



THE FARMERS MARKETS OF DOUGLAS COUNTY, KANSAS

Assessment and Recommendations

Report submitted by SCALE, Inc.
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CONTEXT

"I've been shopping at the market for 30 years. I love the freshness and quality of the items, but I also enjoy connecting directly with the farmers, which you can't do in stores"

"I like the market, but I don't go often because... the direct interaction with the farmers makes me uncomfortable, feeling guilty if I don't buy something"

-Two different shoppers from Lawrence

Farmers markets have played a critical role in building the local food system in Douglas County, northeast Kansas and much of the nation. Over the past two decades, the number of farmers markets across the country has grown almost five fold, from 1,750 to more than 8,300 (USDA AMS). In small towns and big cities alike, these markets have helped expand both the supply and demand for locally produced food, and in many cases, helped revitalize downtowns and city centers. From New York City to Lawrence, farmers markets have “put a face on food”, a reconnection that has been central to the development of the broader local food culture and marketplace.

But that ‘face’ has not always been good; and farmers markets have not always been sufficient for producers to earn the sales revenue and profitability that they need. And as we heard from several consumers, not everybody wants the very personal, direct connections with the people producing and selling them food.

Farmers markets have made great strides, but in many communities, including Douglas County, the customer base and sales have begun to plateau, as the increased supply of local food and the proliferation of farmers markets and other local food venues have diluted and dispersed consumer demand. A recent study from USDA put numbers behind this: From 2002 – 2007, the number of farmers selling ‘direct-to-consumer’ increased by 17%, but that growth in supply was outpaced by a more than 30% increase in demand. However over the very next five years, while the number of farmers selling through farmers markets and CSAs continued to grow (though more modestly), consumer demand for local food was flat (USDA, “Trends in Local and Regional Food Systems”).

In a sense, the “success” of the local food movement – bringing new and young people into farming, increasing the expectations of consumers around convenience and product availability, and expanding local food offerings through traditional retail markets – has created a whole new set of challenges. While there are broad trends and issues confronting most all farmers markets, each also faces specific challenges related to their location, vendor mix, customer base, or leadership and management. In most cases, an array of opportunities also may be present, generally less obvious than the challenges.

One critical challenge facing the local foods movement, including farmers markets, is how to reach beyond locavores and ‘foodies’ to an altogether new segment of consumers, a group we at SCALE, Inc have called “vaguely concerned and sporadically motivated” eaters and shoppers. Our report offers some ideas about how to reach this group; any chance of success will undoubtedly require coordinated, county-wide action over several years. We believe that Lawrence and Douglas County, with a strong food policy council and a relatively broad public commitment to building a healthy food system, is in a good position to undertake this critically important work. The increased attention to SNAP program participants, and the potential expansion of SNAP matching funds – “Double Up Food Bucks” – should also help in this regard.

Farmers markets and ‘local food system’ initiatives have been at the forefront of a broader effort to diversify local economies and to create more locally unique, place-based businesses. In fact, there is strong evidence that robust farmers markets accelerate local economic development, helping to incubate new farms and food and farm enterprises (USDA AMS, Sept, 2010 post). They can also entice shoppers downtown, to other local businesses. A number of studies, both national in scope (“Measuring the Impact of Public Markets and Farmers Markets on Local Economies”, 2002) and regional (“Research Brief: How do Farmers Markets Affect Neighboring Businesses?”, 2003)) have verified that consumers are much more likely to come into the downtown because of a farmers market, and once there to frequent and buy from other shops in close proximity. What’s more, studies from Oklahoma and Iowa (“Farmers Market Talking Points, 2016) conclude that every dollar spent at farmers markets leads to an additional expenditure of \$.58 - \$1.36 at nearby businesses. Future discussion about potential changes in location for the Saturday Lawrence market should consider this broader economic impact.

As part of their ongoing commitment to building a healthier local food system, the Douglas County Food Policy Council (DCFPC) and the Office of Sustainability pursued funding to enable them to analyze and strengthen the farmers markets throughout the County, including those within the city of Lawrence. SCALE, Inc of Abingdon, Virginia was awarded the contract to undertake this work. The project, which began in February of 2016, was funded through a USDA Farmers Market Promotion Program grant, awarded to Douglas County.

The forgoing analysis and recommendations are based upon extensive research, including two site visits to Douglas county (first in June and then in August/September, 2016); Rapid Market Assessments at each of the six markets; phone interviews with shoppers and phone and in-person interviews with vendors and market managers; focus groups with vendors, shoppers and non-farmers market shoppers; and broader research encompassing more than two dozen reports and analyses related to farmers markets and local foods. This examination makes it clear that **going forward, strengthening and expanding the farmers markets of Douglas County will require more deliberate, creative and sustained action than was needed in the past, both from the markets themselves and across wider, collaborative efforts.** It will also require targeted, significant investment if the current plateau is to be overcome and a new phase of market growth be launched. For local leaders in Lawrence and Douglas County it may be challenging to build support for use of public funds. **However, we believe that the multiple benefits of farmers markets – for farmers and consumers, for the economy, public health and environmental stewardship – make a strong case for public investment.**

Whatever the challenges they face, there is no question that **overall, the farmers markets of Lawrence and Douglas County are generating a substantial amount of sales** for farmers and vendors who utilize them. Extrapolating from the customer counts we did at each market, the average purchase amounts reported by shoppers, and the sales data obtained from vendors at the Saturday Market, **we estimate that total annual sales through the county's farmers market are approximately \$810,000, with the Saturday market accounting for about \$677,000 or 84% of that total** (These estimates come from reported vendor sales, checked against reported average shopper purchases and customer numbers). It is not unreasonable for the county and its markets to set a goal of \$1 million in annual sales by 2020.

STRUCTURE OF THIS REPORT

This report has four central components:

- **An overall assessment of farmers markets in Lawrence and Douglas County**, highlighting the most important strengths, weaknesses, challenges and opportunities
- **A set of recommendations for the county as a whole**, focused on actions that are likely to strengthen all or most of the markets in the county
- **Individual farmers market profiles of the six markets** available for study (Note: While the Baldwin City farmers market was included in the RFP, we were unable to gather any information on this market, despite repeated attempts). The profiles are concise, providing a snapshot of their current status and recommendations for improvements
- **An analysis of city, county and state public policy and regulatory issues** as they pertain to farmers markets. This analysis considers the present situation while incorporating what appear to be effective or promising policy initiatives from other communities.

In addition to these four central components, the report includes a short description of the methodology that SCALE has used in this consultation; a brief summary of findings from relevant research; and nine appendices with supportive data and information. Most of the “best practices” that we uncovered in our research are integrated into the recommendations section of the report.

The full report will be accompanied by an Executive Summary intended for a much wider audience.

METHODOLOGY

To gain a full understanding of the local farmers market environment in Douglas County, SCALE staff used a variety of methods in order to gather both quantitative and qualitative data, conduct research and immerse themselves into the local food community. These methods included:

- Surveys: one unique survey for vendors at each of the county’s farmers markets
- Rapid Market Assessment (RMA) surveys on site at farmers markets: for farmers market customers
- Interviews: both in-person and over the phone with farmers market managers, vendors, customers and “Non Farmers Market Shoppers” (NFMS)
- Focus Groups: for vendors, customers and NFMS
- On-site visits: conducted in June 2016 and August/September 2016
- Invitation for interaction via social media
- Research and white paper review
- Policy research and analysis
- Other research and communications with key stakeholders

SCALE developed the survey and rapid market assessment (RMA) to gather a baseline of both quantitative and qualitative data from a wide-variety of farmer’s market vendors and customers. SCALE developed the survey instrument using the online survey tool, Survey Monkey. SCALE distributed the surveys via email to vendors, and handed out paper copies of the surveys to vendors during site visits. SCALE conducted RMA surveys with the help of volunteers, at all the county’s farmers markets during the first site visit (Details in Appendix 1). Customer counts were also done at this time, based on extrapolations from 15 minute counts done every hour a market was open. SCALE visited the study area in person twice during the assessment period. These visits, held

Rapid Market Assessments, also called ‘dot surveys’ engage a broad base and relatively large number of shoppers, as they enable people to express their thoughts quickly and easily.

One-on-one interviews, by phone or in-person, allow for much greater depth of discussion, as well as surfacing issues that were not considered in the original set of questions. Because they require much more time than the dot survey, a far smaller number of people participate at this level.

Focus groups provide a similar level of depth as one-on-one interviews, with the added benefit that participants tend to ‘play off’ of each other – both affirming and contrasting – as one person’s comments sometimes stimulates other participants’ thinking.

in June 2016 and August/September 2016, provided the team an opportunity to engage groups of vendors, customers and non farmers market shoppers in focus groups. SCALE held two focus groups for each, for a total of six focus groups (Details in Appendices 6, 7 and 8). SCALE visited all of the farmers markets in the county, to assess the overall set up, displays, logistics, location, and more. SCALE also conducted interviews with market managers and other key community stakeholders during both site visits.

Additionally, SCALE worked with Dr Susan Harvey of the University of Kansas to add four farmers market-specific questions to “intercept surveys” (surveys of people as they enter or exit a grocery store) her students conducted in mid-September (Details in Appendix 5). The primary target group for these surveys was NFMS or those who for the most part do not shop at farmers markets.

Methodology	Number of participants
Vendors Survey	76
Rapid Market Assessment	366 (approximately)
Vendor Interviews	15
Farmers Market Shopper Interviews	12
Non Farmers Market Shopper Facebook Solicitation	62
Focus Group participants (vendors)	17
Focus Group participants (Farmers Market Shoppers)	10
Focus Group participants (NFMS)	4

It’s important to recognize that the different information gathering methods in a few instances gave divergent results. One instance of this is with Saturday vendors and their sales. Thirty six percent of vendor survey respondents indicated that their sales had been rising over the past few years, compared with 26% who indicated sales had either been plateauing or falling. By contrast, in both interviews and in brief conversations with most of the vendors at the Saturday market, a strong majority indicated that their sales had been declining in recent years. This of course is a critical question, so sorting through the different responses is important. There are a number of possible explanations for the discrepancy:

- Survey respondents may have leaned more heavily towards younger, newer vendors who in many cases may be just getting established, increasing their product offerings and therefore seeing an increased customer base and sales.

- The survey was done in the spring and early summer, while most of the interviews were done from June onwards. The market conversations in particular, during which the great majority spoke of declining or flat sales, was on September 3rd, relatively late in the season. Even though that was a strong sales day for most vendors, it could be that the 2016 season overall had lower sales, influencing, even changing some vendors' perspectives on sales trends over the past few years.
- The discrepancy in vendors' sales estimates (between survey reports and first hand interviews and conversations) is mirrored by differences in shopper responses to the RMA survey and shopper interviews, both one-on-one and in focus groups. While both data sets contained many positives, the one-on-one and focus groups responses had more critical comments, and expressed more concerns and disappointments overall than materialized in the RMA. Hence we might consider that there is a greater willingness to be candid and critical in the in-person (or even phone) interviews than in a survey setting. Note that vendor sales data was systematically collected only at the Saturday market.

Another consistent feature of the methodology was a high level of communication with the Douglas County Office of Sustainability and Food Policy Council representatives, particularly Helen Schnoes, Marlin Bates, Jen Humphrey and Eileen Horn. SCALE held conference calls with the team on a regular, sometimes weekly, basis throughout the assessment period. SCALE also communicated consistently with the Food Policy Council, and participated in conference calls and meetings during on-site visits to stay abreast of pertinent information related to the study.

SCALE reviewed more than two dozen published studies (listed in Appendix 2) and analyses pertaining to local farmers markets and local food research, including those provided by the Office of Sustainability, along with many others from USDA, the Farmers Market Coalition and other sources. This research proved very useful in putting the situation of farmers markets in Douglas county into a larger context, and also surfaced a number of 'best practices' and other ideas with potential usefulness to the markets in this study.

SCALE also reached out to other farmers markets, with help from Helen Schnoes in several instances, to create a benchmark comparison of vendor and customer numbers, sales, and other important information (Detailed in Appendix 4). While this information was also useful and is included in the report, we found it difficult to obtain consistent data from farmers markets, primarily because they often don't have it themselves. Nevertheless, it does add to our understanding of comparable markets in comparable communities.

SCALE partnered with the consulting firm, Downstream Strategies, to conduct a review of public policy and the regulatory environment impacting farmers markets, including ideas for best practices in this arena. This policy research allowed SCALE to develop the recommendations around a policy agenda and action items.

SUMMARY OF FINDINGS FROM RELEVANT RESEARCH

SCALE reviewed over two dozen publications to enhance our understanding of key issues and opportunities emerging among farmers markets, as well as to surface 'best practices' that seem to be strengthening markets. A list of the publications and studies reviewed for this assessment can be found in Appendix 2.

