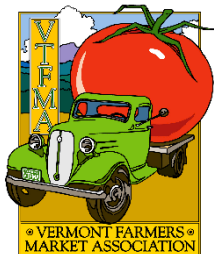
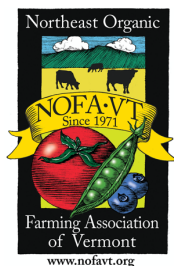


Vermont Farmers Market Report



2019

Table of Contents

Table of Contents	2
INTRODUCTION	3
VENDOR DETAILS	4
VENDOR CHARACTERISTICS	5
GROSS SALES	6
MARKET INCOME	7
MARKET EXPENSES	8
MARKET DAY & LOCATION	Error! Bookmark not defined.
MARKET ACCESSIBILITY	11
MARKET CHALLENGES	12
SUPPORT FOR MARKETS	12

INTRODUCTION

This report has been prepared by the Northeast Organic Farming Association of Vermont (NOFA-VT) and the Vermont Farmers Market Association (VTFMA) to shed light on the landscape of farmers markets in Vermont during the 2018-2019 winter and 2019 summer seasons. We consider the winter season to be November 2018 -April 2019 and the summer season to be May - October 2019.

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 2018-2019, to the best of our knowledge, Vermont had 66 independently operated market organizations that hosted a total of 68 summer markets and 15 winter markets. Of the 66 market organizations known in 2019, 51 (77%) were members of the VTFMA.

This report summarizes the results of two surveys conducted in 2020 that collected information on the 2018-2019 winter and 2019 summer farmers market seasons. NOFA-VT sent a survey to all known farmers markets in Vermont at the time, of which 31 (46%) summer markets and 6 (40%) winter markets completed it. Markets were asked to complete separate surveys for the 2018-2019 winter and 2019 summer seasons. As such, winter markets are treated separately in our analyses. The Vermont Agency of Agriculture, Food, and Markets (VAAFMA) surveyed Vermont agricultural direct market producers to better understand specific direct market channels, including farmers markets; seventy-three producers responded.

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 37 markets that completed the survey, seven were small (1-12 vendors), eleven were medium (13-19 vendors), nine were large (20-30 vendors), and ten were very large (31 or more vendors). 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 27 (n=31) vendors present each week and 41 (n=30) vendors on their roster. Winter markets averaged 23 (n=6) vendors present each week and 30 (n=6) on the roster. Tables 1 and 2 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.

Table 1: Average Number of Vendors by Market Size (Summer Markets)

	Avg. # of vendors on roster	Avg. # of vendors at market	Avg. # of agricultural vendors/market	Avg. # of prepared food vendors/market	Avg. # of craft vendors/market
Small (n=6)	18	11	4	3	3
Medium (n=8)	24	15	7	5	4
Large (n=8)	37	24	12	6	8
Very Large (n=9)	73	52	25	14	10
All Summer Markets (n=31)	41	27	13	8	7

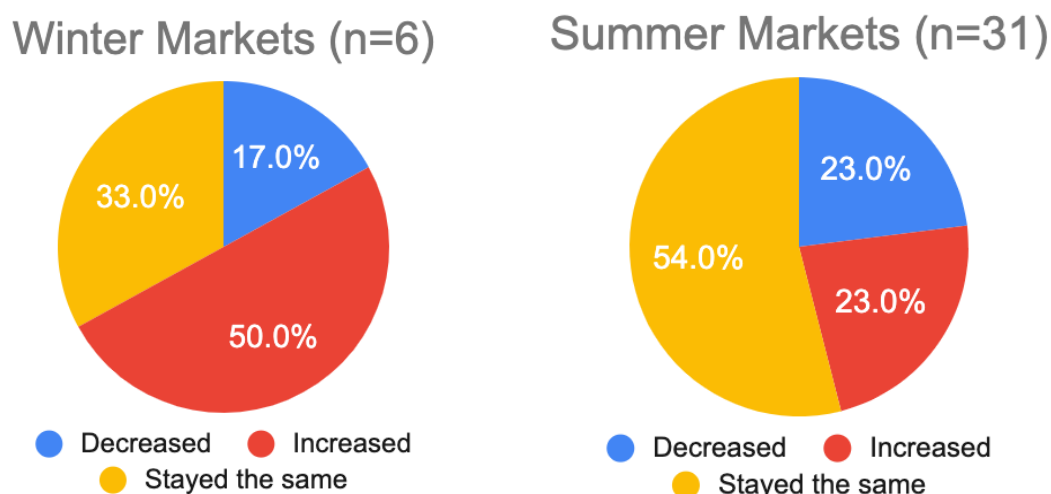
Table 2: Average Number of Vendors (Winter Markets)

