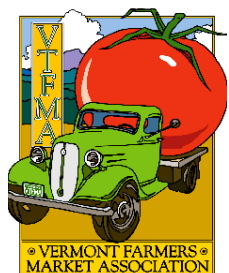


VERMONT FARMERS MARKET REPORT



2018



2018 REPORT

This report has been prepared by the Northeast Organic Farming Association of Vermont (NOFA-VT) and the Vermont Farmers Market Association (VTFMA), with help from Farmers Market Consultant, Darlene Wolnik, to shed light on the landscape of farmers markets in Vermont during the 2017-2018 winter and 2018 summer seasons. We consider the winter season to be November-April and the summer season to be May-October.

Farmers markets in Vermont are independently operated, and therefore each market is unique to the needs of its community; the size, make-up, and operating principles of markets vary widely. By organizing data from markets across the state, we can both paint a picture of the broad landscape of farmers markets as well as give communities reference points to compare to their own markets.

In 2017-2018, to the best of our knowledge, Vermont had 60 independently operated market organizations that hosted a total of 67 summer markets and 15 winter markets. Of the 60 market organizations known in 2018, 47 (78%) were members of the VTFMA. The last page of this report is a summer map and list of 2018 VTFMA member markets.

This report summarizes the results of a survey conducted in 2019 that collected information on the 2017-2018 winter and 2018 summer market seasons. NOFA-VT sent the survey to all known farmers markets in Vermont at the time, of which 29 (47%) summer markets and 5 (33%) winter markets completed it. Markets were asked to complete separate surveys for the 2017-2018 winter and 2018 summer seasons. As such, winter markets are treated separately in our analyses.

Due to the variable nature of Vermont's farmers markets, this report groups markets by the average number of vendors present at a market to enable fair comparisons of market characteristics. Of the 34 markets that completed the survey, nine were small (1-12 vendors), nine were medium (13-19 vendors), nine were large (20-30 vendors), and seven were very large (31 or more vendors). This grouping has changed slightly since the 2017 Vermont Farmers Market Report, which used the total number of vendors accepted that season (i.e. the number of vendors who vended at least once during the season).

Due to small sample sizes, we report the median of some measures rather than the average. The median is the value at which 50% of the sample is below and 50% is above. We use "n" to denote the sample size of an analysis; this represents the total number of markets that answered a particular question.



VENDOR DETAILS

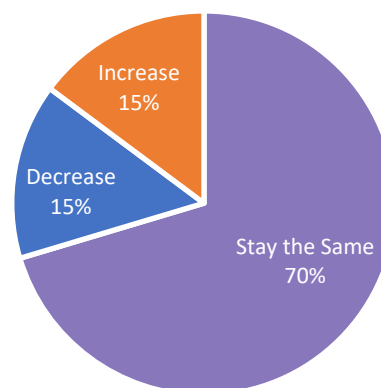
Summer markets averaged 23 (n=29) vendors present and winter markets averaged 28 (n=5) vendors present at the market each week. The tables below show the average number of each type of vendor for both winter and summer markets. The summer market table shows the average number of vendor types by market size. There was not enough data to do a market size comparison for winter markets.

Across all 34 markets, agricultural vendors made up an average of 44% of vendors at the market.

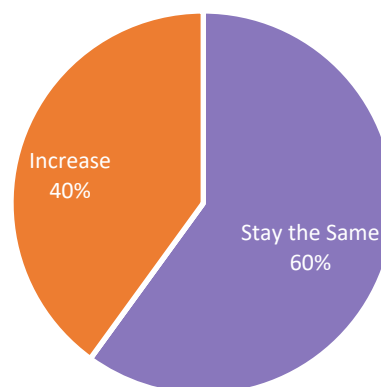
AVERAGE NUMBER OF VENDOR TYPES (Winter Markets)

	All Markets (n=5)
Avg. # of total vendors on roster	37
Avg. # of vendors per market day	28
Avg. # of agricultural vendors/mkt	8
Avg. # of prep. food vendors/mkt	8
Avg. # of craft vendors/mkt	6

CHANGE IN SUMMER VENDOR NUMBERS FROM 2017-2018 (n=27)



CHANGE IN WINTER VENDOR NUMBERS FROM 2017-2018 (n=5)



The majority of summer and winter markets reported that their vendor numbers stayed the same between 2017 and 2018. No winter markets reported fewer vendors in 2018, but 15% of summer markets did.