Specific topics we sought research on included:

- Local and state policies impacting farmers markets
- Farmers market management and governance
- Inter and intra-market cooperation or competition
- Food safety and sampling rules and approaches
- Marketing, promotion and increasing sales/customers
- Location issues, farmers market structures
- Farmers markets' impacts on other businesses, the economy
- Lessons of success, lessons from failures of farmers markets

Information was much more widely available on some of these topics than others. Working within these limits and the constraints on SCALE's time for this part of the work, a number of findings and insights are summarized below:

Pertaining to local and state policies

Most of the findings from this part of the research are integrated into the Policy and Regulatory Assessment found later in this report. A few broader takeaways included:

- Because farmers markets have emerged so quickly and for the most part, organically in most places, public policy is in general playing 'catch up' with this new reality. The development of public policies that support farmers markets and enhance their contribution to the larger communities of which they are a part is, to a large degree, at the experimental phase.
- That said, certain policy trends appear to be emerging, including the need to assist or enable farmers markets to have either a permanent location or at least long term security in a place; the importance of dealing with logistical challenges – parking space, pedestrian access, proximity to other businesses- for markets to stabilize and have wider impacts; and the importance of public support, both in terms of funding and integration into public priorities, for markets to reach stability and substantial impact.

“As the number of markets grows, there is greater likelihood of any given market overlapping with other markets in reaching out to potential customers and vendors. Greater potential competition among markets for vendors and customers presents both opportunities and challenges for market managers, planners and policy makers. Failure to take account of the potential competition for vendors and customers can be a serious problem for many farmers markets.”

- From “Mapping Competition Zones for Vendors and Customers in US Farmers Markets”, USDA ERS, September 2011

Market management and governance

- Well managed markets, with stable management (as opposed to high turnover rates) are more likely to grow and succeed.
- There is a tension between the desire that vendors at many smaller, newer farmers markets have for informality, for avoiding “too many rules”, with the need for consistency and good management
- Smaller, newer markets are far more likely to have minimal or volunteer management, and to have less experienced managers than larger, established markets
- Estimated that nationwide, local governments are the exclusive sponsors of farmers markets in only about 15% of cases
- Vendor participation in market leadership (boards, steering committees) and critical functions of the market (promotion, outreach, etc) is both critical and challenging to maintain
- Farmers markets “need to have strong boards who avoid micromanagement and complement a strong manager who listens to advice and is highly self-motivated” (Market Umbrella, “Organizational Details: Governance”, 2013)

Inter and intra-market cooperation or competition

- Up to a point, having multiple vendors in the same product categories strengthens markets, increases customer satisfaction and increases overall sales. In smaller markets, the tendency is to “protect” vendors from such competition, but this can reduce the number of shoppers and overall sales
- As the number of markets in a given area increases, competition for both vendors and customers increases. While this presents both opportunities and challenges, failure to address this may lead to declining markets and/or market closure
- Coordinated promotion and cooperation among market managers as to market schedules and special features can encourage shoppers to patronize markets as a group, not just a single market

Food safety, sampling rules and approaches

States take different approaches to food safety and product sampling at farmers markets. Some, like Virginia, have recently enacted “cottage industry” food laws, allowing farmers to produce certain goods in a home kitchen (rather than a licensed, inspected kitchen) for sale at farmers markets or directly from their home. While there are restrictions in the products that can be produced and sold in this way, and in some cases, limits on sale volumes, the laws generally allow most baked goods, jams and jellies, and some acidified foods that meet a pH threshold.

Regarding sale of on-farm processed broiler chickens at farmers markets, Kansas follows the federal rule, allowing such sales from farms harvesting up to 20,000 birds per year (Note, this is a recent change).

Product sampling laws appear to generally be tightening where farmers markets are concerned. More are requiring wash stations, for hands and utensils, covered containers, and clearly defined temperature ranges for hot foods (like cooked meat samples) and chilled food, when not hot. In Kansas until recently, the state limited the number of times a vendor can sample his or her product to seven times per year, without having a food preparation license. It can now be done as often as the vendor chooses, an important and potentially useful development for market vendors (Summary of KS sampling rules in Appendix 3).

Marketing, promotion and increasing sales and customers

The literature in this area reviewed efforts being undertaken locally, regionally (among a group of markets) and at state levels.

Nearly all states now have some sort of “buy local” – or buy from producers within the state – promotional program. Examples include “AgriMissouri”, “Pick Tennessee” and “From the Land of Kansas”. This investigation uncovered no comprehensive analysis as to the effectiveness of these programs. One study, however, offered two insights: First, the states with the most rigorous requirements (for use of the state brand and/or logo) – California and New Jersey – also seemed to show the highest rate of consumer interest and sales related to the program. Second, in a survey of consumers in five mid-Atlantic states, individual’s propensity to buy products labeled as ‘local’ was, in four out of five states, much higher than their likelihood of buying products with the state label or brand. This increased preference for local ranged from 50% to 125% higher.

At the local and regional level, these studies surfaced several interesting ideas and findings related to increasing customers and sales at markets:

- Consumers who shop at farmers markets every week spend significantly more (each time they shop) than those who shop every other week, and more still than those who shop occasionally. Weekly shoppers bought an average of 56% of their produce at farmers markets compared to 35% for occasional shoppers.
- A number of studies indicate that the majority of farmers market shoppers are in one to two person households, limiting the quantities they’re likely to buy
- A survey of shoppers at four markets in Oregon identified the top 4 reasons (in order) that they don’t purchase more at farmers markets as: 1)they run out of cash; 2)they can’t carry any more; 3) perceived higher prices; and 4)lack of product availability
- One study examined a \$5 coupon program conducted with residents in proximity to ten farmers markets in California. Though the coupon redemption rate was very low – 2% - the experiment was considered a success because
 - 36% of those redeeming coupons were first time shoppers
 - Almost half of the first time shoppers returned to the market, on average three to four times over a two month period (with no additional coupons)
 - 39% of ‘irregular’ shoppers increased the frequency of their farmers market shopping
 - On average, shoppers spent an additional \$13.50 beyond the coupon’s value
 - Maintaining relationships with customers, even through the off-season, helps build the customer base
- One study projected that only about 18% of farmers market shoppers are likely to support or frequent a winter market (Note: While that figure seems low to us, and would surely vary by region and according to the quality of the market, it does seem likely that a relatively small proportion of farmers market shoppers would consistently support a winter market. Among a number of reasons for this, including periodic weather problems, the biggest is that a great majority of people shop at farmers markets primarily because of the fresh produce offerings, which are likely to be substantially restricted in a Kansas winter market)

Location issues and farmers market structures

Issues related to the number and density of farmers markets were discussed above. Regarding location issues for new markets, or markets making a move to a long-term site:

- Downtown locations are generally preferred, in part because of their positive impacts on other businesses and the community, but also because of foot traffic. One study found that fairground locations, while well suited for a farmers market from the standpoint of parking and available structures, require more marketing and promotion, owing to the reduced foot traffic and visibility
- A permanent or at least long term home for a farmers market is critical to increase shoppers and to build vendor confidence as well
- Farmers markets should have excellent visibility from high-traffic streets
- On average, a market with fifty vendors needs about 20,000 square feet – half an acre - of space, not including parking
- A number of towns and cities are now working on zoning designations and land-use protections for farmers markets, though no clear pattern or best practice has yet emerged. Most are driven by the desire to provide stability if not permanence for farmers markets, and to recognize or elevate the status of farmers markets within zoning laws and the planning apparatus of the locality

Impacts on other businesses, the economy

- Both national and regional studies of shoppers' patterns confirm that large proportions of people (ranging from 35% to almost 70%) come into town only on days the farmers markets are open
- So long as other businesses are open and close by, they generally benefit from this, as moderate to high levels of farmers market shoppers also report visiting and purchasing from other local businesses.

Lessons from successes and failures

- Newer markets, like new businesses, struggle more than established markets. One study found that for every two new markets created, one failed, usually within its first four years of operation
- Smaller markets also struggle more, in part because of a lack of the product quantity and diversity needed to attract a strong customer base, and in part because of a lack of revenues for management and promotion. One study from 1995 suggested that markets with fewer than 12 regular vendors will struggle to survive, a number that may have increased over the past twenty years. The number of vendors needed for success would vary, depending upon their size, quality and diversity
- The need for more and better products is among one of the most common challenges faced by farmers markets, and one of the most important determinants of success or failure
- Low revenue streams, stemming from a small vendor base and/or low stall fees makes markets less viable over the long term.
- Skilled and experienced market managers, who are compensated enough to minimize turnover, are critical to a market's success. Volunteer or near-volunteer managers do not generally lead to long term market success.

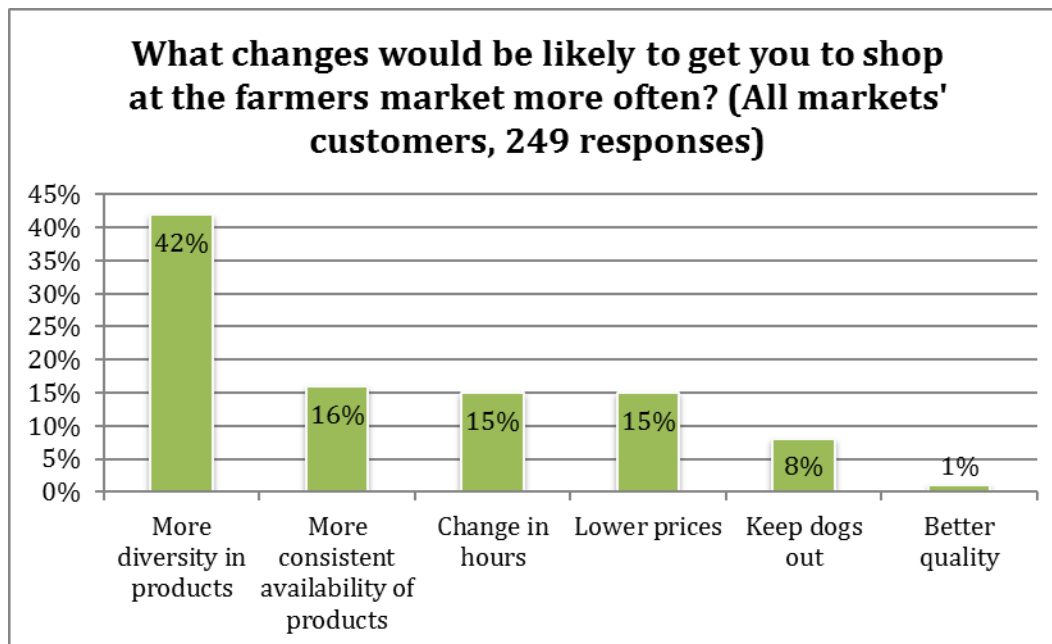
OVERALL ASSESSMENT OF FARMERS MARKETS IN LAWRENCE AND DOUGLAS COUNTY

This section of the report looks at the farmers markets as a whole for Douglas County - including the Perry-Lecompton market that is slightly outside of the county - though at times we focus in on specific markets to clarify issues. The assessment is based on the data we collected throughout this process (described in the Methodology section); comparative data from other farmers markets we consider to be comparable or otherwise valid for a comparison; findings and insights from the studies and analyses we read through; and our own considerable direct experience in starting, managing and assisting farmers markets. While our tone is one of candor, our intention is to be straightforward about the strengths and weaknesses of the market as best we understand them.



KEY FINDINGS

- 1. There are numerous high quality food and farm vendors with a robust offering of products, including at least a few such vendors at each market. Nevertheless, most markets have room for considerable improvement in their overall presentation, ie the quantity, quality and diversity of products, as well as the aesthetics of market layout and product presentation.** Given that farmers markets are to a significant degree competing against supermarkets or the Merc – a reality that was confirmed by several shoppers in interviews and focus groups - it is easy for most shoppers to view the offerings at most of the farmers market as quite limited and of uneven quality. In customer surveys, 58% identified either ‘more product diversity’ or ‘more consistent availability of products’ as changes that would get them to shop at farmers markets more often. In focus groups, the quality of products relative to their price was discussed as a factor that limits spending at markets, even though “quality” concerns was identified by only 1% of RMA respondents overall.



- 2. All six of the markets, including the smallest ones, have a number of assets, including:**
 - several vendors who have persevered through less than ideal circumstances and who wish to see the market grow
 - volunteer market managers, or in the case of Cottin’s and Clinton Parkway, market ‘enablers’, who have thus far been willing to give considerable uncompensated time and creativity to organize the market and attempt to build it up
 - All mid-week markets have high proportions of first time customers, meaning that people are still ‘discovering’ them, which offers the opportunity to increase the base of regular shoppers.
- 3. The Saturday market is the flagship market with by far the best overall quantity, quality and diversity of products, and generally strong presentation by vendors.** This market has a strong, loyal base of customers and a solid base of vendors. **It is also true, however, that the perception**

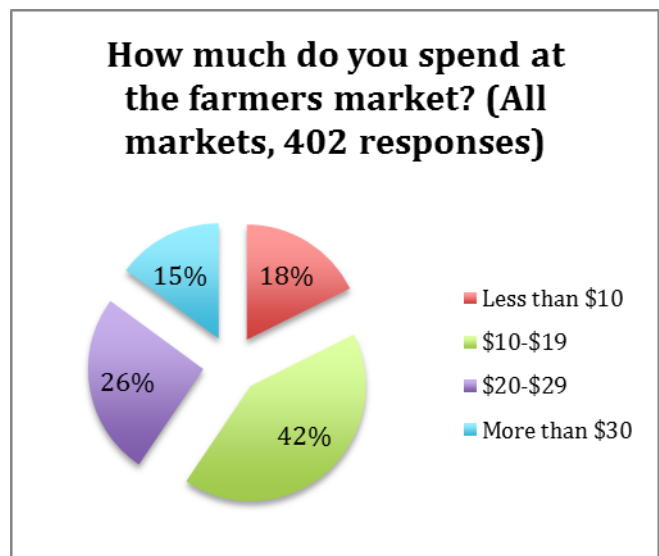
among a substantial proportion of both vendors and customers is that the market is not growing or improving, but instead has hit a plateau or a slight decline. Vendors and customers both state that the market has lost several good vendors and that these are not being adequately replaced. When asked in person, a large majority of vendors state that sales have declined significantly over the past few years, and they are both concerned and frustrated by this. We do not have data for customer counts from prior years, but the June 11, 2016 count of 1,854 shoppers, while far above all other DC markets, is modest for a town of 90,000 people - just over 2% of the town's residents and 1 1/2 % of the county's. Abingdon, Virginia, with 8000 people, has nearly as many shoppers at its Saturday market as does Lawrence.

