

“This Little Farmer Went to Market...”

An Economic Impact Study
of the
Member Markets
of the
Farmers' Markets Association of Manitoba Cooperative

December, 2008



prepared by: **Dungannon Consulting Services**

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1.0 EXECUTIVE SUMMARY

The Farmers' Markets Association of Manitoba Cooperative Ltd. (FMAM) has commissioned an examination of the economic impact of its member markets by Dungannon Consulting Services. The work consisted of surveys of both consumers and vendors from markets throughout the province, supplemented by the selective use of existing data from technical sources and other jurisdictions.

The study surveyed 405 consumers and 143 vendors at 15 markets scattered all through Manitoba, ranging from the very small to the very large. The data was collected during the 2008 market season. The study had 5 key findings:

- 1. Markets are a Local Phenomenon.** Vendors typically travel 20 miles or less to market, and consumers are overwhelmingly from the local community.
- 2. More Advertising & Promotion.** Although well-known to regular customers, there is room for a more systematic and coordinated marketing of the various markets, as reported by both consumers and vendors.
- 3. The Experience & the Product.** Consumers value the social experience and “fun” of an outing to the farmers’ market, but fresh quality produce is the driving consumer motivation.
- 4. Farmers’ Markets Provide Supplemental Income.** Vendors rarely rely on the markets for a substantial part of their household income, but both the income and the social experience are valuable components of a livelihoods approach to rural life.
- 5. Markets Can Expand Their Season.** Vendors at most markets have the ability and desire to provide product over a longer season, perhaps 26 weeks in duration.

In addition to these key findings, the study reviewed work from 7 other jurisdictions and found that an economic multiplier of 3.0 times the sum of direct sales and other sector purchases was a reasonable method.

FMAM markets have seen the number of vendors increase by 51% over the last 5 years, and gross sales have almost quadrupled, going from \$600,000 to \$2.2 million in the same period. When added to other sector purchases and applying the multiplier effect, the overall economic impact in Manitoba communities is **\$10.26 million**.

Despite this substantial growth in the “hard”, quantifiable indicators, the more significant contribution of farmers’ markets continues to be in building social relationships and improving the quality of life in Manitoba communities.

2.0 BACKGROUND INFORMATION

The Farmers' Markets Association of Manitoba Co-operative Ltd. (FMAM) was initially organized in 2007, (incorporation in August) with the first Annual General Meeting of the organization occurring in November of 2007. The purpose of the organization is to promote farmers' markets throughout the province (both to the public and government), educate vendors & consumers, and to organize services that will benefit the member markets and their vendors. There had been a prior organization with a similar mandate in the 1990's which had ceased operation, and for a number of years there was a resulting absence of a unified voice for farmers' markets.

In 2008, FMAM was able to secure funding for an organizational planning process that examined its own operations, as well as for a separate study to gauge the economic impact of its member markets. Blair Hamilton of Dungannon Consulting Services was retained to carry out the economic impact study, with a mandate to complete the analysis from a community economic development perspective. The data collection was to occur during the 2008 market season, with an interim report in late 2008, and a final report in early 2009. This report is to be presented at the Direct Farm Marketing Conference in late February 2009.

The most recent look at farmers' markets in Manitoba had been as part of an examination of alternative food production/marketing strategies by Doucette & Koroluk in 2004, as part of the Manitoba Research Alliance on Community Economic Development in the New Economy. As part of that work, 127 consumer surveys were administered by researchers, and 119 self-administered vendor surveys were returned (43%).

Based on the Doucette and Koroluk data, gross sales for the farmers' market sector was estimated at \$600,000 annually in 2003. There were an estimated 268 vendors at approximately 21 markets throughout the province.



The approach to the new economic impact study was not to replicate the work of Doucette and Koroluk, but to build upon it. By changing methodology, the new study would ask fewer detailed questions, but receive a higher rate of return. In the case of consumer surveys this was

successful, more than tripling the number of completed surveys. Although the number of vendor was somewhat higher at 143, the participation rate was slightly lower at 39%.

There were other two significant changes in approach. One was to gather more detailed information segmented by individual market, that would provide each market with some feedback specific to their operation, that could be used in future planning. The second change was to take a more in-depth look at the economic multipliers used in calculating impact on various communities.

The following sections of this document detail the process, the data, and the findings from the newer study.

3.0 CONSUMER SURVEY

This section of the report presents the results of the consumer survey conducted during the 2008 farmers' market season. The first subsection reviews methodology, the second through fourth subsections present survey results. More detailed survey results, with comments relating to individual markets, are contained in appendices.

3.1 Consumer Survey Methodology

The consultant designed, tested and revised a survey to be used with consumers at the various farmers' markets. The design of the survey was done within certain parameters. The survey form was circulated by market coordinators but self-completed by the respondents. The form was intended to be filled out in approximately 5 minutes, certainly no longer than 10 minutes. Forms could be completed anonymously, but a detachable entry form for a draw was attached, to provide an incentive for completion. Each market would have one winning respondent receive \$25 in certificates redeemable at that market.

The survey consisted of 11 questions, and included questions that were open-ended, rating questions, ranking questions, "check all that apply", and "check the one that applies". Quite a number of respondents had difficulty with the concept of ranking, an issue that is expanded on in section 3.3. Otherwise, there were no substantial difficulties with the form itself. A copy of the survey is included in report appendices.



Surveys, along with a set of written instructions, were circulated to all market coordinators who had indicated a willingness to administer the survey. The number of survey forms sent out in the package was determined by a formula, approximately 5 times the number of vendors at that market. Coordinators were instructed that they could copy more forms if required. Coordinators were to administer the survey over

1-3 weeks, in an attempt to get a substantial number completed, The completed surveys were then mailed back to the consultant.

There were 14 of the FMAM markets that administered the surveys and submitted results. A total of 495 completed surveys were submitted, although some respondents

chose to leave a given question blank. The “no answer” responses have been removed for presentation of these results.

3.2 Who Answered - (Questions 1, 2, and 6)

As noted above, 14 markets sent back consumer surveys. These included Altona, Brandon, Lundar, Pineridge Hollow, Portage la Prairie, St. Malo, St. Norbert, Steinbach, Swan Valley, Winkler, Killarney, Cypress River, Ste. Agathe, and the Winnipeg Exchange District. The last four markets experienced difficulty in getting sufficient results, so in the presentation of the data they have been grouped together under the heading “Miscellaneous Markets” so that meaningful percentages can be calculated. The following table shows the number of completed surveys per market.

Table 1 - Consumer Survey Responses

Market	# Surveys	% of total
Altona	18	3.6%
Brandon	39	7.9%
Lundar	24	4.8%
Pineridge Hollow	103	20.8%
Portage la Prairie	16	3.2%
St. Malo	73	14.7%
St. Norbert	152	30.7%
Steinbach	17	3.4%
Swan Valley	15	3.0%
Winkler	26	5.3%
Miscellaneous Markets	12	2.4%
Total	495	100%

Question #2 asked respondents for the first three letters of their postal code, to determine where they were residing. The appendix which describes some of the market-by-market comments identifies the specific postal code areas for each market. As a general finding, the consumers are overwhelmingly local to the market area. Where markets were located in a town with a distinct postal code, most of the customers came from that postal code area (i.e. Winkler, Brandon, Steinbach).

The St. Norbert market, which falls within City of Winnipeg limits, serves Winnipeg almost exclusively. PineRidge Hollow draws 58% of its customers from Winnipeg, most the northeast portion, but the balance come from Selkirk and the bedroom communities nearby.

There were only 2 out of province postal codes, indicating that the customer profile for FMAM markets does not include tourists (which would not be the case for a venue like The Forks for instance). This general comment is a little less true for St. Malo, which is near a provincial park campground that draws customers from Winnipeg.