AVERAGE NUMBER OF VENDOR TYPES BY MARKET SIZE (Summer Markets)

	Avg. # of total vendors on roster	Avg. # of vendors per market	Avg. # of agricultural vendors/mkt	Avg. # of prepared food vendors/mkt	Avg. # of craft vendors/mkt
Small (n=9)	18	9	5	3	3
Medium (n=7)	38	16	7	4	6
Large (n=7)	42	24	12	6	8
Very Large (n=6)	79	50	22	19	10
All Markets (n=29)	41	23	10	7	6



GROSS SALES

Eighty-eight per cent of markets (n=34) collected gross sales data. Of the markets that did, 90% (n=30) did so by collecting paper slips from vendors after the market. Similarly, the vast majority of markets that collected gross sales collected it in the categories of agricultural, prepared food, and craft sales. The total gross sales reported by the 30 markets that responded was \$6,205,181.

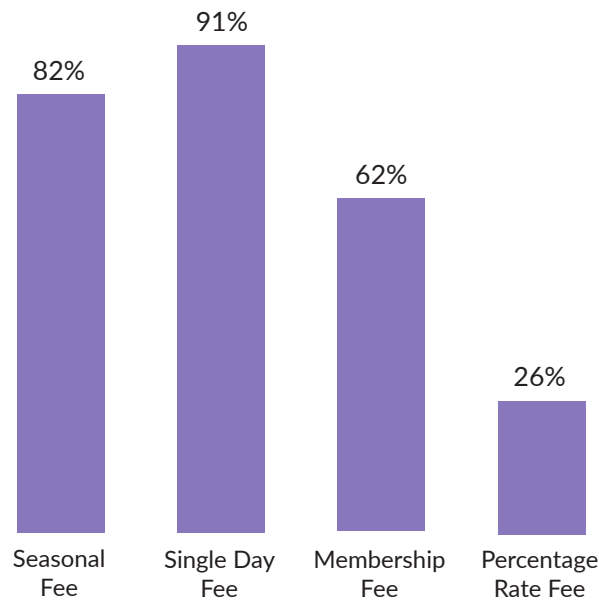
The table below shows the median estimated gross sales for each category by market size. There was not enough data to do a meaningful separate analysis for winter markets. On average, across all markets (n=28), agricultural sales made up 53% of total gross sales, prepared food sales made up 32%, and craft sales made up 15%. These proportions did not vary significantly by market size or season.

	Median Total Gross Sales (n=30)	Median Total Gross Sales per Market Day (n=30)	Median Gross Agricultural Sales (n=28)	Median Gross Prepared Food Sales (n=29)	Median Gross Craft Sales (n=28)
Small	\$27,550	\$1,449	\$18,000	\$6,715	\$2,021
Medium	\$51,458	\$2,914	\$22,184	\$17,000	\$5,573
Large	\$98,951	\$4,927	\$50,114	\$32,457	\$13,294
Very Large	\$550,116	\$17,559	\$260,361	\$185,919	\$83,393
All Markets	\$53,584	\$3,342	\$28,291	\$17,000	\$28,684

MARKET INCOME

The primary source of market income for most markets came from vendor fees. The system for collecting vendor fees at Vermont markets is done through a mix of annual membership fees, seasonal rates, daily rates, and/or percentages of vendor sales (known as a percentage rate fee). The chart below shows the proportion of markets that utilized each type of vendor fee. Every market utilized more than one fee type.

