.19	\$38.54	\$30.00	\$54.50
<i>Number of Markets</i>	<i>21</i>	<i>14</i>	<i>14</i>	<i>14</i>

6. Does the market have a governing board of directors? If yes, how many members

Answer, %, Num	Percent Yes	Board Size Average	Board Size Minimum	Board Size Maximum
Board of Directors	61.90	9.33	3	18
<i>Number of Markets</i>	<i>21</i>	<i>12</i>	<i>12</i>	<i>12</i>

7. Does the market operate under a set of by-laws or regulations?

Answer, %, \$	Percent Yes
By-laws / Regulations	100.00
<i>Number of Markets</i>	<i>20</i>

APPENDIX II(a) 2008 NNY Farmers' Market Manager Survey Summary

8. How would you describe your position as a market manager/coordinator?

Category	Percent
Employed by Market	38.10
Employed by City	4.76
Employed by County	0.00
Contract/Reimbursed	14.29
Volunteer	23.81
Other	19.05
<i>Number of Markets</i>	<i>21</i>

9. As a market manager, which best describes amount of time allocated to these duties?

Category	Percent
Full-Time	23.81
Half-Time	14.29
Quarter-Time	23.81
Less than Quarter-Time	38.10
<i>Number of Markets</i>	<i>21</i>

10. Have you received any specialized training as a market manager?

11. Do you feel you would benefit from specialized market manager training?

Answer, %, <i>(N=21)</i>	Percent Yes
Specialized Training <i>(N=21)</i>	19.05
Would benefit from specialized training <i>(N=16)</i>	56.25

12. What amenities are available at your market and the level of importance of each?

Amenity (ranked from most important to least important)	Percent Yes	Importance (Percent by Category)			Average Importance Score
		Very Important	Important	Not Important	
Convenient parking <i>(N = 20)</i>	100.00	100.00	0.00	0.00	2.00
Ample parking <i>(N = 18)</i>	77.78	84.62	15.38	0.00	1.85
Restrooms <i>(N = 20)</i>	85.00	75.00	25.00	0.00	1.75
Concessions (food or drink) <i>(N = 18)</i>	50.00	45.45	36.36	18.18	1.27
Shade from trees <i>(N = 18)</i>	66.67	30.00	60.00	10.00	1.20
Shade from structures <i>(N = 17)</i>	58.82	33.33	41.67	25.00	1.08
Building <i>(N = 19)</i>	26.32	41.67	25.00	33.33	1.08
Hand washing facilities <i>(N = 20)</i>	55.00	38.46	23.08	38.46	1.00
Electrical hookups <i>(N = 20)</i>	75.00	23.08	30.77	46.15	0.77
Picnic area <i>(N = 18)</i>	61.11	10.00	50.00	40.00	0.70
Water fountains <i>(N = 20)</i>	20.00	7.69	30.77	61.54	0.46
Refrigeration <i>(N = 18)</i>	11.11	0.00	30.00	70.00	0.30

*Importance Rating Scores: 0 = not important, 1 = important, 2 = very important
Average Number of Amenities Available = 7.27. Min = 4, Max = 11*

13. Rank the following expenses your market incurs, from largest to lowest expense.

Expense Category	Average Rank	Highest Rank	Lowest Rank
Insurance <i>(N=14)</i>	1.21	1.00	2.00
Advertising <i>(N = 18)</i>	1.44	1.00	3.00
Salaries <i>(N = 8)</i>	1.75	1.00	3.00
Special Events <i>(N = 9)</i>	1.89	1.00	3.00
Rent <i>(N = 4)</i>	2.75	1.00	4.00
Other <i>(N = 4)</i>	2.75	2.00	3.00

Expenditure categories ranked from most expensive to least expensive, where 1 = most expensive

APPENDIX II(a) 2008 NNY Farmers' Market Manager Survey Summary

14. What is the stall fee for vendors?

Category	Average	Minimum	Maximum
Weekday market fee, \$/day (N=11)	\$13.45	\$0.00	\$35.00
Weekend market fee, \$/day (N = 9)	\$11.44	\$5.00	\$20.00
Full Season fee, \$/season (N = 9)	\$68.56	\$25.00	\$235.00
<i>Expenditure categories ranked from most expensive to least expensive, where 1 = most expensive</i>			

15. What types of advertising and promotions does your market do and how important is each?

Advertising & Promotion (ranked from most important to least important)	Percent Yes	Importance (Percent by Category)			Average Importance Score
		Very Important	Important	Not Important	
Signs, signage (N=21)	95.24	90.00	10.00	0.00	1.90
Press releases (N=21)	71.43	88.24	11.76	0.00	1.88
Posters and flyers (N=21)	66.67	82.35	17.65	0.00	1.82
Newspaper ads (N=21)	80.95	81.25	18.75	0.00	1.81
Radio ads (N=21)	47.62	76.92	23.08	0.00	1.77
Internet / website (N=21)	66.67	64.29	21.43	14.29	1.50
<i>Importance Rating Scores: 0 = not important, 1 = important, 2 = very important</i>					
<i>Average Number of Advertising Forms Utilized = 3.43, Min = 1, Max = 5</i>					

16. How do vendors choose their spaces at the market location?

Category	Percent
Seniority	9.09
First come, first serve	9.09
Random drawing	0.00
Product volume	0.00
Assigned	27.27
Other:	54.55
<i>Number of Markets</i>	<i>11</i>

17. Do you provide training or mentoring for new vendors on how to display their products?

Answer, %	Percent Yes
Vendor Training or Mentoring	52.63
<i>Number of Markets</i>	<i>19</i>

18. Is rivalry among vendors a problem at your market?

Answer, %	Percent Yes
Vendor rivalry problem	33.33
<i>Number of Markets</i>	<i>21</i>

19. Does your market sell crafts or have food and drink concessions? If so, what are the percentages of total vendors?

Answer, %	Percent Yes	Percent of Total Vendors		
		Average	Minimum	Maximum
Market Sells Crafts	85.71	26.56	5.00	70.00
Food and Drink Concessions	57.14	--	--	--
<i>Number of Markets</i>	<i>21</i>	<i>16</i>	<i>16</i>	<i>16</i>

APPENDIX II(a) 2008 NNY Farmers' Market Manager Survey Summary

20. What percent of vendors sell conventional, certified organic, and non-certified organic products at your market? Are they increasing, decreasing, or staying the same?