Question #6 asks the age range of the respondent. As might be expected, customers tend to be older and the overall figures show 37% are aged 60 or older, while just under 6% are aged less than 30 years. There is some considerable variation between markets, with Lundar, Steinbach and Altona having a significantly older customer base. See the following table for the age distribution by market.

Table 2 - Consumer Age by Market

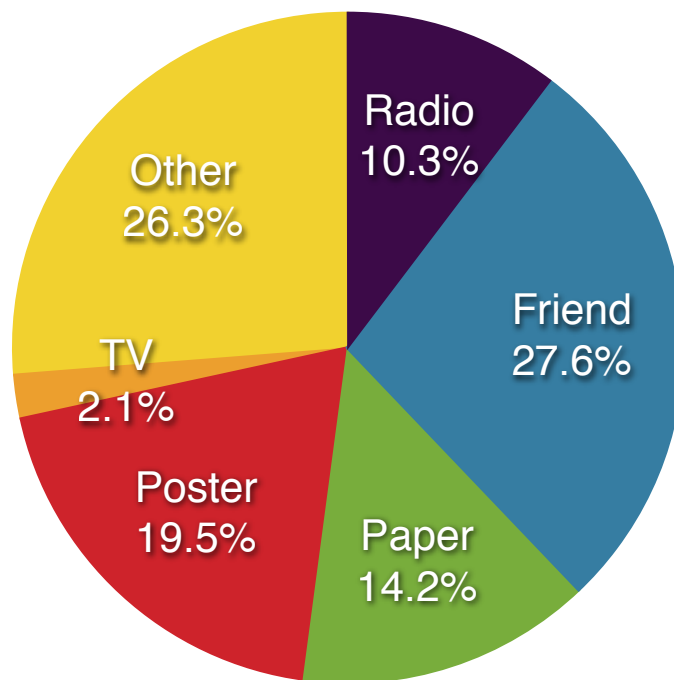
	<i>18 or less</i>	<i>19-29</i>	<i>30-39</i>	<i>40-49</i>	<i>50-59</i>	<i>60-69</i>	<i>70-79</i>	<i>80 plus</i>
Altona	0.0%	11.1%	5.6%	16.7%	11.1%	33.3%	16.7%	5.6%
Brandon	0.0%	7.7%	10.3%	15.4%	20.5%	28.2%	17.9%	0.0%
Lundar	4.2%	8.3%	4.2%	8.3%	8.3%	25.0%	33.3%	8.3%
Pineridge Hollow	0.0%	2.9%	17.5%	18.4%	26.2%	25.2%	8.7%	1.0%
Portage	0.0%	6.3%	6.3%	12.5%	25.0%	37.5%	6.3%	6.3%
St. Malo	1.4%	6.8%	20.5%	24.7%	20.5%	13.7%	8.2%	4.1%
St. Norbert	0.0%	6.6%	17.9%	19.9%	24.5%	20.5%	7.3%	3.3%
Steinbach	0.0%	11.8%	5.9%	11.8%	5.9%	29.4%	35.3%	0.0%
Swan Valley	0.0%	0.0%	13.3%	13.3%	33.3%	13.3%	26.7%	0.0%
Winkler	0.0%	3.8%	7.7%	19.2%	15.4%	11.5%	19.2%	23.1%
Misc*	0.0%	0.0%	8.3%	25.0%	16.7%	25.0%	25.0%	0.0%
Total	0.4%	5.9%	14.8%	18.6%	21.7%	22.1%	12.8%	3.8%

3.3 Attending & Spending (Questions 3,4, and 8)

Consumers were asked how they found out that the farmers' market they visited was open for the season. The two most common responses were "from a friend" and "other", which combined for over 50% of the responses. The "other" category contained many different possibilities, including word-of-mouth, internet, MAFRI, roadside signs, seeing the market while out driving, living across the street, and "I went last year". Although we did not track internet and email as specific responses, these are likely the methods that will be the fastest (and cheapest) to grow. The overall responses are illustrated below in Figure 1, and the detailed data table is contained in Appendix A.

There was quite a bit of variation among markets. Radio was very effective in some market areas (Swan Valley, Altona, Steinbach) but poor in others (Portage la Prairie, St. Malo, and Pineridge Hollow). Newspapers were useful in most communities, with the exception of St. Malo and Pineridge Hollow. Posters were effective everywhere except St. Norbert, but that is likely because the St. Norbert Market is so well-established.

Figure 1 - How Consumers Heard Market was Open



Consumers reported that they were most likely to attend the farmers' market 2-5 times per year (39%), with 29% attending 6-9 times per year, and 27% attending 10 times or more. Put another way, 57% of consumers attend 6 or more times per year. (see Table 3 for detail). There was some variation among the individual markets. Pineridge Hollow and St. Malo were more likely to have less frequent visitors, probably as a result of their location near provincial park campgrounds. Some of the smaller markets (Swan Valley and the Misc. markets) had fewer responses in the 10 or more category, but this may be a result of a slightly shorter season than the larger markets.

Table 3 - Frequency of Attendance by Market

	once	2 – 5	6 – 9	10 plus	Total
Altona	0.0%	27.8%	27.8%	44.4%	100.0%
Brandon	0.0%	23.1%	30.8%	46.2%	100.0%
Lundar	4.2%	37.5%	20.8%	37.5%	100%
Pineridge Hollow	15.5%	52.4%	14.6%	17.5%	100.0%
Portage	0.0%	12.5%	43.8%	43.8%	100.0%
St. Malo	9.6%	64.4%	21.9%	4.1%	100.0%
St. Norbert	7.9%	33.8%	21.2%	37.1%	100.0%
Steinbach	0.0%	50.0%	31.3%	18.8%	100.0%
Swan Valley	0.0%	13.3%	73.3%	13.3%	100.0%
Winkler	7.7%	19.2%	34.6%	38.5%	100.0%
Misc*	0.0%	8.3%	75.0%	16.7%	100.0%
Aggregate	7.7%	39.1%	25.6%	27.6%	100.0%

Consumers visiting a farmers' market reported that they would typically spend \$21-\$40 with 52.7% selecting this option. Again, there was some variation among markets. It appears that markets with a greater proportion of handicraft vendors had a higher response in the "\$41-60" and "\$61 or more" categories, caused by the higher per item cost of handicrafts. This tended to favour the larger markets, but not universally so. The breakdown is detailed in Table 4 below.