In one-on-one interviews, only one out of ten shoppers indicated that they view the farmers market as a "primary grocery" shopping destination, the other nine stating that they shopped for a limited, specific set of items and did the bulk of their grocery shopping elsewhere.

Most markets outside of Douglas County whom we contacted have not done customer counts, making it impossible to make a broad comparison. It is almost certainly true that the vast majority of farmers markets see but a small fraction of their population as regular shoppers. Nevertheless, we believe that the Saturday Market, along with some of the mid-week venues, could reach some of the 98% of people generally not shopping at farmers markets in the county.

4. **From both in-person interviews and focus groups, it is clear that the vast majority of regular farmers market shoppers do not view the market as a primary source of groceries, but see it more as a source for seasonal or specialty items, or for a narrow range of specific foods.** This holds true for the Saturday market as well as the mid-week markets. For the Saturday market, over half of shoppers spend \$19 or less, and less than one in five spends \$30 or more. At Clinton Parkway, three fourths of customers spend less than \$19; at Cottin's, 60%. For comparison, surveys and polls indicate that American households spend an average of approximately \$80 - \$100 per week on groceries (food), indicating that local farmers markets are only capturing about 20% of that food dollar.

- a. As a subset of this, **the proportion of people who rarely or never buy meats at their farmers market appears to be very high.** Most of these shoppers are themselves meat eaters, but are reluctant to buy meats at farmers markets for a range of reasons, including concerns about safety, uncertainty about what the vendors actually are selling (since it is challenging to display meats), and price. We believe this to be an area with considerable potential for growth.



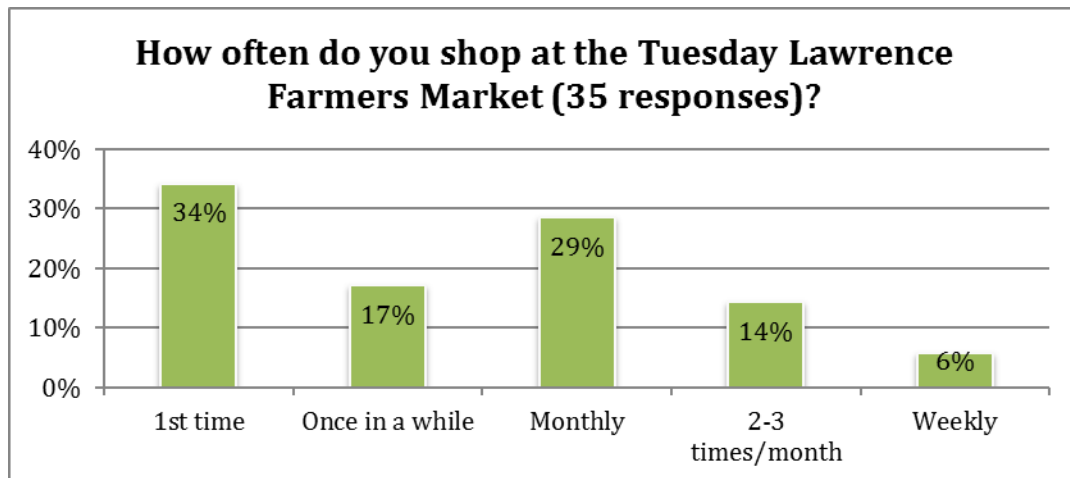
5. **The number of farmers markets in the county may be too great for the current farmers market customer base.** Overall attendance, especially at midweek markets, may be too low to create significant market or income opportunities for most vendors. The combined attendance at all three midweek markets in Lawrence was under 500 for the second week of June.

Market	Estimated Total Number of Attendees
Lawrence Farmers Market - Saturday	1864
Lawrence Farmers Market - Tuesday	120
Eudora	36
Clinton Parkway	150
Cottin's Hardware	204
Perry Lecompton	44

**Note: Customer counts taken week of June 6-11, 2016*

[Please note: For markets outside of Lawrence – Eudora and Perry-Lecompton – the decision to hold and continue the market involves more than the economic calculus, as these markets can be seen as expressions of and additions to the life and culture of those communities].

6. **Several ideas emerged from interviews and focus groups with shoppers and non-farmers market shoppers regarding how to broaden the base of customers significantly, and how to increase the average purchases** that customers make while at a farmers market. These are integrated into our Recommendations. What we experienced in shopper interviews and focus groups was a very strong appreciation for the farmers markets (particularly the Saturday market) and a desire to offer candid suggestions as to how to improve them. While no one thinks the markets are perfect, **there is considerably more contentment than discontent among the current base of shoppers, something that can potentially be harnessed for further improvements.**
7. **The Tuesday Lawrence market is remarkably small in relation to the Saturday market,** with only 8 – 10 vendors and 120 shoppers counted on June 7th (less than 7% of the shoppers counted at the Saturday market). This may be because of the overall proliferation of mid-week markets, along with location issues (consumer uncertainty about when and where it is, and a less-than-appealing location). Whatever the reasons, the ratio of vendors on Tuesday versus Saturday is very low, about 1:5 or less. By comparison, the Iowa City market is at a 1:2 ratio between mid-week and Saturday markets, while in Abingdon, it is about 1:1.5.



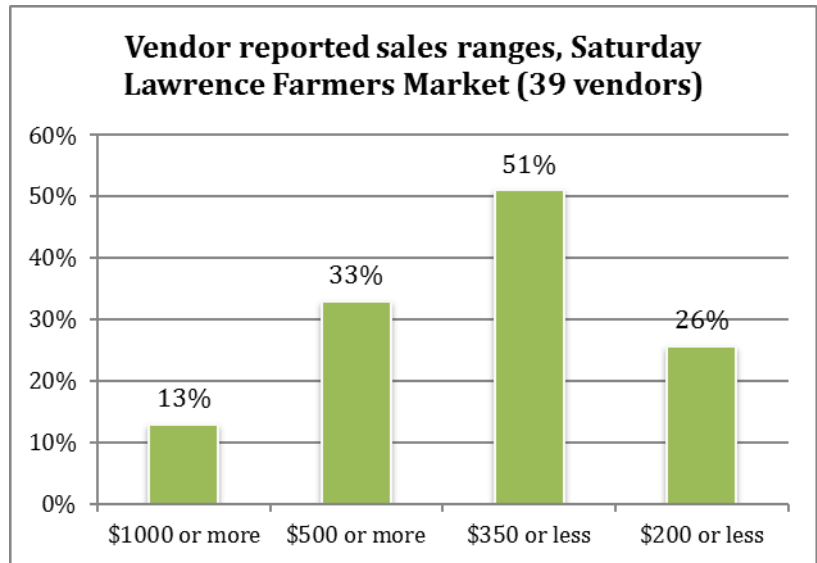
8. **Vendor sales at markets vary considerably, but in our assessment, need to be stronger at all markets, including the Saturday market, in order to attract and retain a diversity of high quality vendors.** Our September 3rd survey of vendors' sales at the Saturday market indicated that the average sales across all vendors at the Saturday LFM is just under \$500 per market day, with a median figure of \$350. About 13% of vendors reported typical sales of \$1,000 or more, while two thirds of vendors sell less than \$500 on average. Because most markets to whom we reached out do not know their vendor sales, it is difficult to know how this level of sales compares with comparable markets and communities. We have information for two other markets: North Asheville, NC (pop 87,000) averages close to \$1000 for farm vendors, about half that or less for prepared food and other vendors; Charlottesville, VA (pop 44,000) averages \$775 for farm vendors, just over \$500 for all vendors. The Saturday Lawrence Market is somewhat below these two, though not dramatically.

In our assessment, these sales figures indicate that there is considerable room for growth in customers and sales, given the population size and demographics of Lawrence.

It is critical, in our judgement, that farmers markets offer an interesting, high quality and robust range of products to attract and retain customers. **It is equally important that market sales for farmers and vendors be substantial, sufficient for them to not only commit to the market for the long term, but to grow and improve their product offerings, with minimal risk of having large amounts of unsold products.** By this measure, sales for most of the Saturday LFM vendors - and the great majority of mid-week market vendors, are probably not adequate. For a vendor who sells \$350 per week (half of those on Saturday), if they were to sell at every Saturday market of the year, their gross sales would amount to \$11,900. For those reaching the average sales volume of \$496 per Saturday, annual gross sales would be just over \$16,864. Assuming that net revenue is 35% of gross sales (a generous assumption), two thirds of Saturday Market vendors likely net under \$6,000 per year from that market. Recognizing that most of these farmers and vendors sell elsewhere, it is nevertheless a very low figure for 8 months of sales at the county's best market.

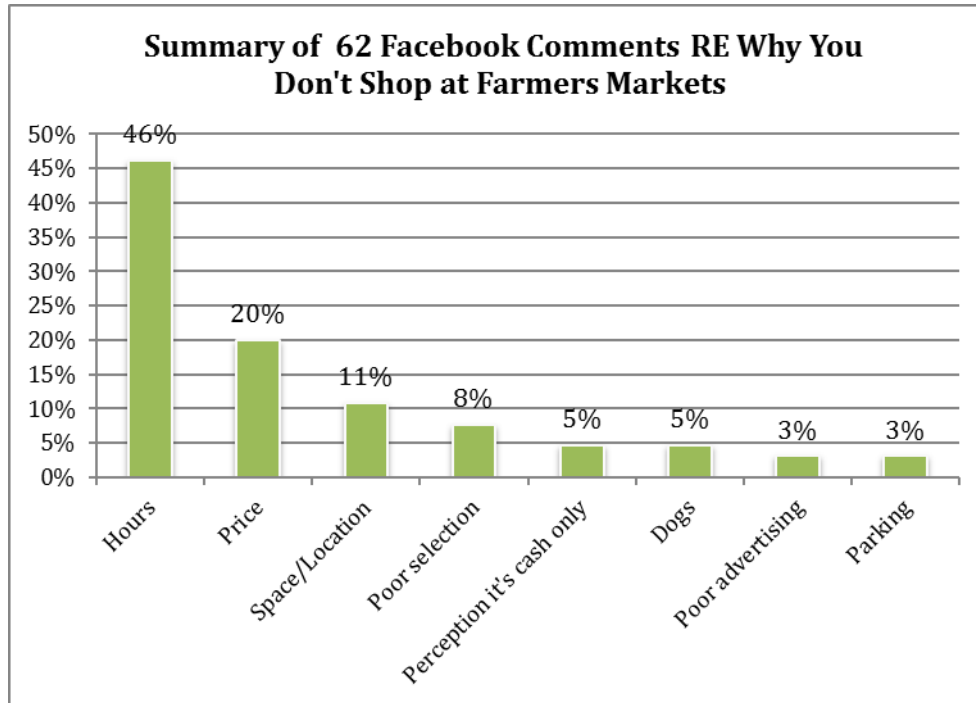
We want to be clear here: This is less a critique of the Lawrence and DC markets than a candid recognition of a common problem in many if not most farmers markets. Sales, and more specifically, net income is just too low for too many farmers and vendors. This may be

part of why the Kansas Department of Agriculture lists fewer than 500 farmers growing vegetables statewide. To strengthen farmers markets and increase the availability of healthy local food through them, we need to acknowledge this reality and be ambitious in our goals to improve farmers markets to the point where they truly enable farmers to make a decent living.