Category, Percent	Conventional	Certified Organic	Non-Certified Organic
Percent of Vendors:			
Average	62.27	8.00	22.06
Minimum	5.00	0.00	0.00
Maximum	100.00	63.00	88.00
<i>Number of Markets</i>	<i>18</i>	<i>18</i>	<i>18</i>
Change in Vendor Numbers:			
Decreasing	10.53	10.00	7.14
Same	42.11	40.00	50.00
Increasing	47.37	50.00	42.86
<i>Number of Markets</i>	<i>19</i>	<i>10</i>	<i>14</i>

21. Does the market specify a certain percentage of produce that must be grown by the vendor? What is the minimum percentage? Are wholesalers or resellers allowed to sell? Do you have authority to deal with product quality concerns at your market?

Answer, %	Percent Yes	Minimum % Own-Produce Requirement		
		Average	Minimum	Maximum
Minimum % Own-Produce (<i>N = 21</i>)	100.00	69.81	40.00	100.00
Wholesalers or Re-sellers Allowed (<i>N = 18</i>)	27.78	--	--	--
Manager has authority over quality (<i>N = 18</i>)	89.47	--	--	--

Summary of enforcement mechanisms to ensure market-specified minimum percentage of produce that must be grown by the vendor:

- Farm inspections, crop plans (2)
- Honor system/ trust
- Talk to vendors
- Manager Supervision, Eyeball it (2)
- Board Actions, Rules/ violation= expulsion (2)

22. Compared to last year, are vendor numbers and average sales growing, declining, or staying about the same?

Change from Last Year, %	Vendor Numbers	Vendor Sales
Decreasing	15.00	22.22
About the Same	20.00	16.67
Increasing	65.00	61.11
<i>Number of Markets</i>	<i>20</i>	<i>18</i>

23. From your perspective as a market manager, would you agree with the statement that your Farmers' Market is "successful", for the market, for the vendors, and for the local community?

Category, %	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Market (<i>N = 21</i>)	85.71	4.76	4.76	4.76	0.00
Vendor (<i>N = 21</i>)	80.95	14.29	0.00	4.76	0.00
Community (<i>N = 21</i>)	80.95	4.76	9.52	4.76	0.00

APPENDIX II(a) 2008 NNY Farmers' Market Manager Survey Summary

24. Which do you feel your market more often needs: more produce, more non-produce products, or more customers. Is it quantity or variety that is most important?

Category	Percent
More customers (N=14)	70%
More produce variety (N=10)	50%
More non- produce quantity (N=4)	20%
More produce quantity (N=4)	20%
More non-produce variety (N=2)	10%

25. Do you receive any kind of support from other organizations? If so, from whom and what level/type of support?(N = 20)

Organization	Percent Yes	Type and/or Level of Support
Chamber of Commerce	30.00	Sponsor, manager, full, total
CCE	55.00	Senior Nutrition Coupons, EBT, WIC, Fresh Checks, host, education, information, expertise, guidance, advertising
Municipal (city, town, county)	35.00	Free space, co-manager, grant writing, building, property, parking
Local Business	20.00	Purchase through market, location, advertising
Churches	5.00	Storage space, park, insurance, dispute resolution, volunteers
NY Dept of Agriculture	50.00	WIC coupons, signs, education, support, information, guidance, FMNP
NY Farmers' Market Federation	75.00	Information, manager training, EBT, food stamps, program support, guidance, advice, advertising, insurance
Other	35.00	Garden share; seed corn (501C3) insurance; Public Health, advertising, educational support; Ag society/ Fair Board sponsor; Neighborhood Thrift Shop; College location, budget, salary, tent storage; advertising

26. What do you consider the greatest strength of your market? (Summary of Responses)

- **Vendor Characteristics (10):** Rapport with customers, product variety, product quality, pride, core vendor participation, consistency
- **Strengthens Community (7):** Weekly newspaper articles, locally grown and operated, meeting consumer demands for local, connecting public with producers
- **Partnerships with Other Organizations (5):** Cornell Cooperative Extension, Adirondack Farmers' Market Cooperative, Town/Village, Other
- **Customer Base (4):** Loyalty, market integrity, market longevity, market growth
- **Location (2)**
- **Product Prices and Sales (2):** Low prices, ability to accept food stamps and debit/credit

27. What do you consider the greatest threat to your market?

- **Vendor Conflict (6):** Consistent vs. Occasional/New, Not following market rules, not following state requirements, Vendor burn-out, back-stabbing, no vision and cooperation to grow
- **Small Market Size – Vendors (4):** Not large enough to attract a strong, steady customer stream, decline in number of area farmers, not enough vendors
- **Small Market Size – Customers (3):** lack of customers, dependent on high income buyers and tourists, variation in customer numbers makes difficult to plan product needs
- **Space Limitations (3):** running out of room, limited parking, no room for more vendors
- **Technical Resource Barriers (1):** Inability to use EBT program
- **Operational Costs (1):** Increasing insurance cost
- **Competition (1):** Growth in individual fruit and vegetable stands
- **Economy (1)**
- **None (1)**