Table 4 - Amount Spent per Visit, by Market

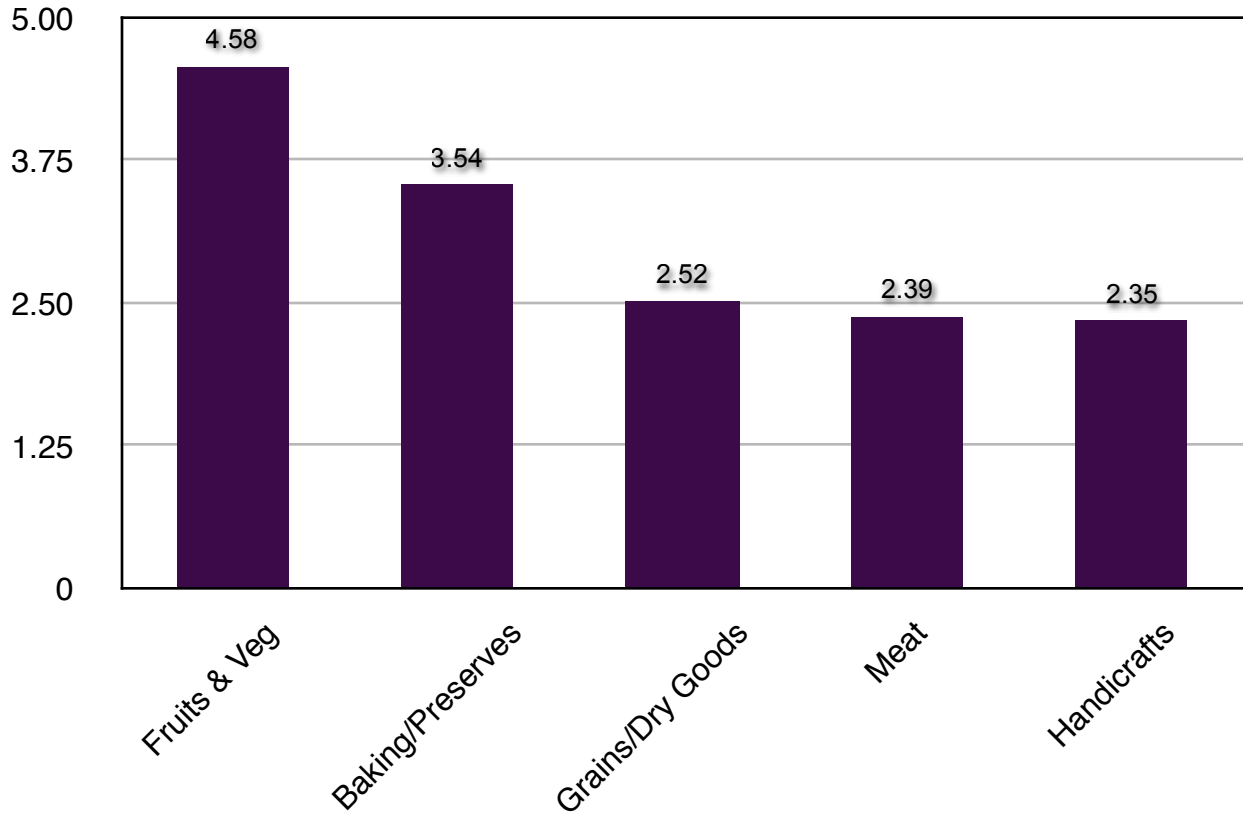
	\$20 or less	\$21-\$40	\$41-60	\$61 plus	Total
Altona	61.1%	38.9%	0.0%	0.0%	100.0%
Brandon	30.8%	53.8%	7.7%	7.7%	100.0%
Lundar	83.3%	16.7%	0.0%	0.0%	100.0%
Pineridge Hollow	17.5%	58.3%	17.5%	6.8%	100.0%
Portage	0.0%	50.0%	50.0%	0.0%	100.0%
St. Malo	50.0%	45.8%	2.8%	1.4%	100.0%
St. Norbert	13.8%	55.3%	22.4%	8.6%	100.0%
Steinbach	50.0%	43.8%	6.3%	0.0%	100.0%
Swan Valley	0.0%	60.0%	40.0%	0.0%	100.0%
Winkler	54.2%	41.7%	4.2%	0.0%	100.0%
Misc*	33.3%	58.3%	8.3%	0.0%	100.0%
Aggregate	29.1%	50.9%	15.1%	4.9%	100%

3.4 Purchasing Factors (Questions 5 and 7)

Consumers were asked how important various product types were to them during a visit to the farmers' markets. They were asked to rate how important each category was on a scale of 1 to 5 with 5 being "very important" and 1 being "not important at all". These ratings were added and then averaged as a total, and by individual market. The overall results are shown in Figure 2, and the detailed data table is contained in Appendix A.

For all markets, Fruits & Vegetables were the top priority and Baking/Preserves were the second most important category. The other three categories varied from market to market, and the rating was influenced by whether that particular market had meat vendors or a strong handicraft presence (for instance). There were some write-in comments on products in the "other" category. Two of these products did not fit in the above categories, but seemed to be important to consumers. These were honey (especially in the Swan Valley market) and plants/flowers.

Figure 2 - Importance of Product Type to Consumers Visit



Consumers were also asked to rank a number of factors in their order of importance in making the decision to purchase a product. There were 9 factors presented, and the idea was that respondents would rank them 1 through 9. A number of people were confused by the concept of ranking, and either checked all that applied, or gave each factor a score (where you might have three “1”s, 4 “2”s etc.) These responses were listed as “no answer”, reducing the total responses to 297. In situations where the respondent ranked 1 through 6, and left three blank, the blank responses were all ranked “10”.

The resulting ranks were added up and divided by the number of respondents to create a composite score. With this score, a lower number means the factor has a greater influence on purchasing decisions, a higher score means it is less important. The factor of “Freshness” was clearly the most important, as illustrated in Table 5 below.

Table 5 - Relative Importance of Purchasing Factors

Rank	Purchasing Factor	Score
1st	Freshness	2.67
2nd	Locally Grown/Made	3.68
3rd	Price	5.16
4th	Quality/Taste	5.42
5th	Availability	6.65
6th	Health Benefits	7.22
7th	Unique	8.11
8th	Packaging/Presentation	8.43
9th	Impulse	8.67

Although there is strong support for local product, these results also indicate that there is some price sensitivity with the consumer. There is also a cautionary note with the results from this particular question. Even though the results for each market are included in Appendix A, the smaller number of responses means that the percentages for individual markets (especially small markets) are not highly reliable. They should not be given as much weight as the aggregate response.

3.5 Open Ended Feedback (Questions 10 and 11)

Question 10 asked consumers what their 2 favorite things were about their local farmers' market. This generated 711 responses, which were then categorized by type of comments. The general trends are reported below, but some specific comments are also listed in Appendix D.

Not surprisingly, the largest number of the comments (45%) were product-related comments. Some consumers named specific products, but most were more general - "fresh vegetables", "baking", etc.

The next highest responses were comments related to atmosphere (20%). Many consumers actually wrote "atmosphere", but comments such as "friendly people", "sights & smells", "the whole thing" were also included in this category. The two larger markets scored somewhat higher in this area, likely due to the higher traffic creating more of a "buzz", and a feeling of ambience.

The third highest response was tied between comments related to “local” and miscellaneous comments (both at 11%). The comments relating to local were specific to supporting local producers/vendors. Comments about convenient location were recorded under miscellaneous, which also included things like “entertainment”, “music”, “price” or other factors.

The last two types of responses were “variety” (7%), and responses related to social capital (6%). Social capital responses were those that indicated a specific comment that placed value on social interaction. Things like “building community” or “visiting friends” were examples.

Consumers were also asked what kind of changes they would recommend for their local market. These suggestions varied widely by market, as the location, product offering, schedule, site issues and other factors vary from market to market. Consequently, these suggestions are listed in Appendix D.

4.0 VENDOR SURVEY

This section of the report reviews the findings of the survey to vendors. The first subsection deals with the methodology of the survey, and subsections 4.2 through 4.7 describe the results. Analysis of the results is deferred to section 5 of this report. For some issues only the general finding is contained in this part of the report, and the more detailed tables of findings are contained in Appendix B. Some of the comments that are specific to individual markets are combined with market-specific answers from the consumer survey and listed in Appendix D.

4.1 Vendor Survey Methodology

The consultant designed, tested and revised a survey to be used with vendors at the various farmers' markets. The design of the survey was done within certain parameters. The survey form was circulated by market coordinators but self-completed by the respondents. The form was intended to be more detailed than the consumer survey, but not so long that vendors would decline to complete it. Too many questions, or asking for too much detail, would be seen as intrusive, and less likely to be completed.

Survey forms were to be completed anonymously, and a stamped, pre-addressed envelope was provided. Respondents could mail the survey back themselves or give it to their market coordinator to return.