	Avg. # of vendors on roster	Avg. # of vendors at market	Avg. # of agricultural vendors/market	Avg. # of prepared food vendors/market	Avg. # of craft vendors/market
All Winter Markets (n=6)	30	23	9	5	4

Across all markets, agricultural vendors were the greatest proportion of vendor type, with summer markets averaging 46% (n=31) of vendors and winter markets averaging 51% (n=6). The next greatest proportion of vendor type across all markets was prepared food vendors, with summer markets averaging 28% and winter markets averaging 32%. Lastly, craft vendors represented the smallest proportion of vendor type across all markets, with summer markets averaging 25% and winter markets averaging 21%.

About half of summer markets reported that their vendor numbers stayed the same between 2018 and 2019, and about a quarter, each, reported either decreased or increased vendor numbers. Half of winter markets, however, reported an increase in vendors in 2019, with only 17% reporting a decrease in vendors.

Figures 1 & 2: *Vendor number changes compared to 2018-2019 and 2019 seasons*



VENDOR CHARACTERISTICS

Of the 73 agricultural producers that responded to the VAAFM Vermont Direct Market Producer Survey, 63% reported selling at farmers markets in 2019. Of those selling at farmers markets, 53% (n=45) reported selling at two or more farmers markets. About half (52%, n=46) of producers selling at farmers markets utilized only direct market channels, including both direct-to-consumer and direct-to-retail.

The average number of acres owned by farmers market producers was 33 acres (n=45), which is slightly less than the 44 (n=68) average acres owned by all producers surveyed. Thirty-three percent of farmers market producers (n=45) sold some or all certified organic products. On average, farmers market producers had been in business for 19 years (n=46) and had been selling at farmers markets for an average of 12 years (n=45).

Producers selling at farmers markets averaged \$30,800 (n=41) in gross sales from farmers markets in 2019 and \$126,334 (n=38) in total gross sales for the year.

The average number of staff working at the farmers market was 1.5 (n=45) and 91% (n=45) of business owners usually were present at the farmers market. Only 4% (n=45) of producers sold other producers' products at their farmers market stand.

GROSS SALES

Seventy-six percent of markets (n=37) collected gross sales data. Of the markets that did (n=28), 82% did so by collecting paper slips from vendors after the market, 7% collected data online, and 7% utilized both paper and online sales collection methods. Similarly, the vast majority of markets (93%, n=28) that collected gross sales collected it in the categories of agricultural, prepared food, and craft sales. The total gross sales reported by the 28 markets that responded was \$7,923,925.

Table 3 shows, by market size, the average estimated gross sales per market day for each product category, total gross sales, and the proportion of sales each product category represented at summer markets. The product categories have been abbreviated as such: AG is agricultural products; PF is prepared foods; and CR is crafts.

There was not enough data to do a meaningful separate analysis of average sales for winter markets. On average, across all winter markets that responded (n=5), agricultural sales made up 56% of total gross sales, prepared food sales made up 31%, and craft sales made up 11%. These proportions do not vary significantly from those of summer markets.