UTILIZATION OF VENDOR FEE TYPES (n=34)



The proportion of markets using these fee structures did not vary significantly by market size, with the exception of membership fees, which were utilized more commonly by larger markets. The proportion of markets utilizing a membership fee was 33% for small markets, 56% for medium markets, 67% for large markets, and 100% for very large markets. The table below lists the average of each type of fee by market size. We included summer and winter markets together, because there were few differences between the two seasons.

Markets reported a wide range of income collected from the various vendor fee types. The average total income collected was \$1,602 by small markets (n=9), \$6,812 by medium markets (n=6), \$8,605 by large markets (n=9), and \$28,221 by very large markets (n=6).

Seven markets also generated income through grant support, with a median income of \$6,790. Eight reported generating income from other forms of community support (i.e. sponsorships), with a median income of \$680. Twelve reported generating income from other sources, including donations, with a median income of \$306.

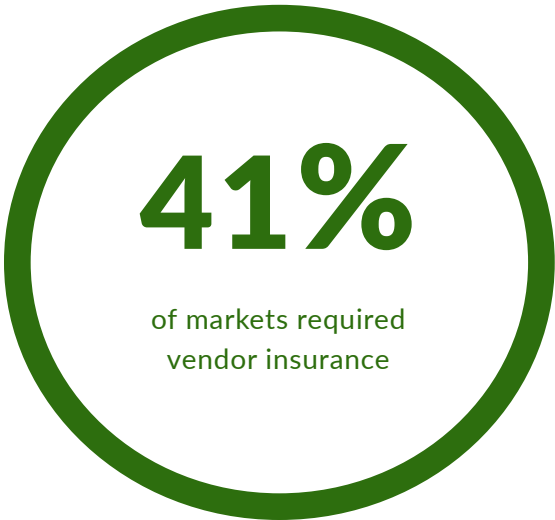
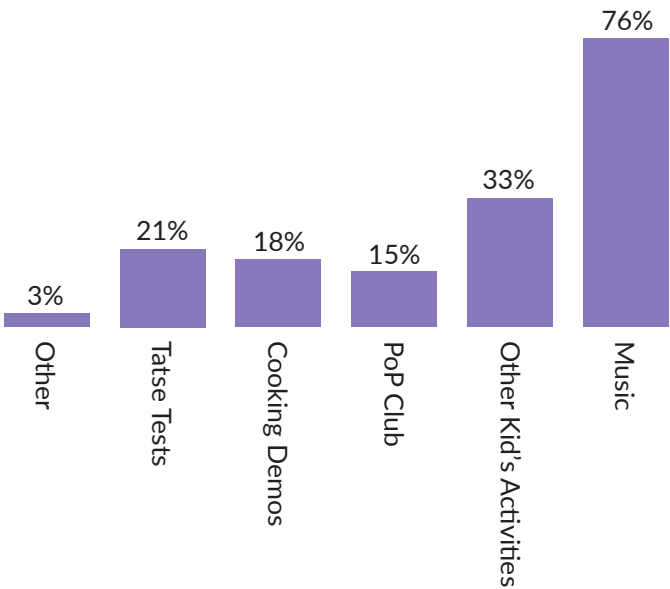
AVERAGE VENDOR FEES BY MARKET SIZE (Winter & Summer)

	Membership Fee (n=21)	Seasonal Vendor Fee (n=28)	Single Day Vendor Fee (n=31)	Percentage Rate Fee (n=9)
Small	\$18	\$137	\$14	4%
Medium	\$40	\$117	\$14	6%
Large	\$30	\$195	\$20	4%
Very Large	\$42	\$464	\$34	5%
All Markets	\$35	\$207	\$19	5%

MARKET EXPENSES

ENTERTAINMENT & ACTIVITIES

Eighty-two per cent of markets (n=34) offered some sort of entertainment or activity. The chart below shows the proportion of markets that offered various types of entertainment or activities. The median amount spent on entertainment was \$1,300 (n=23). The amount spent on events/activities (e.g. PoP Club, cooking demos, etc.) varied quite a bit, ranging from \$66-\$2,564, with a median of \$100 (n=8).