The survey consisted of 22 questions, and included questions that were open-ended, rating questions, ranking questions, and "check the one that applies". Unlike the consumer survey, most respondents had no difficulty with the concept of ranking. In questions 19, 20 and 21 it became apparent that many respondents viewed the question of other businesses who benefited in the abstract. Others named specific businesses. Due to this split, and given that the physical sites are so different from one market to the next, the quantitative responses for these questions is minimal. However, the answers were used to develop a better sense of each market location and to support some general comments on spin-off economic benefits. Otherwise, there were no substantial difficulties with the form itself. A copy of the survey is included in report appendices.

Surveys, along with a set of written instructions, were circulated to all market coordinators who had indicated a willingness to administer the survey. The number of survey forms sent out in the package was determined by a the estimated number of



vendors at that market. Coordinators were instructed that they could copy more forms if required. Coordinators were to administer the survey over 1-3 weeks, in an attempt to get a substantial number completed, The completed surveys were then mailed back to the consultant.

There were 15 of the FMAM markets that administered the surveys and submitted results. A total of 143 completed surveys were submitted, although some respondents chose to leave some questions blank. The “no answer” responses have been removed for presentation of these results.

4.2 Who Answered (Questions 2,3 and 9)

There were a total of 143 vendor surveys completed from the 15 participating markets, out of an estimated maximum sample size of 359, for a healthy participation rate of 39.8%. (each market coordinator was asked to estimate their total number of vendors) These responses were grouped together into small market responses, medium market responses, and large market responses in order to get a large enough grouping to calculate percentages and to preserve anonymity. The groupings were:

Small Markets: Cypress River, Killarney, Winkler, Winnipeg Exchange District, Ste. Agathe, Lunder, Altona, Roblin and Swan Valley.

Medium Markets: St. Malo, Portage la Prairie, Brandon, and Steinbach.

Large Markets: St. Norbert and Pineridge Hollow.

Small markets were defined as less than 15 vendors, medium markets as 15-49 vendors, and large markets as 50 or more vendors. There were 48 small market responses (34%), 35 medium market responses (24%), and 60 large market responses (42%). The participation rates for individual markets is presented in Appendix B. For purposes of this section, all the other data is presented by market size.

The vendor responses were analyzed by postal code, and as a general rule, most markets drew vendors from their immediately surrounding area. Both PineRidge Hollow and St. Norbert drew vendors from somewhat wider areas, as the size of the markets made it more feasible to travel a little further. In Appendix D, the postal codes areas for vendors are outlined in the comments for each individual market.

The vendors were asked which age category they fell into. The two largest categories were vendors in their forties and in their sixties, combining for almost half of all responses. Another way to view the data is that 50% of vendors are aged 50 or older.

The age distribution was fairly similar for the different market sizes, with the medium sized markets having more vendors in their seventies and fewer in their thirties.

Table 6 - Vendor Age by Market Size

	small	medium	large	overall
<i>18 or younger</i>	8.3%	0.0%	0.0%	2.9%
<i>19-29</i>	10.4%	3.1%	3.4%	5.8%
<i>30-39</i>	22.9%	9.4%	15.3%	16.5%
<i>40-49</i>	20.8%	21.9%	28.8%	24.5%
<i>50-59</i>	10.4%	21.9%	16.9%	15.8%
<i>60-69</i>	22.9%	25.0%	25.4%	24.5%
<i>70-79</i>	4.2%	15.6%	8.5%	8.6%
<i>80 or older</i>	0.0%	3.1%	1.7%	1.4%

4.3 How Far & How Often? (Questions 1, 4, 5 and 6)

Vendors were asked how many markets they sold at in Manitoba (this may include some markets not affiliated with FMAM). Most vendors only sold at a single market (76%) and there were a significant number that sold at 2 markets (24%). Only a handful (4%) sold at more than 2 markets.

The average distance travelled by a vendor to market was 13.7 miles or 23 kilometers. Both small and medium market vendors averaged 9 miles (15 km) to market, while the larger markets drew vendors from a little further away and averaged 20.7 miles (35 km). Since averages can potentially be distorted by a few large values, a distribution was done, shown in Table 7 below.

Table 7 - Distribution of Vendor Distance to Market

distance (miles)	<i>0-1</i>	<i>2-5</i>	<i>6-10</i>	<i>11-20</i>	<i>21-30</i>	<i>31-40</i>	<i>41-50</i>	<i>51+</i>
# vendors	17	28	33	36	9	3	2	7
% vendors	12.6%	20.7%	24.4%	26.7%	6.7%	2.2%	1.5%	5.2%

Looking at the distribution shows that 72% of the vendors are traveling between 2 and 20 miles to market, which confirms that the average figure is representative of the typical vendor.

Vendors were asked how often they attended market, and most of the respondents appeared to be regular attenders with 61% saying they attended 10 times per season or more, and another 20% attending 6-9 times per season. The breakdown by market size varied a little, with small market vendors a little less likely to attend 10 or more times. This is likely a function of smaller markets tending to have slightly shorter seasons. The detailed table is contained in Appendix B.

Vendors were also asked how many weeks they could supply product to a farmers' market to test whether there is sufficient demand to approach government about increasing the number of weeks licensed markets can be open. The average response was 26 weeks, although the interpreting the results is not necessarily straightforward. This point is discussed further in section 5.

4.4 Takin' It to the Streets (Questions 18, 19 and 21)

Vendors were asked how well their market was known in the local community, using a scale of 1 to 6, where 6 represented "very well known". The overall response was quite good, with an average weighted score of 4.5. Small market vendors felt their markets were not quite as well known (4.0 score) and vendors at medium size markets ranked their visibility comparatively higher (5.2 score). The large market vendors averages a 4.5 score.

Vendors were asked if they felt there were local businesses that benefited from the presence of the farmers' market. The "yes" responses were 89%, but many of these did not give examples, as requested in question 21. Of those who did respond to question 21, some listed examples of suppliers to vendors, others listed types of businesses, while others named specific establishments.

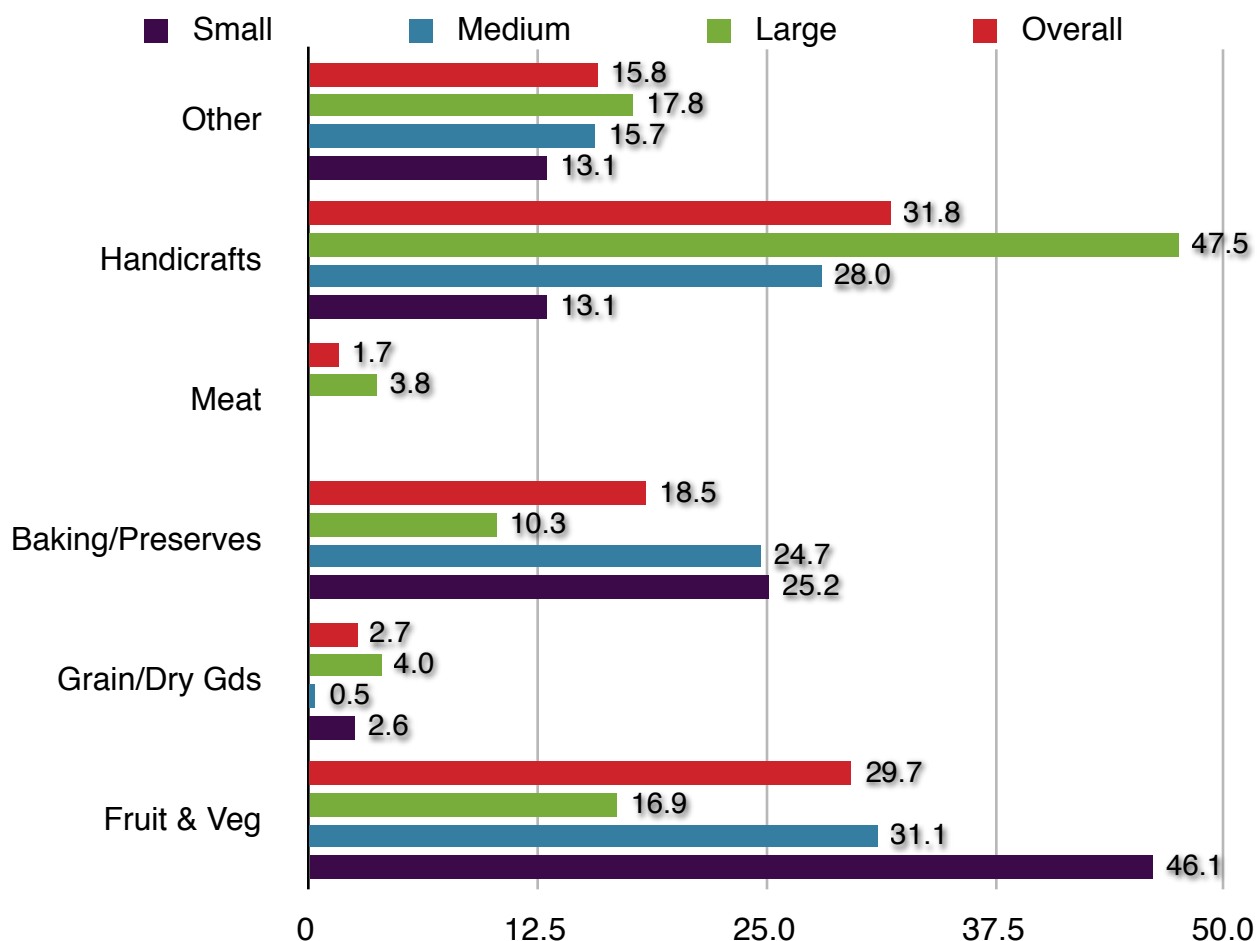
The most obvious example of this was the restaurant at PineRidge Hollow, which actually sponsors the market as an attraction. As a general observation, the most consistently listed businesses were malls, grocery stores, gas bars, and restaurants. There is some discussion of the merits of co-location contained in section 5.