APPENDIX II(a) 2008 NNY Farmers' Market Manager Survey Summary

28. What would you like to see happen that would help your market if you had the money?

- **Building/Site Improvements (9):** more parking, building improvements, side curtains, permanent structure, roof and vendor stalls, electricity, better equipment available, EBT phone line, larger space, sound system, pavilion
- **More Advertising and Exposure (6):** advertising, improved signage, media coverage, more "buy local, be local" advertising, direct mailing to all community postal customers
- **Offer Entertainment and Educational Programs (5):** music entertainment, children's programs, hands-on demonstrations
- **Improved Market Manager Responsibility and Compensation (3):** expand duties, better compensation and benefits, ease burden of market officers and board members, stipends for market interns
- **Grow the market (3):** open more than just Saturday, extend season longer
- **Increase Local Restaurant Shopping (1)**

END OF MARKET MANAGER SURVEY SUMMARY (PART ONE)

APPENDIX II(b) 2008 NNY Farmers' Market Vendor Survey Summary

PART TWO

Vendor Survey Summary, NYS North Country Farmers' Markets, Summer 2008

Total Number of Vendors Returning Survey = 124

Participating Vendors by County of Residence

County	Percent
Clinton	13.58
Essex	8.64
Franklin	2.47
Jefferson	23.46
Lewis	14.81
Oswego	1.23
St. Lawrence	34.57
Vermont (State)	1.23
<i>Number reporting: N = 81</i>	

Percent of Sample Vendors Attending Study Markets

Farmers' Market	% of Vendors that Attend		Farmers' Market	% of Vendors that Attend
Alexandria Bay**	2.5%		Ogdensburg	7.4%
Brasher Falls**	0.0%		Paul Smith's	6.6%
Canton	17.2%		Plattsburg Green**	4.1%
Cape Vincent**	0.8%		Plattsburg FC	9.8%
Carthage	11.5%		Potsdam**	4.1%
Chateaugay Lakes	4.9%		Saranac**	0.8%
Clayton	5.7%		Saranac Lake**	1.6%
Elizabethtown	8.2%		Stone Mills**	0.8%
Gouverneur	5.7%		Watertown CCE	5.7%
Keene	18.9%		Watertown Fairgrounds**	4.1%
Lowville	11.5%		Watertown Jeff Bulk**	3.3%
Malone	4.9%		Watertown SOB	10.7%
Massena	4.9%		Wilmington**	2.5%
Norwood**	2.5%			
<i>Number Reporting: N = 122</i>				

****Vendor Summary by Market Not Completed.** To maintain confidentiality, vendor survey summaries by market are completed only for those markets with more than five corresponding vendor surveys returned. The individual market summaries are available upon request.

Note below: "Prepared Foods" = prepared ready for consumption at market; i.e., concessions. "Other Foods" = other processed foods for sale; i.e., baked goods, wines, jams/jellies, etc.

APPENDIX II(b) 2008 NNY Farmers' Market Vendor Survey Summary

1. How many years have you been selling at farmer's markets? How many markets do you attend? What is the average travel distance (one-way) to the markets you attend?

Category	Average	Minimum	Maximum
Years Selling (N = 97)	5.92	0.00	30.00
Number of Markets Attend (N = 122)	2.07	1.00	18.00
Average one-way travel distance to markets (N = 175)	24.13	0.00	200.00

Distribution of Markets Attended	Percent
One	49.18
Two	24.59
Three	15.57
Four	5.74
Five or more	4.92
<i>Number Reporting: N = 122</i>	

2. How do you choose which markets you will attend?

Market Choice Factor	Percent
Location	78.33
Market Size	37.50
Time of Year	27.50
Other	24.17
<i>Number Reporting: N = 122</i>	

3. Overall, how satisfied are you with the managers at your market(s)?

Level of Manager Satisfaction	Percent
Very Satisfied	60.83
Satisfied	33.33
Neither satisfied nor unsatisfied	2.50
Unsatisfied	0.83
Very Unsatisfied	2.50
<i>Number Reporting: N = 120</i>	

4. Can approach the manager and be listened to about concerns or suggestions about the market?

Manager Approachable	Percent
Strongly Agree	58.62
Agree	33.62
Neither agree nor disagree	4.31
Disagree	1.72
Strongly Disagree	1.72
<i>Number Reporting: N = 116</i>	

5. Approximately what percent of your farm income is from farmers' market sales?

Farmers Market Income Level	Percent
Less than 10%	28.57
11% - 25%	15.31
26% - 50%	26.53
51% - 75%	17.35
75% - 100 100%	6.12
Don't know	6.12
Average	35.25
<i>Number Reporting: N = 98</i>	

APPENDIX II(b) 2008 NNY Farmers' Market Vendor Survey Summary

6. I am a full time, part-time, hobby, or retired grower/farmer, or other.

Vendor Status	Percent
Full-time grower/farmer	28.87
Part-time grower/farmer	27.84
Hobby grower/farmer	10.31
Retired grower/farmer	15.46
Other	17.53
<i>Number Reporting: N = 97</i>	

7. How do you rate your direct marketing skills?

Marketing Skill Rating	Percent
Successful	57.76
Average	30.17
Needs Improvement	9.48
Don't know	2.59
<i>Number Reporting: N = 97</i>	

8. List the types of products you sell?

Category	Percent
Fruits	14.68
Vegetables	42.20
Meats/Eggs	18.35
Dairy	1.83
Prepared Foods	5.56
Other Foods	28.70
Arts, Crafts, Jewelry	27.52
Other Nonfood Items	31.19
<i>Number Reporting: N = 109</i>	

9. Approximately how many customers stop by your booth each market day?

Customer Class, %	Weekday	Weekend
Less than 25	11.58	7.58
25 - 50	41.00	30.30
50 - 100	32.63	36.36
100 - 150	10.53	15.15
More than 150	5.26	10.64
<i>Average Number</i>	<i>64.61</i>	<i>79.73</i>
<i>Number Reporting</i>	<i>95</i>	<i>66</i>