INSURANCE

Across all markets (n=34) 82% had market liability insurance, 41% required vendor insurance, and 24% had board/director insurance. The median amount spent on insurance was \$150 for small markets (n=7), \$213 for medium markets (n=7), \$306 for large markets (n=9), and \$1,224 for very large markets (n=6).

MARKET MANAGERS

About three quarters (76%, n=34) of markets reported paying their manager. The table below shows the proportion of each market size that paid their manager, the median wage paid for that market size, and the median estimated number of hours worked by the manager over the course of the market season.

MARKET MANAGER WAGES & HOURS (Winter & Summer)

	Proportion with Paid Manager (n=34)	Median Manager Wage (n=26)	Median Estimated Hours Worked by Manager (n=30)
Small	67%	\$1,350	172
Medium	78%	\$2,272	267
Large	78%	\$3,000	350
Very Large	86%	\$10,300	400
All Markets	76%	\$2,923	250

MARKET EXPENSES CONT.

MARKETING

The amount spent on marketing varied greatly, ranging from \$25-\$6,289 (n=28). The median amount spent on marketing was \$250 for small markets (n=9), \$886 for medium markets (n=5), \$866 for large markets (n=8), and \$2,942 for very large markets (n=6).

Across all 34 markets, 97% used social media, 65% used newspaper ads, 65% used Front Porch Forum, 68% used a website, and 33% used an email newsletter.

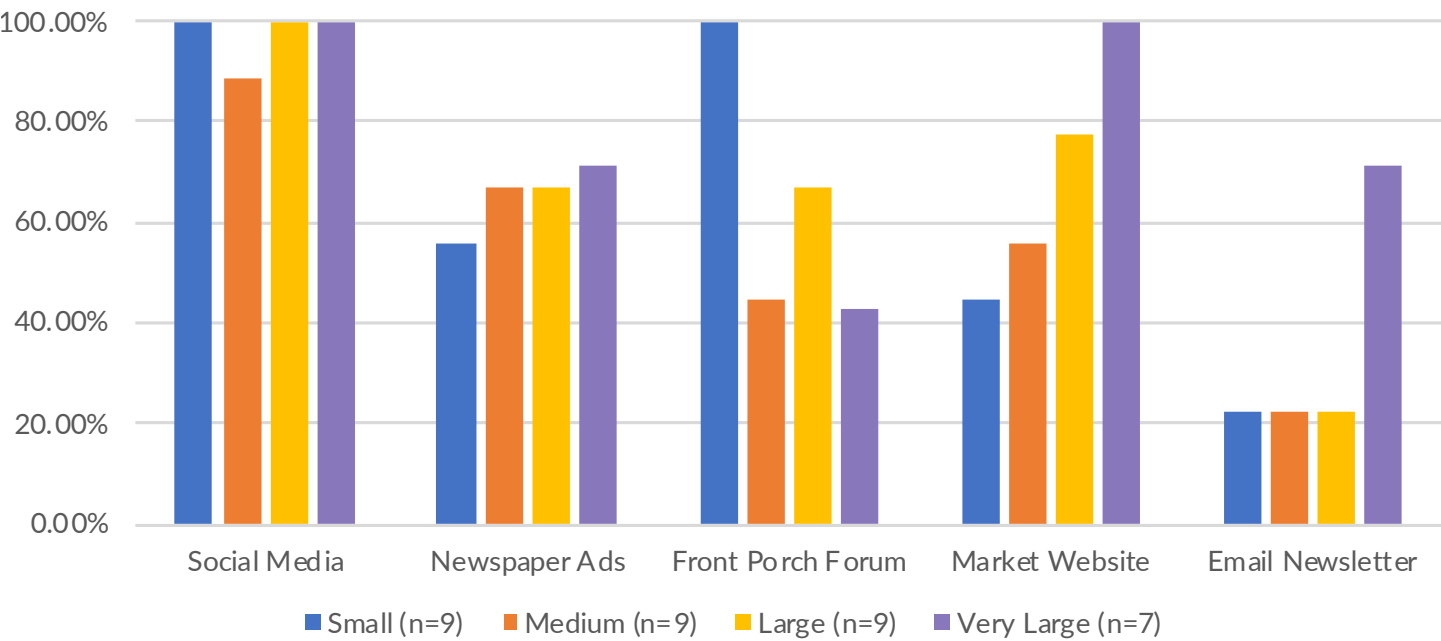
The graph below shows the proportion of markets by market size that used each marketing channel. Larger markets used a market website more than smaller markets and very large markets used email newsletters at a higher rate than other markets.