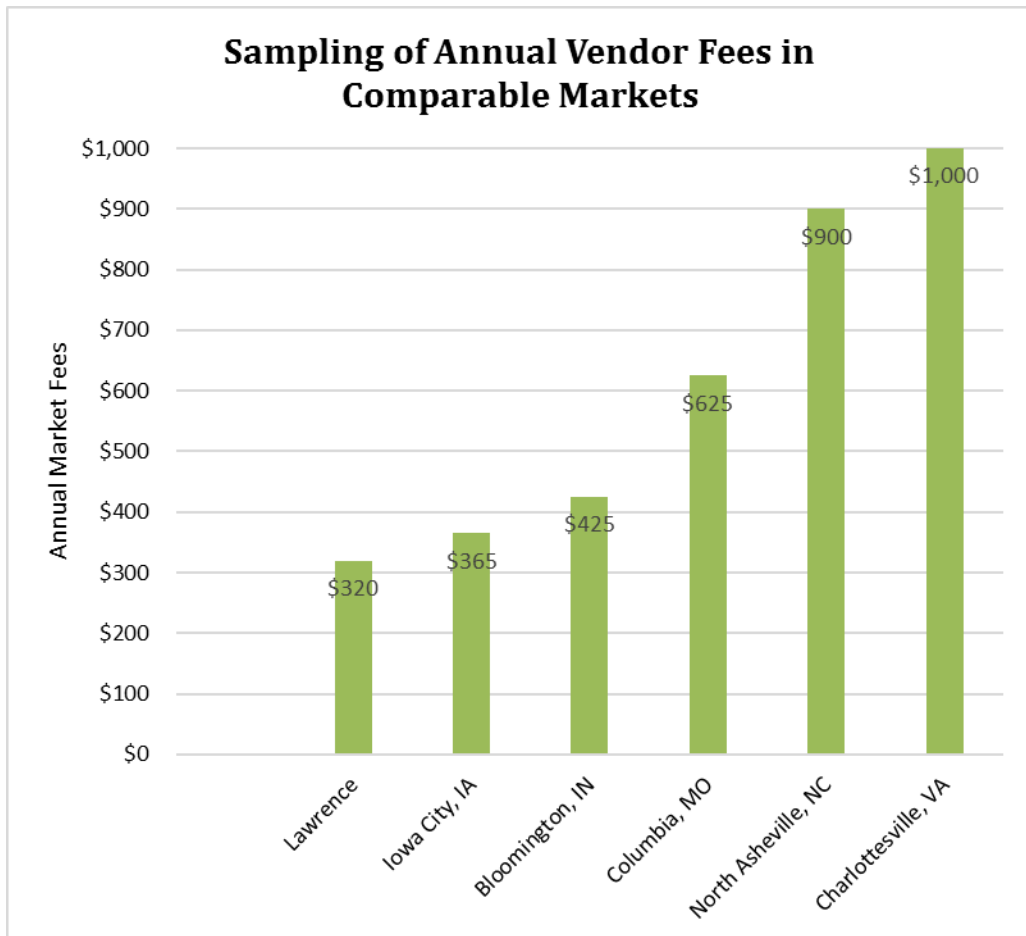
9. **Among Non Farmers Market Shoppers (NFMS), we discovered both surprising and expected reasons for their reluctance or unwillingness to shop at farmers markets.** Top among the expected reasons were first, **the relative inconvenience of farmers markets,** particularly the locations; **limited hours of operation and parking issues;** **the perception that prices are higher at farmers markets;** and **general uncertainty about the markets,** including days and hours of operation and what is offered for sale at markets (and in the case of most mid-week markets, a complete lack of awareness about them). These results were relatively consistent across our three sources of data: the KU intercept surveys (215 responses), social media responses (62) and focus group discussions (4 participants).

Among the more surprising findings: Focus group **NFMS participants felt uncomfortable with the very personal nature of shopping, selecting and buying at farmers markets, compared with the efficiency and anonymity of supermarkets, which was preferred.** The belief that **you must have cash to purchase items** at the farmers market was relatively widespread among NFMS participants in both intercept surveys and focus groups.



10. **Relatively few farm vendors at any of the markets offer samples of their products.** At the September 3rd Saturday market, we observed just one meat vendor and one produce vendor offering samples (There were four bakers/prepared food vendors offering samples). **This is in part due to misunderstandings and concerns about the Kansas Department of Agriculture's rules and requirements regarding sampling of produce and meat.** Our research and conversations with KDA staff lead us to conclude that the concerns are generally exaggerated and that the requirements for sampling are not especially onerous. Among a range of policy and regulatory issues related to local food production, this issue of product sampling at markets is one of the most important (in terms of potential benefits) and easiest to address.
- a. Note that **a high proportion of consumers, both regular shoppers and NFMS expressed a strong desire for samples** – for meats and fruits, especially – **which they felt might increase their likelihood to purchase.**
 - b. Note also that Anthony Flaccavento's own extensive experience with product sampling at his farmers market has shown consistent, sometimes dramatic increases in customers' purchases of the sampled products, not only on the day of the sample but continuing well beyond that.
11. **Most shoppers and NFMS do not feel adequately informed about the markets, including details about days and hours and about what products are available.** With a couple of notable exceptions – outreach from the Pendletons and Cottin's Hardware – most are unaware of, and are certainly not tuned in to, the social and traditional media efforts that markets currently make. Marketing budgets and efforts are quite limited for all markets. Stall fees are too low at all markets (with some markets only charging \$5/day) to develop significant marketing budgets, and free marketing efforts are implemented irregularly, without consistent monitoring for evidence of success. The sense of not being adequately informed came through strongly and consistently in focus groups and interviews for both shoppers and NFMS.

Douglas County Market	Single Stall Fees	Number of vendors
Lawrence Farmers Market (Saturday)	\$220/season; \$60/season advertising fee / \$40/season membership fee	70-90; about 45-50 at each Saturday market
Lawrence Farmers Market (Tuesday)	\$55/season; \$60/season advertising fee / \$40/season membership fee	8-10
Clinton Parkway	\$50/season	8 max
Cottin's Hardware	\$0	20-23
Perry Lecompton	\$45/season - \$5/day	10-12
Eudora	\$20/season - \$5/day	8-10



12. **Compared to markets in comparable cities, the vendor fees for the Saturday Lawrence market, which total \$320 per year, are at the low end of the spectrum.** Other markets range from \$364 at Iowa City (pop 72,000) to \$625 in Columbia, Missouri (pop 115,000), to near or above \$1000 in North Asheville, NC (pop 87,000) and Charlottesville, VA (pop 44,000). Increasing vendor fees significantly would enable the Saturday market, and for that matter, others in the county, to undertake more outreach and promotion of the market, and/or to strengthen market management, which in turn could also lead to better promotion and increased customers. However, vendors must be persuaded that an increase is justified by the potential increase in their sales, or perhaps in other important aspects of the market.
13. **None of the markets undertake significant off-season outreach and promotional efforts to gain new customers, reach new demographics of people, or solidify the current customer base.** Nearly all of the outreach and promotion begins once the season is underway, or shortly before that. In our experience, off-season promotion of farmers markets is essential to expanding and broadening the customer base over time, and to maintaining the interest and commitment from current customers. This is supported by the literature we reviewed.
 - a. There may be an opportunity here to coordinate efforts to reach out to the broader community during the offseason with Douglas County’s work to increase awareness of and participation in farmers markets among SNAP participants.
 - b. Off season outreach could be greatly enhanced through joint campaigns with Live Well Lawrence, Downtown Lawrence, the CVB and other groups eager to promote farmers markets and healthy eating.
14. There is a wide spectrum of opinions **regarding the location of the Downtown Saturday market**, both among vendors and customers. A few **common threads** have nevertheless emerged:
 - a. **The vast majority of both shoppers and vendors want to keep the market in the downtown area, whether it stays in its current location or moves.** The “downtown” includes, for all of the people we sampled, the South Park area.
 - b. **Many customers and some vendors express frustration with the encroachment of the adjacent developments** and what this has done to limit the space and degrade the visual appeal of the market.
 - c. **A majority of people express concerns about the parking limitations of the current location.** Some noted that, while it is usually possible to find parking within a few blocks, the further they have to go the less likely they are to come to the market, or if they do attend, the less likely that they will buy substantial amounts of products. One of the studies we reviewed indicated that “limits to what they can carry” is an important factor in limiting purchases at farmers market.
 - d. **Nearly everyone sampled believes that a long term decision regarding the market’s location needs to be made** in order to provide a sense of stability and permanence, and to engender investment in the facility itself.

Desired features of a farmers market location	
Located Downtown (for LFM specifically)	Cover/Shade
Parking	Electricity for vendors
Sense of permanence	Storage for vendors
Safe and easy access for customers and vendors	Signage
Bathrooms	Seating and gathering areas for customers

15. **None of the markets currently have a plan or strategy for recruiting new vendors to replace those who are leaving or retiring from the market, or to bring in high-quality farmers to fill gaps in the available products.** Given the large proportion of customers who cite product diversity and consistency as important to their decisions about shopping at farmers markets, it follows that a strategy for targeted outreach and recruitment of farmers would likely be helpful for all of the markets.
16. **We did not find a strong or broadly based demand for a winter market beyond what is already taking place at Cottin’s Hardware store.** Given the challenges of operating and supplying a winter market well, and the numerous challenges and opportunities which most markets are facing in-season, we believe that it would be premature, and likely ill-advised, to expend time and resources on another winter market at this point in time.

RECOMMENDATIONS

The recommendations below all pertain to potential joint actions, best taken across multiple markets, sometimes involving the City of Lawrence or Douglas County. There are an additional set of market-specific recommendations included in each of the six individual market profiles.

The recommendations below are organized by area of focus, for example, Marketing, outreach and promotion recommendations to expand the customer base and increase sales; Leadership and market governance recommendations, etc. We have attempted in these recommendations to balance ambitious, often longer-term strategies with more readily implementable, shorter-term action steps, understanding that both are necessary.

According to a survey of farmers market managers in five cities in Oregon, successful farmers markets shared four top characteristics:

- **High quality, diverse mix of vendors**
- **Strong product mix**
- **Good location**
- **Strong management**

-“Characteristics at Successful Farmers Markets”, Portland Farmers Market, Direct Market Analysis, September, 2008



Marketing, Outreach and Promotion of Farmers Markets

Recommendation One: Convene a meeting of the market leaders from all six markets – including managers, proprietors (Cottin’s and Clinton Parkway), key vendors and core customers – with the goal of developing strategies to substantially increase the purchase of local food and farm products at farmers markets. This should be a third party-facilitated meeting with open and candid conversation among and across markets, and with the intention of finding collaborative means to increase the customer base, improve outreach and marketing, recruit new and stronger vendors, and address issues of competition (for customers and vendors) and confusion or uncertainty in the general public.

“Strategies that encourage periodic shoppers to become weekly shoppers can have a bigger payoff than strategies to attract new shoppers. Weekly shoppers spend 14% more on average than biweekly shoppers, and more still than occasional shoppers.”

-Market Thymes, Pacific Coast Farmers Market Association, *Special Report*, 2009.

- One option that should be on the table, if feasible, would be to reduce the number of mid-week markets and strengthen those that remain. This will likely be a difficult conversation to have. However, if the clear goal would be to increase the total number of shoppers at mid-week markets, while increasing average vendor sales per market day, it may be possible to have such a discussion.
- Depending upon the outcome of this convening, it may make sense to form a

countywide farmers market association, discussed in more detail in recommendation seven.

Recommendation Two: Working with farmers market leadership, and following the meeting described above, plan and launch a county-wide initiative to substantially broaden the base of 'local foods shoppers', with a particular focus on farmers markets. The goals for this recommendation should include the following:

- *Cultivate new farmers market shoppers through creative outreach to churches, civic groups, foreign graduate students, and a range of other associations of people who do not now typically shop at farmers markets.* It will be critically important to address some of the core reasons that people do not shop at farmers markets, including uncertainty about hours/locations, convenience, perceptions about affordability, lack of awareness of what is at the market(s) week to week, etc.
- *Substantially increase community awareness of the farmers markets, increase the ease with which people can find markets, and improve outreach and promotion through both social and traditional media.* A stand-alone website and Facebook page with an interactive map of all farmers markets, links to all markets' social media pages, information about farmers market and local foods events could be featured. The website could also provide a platform to tell the story and make the case for local food (as described below). It should be linked to and cross promoted with Downtown Lawrence, the CVB, Live Well Lawrence and other partners.
- *Target outreach materials and efforts not just to foodies and locavores, but to "vaguely concerned and sporadically motivated" food shoppers, that is, people with growing concerns about health, healthy eating, or their children's health, but whose eating and shopping habits are heretofore driven more by habit, convenience, speed and price.*
- *Coordinate with and build upon efforts to increase the number of SNAP participants shopping at farmers markets.* This might include strategies for maintaining SNAP participants as farmers market customers, when they no longer receive such benefits, along with outreach strategies designed in concert with people participating in the program.
- *"Tell the story" of the farmers markets in Douglas County through more consistent and more creative stories in the media* (for example a "Farmer of the week" profile in local papers and on-line), and by deploying 'satisfied customers' in the outreach efforts.
- *Enlist the help of the vendors themselves to increase their own social media presence, create and utilize customer email lists, etc.*
- *Consider utilizing coupons to reach out to the broader public, including particularly NFMS, and to bring in first time shoppers and move occasional shoppers to become regulars.* (Read the publication, "Increasing Customers and Sales at Farmers Markets: Targeted Marketing Campaign with the Pacific Coast Farmers Market Association" for details on how to implement a coupon campaign)

Recommendation Three: Significantly increase the average purchases existing customers make at farmers markets in the county through a number of strategies, including:

- *Improving the overall quantity, quality, consistency and presentation of vendors at all markets, but most particularly at mid-week markets*

- *Provide training and assistance to vendors in product display, merchandising, sampling, signage and related issues*
- *Recruiting and assisting new farmers (new overall, or new to farmers markets) with a focus on 'filling gaps' in products at the market*
- *Launching a countywide campaign to "Make the market your grocery store!", using price comparisons (with supermarkets), better product information, and other means to move customers towards making the market their primary source for groceries.*
- *Develop a campaign to increase the purchase of meats at farmers markets, which are currently under-represented on both the supply and demand side, as a means to increase average market purchases. Ramping up both the supply of meats and the consumer demand for them at farmers markets will require a number of steps, including much more product sampling of meats at farmers markets; improved displays at booths selling meats; chef, cooking and nutrition demos that utilize locally produced meat; and consumer education about both the safety of meats sold at markets and the nutritional benefits of pasture-based meat (and egg, dairy) products.*

Recommendation Four: Work with market leadership, key vendors and committed customers to develop improved communications between markets and their existing customer base. This might include concise weekly or biweekly newsletters that highlight new items at the market, list items available that week, describe upcoming events and special activities, and provide compelling stories, satisfied customer quotes, or data points that help make the case for shopping at markets (related to nutrition, food miles, superior flavor, etc)

Recommendation Five: Develop and implement a plan for off-season outreach to the community, including media, social media, joint events with chefs and restaurants, and targeted outreach to 20 - 30 businesses, civic groups, and informal associations of people who are likely to be concerned about health, food, cooking and related areas. A list of potential community and civic groups is included here.