10. What are your average gross sales each market day?

Gross Sales Per Day, %	Weekday	Weekend
Less than \$25	5.19	5.36
\$25 - 50	11.69	3.57
\$50 - 100	12.99	10.71
\$100-200	29.87	33.93
\$200-300	18.18	21.43
\$300-400	11.69	8.93
\$400-500	3.90	8.93
\$500 +	5.19	7.14
<i>Average Sales Number</i>	<i>\$194.57</i>	<i>\$225.22</i>
<i>Number Reporting</i>	<i>77</i>	<i>56</i>
<i>Overall Average Gross Sales Per Customer Stop = \$2.62</i>		

APPENDIX II(b) 2008 NNY Farmers' Market Vendor Survey Summary

11. Do you have a written business plan of any kind for your farmers' market enterprise?

Answer, %	Percent Yes
Written Business Plan	19.19
<i>Number Reporting</i>	<i>99</i>

12. Select all of the marketing outlets through which you normally sell your farmers' market-type products. In the column next to each outlet, estimate the percentage of total sales coming from that outlet.

Outlet	Percent Yes	Average Percent of Total Sales (if Yes)
Retail:		
Farmers' Market	98.97	64.13
Own Site (roadside stand, greenhouse, farmhouse/out building)	30.85	27.22
Pick Your Own	20.40	43.75
Community Supported Agriculture	26.66	42.17
Other	47.40	37.75
Wholesale:		
Packer	3.30	28.25
Grocery/Specialty Store	23.08	14.51
Restaurant	10.99	10.51
Direct (produce stand, greenhouse, farmers' market vendor)	13.98	6.23
Other:	5.43	34.29
<i>Number Reporting = 92</i> <i>Average Number of Retail Channels = 1.76, Min = 1, Max = 4</i> <i>Average Number of Wholesale Channels = 0.56, Min = 0, Max = 4</i> <i>Average Number of Total Channels = 2.18, Min = 1, Max = 6</i>		

13. What percent of all products sold at the farmers market is grown or prepared by you and your operation (not resold)?

Percentage Class, %	Percent
Less than 25%	3.67
25% - 50%	0.00
51% - 75%	10.09
76% - 100%	84.40
Don't Know	1.83
<i>Number Reporting</i>	<i>109</i>

14. Do you sell value-added products such as baked goods, preserves, dried flowers, etc. at the farmers' market?

Answer, %	Percent Yes
Sell Value Added	45.63
<i>Number Reporting</i>	<i>103</i>

15. Do you sell organically grown or made products (incl. certified, non-certified organic, or transitioning)? If so, what percent of your total product sold is organic? Is the percent increasing, decreasing, or staying the same?

Answer, %	Percent Yes	% of Total Product Sold		
		Average	Minimum	Maximum
Sell Organic (N = 71)	46.48	82.14	5.00	100.00
<i>Increasing Organics = 29.17%, Same Organics = 66.67%, Decreasing Organics = 4.17% (N=24)</i>				

APPENDIX II(b) 2008 NNY Farmers' Market Vendor Survey Summary

16. Rank the following reasons why you choose to sell your products at a farmers market.

Percentage Class, %	Normalized Rank
Customer interaction	1.00
Receive retail value for products sold	0.87
To advertise your products	0.77
Convenience	0.70
To sell surplus produce from your garden	0.21
To sell excess products unsold through other outlets	0.20
<i>Number Reporting N = 109</i>	
<i>Normalized rankings based on level of ranking and number of times ranked</i>	

17. Indicate methods used to promote the sale of your product at the farmers' market? For each indicate how effective it was for you.

Advertising & Promotion (ranked from most important to least important)	Percent Yes	Importance (Percent by Category)			Average Importance Score
		Very Important	Important	Not Important	
Signs indicating your price (N = 99)	89.90	79.01	20.98	0.00	1.79
Taste testing/samples (N = 58)	53.45	82.86	8.57	8.57	1.74
Signs for product information (N=76)	77.63	60.07	32.75	2.17	1.53
Bulk discounts (N = 49)	44.90	45.83	41.67	12.50	1.33
Recipes (N = 54)	37.04	47.83	30.43	21.74	1.26
<i>Importance Rating Scores: 0 = not important, 1 = important, 2 = very important</i>					

18. Rank the top 3 methods that best describe how you normally determine your prices at the farmers' market?

Product Pricing (ranked from most to least utilized)	Number of Vendors Ranked in Top 3			Normalized Ranking
	Rank 1	Rank 2	Rank 3	
Cost of production plus mark-up	54	4	8	1.00
Matching other vendors' prices	34	16	5	1.34
Grocery store comparison	18	15	8	1.93
Pricing above other vendors	7	2	1	2.11
Charge the same as always	13	4	6	2.27
Pricing below other vendors	6	4	2	2.47
Internet	1	3	5	3.71

19. How do you measure your success at the farmer's market you attend? Select any two.

Measurement	Number
Having return customers	75
Gross sales	56
Selling most of your products by the end of the market day	41
Net sales	24
Selling enough to cover expenses	19
Selling out enough products to go home early	4

20. How do you see your business at farmers' markets changing over the next 3 years?

Business volume over next 3 years	Percent
Expanding	53.70
Decreasing	8.33
Staying about the Same	37.96
<i>Number Reporting N = 108</i>	

APPENDIX II(b) 2008 NNY Farmers' Market Vendor Survey Summary

21. How satisfied are you with the profitability of the farmer's market portion of your sales?

Measurement	Percent
Very satisfied	37.72
Satisfied	51.75
Neither satisfied nor unsatisfied	10.53
Unsatisfied	0.00
Very unsatisfied	0.00
<i>Number Reporting N = 114</i>	

22. From your perspective as a vendor, would you agree with the statement that your Farmers' Market is "successful", for the market, for the vendors, and for the local community?