Table 3: Gross Sales by Market Size (Summer Markets)

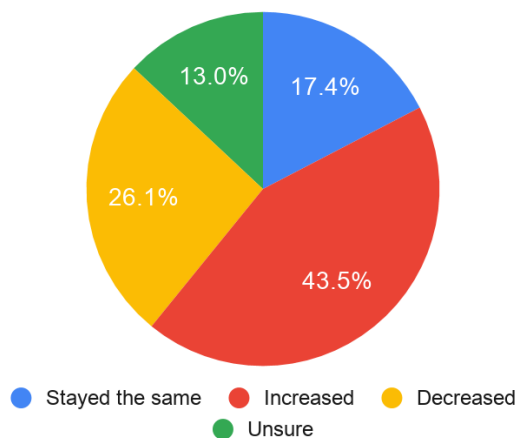
	Avg. Total Gross Sales (n=23)	Avg. Gross Sales/ Day (n=23)	Avg. AG Sales/ Day (n=20)	Avg. % AG Sales (n=20)	Avg. PF Sales/ Day (n=19)	Avg. % PF Sales (n=19)	Avg. CR Sales/ Day (n=20)	Avg. % CR Sales (n=20)
Small	\$34,000	\$1,684	\$913	46%	\$916	46%	\$125	7%
Medium	\$61,376	\$3,284	\$1,945	55%	\$964	32%	\$319	12%
Large	\$166,900	\$7,186	\$3,932	54%	\$1,930	25%	\$847	13%
Very Large	\$757,949	\$29,590	\$18,186	50%	\$1,930	28%	\$6,105	17%
All Markets	\$331,017	\$13,343	\$7,358	52%	\$4,207	31%	\$2,210	13%

*AG: Agricultural; PF: Prepared Foods; CR: Craft

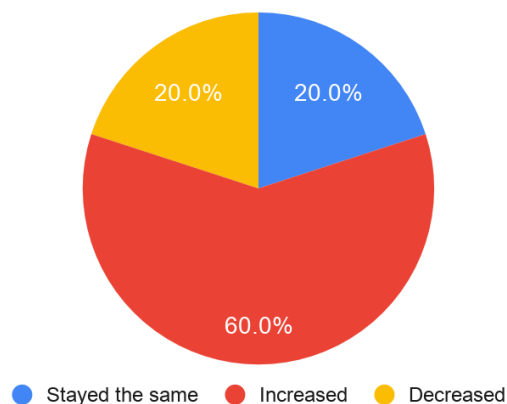
Nearly half of summer markets saw an increase in total gross sales in 2019 compared to 2018, though large and very large markets were more likely to see increased sales. Similarly, over half of winter markets saw an increase in total gross sales in 2018-2019 compared to 2017-2018.

Figures 3 & 4: Gross Sales Compared to Previous Seasons

2019 Summer Sales Compared to 2018 (n=23)



2018-2019 Winter Sales Compared to 2017-2018 (n=5)



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). Figure 5 shows the proportion of markets that utilized each type of vendor fee. Most markets utilized more than one type of vendor fee.