Farmers market vendors, shoppers and non-farmers market shoppers all contributed to this list of groups to whom outreach could be targeted, in order to grow the base of farmers market shoppers:

- **New parents and related groups, included MOMS club, breastfeeding support groups, etc.**
- **Health and wellness groups**
- **Healthy eating and weight loss organizations**
- **Yoga, fitness, exercise and running clubs**
- **Hiking, biking, trail clubs**
- **Established civic organizations, such as Rotary, Kiwanis clubs**
- **Church groups and pastors, especially those known to be encouraging healthy eating**
- **Master gardeners**
- **Foreign graduate students and their families at KU, associations of Asian and Middle Eastern students**
- **Corporate wellness programs**
- **Senior citizen groups**
- **Ethnic associations**
- **Local business/downtown associations,**
- **Newcomers groups and clubs**
- **Realtors associations**

To help implement this recommendation:

- Develop and refine the list of potential groups to whom outreach should be targeted, and identify key contacts within each group.
- Develop a compelling presentation of 6 – 10 minutes that effectively ‘tells the story’ of markets in the county, provides a glimpse (with lots of photos!) of the many products available, and clarifies details such as market locations, times, acceptance of SNAP and Double Up Food Bucks or Senior Farmers Market Nutrition Program (SFMNP), etc
- Develop a one to two page “Frequently Asked Questions” handout to further clarify details and dispel common myths or misperceptions (eg, that markets are cash-only)
- Build a core of 10 – 20 Farmers Market Advocates or “Champions” willing and able to deliver the presentation effectively. These advocates should primarily come from amongst strong farmers market shoppers and market vendors, rather than non-profit staff, public employees, etc. An annual training for the advocates should take place to ensure that they feel fully equipped and they deliver consistent information

Note: Appendix 9 summarizes what we found to be the “common characteristics” of non-farmers market shoppers, and of relatively regular farmers market shoppers, information that could be useful in designing outreach strategies to these groups of people.

Strengthening Market Leadership, Management and Governance

Recommendation Six: Strengthen the capacity of markets by a)organizing and providing training for market leadership, board and management; b) providing mini-grants to targeted smaller markets to hire a paid market manager to help build the market; and c)providing training and support for both vendors and core customers to become ‘farmers market advocates’, well equipped to spread the word about farmers markets, answer questions and broaden the customer base (this element was described in more detail in the prior recommendation)

Recommendation Seven: Consider forming a countywide farmers market association whose goal is primarily twofold: **To facilitate peer learning among market managers and leaders** that leads to sharing of ideas and practices that work, solves problems and strengthens markets; **and to increase the buy-in from all or most markets on joint projects and city or countywide efforts**, including especially the broader effort to expand the customer base for farmers markets. While our research has not uncovered many such associations, one place to begin this investigation would be with the Appalachian Farmers Market Association.

Increasing and Strengthening the Vendor Base

Recommendation Eight: Work with K-State Research and Extension to strengthen efforts to reach out to new and transitioning farmers to broaden the base of strong, high quality vendors at the markets. Special attention should be paid to finding and cultivating farmers who would help fill gaps and/or bring products where demand currently exceeds supply. Based on the market and shopper preferences gathered in this study, each market should candidly assess its product gaps and then brainstorm how to fill those gaps, whether that’s done by existing vendors or new vendors.

- To this end, we also support one of the recommendations put forward by the Kansas Rural Center (“Feeding Kansas”, 2014), that a statewide Fruit and Vegetable Agriculture

Economist position be created and supported, at both county and state levels, to enhance and strengthen the work being done at the local level, for example by Marlin Bates in Douglas County.

Recommendation Nine: Organize vendor and manager ‘field trips’ to other markets to stimulate ideas related to product displays and presentations, market logistics and design, sampling ideas and procedures, etc. These visits could also be used to look at how other markets balance ‘product overlap’ among different vendors to increase appeal to shoppers while increasing average vendor sales. At present, a number of markets are hesitant to have more than one vendor for certain product categories, which while understandable with a small customer base, may be self-defeating in the long run.

Securing a Viable, Long-term Location for the Downtown Market

Recommendation Ten: For the Downtown Lawrence markets (Saturday and Tuesday), create a working group to definitively deal with the “location issue” within the next two to three years. This working group should include 8 – 12 people, with representation of vendors (4), core customers (2 – 3), key town staff (3 – 4) and community local foods activists or entrepreneurs (2). **The working group will need buy-in from the beginning from the LFM board and the town, including a commitment to resolve the question of location and develop and implement a long-term plan.** Whether or not that plan calls for a move, it is clear that improved facilities will be needed going forward for the Saturday market, and that a much better location should be secured for the Tuesday market.

- We highly recommend that the Saturday and Tuesday markets take place at the same location, which is not possible in the current setting. Recognizing that this would require a change of location for both markets, we nevertheless believe that a single location for both Saturday and Tuesday (or other mid-week day) markets will enable the development of a much larger customer base for the Tuesday market, will help guide decisions about other mid-week markets, and will raise the prominence and profile of the Downtown market considerably.
- The working group should develop a clear, prioritized list of location criteria to guide the process. Some of those criteria have been discussed in this report and others will emerge in early group conversations. Among the most important we see are:
 - Permanence of the market location
 - Proximity to downtown and/or to other clusters of businesses
 - Visibility and prominence, especially from major roads and corridors
 - Excellent, prominent signage, both at the market and guiding to it
 - Sufficient space, for vendors and their vehicles, for customers, and if possible, for music, demos, events and eating areas
 - Adequate parking and/or easy access to public transportation
 - Cover from the weather, balanced with the feel of an open air facility
 - Potential for use as a multi-purpose facility on non-market days and times
 - Potential for other infrastructure and amenities, including such things as electric power, running water (including washing stations to facilitate product sampling), pleasant public toilets, drop down sides and heating possibilities for the off season or winter, and shopping carts and lanes for customers to carry out their purchases

Recommendation Eleven: Develop a policy agenda, including both state and local policies and regulations, that promotes local food consumption, and specifically, enables farmers markets and vendors to compete more effectively with more traditional market venues. The next section of this report provides a starting place for this policy agenda. Policy and regulations, however, change fairly often, and so a farmers market policy agenda must be dynamic, updated annually as circumstances change.

Recommendation Twelve: Develop a clear, simple clarification of the Kansas Department of Agriculture's rules and requirements regarding product sampling at markets, and work with market managers to ensure that all vendors receive this one – two page document.

- A workshop for all market managers, open to vendors as well, might be useful in conveying this information and clarifying questions. Staff from the KDA have expressed a willingness to do this.

ASSESSMENT OF POLICY AND REGULATORY CHALLENGES AND OPPORTUNITIES

Priority Issues, based on current policies and regulations:

1. Clarify existing food safety rules as they pertain to farmers markets, particularly around product sampling. A summary of the sampling rules, compiled from communications with KDA staff, is included in Appendix 3. It should be widely shared with farmers market managers and with all food vendors, perhaps including a workshop with KDA staff to ensure complete understanding.
 - a. The current policies allow for interpretation as to how many washing stations – for hands and for utensils – are required, specifying only that there be ‘reasonable’ access. Rather than pushing for a specific number of stations, we would recommend that markets develop plans for washing stations in key areas of the market, based on the mix of vendors and their likelihood to need access, and then begin implementing the plans in close coordination with KDA staff.
 - b. The FPC may be able to assist with mini grants to partially fund the washing stations.
2. The agritourism designation for farmers markets currently requires two separate applications from any given market, one to the state the other to Douglas County. These two applications should be either combined or synchronized to reduce the burden on the markets.
 - a. More importantly, the benefits of an agritourism designation are not readily apparent at this point. With a streamlined process for achieving this designation should also come a much more robust commitment to promote and advertise farmers markets as agritourism designations. This in turn would require that farmers markets include both a robust offering of local foods (and other products) and food and farm-based activities, such as cooking demonstrations, chef and restaurant competitions, and other hands-on activities that link shoppers with farms and the farming process. We urge that most of the activities encouraged to increase the appeal of farmers markets as a “destination” also contribute to the likelihood of increased sales for farmers, rather than just more foot traffic.
3. The state sales tax on food presents a substantial barrier, adding to the cost of food items sold at markets. One approach to this issue comes from Mississippi, where HB 1566, passed in 2010, exempted from sales tax any food products grown, made or processed in the state and sold at a registered farmers market.

Lawrence Policies and Regulations

We are not aware of any major hurdles or challenges that farmers markets face in the codes or ordinances of Lawrence. However, the following might help to strengthen the relationship between the city and the farmers markets operating within it:

1. Clarify site plan requirements for existing markets, and for 'new' markets, should the existing downtown market change location (Saturday and Tuesday). If parking and bike parking requirements are to be enforced, city staff should work with market leaders to enable them to meet these requirements.
2. The city of Lawrence, Douglas County and to the degree possible, the state should develop and implement a 'one stop shop' process whereby any and all requirements for farmers market operators, and the vendors selling through markets, are posted, and the various requirements integrated to avoid both duplication (of applications, fees) and confusion. Seattle's Office of Economic Development provides one example of the 'one stop shop' approach for farmers markets.
3. The City of Lawrence should evaluate the potential to develop land use protections for farmers markets that assure their long term tenure at specific locations, while simultaneously recognizing their importance to the health, economic vitality and culture of the town. The lack of permanence, or at least long term stability of venue adds to public uncertainty about farmers markets and may also inhibit greater investment on the part of both vendors and market leadership.
4. The City, in conjunction with Douglas County, should build upon recent steps to earmark funds for a major, long-term facility to serve both the Saturday and Tuesday (or other mid-week day) markets. While specific amounts cannot be thoughtfully considered before a clear plan for a location and facility design are developed, the local leaders can begin to take steps to inform the community and build support for the eventual allocation of funds. Creative grassroots, crowdfunding or other private funding mechanisms should also be explored during this period, as well as possible federal funds.

Douglas County Policies and Regulations

1. As described under state policies, the county should clarify and streamline its application process for agritourism designation status for farmers markets, while also increasing the benefits which such a designation potentially brings.
2. As plans for increased connectivity across the town and county emerge, including greater access to mass transit, the potential to include farmers markets in route planning should be explored. This could help mitigate parking challenges to some degree, and might also make shopping at farmers markets easier for senior citizens and people with disabilities.
3. The county and town together should support expansion of the Senior Farmers Market Nutrition Program to full funding for all eligible participants, both by allocating some portion of funds, and by advocating with the state that it allocate adequate funding for the program. According to USDA rules, *"State agencies may also supplement the benefit level with State, local or private funds... State agencies are allowed to contribute their own funds to enhance their Federal SFMNP grants."*

State Policies and Regulations

Two state-level policies have already been discussed above. Additionally, we recommend building a campaign to fully fund the Senior Farmers Market Nutrition Program, which provides \$30 worth of coupons to senior citizens, at or below 185% of the federal poverty level, to purchase produce (and in some places, honey) at farmers markets. According to the “Feeding Kansas” study, approximately 5000 Kansas seniors now get these coupons, but an additional 10,000 are eligible. Recognizing that Kansas faces severe budget issues at present, we nevertheless think this could be a winnable issue, for the following reasons:

- These coupons make a difference. The program has a very high redemption rate, and seniors love to be able to purchase fresh vegetable and fruits, which many struggle to afford
- Most farmers love this program. It is very easy for farmers to participate and does not require the market to set up infrastructure or administer in any way.
- 100% of the money goes into farmers pockets
- Getting more seniors to the markets through this program will likely lead to more overall shoppers, as research shows that people who first attend markets because of a coupon tend to continue shopping there once the coupons have been utilized.
- The cost to the state to fully fund the program would be negligible. An additional 10,000 SFMNP participants would cost the state just over \$300,000 per year (including a small increase in program administration costs). With an annual state budget of more than \$11 billion, not including federal contributions, this addition amounts to roughly one penny out of every \$40,000 in state expenditures.

Additional “Best Practices”

There are a number of potential Opportunities to strengthen farmers markets through public policy and administrative actions, some of which have been noted above. Additional best practices worth further consideration include:

Funding for farmers market facilities

- In 2009, Arkansas passed SB 271 which appropriated \$355,000 to the Arkansas Department of Agriculture for construction and associated expenses for farmers markets in the state
- In 2011, New York State passed SB 2801, appropriating \$3 million to establish, improve and promote farmers markets in select counties
- In 2010, Washington State passed HB 2402, providing real estate and personal property tax exemptions for non profits, associations or corporations that host a farmers market
- Ithaca, NY provided a \$50,000 grant, matched by the sweat equity of farmers market vendors and supporters, to construct their pavilion (Note: This was in 1988. In today’s dollars this would be slightly over \$100,000, still a small sum for such a substantial pavilion. The money was used for materials, while all of the labor was donated).