Category, %	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Market (N = 105)	52.38	42.86	3.81	0.95	0.00
Vendor (N = 96)	46.88	46.88	6.25	0.00	0.00
Community (N = 101)	55.45	40.59	3.96	0.00	0.00

23. What do you consider the greatest strength of your market? (Summary listing of responses)

Number of vendors	Vendor's personalities and interests
Location	Longevity
Most everyone getting along	Music
Atmosphere	Faithful customers
People	Layout
Community	Community outreach
Variety	Informality
Customers	Lack of hassling from Ag & Markets and market manager
Vacation crowd	Quality of baked goods/ produce
Quality products	Developing stronger relations with other vendors
Good vendors	Few other producers of a similar product
Established market	Healthy meat production
Direct sales	Customer satisfaction
Small business	Reliability of vendors each week
Friendly vendors, cooperative	The way vendors can help customers, even those who use coupons and have no clue what to buy, etc.
Great products	Consistency of vendors- customers get to know the vendors and their quality
Promoting buy local awareness- wholesome ingredients without preservatives	Pavilion- no fear of tents blowing down
Vendors helping each other	Geographic proximity to communities of people to buy regularly
Publicity	Diversity of product & people
Connecting consumers with producers in one place- saves gas for customers wanting local products	Attractive setting on the river
Vacationers & locals	Enthusiasm of vendors
Management	Established
Dependability	Excellent working with chamber
Fresh produce and fruit close to home	Clean market
Customers try the wine	Entertainment
Nice weather	Advertising
Handmade product	Focused on one thing which is strength and weakness at the same time
No crafts	Visibility from Route 12
Market hours	
Number of sellers	
Close to downtown	

APPENDIX II(b) 2008 NNY Farmers' Market Vendor Survey Summary

24. What do you consider the greatest threat to your market? (Summary listing of responses)

<p>Fruits and vegetable stands popping up on every corner Weather Economy Influx of vendors (commercial) who have other main retail outlets such as year-round store front that directly compete with home-based vendors Vendor jealousy and fear Lack of public interest/ community support No customers Lack of exposure Low standards Parking Gas prices Nothing Politics Too many hobby farmers bringing products they did not produce/ imports from other states and Canada Regulations- such as packaging Non producers Road construction Don't generate enough money to pay manager- rely on volunteers Need EBT machine/ double \$5 program Mass retailers and competitors who make lesser quality product and charge less Too many selling same items Crafters Local government interference People not understanding the financial benefits of paying the local producer more than paying Wal-Mart Advertising Hours Non-produce, non-handmade items Too restrictive in what we sell- need more variety of items Oversight by the chamber of commerce Too many little knock-off markets with lower quality- can turn off customers</p>	<p>Vendors under selling produce Buy and sell crafters Amish selling cheap and not following Ag and Markets rules Dissatisfied vendors Not having products that taxpayer otherwise don't see in their local stores- giving them a choice Material expense Insurance expense Not enough vendors Need a covered building Poor quality products Resistance to change New market needs Miserable behavior on the part of certain vendors USDA Local merchants More regulation Higher stall fees Insurance requirement More hassling from Ag & Markets More licensing fees Other groups using place off days Rising costs Vendors re-selling; stops new vendors from coming in Weather can make site muddy Local grocery store selling inferior products cheaper that have many more "miles" on the products Uneducated consumers not understanding that seasonal products takes time to grow and just because it's in the grocery store doesn't mean that our local vegetables are ready Removal of FMNP coupons If it should close for some reason Brokers Farm economy Decrease of disposable income</p>
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APPENDIX II(b) 2008 NNY Farmers' Market Vendor Survey Summary

25. What are the characteristics of a good manager? (Summary listing of responses)

Direct	Looking out for the community
Clear	Knowledgeable
Good communication skills	Wants to see market succeed
Organized	Promotes; publicity
Listening	Cooperative
Good problem solving skills	Supportive
Informative	Good at inviting vendors
Friendly	Keeping a good atmosphere
Accessible	Pleasant
Courteous	Cheerful
Ability to keep things running smoothly	Gets along with everyone
Keeping vendors adhering to market rules and regulations	Working to constantly make it better
Ability to handle difficult people	Good vendor placement
Omnipresence	Open-minded
Personable; nice personality	Aggressively looking for locations that can be successful
Attentiveness	Active participation in decision making
Reliability	Good spokesperson for market
Fair; consistent	Ability to maintain order in a pleasant and productive manner
Able to handle conflict	Be alert
Makes an appearance every week; checks in; availability	Answer questions
Easy to talk with; for both customers and vendors	Tells you what you need to know
Honesty	Ability to pre-plan; plans ahead- makes sure enough people are there to help set up/break down
Vendor service- to accommodate vendors	Flexible
Public awareness/ public needs	Appreciates few vendors of the same type (jeweler)
Adapts to change	Tact
Helps everyone	Diplomacy
Facilitates commerce both for buyers and sellers	Positive energy
Impartial, unbiased	Mechanical skills
Willingness to help	Ego-less
Overall good disposition	Polite
Will to make market fun and interesting	Articulate
Welcoming	Able to work with others; people skills
Easily approachable	Firm
Accommodating	Smile
Spends time and money on press advertising, entertainment	Set a good example
Keeps market standards high	Making decisions that better the market as a whole
Democratic	Involvement
Minimal number of rules	Meetings
Patience	Efficient
Seeing the need for change; changing some things with approval of vendors	Interested in needs- willing to shuffle
Respectful	Innovative
Takes care of issues	Open to suggestions
Promotes traffic	Concern for vendors and consumers
Responsible	Recognize vendors and customers
Kind	Action oriented
Helpful	Paperwork
	Keeps up to date and can see the trends of tomorrow