Figure 5: Proportion of markets using vendor fees

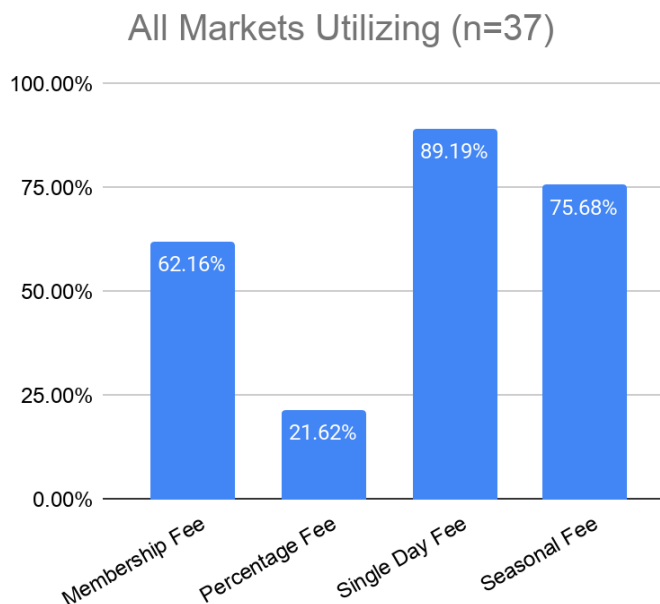


Table 4 lists the average of each type of fee by market size. We included summer and winter markets together, because there were few differences between the two seasons. Markets reported a wide range of income collected from the various vendor fee types. The average total income collected from vendors fees was \$2,009 by small markets (n=6), \$3,397 by medium markets (n=11), \$11,271 by large markets (n=9), and \$26,875 by very large markets (n=10).

Table 4: Average Vendor Fees by Market Size (All Markets)

	Membership Fee (n=23)	Percentage Rate Fee (n=8)	Seasonal Fee (n=28)	Single Day Fee (n=33)
Small	\$37	5%	\$98	\$17
Medium	\$43	5%	\$134	\$25
Large	\$30	5%	\$262	\$23
Very Large	\$49	4%	\$425	31\$
All Markets	\$40	5%	\$250	\$25

Seven markets also generated income through grant support, with an average income of \$1,280. Nine reported generating income from other forms of community support (i.e. sponsorships), with a median income of \$4,262. Seven reported generating income from other sources, including donations, with a median income of \$1,032.

MARKET EXPENSES

MARKET MANAGER

Three quarters (76%, n=37) of markets reported paying their manager. Table 7 shows the proportion of each market size that paid their manager, the average wage paid for that market size, and the average estimated number of hours worked by the manager over the course of the market season. The wage paid to market managers varied greatly and ranged from \$201 to \$22,320.

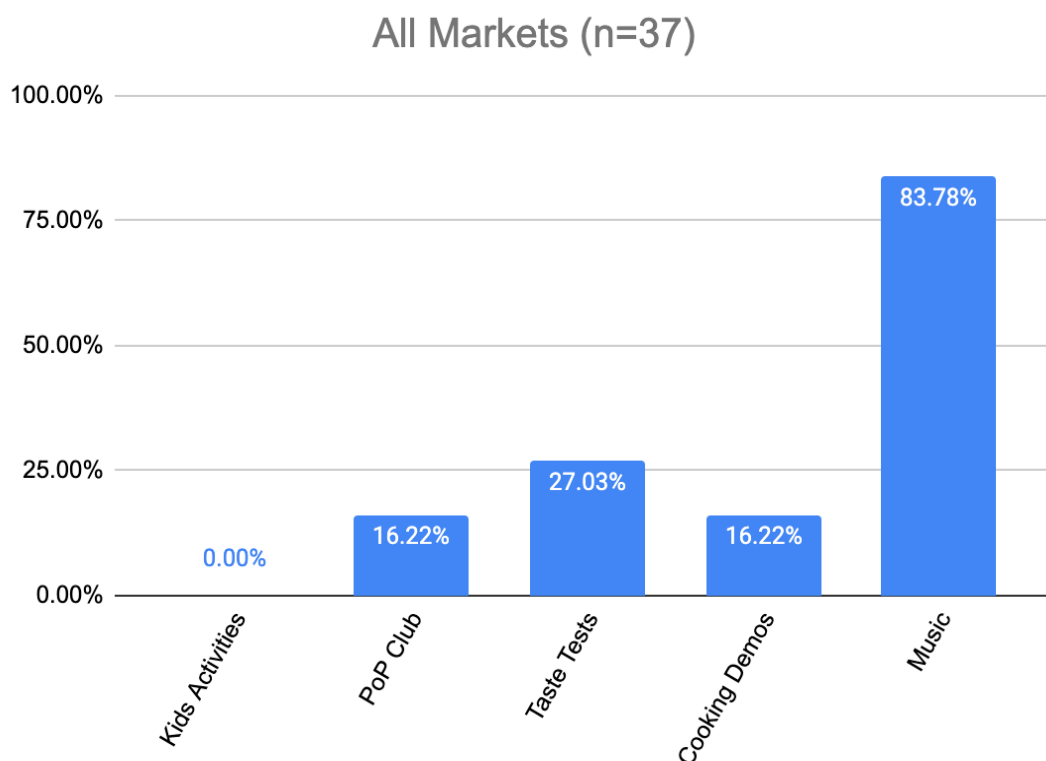
Table 7: Market Manager Details (All Markets)