Promotion of EBT and other supplemental food vouchers

Numerous states and localities are encouraging greater SNAP use at farmers markets ranging from direct investment in infrastructure to financial support for matching funds or coupons. Nevertheless, SNAP utilization at farmers markets, while increasing rapidly, remains a very tiny proportion of overall expenditures of SNAP dollars. To facilitate increased use, Massachusetts in 2009 passed SB393 which: provided EBT machines to all approved farmers markets, and provided all SNAP beneficiaries with a list of every market accepting EBT, along with a brochure explaining the system.

Food safety regulations

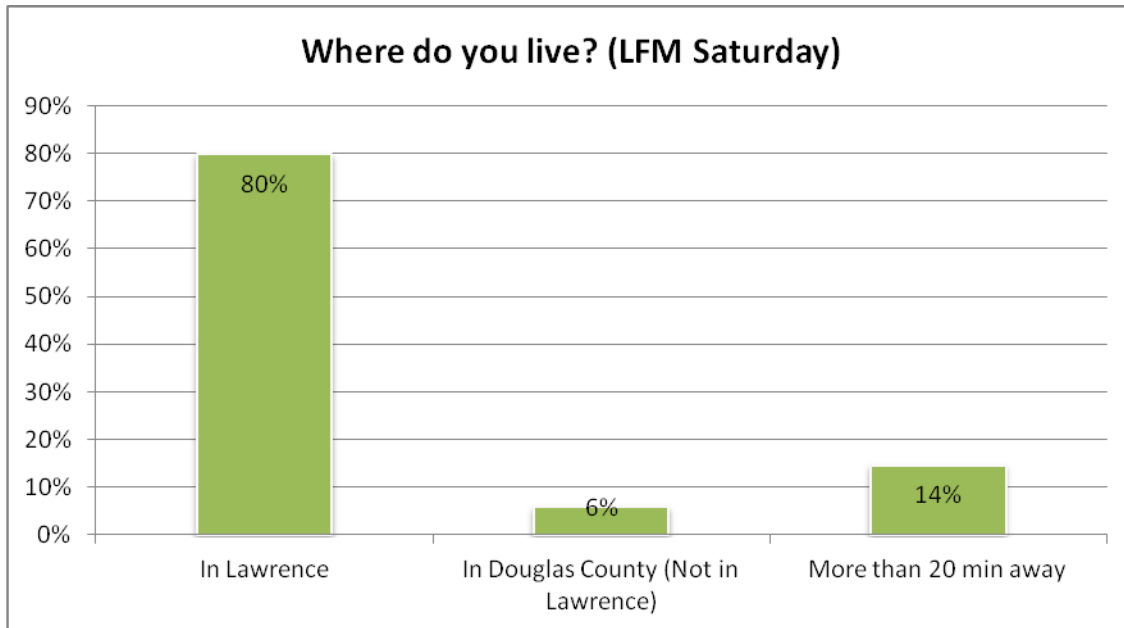
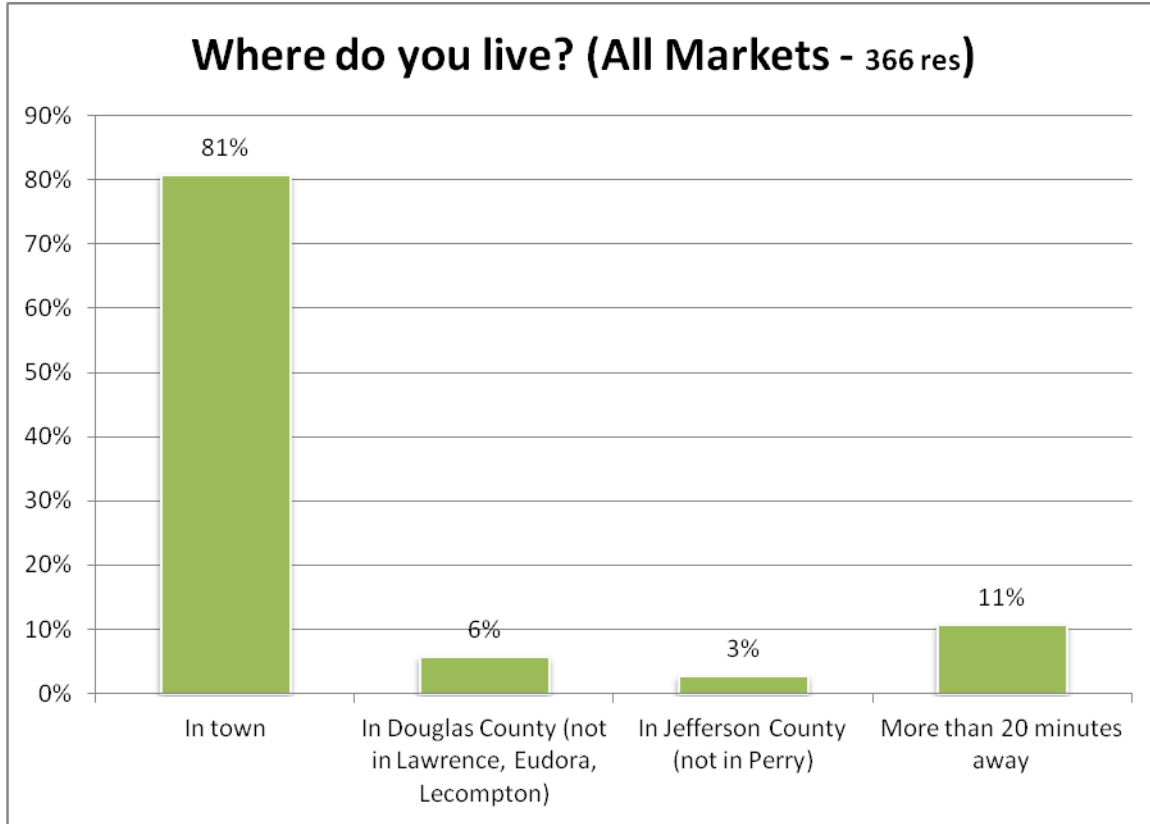
Iowa's food retail laws exclude farmers markets from regulation as 'food establishments', lessening the requirements and stipulations that markets and vendors must meet in order to sell and sample foods. Virginia's updated Cottage Food Industry law (2014) allows for farmers market sales of a range of items produced in a non-certified home kitchen.

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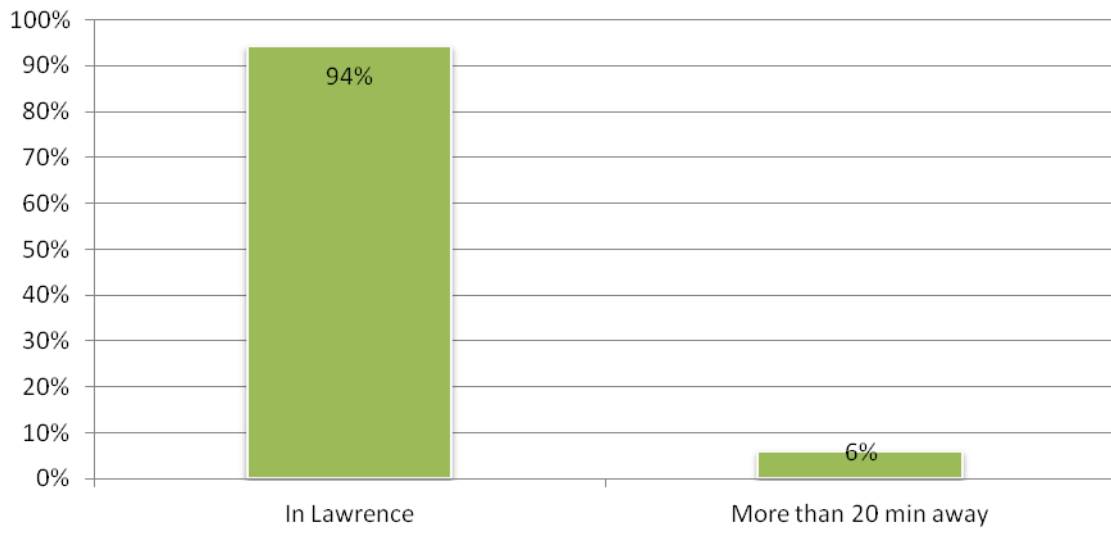
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Appendix 1: Customer Data

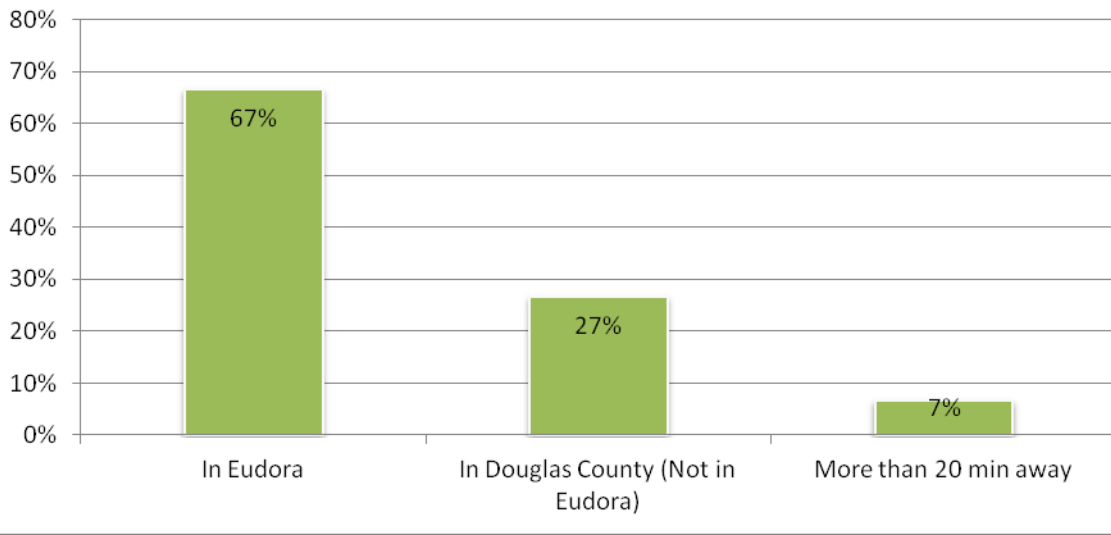
Customer origins



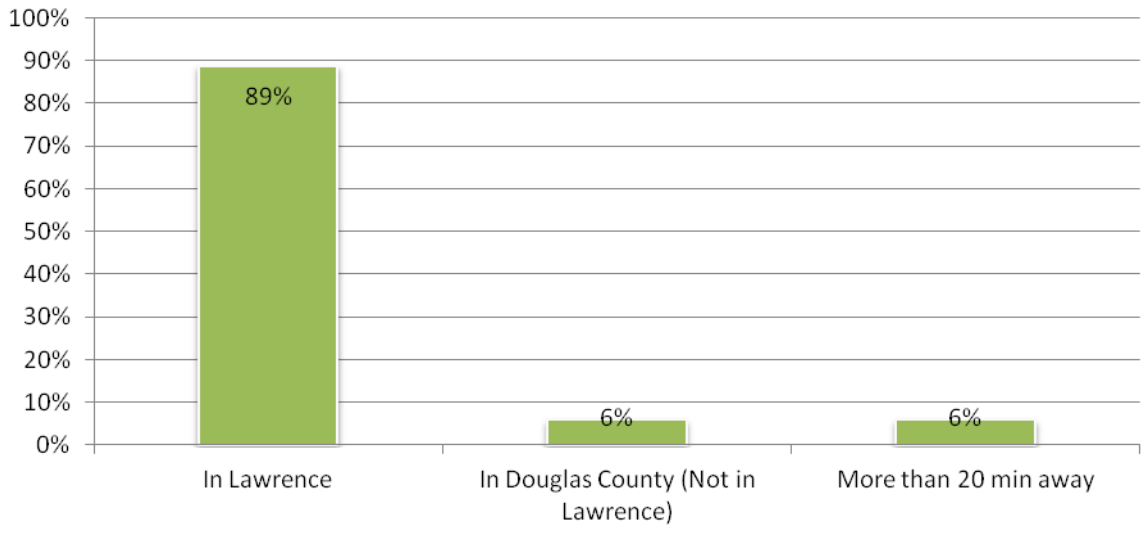
Where do you live? (LFM Tuesday)



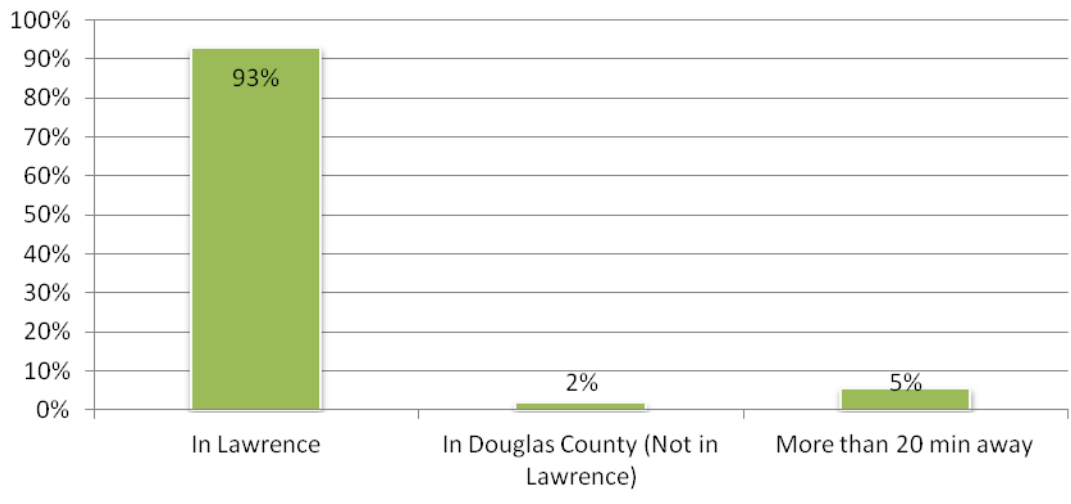
Where do you live (Eudora) ?