4.5 What's For Sale? (Questions 11,12,13 and 14)

Vendors were asked how much each of the various product categories contributed to their annual sales. Even though the answer is as a percentage of sales, the replies were not weighted by either value of the product or by the annual sales of that vendor. As a result, the responses should be viewed as a rough estimate of product mix and vendor emphasis rather than a breakdown of sales figures. Keeping that in mind, the

results show that the product mix varies substantially by market size, as illustrated in Figure 3.

Figure 3 - Vendor Mix by Market Size, as percentage



Small markets are much more likely to have a high percentage of fruit and vegetable vendors, and lower percentages of handicraft vendors. For large markets, the exact opposite is true, with a higher percentage of handicraft vendors and a smaller proportion of fruit and vegetable vendors.

Meat generally appeared to be available only at the larger markets, at least based on those who responded to the survey. Baking and Preserves was an important part of the product mix at all size markets. The “Other” category included a wide range of things. Some were local products that didn’t fit in the main categories (i.e. - honey or garden plants), but it also included things like fair trade coffee, or food meant for consumption on the premises (i.e. - hot dog vendor).

Vendors were asked what percentage of their product was local (i.e. - met the “make it, bake it, or grow it” criteria), how much was bought within Manitoba for resale, and how much came from outside Manitoba. The overall results were quite positive, with 92.6% of the product being local, 2.7% being sourced from others within Manitoba, and 4.6% being sourced from outside Manitoba. Most of the products in the latter category were speciality products like fair trade coffee or environmentally safe cleaning products. There was very little variation according to market size, with large markets being slightly more likely to have these speciality items from out of province.

Vendors were also asked which factors they thought influenced the customer’s decision to purchase. As with the similar question from the consumer survey, there were 9 factors presented, and the idea was that respondents would rank them 1 through 9. Vendors were much less confused by the concept of ranking, and fewer responses were listed as “no answer”. In situations where the respondent ranked 1 through 6, and left three blank, the blank responses were all ranked “10”.

The resulting ranks were added up and divided by the number of respondents to create a composite score. With this score, a lower number means the factor has a greater influence on purchasing decisions, a higher score means it is less important.

Table 8 - Vendor Perception of Factors in Customer Purchasing, by Market Size

Factor	<i>small</i>	<i>medium</i>	<i>large</i>	<i>overall</i>
Availability	6.54	6.0	6.61	6.33
Freshness	4.36	4.3	6.53	5.18
Packaging/Presentation	7.26	5.7	6.59	6.47
Price	4.87	5.4	3.92	4.52
Locally Grown/Made	5	5.0	5.9	5.29
Quality/Taste	4.51	4.9	5.18	4.81
Uniqueness	6.77	6.8	4.29	5.62
Impulse	8.13	8.4	6.76	7.48
Health Benefits	7.79	7.7	8.27	7.84

There are some significant differences according to market size. Large market vendors felt uniqueness was a higher factor than did small or medium market vendors, likely as a result of the higher proportion of handicraft vendors at the large markets. Large market vendors also felt their customers were more price sensitive than small or medium market vendors, and felt their customers were less motivated by freshness.

4.6 Getting Down to Business (Questions 7, 8, 10)

Vendors were asked a series of questions about their income, sources of income and sales. Although there was somewhat more reluctance to answer these questions, the provision of anonymity allowed for a sufficient amount of data to be collected. The data from these three questions are particularly important to evaluating economic impact.

In one question, vendors were asked what their main source of household income was. As can be seen in Table 9, most vendors had a job as the main source of their household income. This varied somewhat by market size.

Table 9 - Main Source of Vendor Household Income, by Market Size

	<i>small</i>	<i>medium</i>	<i>large</i>	<i>overall</i>
Farming	34.0%	19.4%	13.3%	21.7%
Job	38.3%	19.4%	40.0%	34.8%
Self-Employment	10.6%	32.3%	18.3%	18.8%
Pension	14.9%	19.4%	26.7%	21.0%
Other	2.1%	9.7%	1.7%	3.6%
Total	100.0%	100.0%	100.0%	100.0%

Small markets were much more likely to have vendors who relied on farming as the primary household income. Large markets were somewhat more likely to have vendors whose primary source of income was a pension.

Vendors were also asked what percentage of their farming or handicraft income came from sales at farmers' markets.

Table 10 - Percentage of Farming/Handicraft Income from Farmers' Market Sales

	small	medium	large	overall
0-20%	74.5%	74.2%	51.7%	64.7%
21-40%	4.3%	3.2%	13.8%	8.1%
41-60%	6.4%	9.7%	10.3%	8.8%
61-80%	4.3%	6.5%	6.9%	5.9%
81-100%	10.6%	6.5%	17.2%	12.5%

Table 10 shows that most vendors use farmers' markets as only one outlet for their product, with almost two-thirds indicating these markets comprise 20% or less of their farming or handicraft income.

The last income related question asked vendors to report their estimated annual sales at farmers' markets. A total of 91 vendors responded to this question. Unfortunately, virtually none of the vendors from the Brandon or Portage markets answered this question, which made any averages for medium size markets unreliable. To address this, an average for combined small & medium markets was calculated.

The small and medium market vendors reported an average annual sales figure of \$2,752 per season. Large market vendors reported an average sales figure of \$8,986, but this figure was driven up by a handful of vendors who reported very large sales. The overall average for all markets combined was \$5,629 per year.

To put it in perspective, 92% of vendors reported annual sales of \$10,000 or less. Of the seven vendors who reported annual sales greater than \$10,000, all but one was affiliated with a large market.

4.7 The Good, The Bad and The Ugly... (Questions 15, 16, and 17).

Vendors were asked if they felt their main farmers' market was well run. More than half (56.7%) felt their market was "very well run" and 29.1% felt it was "pretty well run", meaning 86% had a favourable impression of how their market was run. Only 7.1% felt their market "needs improvement" in how it was run, and another 7.1% felt it was "average". There were no responses stating a market was run poorly.