SITE FEES

Across all 34 markets, 56% reported paying site fees. The amount of site fees paid varied greatly across all market sizes. The table below shows the proportion of each market size that reported paying site fees and the median fee paid by markets of that size.

	Proportion Paid Site Fees (n=34)	Median Site Fees Paid (n=19)
Small	33%	\$214
Medium	67%	\$575
Large	67%	\$500
Very Large	57%	\$6,899
All Markets	56%	\$600

MARKETING CHANNEL UTILIZATION BY MARKET SIZE (Winter & Summer)





MARKET DAY & LOCATION

Four summer markets reported they had to move from their regular location for any length of time during the 2018 season. Only two markets owned their site. Of the rest (n=29), 62% had written agreements for their site.

The average number of market days scheduled for each market was 25 during the summer season and 14 during the winter season. Twenty-four per cent of markets (n=34) reported they had to close early or not open at all at least once during their regularly scheduled market times because of inclement weather.

62%

of markets had written
agreements for
site use

MARKET CHALLENGES

Markets were asked to report their most significant challenge during 2017-2018. Overall, they had varied challenges with little consensus.

The most commonly reported challenge among all markets (n=31) was too few shoppers, with 32% of markets reporting it as their most significant challenge. Only one very large market selected this challenge, while three of each small, medium, and large markets selected it.

The second most commonly reported challenge was too few farmers/vendors, with 16% of markets reporting it as their most significant challenge. No very large markets selected this challenge.

The next most commonly reported challenges were low EBT/3SquaresVT participation and market location instability, with 9% of markets reporting each as their most significant challenge. One very large market selected each of these challenges.

Other challenges that markets selected or wrote in were (the number of markets that selected each is in parentheses):

- Consistent attendance from vendors (1)
- EBT machine problems (2)
- Inactive board (1)
- Road construction (1)
- Rain/weather (2)
- Too little diversity in products (1)
- Proper record-keeping by volunteers at EBT table (1)

MARKET ACCESSIBILITY

NOFA-VT supports food access programming at markets across the state. In 2017-2018, 43 (62%) summer markets and 15 (100%) winter markets accepted SNAP/3SquaresVT benefits. All of these markets also participated in the Crop Cash Program, which incentivizes the use of SNAP/3SquaresVT benefits at markets by matching the amount of SNAP/3SquaresVT spent with Crop Cash coupons that can be spent on fresh produce.

Collectively, SNAP/3SquaresVT sales brought in \$86,575 to market vendors during the 2017-2018 winter and summer seasons. The Crop Cash Program brought in an additional \$63,860 to produce vendors during that time.

Forty-seven summer markets accepted Farm to Family coupons in 2018, which brought in \$88,452 for produce vendors.



SUPPORT FOR MARKETS

Throughout 2018, NOFA-VT supported farmers markets through a variety of grants and partnerships. A few highlights include:

- NOFA-VT hosted the annual Vermont Farmers Market Conference in March, which was attended by 63 people, including representatives from 30 markets. This full day conference provided opportunities for markets to network with each other, learn about relevant regulations and projects, and dive into specific topics of their choice, ranging from social media to food access.
- In partnership with Vermont Law School and Farmers Market Coalition, NOFA-VT launched the Farmers Market Legal Toolkit, which provides legal resources to markets around business structure, SNAP/EBT, and risk management. Learn more at www.farmersmarketlegaltoolkit.org.
- NOFA-VT continued working with farmers markets around the state to develop/improve data collection systems and resources in order to both support those markets directly and create tools and resources for use by all markets.
- NOFA-VT continued supporting and promoting SNAP/EBT at farmers markets through technical assistance to markets, advocating for state resources to financially support EBT machines for markets, and administering the statewide Crop Cash Incentive Program.
- NOFA-VT promoted markets statewide through posters, brochures, radio advertisements, and print and digital advertisements.