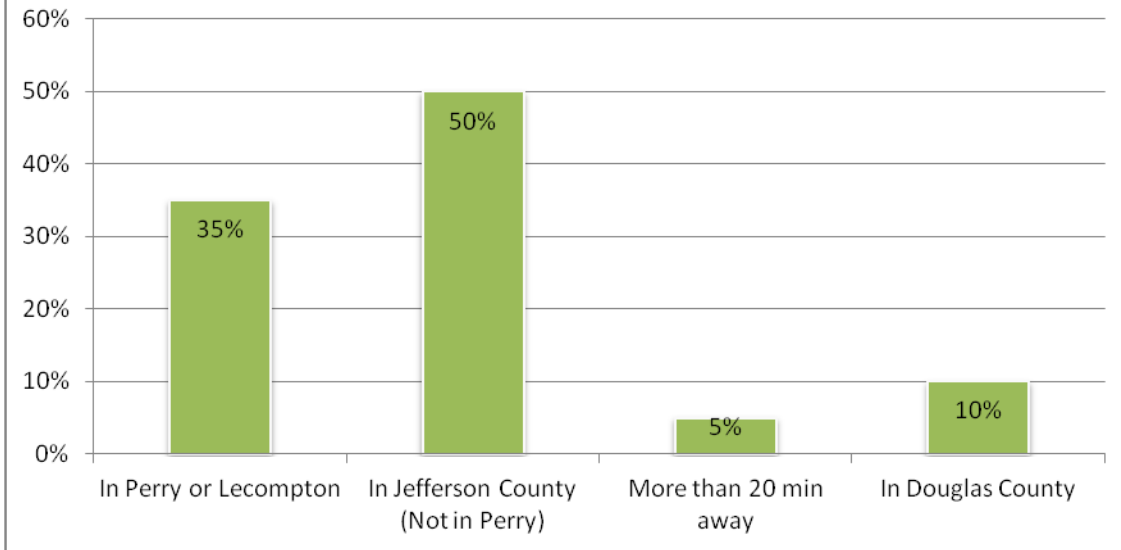
Where do you live? (Clinton Pkwy)



Where do you live? (Cottin's Hardware Market)

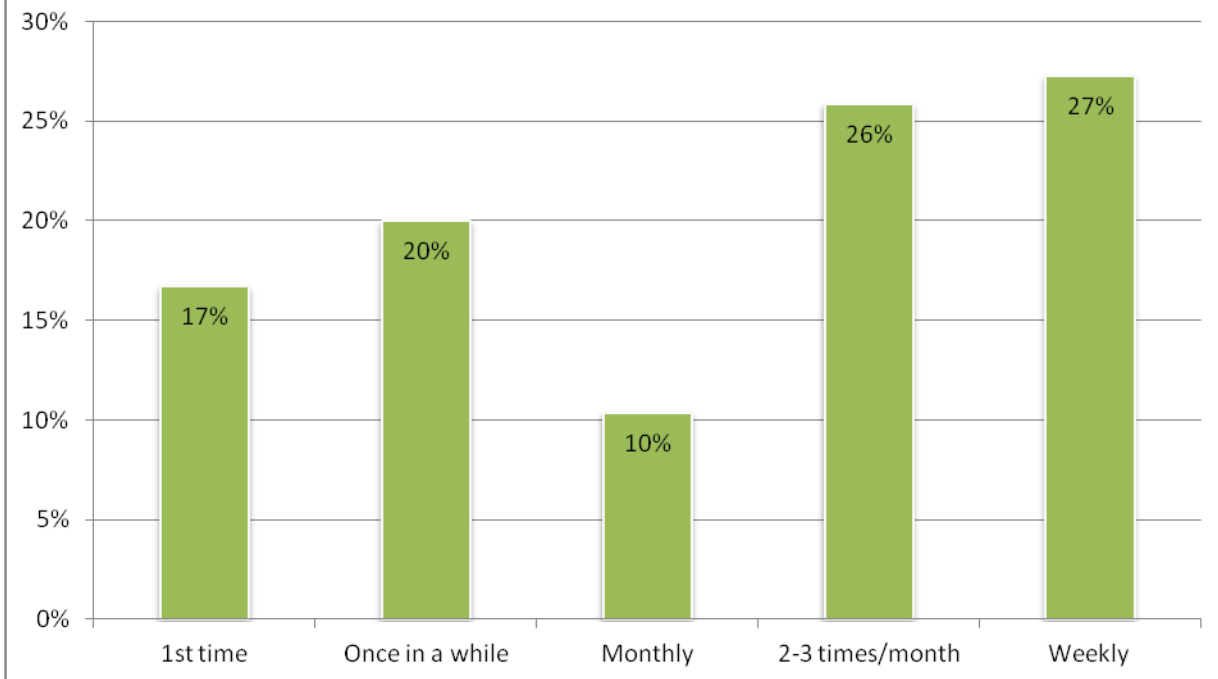


Where do you live (Perry Lecompton)?

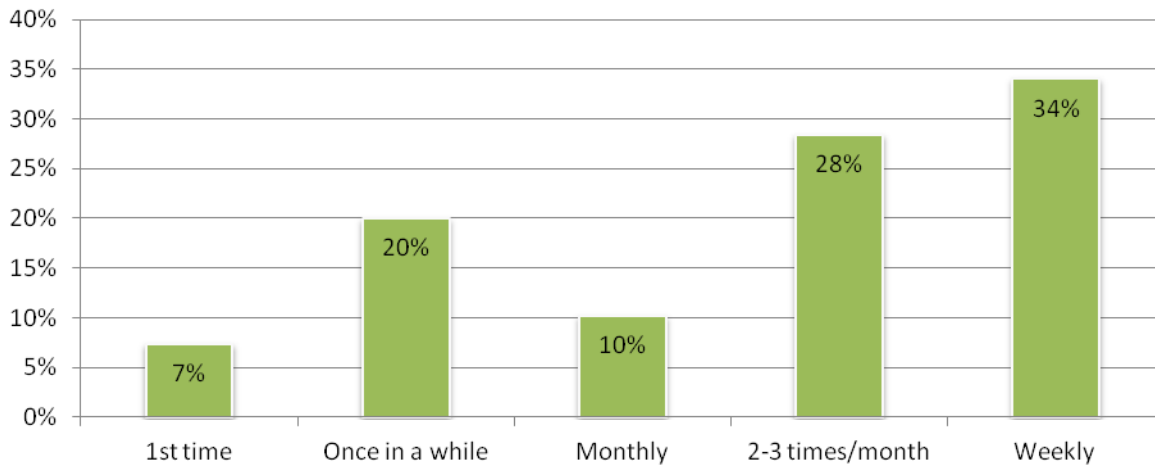


Customers' shopping frequency

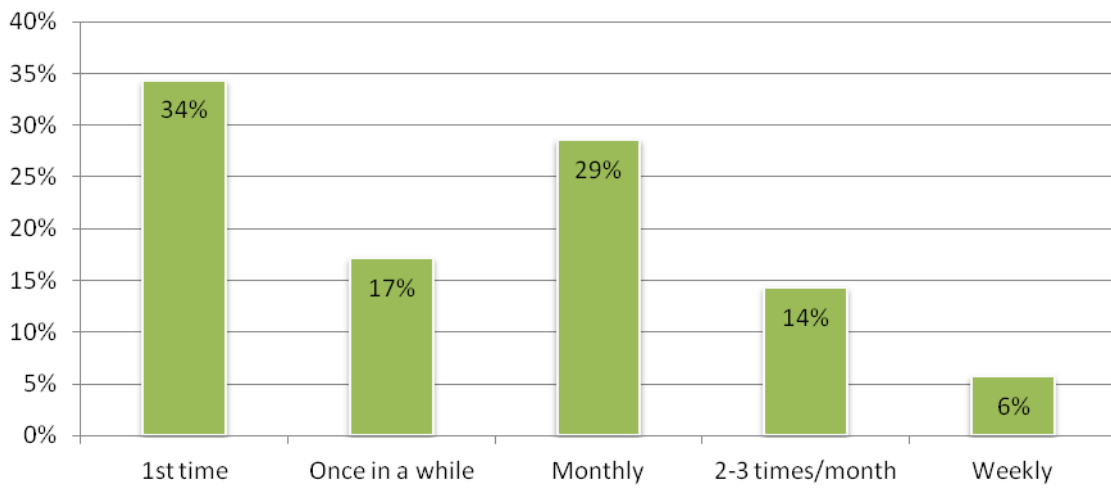
How often do you shop at the farmers market? (All markets' customers - 426 res)



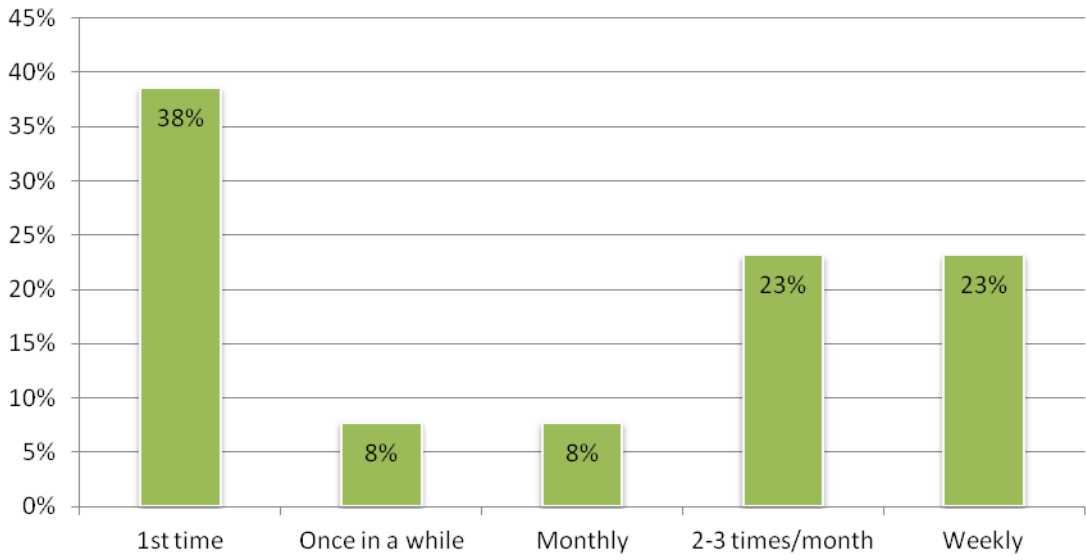
How often do you shop at the Lawrence Farmers Market? (Saturday)



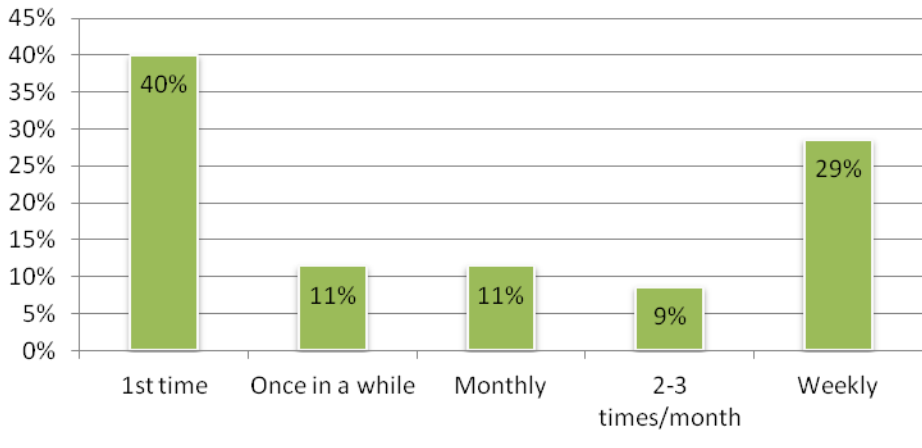
How often do you shop at the Lawrence Farmers Market (Tuesday)?