Vendors were asked an open-ended question about their greatest obstacle to profitability. The answers included the obvious ("not enough sales/customers") and things that are out of the control of the vendor and the market (i.e. - weather). There were some themes that seemed to develop across multiple markets. The specific responses are listed in Appendix D, with a description of the general trends in the paragraph below.

Quite a few vendors identified that having enough time (or access to labour/help) in getting product ready for market was an obstacle. Others mentioned that keeping enough product available, and the right product, was also a challenge. A significant number identified that resistance to premium pricing was an obstacle - the premium pricing is made more difficult both by a lack of consumer education on the product, but also by some vendors under-valuing their own product. In a few instances, vendors felt that markets were not achieving the right mix of vendors, with too many vendors selling the same thing. Although it was only mentioned by a couple of respondents, cost of production (particularly fuel costs) clearly affects profitability.

Vendors were also asked an open-ended question about possible improvements to their markets. Of course, these varied widely, as the individual market circumstances are quite different. The suggested improvements of each vendor group are listed in Appendix D, with some general observations following below.

As a general rule, the vendor suggestions for improvements were not as diverse as those from consumers, but tended to be fairly practical. There was a consistent thread of suggestions calling for more advertising and better signage. There were quite a number of suggestions regarding improvements to the facilities, layout, and amenities, but these varied quite a bit depending on what was available at any given market.



It seems that while vendors do not necessarily want too many selling the same product, they recognize that getting more vendors (in the right mix) tends to draw more customers and benefits everyone. A few vendors also specifically noted how important it was to have a good relationship with the municipal government. This tended to be an issue in some of the larger communities outside of Winnipeg (Portage, Winkler, and Altona).

Interestingly, there were almost no comments suggesting improvements related to the role of market coordinators. The one suggestion for a paid coordinator seemed to be meant to acknowledge how much some markets rely on volunteers, rather than as a criticism. As a related point, as each market considers all these suggestions for improvements, the discussions need to occur in the context of what is practical relative to the volunteers and coordinator time that each market might have available.

5.0 ANALYSIS & FINDINGS

This section of the report presents some analysis of the data from the two surveys, supplemented by some information from external sources. The first subsection summarizes some of the key findings that will be of interest to FMAM and its member markets. The second subsection is a brief discussion of non-economic impacts of farmers' markets, in the context of the data. There is a third subsection that describes how the economic impacts are measured, and the fourth subsection applies this to the FMAM markets. Lastly, there are some concluding comments.

5.1 Key Findings from the FMAM Data

The survey results, including those in the appendices, will provide a lot of information for FMAM and each individual market to consider, discuss, and analyze as they see fit. Different readers will find different things important, yet there seem to be a number of key findings that are worth highlighting. These include:

Finding #1 - Farmers Markets are a Local Phenomenon

Postal code analysis shows that, with only a few exceptions, farmers markets are drawing customers from the community they are located in (and surrounding area), and that almost all of the vendors invariably come from same area. This is confirmed by the distance vendors report that they travel to market, generally less than 20 miles.

This means that as a community economic development strategy, farmers' markets are part of an income retention approach as opposed to attracting dollars from outside the community. This has implications for how the market is advertised, and in understanding the customer profile. This income retention approach can support the efforts of other community businesses, in a coordinated effort to keep income circulating in the local economy.

Finding #2 - More Advertising & Promotion is Required

The FMAM markets have an uneven approach to advertising, with some being fairly aggressive and others being much more passive. While each market needs to determine what works best for it, the surveys seem to demonstrate that radio and newspapers can be used effectively for markets of all sizes. Vendor comments seem to indicate that signage can always be improved. While word of mouth is the single largest way in which consumers hear the market is open, it is not necessary to simply rely upon this.

Marketing is a learned skill, and not all vendors or market coordinators will come to it naturally. This is likely an area where FMAM could play a supportive role, by developing "how-to" kits on press releases, getting stories placed in the media, and other low cost

promotional methods. A coordinated media strategy, perhaps including some centralized joint advertising, is likely the single most effective way to grow sales in the sector.

Finding #3 - Sell the Experience AND the Product

There is no doubt that the overall experience is important to most customers. This includes a good selection of product types, different vendors to choose from, the sense of gathering with other people, and the notion that a trip to the Farmers' Market is not just going shopping, it is a social outing. Entertainment, seating, and site amenities all contribute to this feeling.

While the overall experience is very important to consumers, let there be no doubt that fresh product (particularly fruits and vegetables) are the main reason consumers are coming. All the amenities in the world will not drive a market that lacks fresh, quality produce. Keeping a good supply of high quality product is the single most important task for each and every market.

The survey results seem to indicate that there is a bit of a disconnect between vendors and customers regarding what motivates the purchase. Freshness and local origin are the two most important factors identified by customers, with price being a distant third. Vendors tended to see price as the most important factor. Of course, it is possible that customers may be more price sensitive than they are indicating on the survey, but it is also worth considering that vendors may be more successful in protecting their price if they emphasize freshness.

Finding #4 - Farmers Markets are a Supplementary Income Opportunity

Farmers' markets in Manitoba are clearly a supplementary income opportunity for a wide range of mainly rural (but also some urban) residents. Only 21.7% of vendors report farming as their main source of household income, with employment and pensions both receiving higher percentages. The number of full-time farming families has been in decline for decades, so it is not surprising that as farmers of all stripes rely on outside employment to a greater degree, there will be fewer families that can rely solely on farming. Vendors likely represent a mixture of full-time farmers, part-time farmers, hobby farmers, and retired farmers. As well, many vendors are crafters, bakers, or gardeners who may have never farmed.

Farmers' market vendors generally reported sales of less than \$3,000, and went to on to estimate that for two-thirds of them, these sales represented 20% or less of their annual farming or handicraft income. So, clearly most vendors are using the market as a means to augment income, but there are notable exceptions to this, with a handful of vendors reporting sales that are much, much higher. Approximately 17% of vendors say that these sales represent 60% or more of their annual farming or handicraft income.

It is important to note that the modest sales and income figures are not necessarily the result of insufficient demand, but rather of limitations that are self-imposed by some vendors. Some vendors only attend market twice a year around a single crop like strawberries. Other vendors are retirees who spend the winter knitting or crafting, and come out for a few market days to sell off inventory and recoup money to buy more supplies. Some vendors come mostly because they can't stop gardening, and they hate to see the produce go to waste! It is a diverse group, with diverse motivations and differing expectations about what constitutes a successful market.

Finding #5 - Markets can Expand their Season

At present, provincial regulations limit the number of weeks a farmers' market can operate to 14 per year. As noted earlier, vendors were asked how many weeks they can supply product to market, to see if there was interest in expanding the season to improve earning opportunities. Vendors responded with an average answer of 26 weeks. This could conceivably see some markets open from May 1 though October 31st.

The phrasing of the question was such that some vendors may have self-limited their answer, on the understanding the maximum allowable was 14, so the 26 week average may be slightly under-reporting the capacity. At the same time, there was some concern that vendors of handicraft or other non-food items would disproportionately answer "52 weeks", skewing the average higher.

Consequently, a re-calculated average was done based on all vendors for whom handicrafts were 50% of their sales or less. The average number of weeks in this calculation was 24.7 weeks. Based on this, there is definitely interest in having access to a longer season by some vendors, and 24-26 weeks would likely be achievable by a number of markets. Of course, each market would have to do their own analysis of vendor product mix and willingness to sell, and arrive at a market-by-market solution, but one can definitely make the case that a 14 week cap is overly restrictive.