APPENDIX II(b) 2008 NNY Farmers' Market Vendor Survey Summary

26. What do you like best about selling at the farmers' market? (Summary listing of responses).

<p>The people Co-mingling with vendors and patrons New leads Public interaction Contact with customers Selling produce Exposure to product, farm Close to home Under cover Location Size Variety Gets better every year Talking to, educating, and getting to know different customers Learning from, befriending other vendors Love direct marketing- important farmer backs up product they are selling, personally Meeting a need Encouraging local economy Supplying fresh produce/ no middle man No market day is ever the same twice Educating consumer to local quality meat and produce Share products Retail sales Pride in product Positive feedback from repeat customers/ learning about what they are looking for in products Connecting with the people who eat the product The energy Variety of fresh produce, organic products, maple, honey, cheese The region Inexpensive to participate Promoting & educating about maple Exposure Excellent attendance Trees for shade</p>	<p>Place to sell crafts Patrons are "like minded people" and conversations are rewarding Atmosphere Freshness and beauty of produce Meeting young families Nice community gathering Connecting with localvores Show off hard work Socializing Great food Everyone is nice to each other; friendly Great venue Camaraderie- chance to discuss growing problems/ crop issues with other growers Customers appreciate group of growers in one location on a day that's expected Seeing what other people create Diversity Organic Being outside Time- shorter hours than having own shop Accessibility It increases entrepreneurial activity on the smallest scale Traffic at the market Working with local farmers Bringing locally grown vegetables to customers Getting out to different locations Relaxed atmosphere Network Opportunity to sell excess garden produce Diversity of goods The customers are looking specifically for farm products People come to see what is new at the markets – that's not seen in stores Very few rules- come in and set up, if weather is bad- don't set up</p>
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END OF VENDOR SURVEY SUMMARY (PART TWO)

APPENDIX II(c) 2008 NNY Farmers' Market Rapid Market Assessment Summary

PART THREE

Rapid Market Assessment (RMA) Summary of New York State North Country Farmers' Markets, Summer 2008

Participating Markets:

Farmers' Market		Farmers' Market
Alexandria Bay		Ogdensburg
Brasher Falls		Paul Smith's
Canton		Plattsburg Green
Cape Vincent		Plattsburg FC
Carthage		Potsdam
Chateaugay Lakes		Saranac
Clayton		Saranac Lake
Elizabethtown		Stone Mills
Gouverneur		Watertown CCE
Keene		Watertown Fairgrounds
Lowville		Watertown Jeff Bulk
Malone		Watertown SOB
Massena		Wilmington
Norwood		

APPENDIX II(c) 2008 NNY Farmers' Market Rapid Market Assessment Summary

1. What is your primary reason for coming to the market today? Select one.

Answer, %	All Customers	Market Minimum	Market Maximum
Local agricultural products	61.56	38.96	90.00
Organic agricultural products	10.98	0.00	25.81
The atmosphere	13.20	0.00	25.00
Prepared foods	6.47	0.00	15.38
Arts and crafts	7.79	0.00	25.00
<i>N = 1,129 responses (27 markets)</i>			

2. Which of the following best describes your farmers' market experience? Select one.

Answer, %	All Customers	Market Minimum	Market Maximum
I buy local because I want the freshest products possible	30.28	11.11	43.90
Farmers' markets help keep small farms viable	24.97	11.11	46.88
Agriculture is an important part of the NY rural landscape	11.74	0.00	27.27
Farmers' markets provide a sense of community	15.14	0.00	36.36
Buying local lessens environmental impact of trucking & shipping	17.86	0.00	33.33
<i>N = 1,618 responses (27 markets)</i>			

3. What is your average purchase amount per visit to the Farmers' Market?

Answer, % Weighted Average = \$16.94; Min = \$7.88; Max = \$63.80	All Customers	Market Minimum	Market Maximum
\$10 or less	40.65	12.50	87.50
\$11-25	46.85	6.25	75.00
\$26- 50	9.58	0.00	31.48
\$51-75	1.05	0.00	3.70
\$75-100	0.23	0.00	3.39
More than \$100	1.64	0.00	50.00
<i>N = 856 responses (27 markets)</i>			

4. Rate the farmers' market on the following characteristics:

Answer, % (Market Min, Max)	Very Good	Good	Fair	Poor
Quality of Products <i>N = 785 responses (27 markets)</i>	73.31 (16.67, 100.00)	25.29 (0.00, 83.33)	1.15 (0.00, 10.34)	0.25 (0.00, 10.53)
Variety of Products <i>N = 716 responses (27 markets)</i>	28.63 (0.00, 90.00)	48.74 (0.00, 77.27)	19.97 (0.00, 88.24)	2.65 (0.00, 100.00)
Appearance of Facilities <i>N = 670 responses (27 markets)</i>	48.96 (0.00, 100.00)	44.78 (0.00, 88.00)	5.37 (0.00, 34.62)	0.90 (0.00, 15.38)
Convenience of Location <i>N = 712 responses (27 markets)</i>	71.84 (35.71, 100.00)	23.88 (0.00, 55.17)	3.16 (0.00, 28.57)	1.12 (0.00, 20.00)
Friendliness/ Attitude of Vendors <i>N = 711 responses (26 markets)</i>	83.05 (50.00, 100.00)	16.24 (0.00, 50.00)	0.70 (0.00, 7.69)	0.00 (0.00, 0.00)
Prices <i>N = 710 responses (27 markets)</i>	43.59 (7.69, 100.00)	47.11 (0.00, 80.77)	8.87 (0.00, 26.92)	0.42 (0.00, 3.85)
Parking <i>N = 674 responses (27 markets)</i>	59.50 (0.00, 100.00)	24.48 (0.00, 57.14)	10.98 (0.00, 77.78)	5.04 (0.00, 40.48)

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5. How far did you travel to get to the farmers' market?