	Paid Manager (n=37)	Average Salary (n=26)	Average Estimated Hours Worked (n=35)
Small	42.86%	\$2,499	135
Medium	63.64%	\$2,449	144
Large	100.00%	\$4,740	335
Very Large	90.00%	\$14,751	624
All Markets	75.68%	\$6,560	315

ENTERTAINMENT & ACTIVITIES

Eighty-nine percent of all markets (n=37) offered some sort of entertainment or activity. Figure 6 shows the proportion of markets that offered various types of entertainment and activities. The average amount spent on entertainment was \$1,722 (n=27). The amount spent on events or activities (e.g. PoP Club, cooking demos, etc.) varied quite a bit, ranging from \$100-\$4,500, with an average of \$1,431 (n=9).

Figure 6: *Proportion of markets offering activities*



SITE FEES

Across all 37 markets, 59% reported paying site fees. The amount of site fees paid varied greatly across all market sizes, ranging from under \$100 to over \$18,000. The table below shows the proportion of each market size that reported paying site fees and the average fee paid by markets of that size.

Table 8: *Site Fees by Market Size*

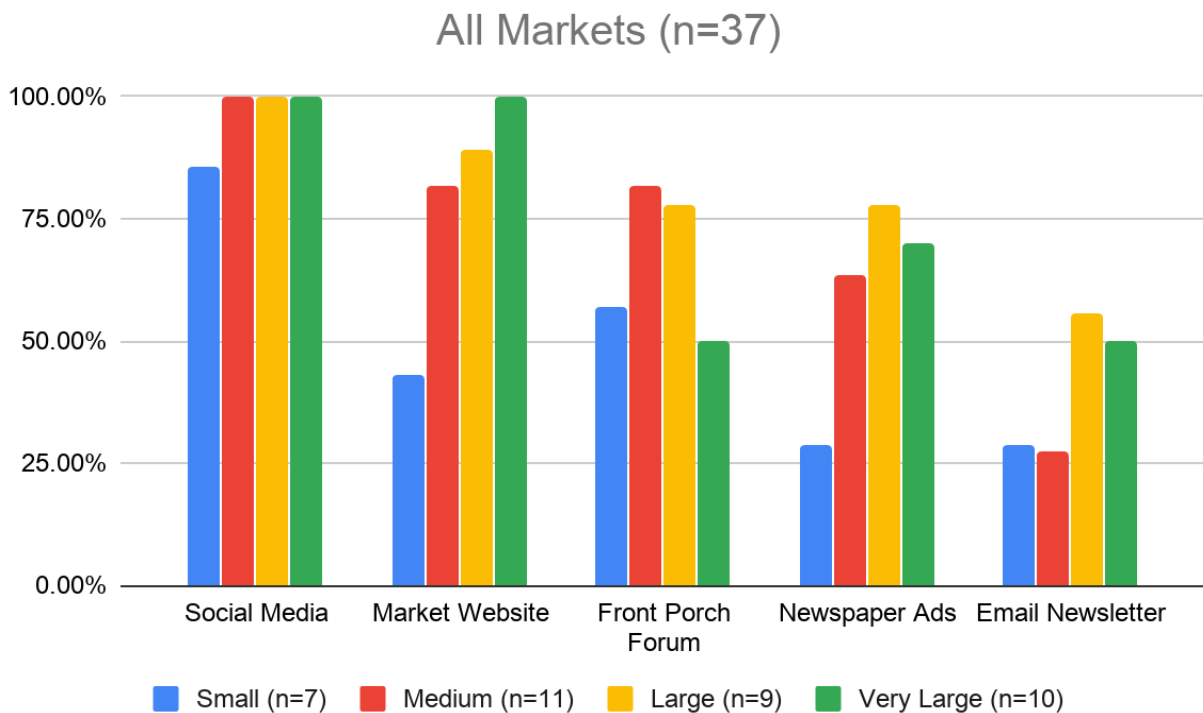
	Proportion Paid Site Fees (n=37)	Avg Site Fee Paid (n=22)
Small	28.57%	\$1,688
Medium	45.45%	\$630
Large	66.67%	\$2,183
Very Large	90.00%	\$4,995
All Markets	59.46%	\$2,935