There is some evidence that the season could be extend even beyond 26 weeks for a few markets. This would need to be carefully evaluated, as it has the potential to create 2 pressures - to bring in fresh produce from outside Manitoba during the off-season, and/or to have the farmers' market resemble more of a flea market during the off season. There are likely strategies to protect against these possibilities, but expansion beyond 26 weeks should be studied in more detail before forming firm conclusions.

5.2 Non-Economic Impacts

The practice of community economic development has been characterized by inclusion of non-economic impacts that are generally excluded from traditional economic development analysis. This "double bottom line" approach strives to practice, in the

words of E.F. Schumacher “economics as if people mattered”. Most theories and proponents of community economic development stress that this means using a different yardstick to measure impacts.

While traditional economic development focuses almost exclusively on job creation (as measured by full-time-equivalent positions), community economic development emphasizes the importance of livelihoods (as opposed to jobs), and quality of life as opposed to standard of living. These concepts bear some further explanation.

A livelihoods approach states that the goal is not necessarily to maximize the number of full-time jobs, but rather to ensure families have all the elements to be able to put together a sustainable livelihood. This may involve full or part-time jobs, it may involve self-employment, it may involve farming, volunteerism, barter systems, or any combination of factors. By piecing all of these together, families are able to choose and create a lifestyle that meets their basic needs, and their own specific goals. In this approach, the quality of life (i.e. - enjoying ones work, living in community, pleasant surroundings, healthy environment) is seen as more important than a one-dimensional standard of living (taxable income, disposable income, consumer spending benchmarks).

It should be readily apparent that farmers’ markets are a model that are well-suited to such a community economic development philosophy. The responses received during this study seem to reflect this. Most of these “soft” responses were written comments offered during some of the open-ended questions, or occasionally scrawled in the margins of the form. As such, they are not readily quantified, but the following list tries to articulate some of the non-economic impacts that were described.

- Farmers’ markets represent a small, but important, opportunity for farm families under great economic pressure to augment their income.
- Markets, and preparing for markets, is used by some vendors as a family activity that brings family members together in a common task, despite their differing roles in the family and in the farming operation. It is also used as a way to introduce a new generation to a part of rural heritage.
- Farmers’ markets provide an opportunity for retired farmers/rural people to “keep their hand in” and still participate in a small way in providing food for their community.
- Markets also represent a local outlet for craftspeople and artisans, where their overhead costs are low, and they get an opportunity for direct customer feedback and interaction.
- Markets are a part of a community identity, and help maintain a sense that there is “something happening” in the area. This is particularly important in some of the shrinking rural communities impacted by rural depopulation.

- Farmers' markets build community. They provide a social opportunity that is highly valued by both vendors and customers who attend regularly.
- Farmers' markets provide a unique opportunity for the general public to meet people who grow their food, and to learn about how that food is created. Unlike roadside stands that may simply be re-selling fruit trucked from B.C., the "make it, bake it, or grow it" rule is one way to ensure customers are exposed to Manitoba agriculture.
- Farmers' markets are also good opportunities for teaching and testing entrepreneurial skills. Whether it is crafts or food, the market is a low risk "incubator" to test products, prices and customer service skills for new entrepreneurs.

In addition to the points outlined above, farmers' markets provide access to fresh local produce, which has at least two non-financial benefits. Firstly, the study data shows that vendors travel an average of 13.7 miles or 23 km to market. Assuming that the consumer's trip to the market is roughly equivalent to a trip to the supermarket alternative, this is a major reduction in food miles.

The concept of food miles is a difficult one to use precisely as most of the studies are based in the U.S., and Canadian studies draw upon different data sources. For example, the most readily available Canadian data for a detailed study only looked at products imported from outside Canada, and so could not determine the food miles associated with Chilean beef, but made no calculations about the food miles associated with Alberta beef being transported to Toronto.

The best estimate for an average number of miles that a food product is likely to travel in Canada is approximately 1500 miles. While that is more than 100 times further than the average FMAM vendor distance, it has to be acknowledged that (a) supermarket food is transported in larger vehicles and greater efficiency, and (b) that most market vendors drive back home empty, while trucking companies can usually avoid an empty return trip. Taking these factors into account, it can be stated with confidence that food purchased from an FMAM market would typically require at least 7-9 times less energy to transport to market.

Food miles is not just an energy calculation however. The time associated with harvesting, packing, shipping, unloading, and then distributing to retailers means trucked food will have to be picked significantly in advance of the day it is first offered to consumers. Even produce from larger Manitoba producers that is distributed through Peak of the Market would typically have at least several days in handling before arriving on supermarket shelves. Farmers' markets can typically offer produce that has been picked 24 hours (or less) before market, giving it a distinct advantage in freshness, a point that was reflected in consumer purchasing decisions.

Although the economic impacts of markets are also important, it is at least of equal importance to recognize the extent to which farmers' markets make our communities better places to live.

5.3 Measuring Economic Impact

There have been numerous recent attempts to measure the economic impact of farmers' markets in various jurisdictions, as the themes of local food, environmental sustainability, and community economic development seek to substantiate their claims to be a better way of doing things.

The scope and scale of these studies varies widely depending on a number of factors. Those involving university departments typically draw upon tenured staff and research assistants, which allow much larger data sets. There is also a range of complexity in the economic models devised to measure these economic impacts. Some models use calculations based on reported consumer spending, while others are based on vendor sales reports. Some reports attempt to factor in community size, type of vendor, or category of expenditure.

There are also at least four different levels of economic impacts. The first level is direct impact - the amount of money that is spent in farmers markets. The second level is indirect impact - this includes the money that the producer spends on suppliers, and that the market spends in operating. The third level of economic impact is "induced economic activity" which is the impact made when farmers market vendors and employees spend their earning in the local economies. Lastly, the fourth level of impact is the purchases that customer/visitors make outside of the market, on their way to and from the market ("other sector purchases").

All of the economic impact studies combine these factors with the levels of impact they are trying to measure, and arrive at a "multiplier", which is a figure that is multiplied by annual sales to arrive at an overall figure for economic impact. Following are some excerpts from studies, along with examples of multipliers.

- A New Economics Foundation study of a market in London, England found that the market had a multiplier effect of 2.5 times, as compared to 1.4 times for food bought in supermarkets.
- A study by Iowa State University calculated a multiplier of 1.58 for direct and indirect impacts, but did not include induced economic activity or other sector purchases.
- The Sticky Economy Evaluation Device (SEED) is an on-line self-evaluation tool for markets to use. They suggest a multiplier of 2.0 as a conservative starting point.

- A study of Oklahoma farmers' markets arrived at a multiplier of 3.08 for other sector purchases, and between 2.4 and 2.6 for direct, indirect and induced impacts.
- Farmers Market Ontario completed a study with Guelph University, and reached a multiplier of 3.0 for all impacts combined. They also found that 50% of farmers market consumers shop at other businesses on their way to and from the market.
- A 2006 study in British Columbia used a multiplier of 2.0 for direct and indirect impacts only. They also found that 50% of customers would make purchases at neighbouring businesses (37% stated these are purchases they would not otherwise have made). It was found that 63% of local businesses had a favourable perception of the farmers markets and its impacts.
- A 2004 study in Nova Scotia found that 47% of customers made "other sector purchases" at a ratio of \$0.50 for every dollar spent at the market. They employed a 3.0 multiplier to the sum of farmers market sales and other sector purchases to arrive at a comprehensive economic impact.

For this study, the Nova Scotia method and multiplier were adopted as a straightforward synthesis of the prevailing multiplier effects within the farmers' market sector.

5.4 Calculating the Economic Impact of FMAM Markets

The following calculation is limited to estimating the impact of Farmers' Markets affiliated with FMAM. The sector is somewhat larger, but without access to the number of vendors at unaffiliated markets or whether their experience is similar to that of FMAM markets, there is no way of knowing how much they are contributing to the sector.