Answer, % Weighted Average = 6.80 miles, Min = 1.75 miles, Max = 12.03	All Customers	Market Minimum	Market Maximum
Less than 1 mile	27.78	0.00	82.14
1-5 miles	32.20	0.00	63.64
6-10 miles	17.23	0.00	48.57
11-20 miles	16.21	0.00	42.86
More than 20 miles	6.58	0.00	27.78
<i>N = 882 responses (27 markets)</i>			

6. What advertising influenced your attendance at this market?

Answer (%)	All Customers	Market Minimum	Market Maximum
Newspaper ads	15.01	0.00	51.43
Radio ads	2.80	0.00	12.10
Internet/website	1.35	0.00	15.38
Posters and flyers	3.31	0.00	25.00
Roadside signs	15.53	0.00	33.33
Press releases	1.35	0.00	10.53
Word of mouth	39.96	0.00	70.00
Other	20.70	0.00	75.00
<i>N = 966 responses (27 markets)</i>			

7. Would you agree that your farmers' market is "successful" for the market, the vendors, and community?

Answer % (Market Min, Max)	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Market <i>N = 476 responses (18 markets)</i>	51.68 (0.00, 75.47)	41.81 (0.00, 100.00)	4.83 (0.00, 33.33)	1.26 (0.00, 66.67)	0.42 (0.00, 12.50)
Vendor <i>N = 373 responses (18 markets)</i>	50.94 (0.00, 73.33)	37.27 (0.00, 88.89)	9.38 (0.00, 36.36)	1.88 (0.00, 75.00)	0.54 (0.00, 25.00)
Community <i>N = 416 responses (18 markets)</i>	66.35 (0.00, 87.50)	29.09 (0.00, 66.67)	3.61 (0.00, 28.57)	0.48 (0.00, 14.29)	0.48 (0.00, 22.22)

8. What would you like to see offered more of at this market? Select one.

Answer (%)	All Customers	Market Minimum	Market Maximum
Organic produce	25.40	0.00	40.96
Cheese	27.74	15.66	43.59
Meat (beef, pork)	7.40	0.00	14.58
Poultry	6.66	0.00	27.27
Prepared Foods	8.63	3.85	25.00
Flowers	11.47	2.56	25.00
Crafts/ clothing/ art, etc	12.70	3.85	25.00
<i>N = 811 responses (14 markets)</i>			

9. How often do you shop at this market?

Answer (%)	All Customers	Market Minimum	Market Maximum
Once a week	37.63	8.70	63.64
2-3 times per month	27.96	0.00	47.62
1 time per month	14.86	0.00	50.00
Less than once a month	19.55	0.00	56.52
<i>N = 512 responses (18 markets)</i>			

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10. How many markets do you visit regularly and how has this number changed from previous years:

Answer, %, (Min and Max Market)	Increasing	Decreasing	Same	Total
Zero	10.21 (0.00, 17.82)	0.91 (0.00, 2.15)	6.10 (0.00, 20.43)	17.22 (0.00, 38.17)
One	24.24 (0.00, 44.44)	1.83 (0.00, 15.38)	19.51 (0.00, 27.03)	45.58 (15.38, 62.22)
Two	19.82 (11.83, 38.46)	0.00 (0.00, 0.00)	7.32 (1.98, 15.38)	27.14 (23.76, 53.84)
Three	5.49 (0.00, 15.38)	0.30 (0.00, 2.22)	0.91 (0.00, 7.69)	6.70 (0.00, 23.07)
Four	1.22 (0.00, 5.41)	0.30 (0.00, 3.85)	0.30 (0.00, 2.22)	1.82 (0.00, 7.70)
More than Four	1.52 (0.00, 7.69)	0.00 (0.00, 0.00)	0.00 (0.00, 0.00)	1.52 (0.00, 7.69)
<i>N = 328 responses (6 markets)</i>				
Weighted Average = 1.35 markets, Minimum = 0.89, Maximum = 2.23				

11. As a result of the market, how has your family's consumption of fresh fruits & vegetables changed?

Answer (%)	All Customers	Market Minimum	Market Maximum
Increased	48.20	8.33	100.00
Decreased	0.00	0.00	0.00
Stayed the Same	51.80	0.00	91.67
<i>N = 388 responses (15 markets)</i>			

12. Do you eat healthier as a result of attending the farmers' market?

Answer (%)	All Customers	Market Minimum	Market Maximum
Yes	76.23	45.45	97.56
No	18.85	2.44	47.73
Don't Know	4.92	0.00	7.37
<i>N = 244 responses (7 markets)</i>			

13. How does your number of visits to this market compare to last year??

Answer (%)	All Customers	Market Minimum	Market Maximum
Increased	55.11	22.22	81.40
Decreased	8.44	0.00	22.22
Stayed the Same	36.44	16.28	55.56
<i>N = 225 responses (9 markets)</i>			

14. Do you prefer organic or non-organic?

Answer (%)	All Customers	Market Minimum	Market Maximum
Organic	58.99	33.33	73.08
Non-organic	5.53	0.00	31.03
No preference	35.48	13.79	66.67
<i>N = 217 responses (8 markets)</i>			

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15. If an item costs \$1.00 at a grocery store, how much would you be willing to pay for that product here?