MARKETING

Across all 37 markets, 78% reported spending money on marketing costs, though only 43% of small markets (n=7) reported any marketing expenses. The amount spent on marketing varied greatly, ranging from \$70 - \$10,000 (n=29). The average amount spent on marketing was \$258 for small markets (n=3), \$360 for medium markets (n=9), \$2,139 for large markets (n=9), and \$2,748 for very large markets (n=8).

Across all 37 markets, 97% used social media, 62% used newspaper ads, 68% used Front Porch Forum, 81% used a website, and 41% used an email newsletter. Figure 7 shows the proportion of markets by market size that used each marketing channel.

Figure 7: Marketing Channels Utilized by Market Size



INSURANCE

Across all markets (n=37) 73% had market liability insurance, 30% required vendor insurance, and 32% had board/director insurance. The median amount spent on insurance was \$219 for small markets (n=2), \$556 for medium markets (n=7), \$689 for large markets (n=9), and \$3,061 for very large markets (n=6).

MARKET DAY & LOCATION

Ten percent of summer markets (n=31) and 17% of winter markets (n=6) reported they had to move from their regular location for any length of time during the 2018-2019 or 2019 season. Only 8% of markets (n=37) owned their site. Of the rest (n=34), 50% had written agreements for their site.

The average number of market days scheduled for each market was 23 during the summer season and 16 during the winter season. Fourteen percent of summer markets (n=31) reported they had to close early or not open at all at least once during their regularly scheduled market times because of inclement weather. No winter markets reported closing due to weather.



MARKET ACCESSIBILITY

NOFA-VT supports food access programming at markets across the state. In 2018-2019, 38 (56%) 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 \$85,100 to market vendors during the 2018- 2019 winter and 2019 summer season. The Crop Cash Program brought in an additional \$63,050 to produce vendors during that time. Fifty summer markets accepted Farm to Family coupons in 2019, which brought in \$91,014 for produce vendors.



MARKET CHALLENGES

Markets were asked to report their most significant challenge during 2018-2019. 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. No very large market selected this challenge. The second most commonly reported challenge was too few farmers/vendors, with 19% of markets reporting it as their most significant challenge. The next most commonly reported challenges were low EBT/3SquaresVT participation and market location instability, with 10% of markets reporting each as their most significant challenge.

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

- Construction downtown (1)
- Too little diversity in products (2)
- Could not find specific vendor types(1)
- Last hour of market too slow (1)
- Mart staff turnover (1)
- Market board disorganized (1)
- Dissatisfied with market location (1)

SUPPORT FOR MARKETS

Throughout 2019, 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 representatives from 24 market organizations (some representing both summer and winter 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 expanded 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 throughout the 2018-2019 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, which raised awareness of farmers market issues with state legislators. You can download a complete overview of the VTFMA's board and activities for 2018-2019 and view a current list of VTFMA member markets at www.VTFMA.org.