The estimated number of vendors for all FMAM markets (including those that could not participate in the survey), is projected at approximately 405. This number will go up and down from year to year, depending on weather, crop success, and other factors.

According to vendor survey data, the average sales figure per vendor is \$5,629 which over 405 vendors shows estimated annual sales of \$2,280,000. Based on figures from other jurisdictions, the "other sector" purchases stimulated by excursions to farmers' markets can be estimates at \$1,140,000 annually.

Using the same methodology as the Nova Scotia study mentioned in section 5.3, the sum of \$2.2 million and \$1.1 million has a multiplier of 3.0 applied to capture direct, indirect, induced and other sector impacts. This results in an overall impact equalling \$10.26 million.

This figure has to be set in context. For the vendor selling their lettuce or honey off the back of their truck, a \$10 million impact is significant and something the vendors and FMAM can be justifiably proud of. Relative to the farmers' market sector in some other provinces, it is quite a modest figure. However, when one considers growing season, population distribution, type of agriculture, and climate, it is apparent that comparisons to British Columbia, southern Ontario, or even the Maritimes are not terribly relevant.

What is more relevant, is the potential for growth in the impact of this sector. FMAM is a very recently created cooperative, bringing organization to a sector that has been fragmented and underdeveloped in the recent past. In the 5 years since the Doucette and Koroluk study, the number of vendors in Manitoba has grown by 51%, and annual sales have almost quadrupled from \$600,000 to \$2,280,000.

As mentioned earlier in this study, there is reason to believe that an extension of the market season to 26 weeks is feasible, and this alone could boost the economic impact for some markets by a substantial percentage. FMAM should continue its advocacy efforts with MAFRI on this issue. Furthermore, a number of the markets are still quite small, and achieving a critical mass of vendors will vary from community to community, but in some areas adding as few as 6 vendors could result in exponential growth in sales for that market.

Coordinated marketing efforts, a drive to attract the unaffiliated markets, extending the market season to 26 weeks, and support in increasing vendors at the smaller markets could conceivably double the economic impacts in a relative short time period, possibly 2-3 years.

5.5 Concluding Comments

The economic impacts of FMAM markets, when viewed from a conventional economic development perspective, are modest. There are very few full-time jobs created, most markets do not have sufficient resources to invest in facilities, and many vendors straddle the grey area between the formal and informal economies.

When viewed from a community economic development perspective, these modest numbers take on a different meaning. These markets are learning environments, social gathering places, points of community pride, and they provide an opportunity for over 400 Manitobans to improve their economic well-being on their own terms. This is the critical distinction, for being able to build a livelihood that includes doing what one loves to do, is a priceless contribution to the quality of life in Manitoba communities.

Providing fresh, high quality food to friends and neighbours, in a way that is less taxing on the environment, and that retains dollars in rural communities, is an activity that contributes to a truly social economy.

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Appendix A
Data Tables for Consumer Survey

Table A-1: How Consumers Heard of Opening by Individual Market

	Radio	TV	paper	poster	friend	other
Altona	22.7%	0.0%	18.2%	13.6%	22.7%	22.7%
Brandon	11.1%	7.9%	22.2%	11.1%	28.6%	19.0%
PineRidge Hollow	4.3%	0.9%	5.2%	22.4%	37.1%	30.2%
Portage	0.0%	0.0%	27.8%	16.7%	16.7%	38.9%
St. Malo	4.7%	0.0%	2.4%	34.1%	21.2%	37.6%
St. Norbert	12.1%	4.2%	17.0%	5.5%	31.5%	29.7%
Steinbach	21.7%	0.0%	26.1%	17.4%	13.0%	21.7%
Swan Valley	32.1%	0.0%	28.6%	28.6%	10.7%	0.0%
Winkler	17.6%	0.0%	14.7%	38.2%	14.7%	14.7%
Misc*	12.0%	0.0%	32.0%	16.0%	24.0%	16.0%
Lundar	0.0%	0.0%	4.9%	36.6%	36.6%	22.0%
Aggregate	10.3%	2.1%	14.2%	19.5%	27.6%	26.3%

Table A-2: Product Type Importance by Market

	Fruit & Veg	Grains	Baking	Meat	Handicrafts
Altona	4.06	1.78	3.44	1.11	0.67
Brandon	4.77	2.51	2.82	1.41	1.56
Lundar	4.92	1.54	4.58	0.54	2.29
PineRidge Hollow	4.5	2.83	3.79	2.75	2.99
Portage	4.67	3	4.2	2.53	2.53
St. Malo	4.51	2.8	3.7	2.28	2.69
St. Norbert	4.68	2.53	3.45	3.22	2.59
Steinbach	4.47	2.41	2.47	2.18	1.29
Swan Valley	4.87	1.27	3.2	0.93	1
Winkler	4.35	2.46	3.35	1.35	1.54
Misc*	4.67	2.75	3.67	2.58	1.83
Aggregate	4.58	2.52	3.54	2.39	2.35

Note: Scale of 1 to 5, with 5= Very Important and 1= Not Important at All. A score with a high number is good.

Table A-3: Importance of Purchasing Factors by Individual Market

	Avail.	Fresh	Pkg	Price	Local	Quality	Unique	Impulse	Health
Altona	5.13	2.75	9.38	7.25	5.25	6.38	8.88	7.13	7
Brandon	6.82	2.41	8.32	6.55	3.18	5.09	8.27	9.14	6.09
Lundar	6	2.67	7.78	3	4.67	6.44	9.67	9.67	7.89
PineRidge Hollow	6.72	2.58	8.51	5.51	4.36	6.1	7.49	8.93	7.76
Portage	7.6	1.9	7.7	5.4	1.9	5.5	8	8.4	5.9
St. Malo	6.55	3.63	8.29	4.61	4.53	5.79	8.29	8.24	7.47
St. Norbert	6.66	2.54	8.47	5.22	3.31	4.68	7.97	8.49	7.38
Steinbach	6.11	2.67	9.22	5.11	4	4.56	8.78	8.56	7.56
Swan Valley	7.62	3.85	9.38	2.08	1.38	5.08	9.08	9.08	5.46
Winkler	7.91	1.82	7.73	6.27	3.45	7.45	9.45	9.82	6.36
Misc*	5.44	1.89	8.56	4.56	3.67	5.33	8.22	9.11	8
Aggregate	6.65	2.67	8.43	5.16	3.68	5.42	8.11	8.67	7.22

Note: Factors were ranked from 1 to 9 in importance, with 1 being most important. For the overall scores, a lower number means the factor is more important.

Appendix B - Data Tables for Vendor Survey

Table B-1: Total Vendors Surveyed and Participation Rates, by Market and Size.

	surveys	vendors (est.)	participation rate
Cypress River	4	7	57.1%
Killarney	5	8	62.5%
Winkler	6	8	75.0%
Wpg Exchange District	7	10	70.0%
Ste. Agathe	5	10	50.0%
Lundar	5	5	100.0%
Altona	5	10	50.0%
Roblin	4	6	66.7%
Swan Valley	7	10	70.0%
Small Market sub-total:	48	74	64.9%
St. Malo	10	25	40.0%
Brandon	7	18	38.9%
Portage la Prairie	9	15	60.0%
Steinbach	9	22	40.9%
Medium market sub-total:	35	80	43.8%
Pineridge Hollow	22	55	40.0%
St. Norbert	38	150	25.3%
Large Market sub-total:	60	205	29.3%
Total	143	359	39.8%

Table B-2: Percentage of Vendors Attending by Market Size

weeks	small	medium	large	overall
once	4.2%	0.0%	3.3%	2.8%
2 – 5	14.6%	17.6%	16.7%	16.2%
6 – 9	31.3%	14.7%	15.0%	20.4%
10 or more	50.0%	67.6%	65.0%	60.6%