NOFA-VT also proudly served as the parent organization for the Vermont Farmers Market Association (VTFMA), which met monthly throughout the 2017-2018 winter. The VTFMA promoted member markets through a variety of print and digital media throughout the year, including large posters in most rest areas and co-op grocery stores as well as multiple online directories. The VTFMA board hosted Farmers Market Awareness Day at the Vermont Statehouse in February, which raised awareness of farmers market issues with state legislators. You can download a complete overview of the VTFMA's board and activities for 2017-2018 and view a current list of VTFMA member markets at www.VTFMA.org.

VERMONT FARMERS MARKETS

Find a market, with
directions & details:
[www.nofavt.org/
vtfarmersmarkets](http://www.nofavt.org/vtfarmersmarkets)

Scan with your mobile device for directions & hours



MARKET TOWN • TIME

SATURDAY

1. Bennington • 10-1 pm
2. Brattleboro • 9-2 pm
3. Burlington (Downtown) • 8:30-2 pm
4. Craftsbury • 10-1 pm
5. Grand Isle • 10-2 pm
6. Londonderry • 9-1 pm
7. Middlebury • 9-12:30 pm
8. Montgomery • 9-1 pm
9. Montpelier • 9-1 pm
10. Morrisville • 9-1 pm
11. Newport • 9-2 pm
12. Norwich • 9-1 pm
13. Randolph • 9-1 pm
14. Rutland • 9-2 pm
15. Shelburne • 9-1 pm
16. St. Johnsbury • 9-1 pm
17. St. Albans • 9-2 pm
18. Waitsfield • 9-1 pm
19. Woodstock (Mt. Tom) • 9:30-12:30 pm

SUNDAY

20. Dorset • 10-2 pm
21. Putney • 11-2 pm
22. Stowe • 10:30-3 pm
23. Williston • 1-4 pm
24. Winooski • 10-2 pm

TUE

2. Brattleboro • 4-7 pm
25. Burlington (Old North End) • 3-6:30 pm
26. Northfield • 3-6 pm

WEDNESDAY

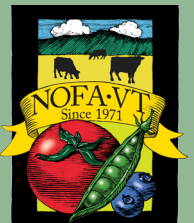
27. Barre • 4-7 pm
28. Danville • 9-1 pm
29. Essex Junction • 4-7:30 pm
30. Jeffersonville • 4:30-8 pm
7. Middlebury • 9-12:30 pm
11. Newport • 9-2 pm
14. Rutland • 3-6 pm
31. South Hero • 3-6 pm
32. Woodstock (Village Green) • 3-6 pm
33. Barnard • 4:30-7:30 pm
34. Burlington (UVM Med Ctr) • 2:30-5 pm

THURSDAY

35. Jericho • 3-6:30 pm
36. Manchester • 3-6 pm
37. Milton • 3:30-7 pm
38. Peacham • 3-7 pm
39. Poultney • 9-2 pm
40. Royalton • 3-6 pm
41. Vergennes • 3-6 pm

FRIDAY

42. Bellows Falls • 4-7 pm
43. Brandon • 9-2 pm
44. Chelsea • 3-6 pm
45. Hardwick • 3-6 pm
46. Hartland • 4-7 pm
47. Ludlow • 4-7 pm
48. Lyndon • 3-6 pm
49. Richmond • 3-7 pm
50. Rochester • 3-6 pm
51. Townshend • 4-7 pm



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