Answer (%) Weighted Average = \$1.35, Min = \$1.09, Max = \$1.47	All Customers	Market Minimum	Market Maximum
Less than \$1	4.98	0.00	15.15
\$1	9.95	0.00	52.94
\$1.01- \$1.50	63.43	41.18	85.71
\$1.51- \$1.99	11.19	0.00	20.31
\$2	5.47	0.00	15.63
More than \$2	4.98	0.00	18.18
<i>N = 201 responses (6 markets)</i>			

16. On average, how often do you prepare meals at home?

Answer (%) Weighted Average 9.8, Min = 7.9, Max = 11.4	All Customers	Market Minimum	Market Maximum
None	2.70	0.00	14.29
1-3 times per week	13.51	14.29	14.71
4-7 times per week	27.03	21.43	32.35
8-14 times per week	28.38	29.41	35.71
More than 14 times per week	28.38	14.29	42.31
<i>N = 74 responses (3 markets)</i>			

17. How has this market affected your frequency of shopping at other local businesses and restaurants?

Answer (%)	All Customers	Market Minimum	Market Maximum
More Often	17.70	9.09	20.00
Less Often	12.39	0.00	21.43
No Affect	69.91	58.93	81.82
<i>N = 113 responses (3 markets)</i>			

END OF RMA SURVEY SUMMARY (PART THREE)

APPENDIX III. Regression Results Evaluating Vendor Performance

Table A3. Regression results of subjective and objective measures of vendor performance.

Variable Label	Ordered Logit			Ordinary Least Squares		
	Level of Profit Satisfaction			Sales per Customer Stop		
	Estimate	Std. Err.	Pr>ChiSq	Estimate	Std. Err.	Pr> t
Intercept - Very satisfied	-7.020	2.469	0.004			
Intercept - Satisfied	-2.673	2.323	0.251			
Intercept				8.207	2.679	0.003
Vendor Variables						
Years selling	-0.079	0.056	0.161	0.182	0.072	0.015
Markets attend	-0.201	0.108	0.063	-1.546	0.431	0.001
Markets attend squared				0.071	0.022	0.003
Full-time farmer (1/0)	1.371	0.672	0.041	-0.200	0.693	0.774
Sell fruits/vegetables (1/0)	0.188	0.761	0.805	-1.776	0.797	0.030
Sell meat/dairy (1/0)	-1.849	0.760	0.015	-0.337	0.763	0.660
Sell proc. food/bev. (1/0)	0.053	0.722	0.941	-1.428	0.830	0.091
Sell arts/crafts (1/0)	-1.429	0.844	0.090	-0.983	1.004	0.332
Sell plants/nursery (1/0)	0.454	0.719	0.528	-1.321	0.817	0.101
Percent sales from FM	0.025	0.011	0.023	-0.125	0.041	0.003
Percent Sales from FM squared				0.001	0.000	0.017
Market Variables						
Number of vendors	0.080	0.041	0.053	-0.028	0.054	0.610
Age of market	-0.179	0.085	0.036	0.635	0.457	0.171
Age of market squared				-0.049	0.036	0.176
Manager at least half-time (1/0)	-2.128	1.356	0.117	0.223	1.452	0.878
Number of amenities	0.730	0.244	0.003	-0.054	0.276	0.846
Vendors certified organic (%)	0.072	0.040	0.074	0.005	0.047	0.912
Vendors non-certified organic (%)	0.051	0.019	0.009	-0.037	0.022	0.105
Minimum own-produce requirement	1.339	2.211	0.545	1.065	2.615	0.685
Customer Variables						
Average purchase amount per visit	0.048	0.033	0.147	0.007	0.035	0.842
Average travel distance to market	-0.272	0.203	0.180	-0.064	0.247	0.796
Likelihood Ratio Test, Beta=0	37.809		0.004			
R-square				0.546		
F test, Beta=0				3.320		0.000

OTHER A.E.M. EXTENSION BULLETINS

EB No	Title	Fee (if applicable)	Author(s)
2009-07	Dairy Farm Business Summary, Western and Central Plateau Region, 2008	(\$12.00)	Knoblauch, W., Putnam, L., Karszes, J., Grace, J., Carlberg, V., Bliven, L. and T. Parmenter
2009-06	Dairy Farm Business Summary, New York Small Herd Farms, 80 Cows or Fewer, 2008	(\$16.00)	Knoblauch, W., Putnam, L., Kiraly, M. and J. Karszes
2009-05	Dairy Farm Business Summary, New York Large Herd Farms, 300 Cows or Larger, 2008	(\$16.00)	Karszes, J., Knoblauch, W. and L. Putnam
2009-04	Putting Market Information to Work: A Guide to Market Planning		Gloy, A.
2009-03	Evaluating Marketing Channel Options for Small-Scale Fruit and Vegetable Producers: Case Study Evidence from Central New York		LeRoux, M.N., Schmit, T.M., Roth, M. and D.H. Streeter
2009-02	Case Studies on the Use of Crop Insurance in Managing Risk		Gloy, B.A. and A.E. Staehr
2009-01	Do I Need Crop Insurance? Self Evaluating Crop Insurance as a Risk Management Tool in New York State		Richards, S., Staehr, A. and B. Gloy
2008-26	Immigration Issues: Perceptions of Golf Course Superintendents		Maloney, R. and R. Bills
2008-25	New York Economic Handbook	(\$10.00)	Extension Staff
2008-24	Directions for Using the Crop Insurance Decision Making Tool		Gloy, B. and A.E. Staehr
2008-23	Dairy Farm Business Summary, New York Dairy Farm Renters, 2007	(\$16.00)	Knoblauch, W. and L. Putnam
2008-22	Dairy Farm Business Summary, Intensive Grazing Farms, New York, 2007	(\$16.00)	Conneman, G., Karszes, J., Murray, D., Grace, J., Degni, J., Staehr, A., Benson, A., Murray, P., Glazier, N. and L. Putnam
2008-21	2008 Federal Reference Manual for Regional Schools, Income Tax Management and Reporting for Small Businesses and Farms	(\$25.00)	Bouchard, G. and J. Bennett

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