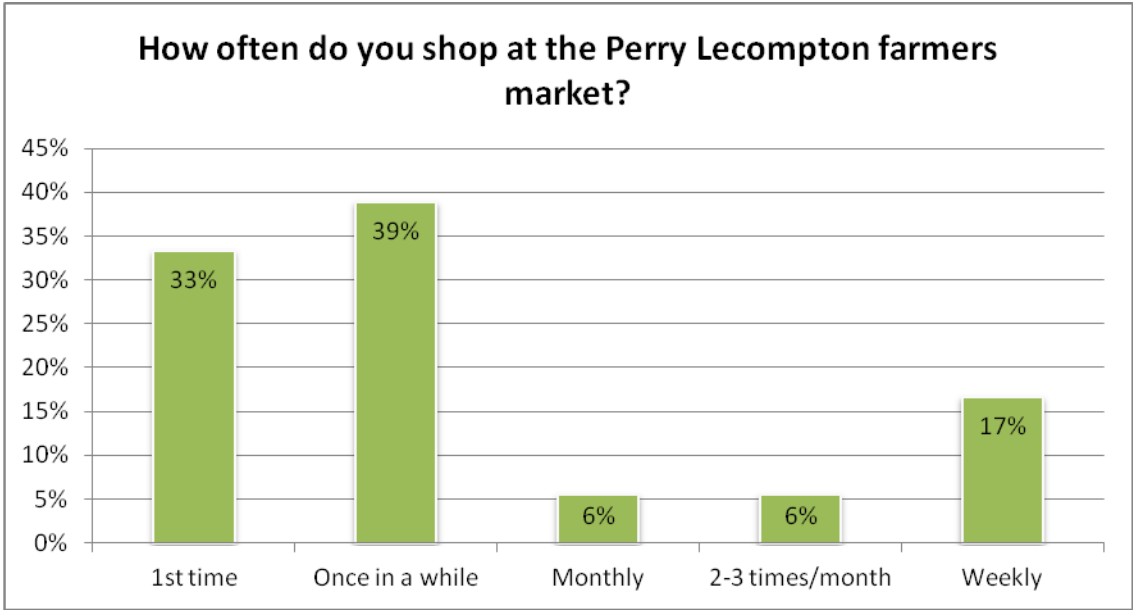
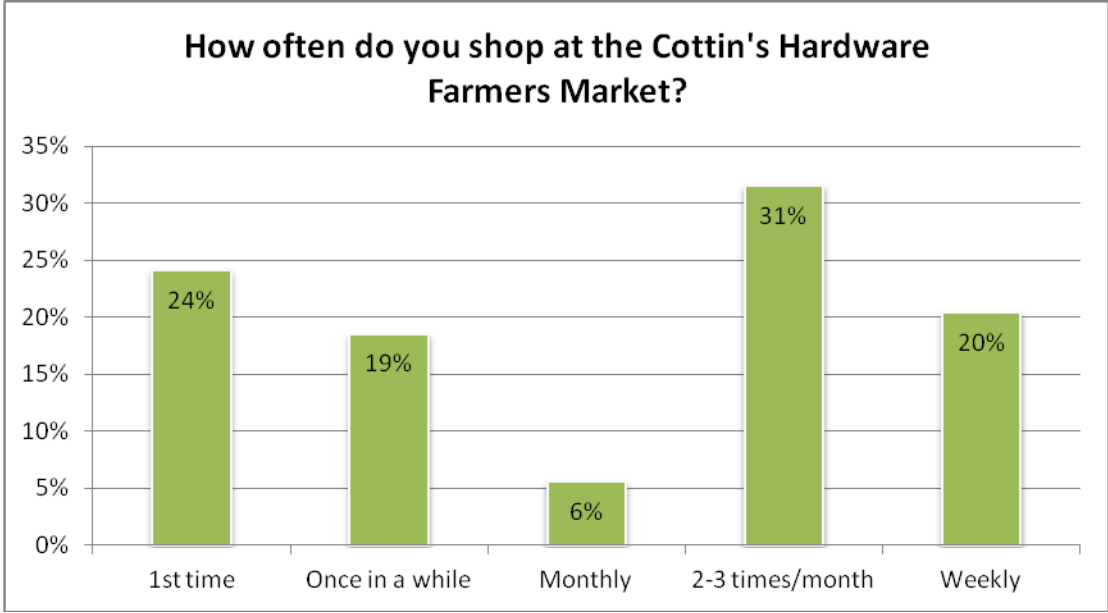


How often do you shop at the Eudora Farmers Market?



How often do you shop at the Clinton Parkway farmers market?





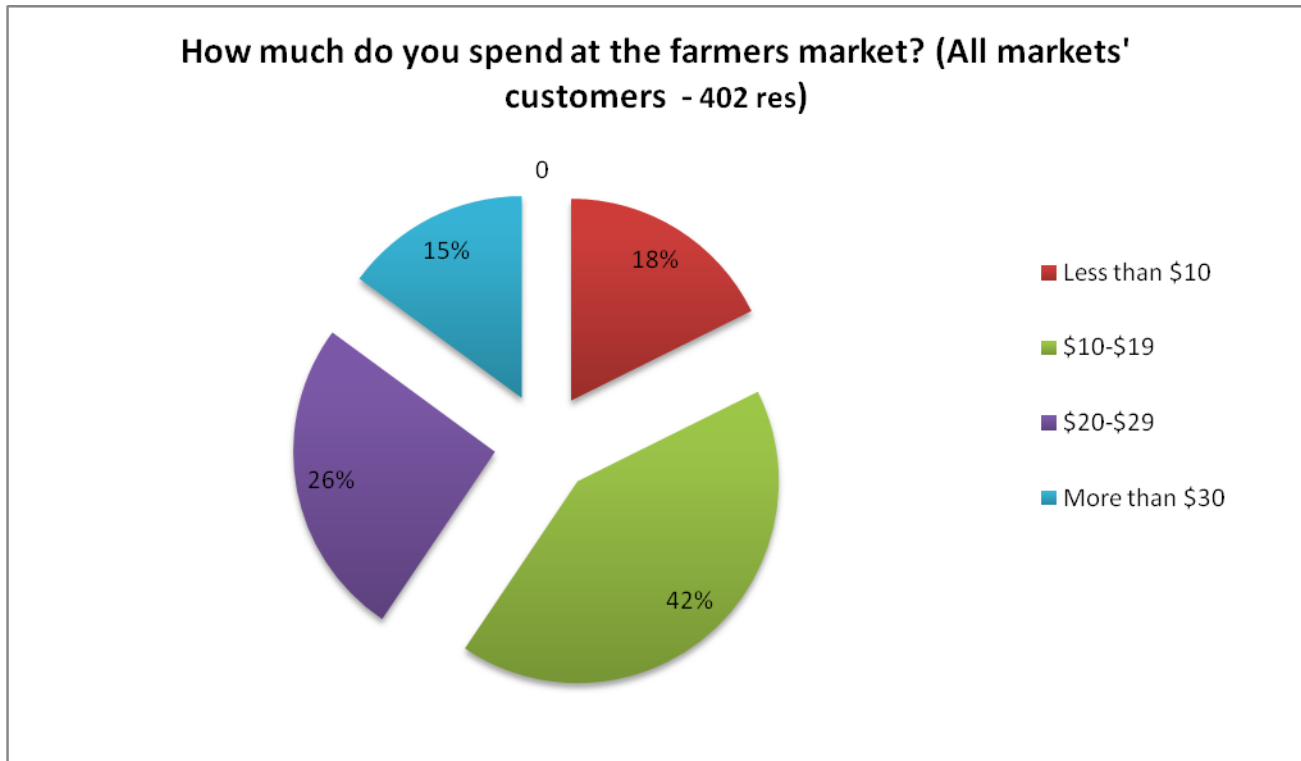
Customer attendance estimates at market

Market	Estimated Total Number of Attendees
Lawrence Farmers Market - Saturday	1864
Lawrence Farmers Market - Tuesday	120
Eudora	36
Clinton Parkway	176

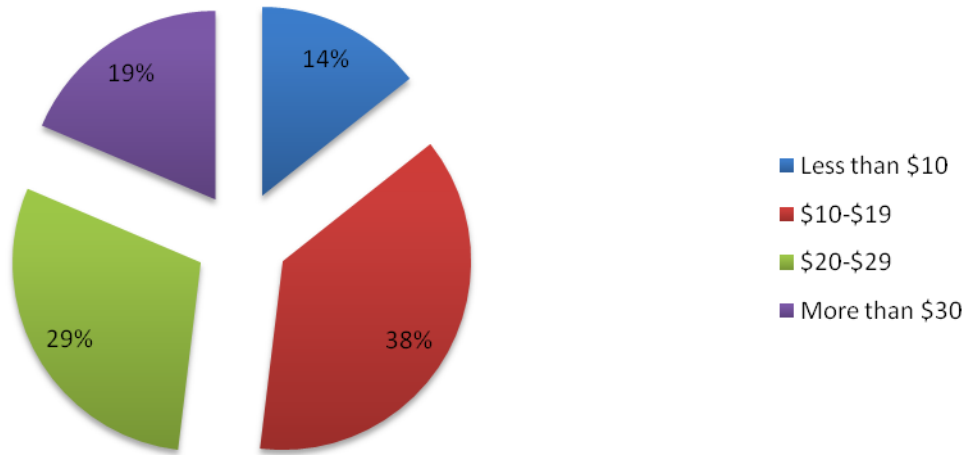
Cottin's Hardware	204
Perry Lecompton	44

**Note: Customer counts take week of June 6-11, 2016*

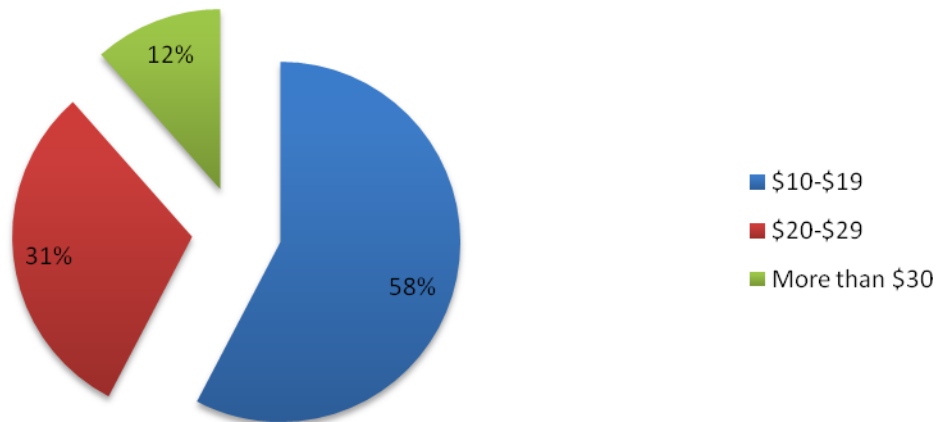
Customer spending



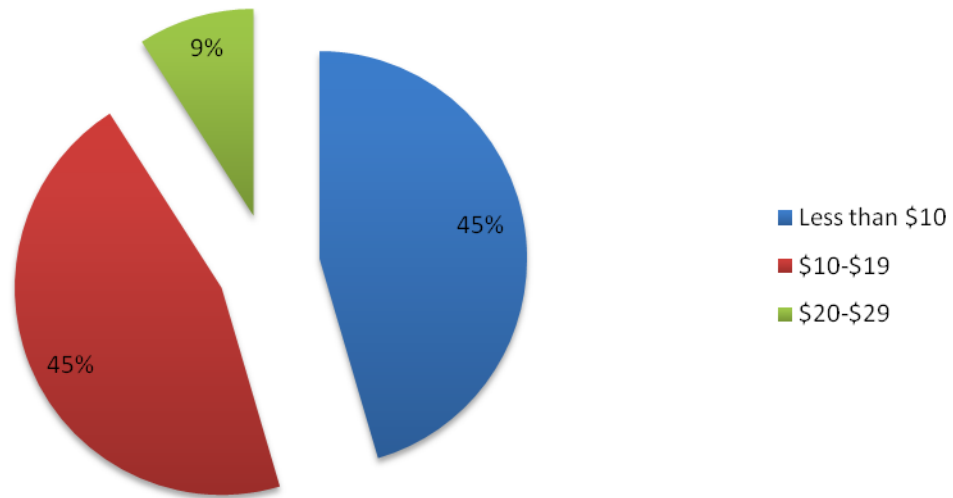
How much do you typically spend at the Lawrence Farmers Market? (Saturday)



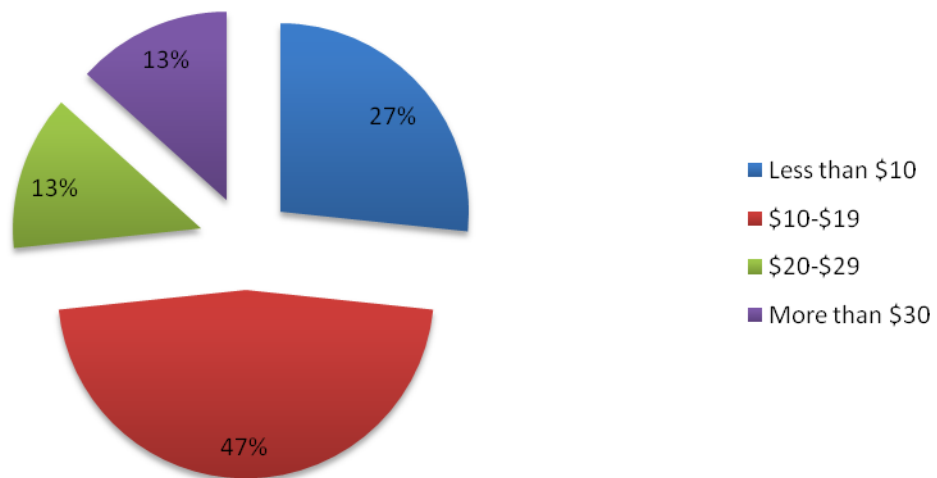
How much do you spend at the Lawrence Farmers Market (Tuesday)?



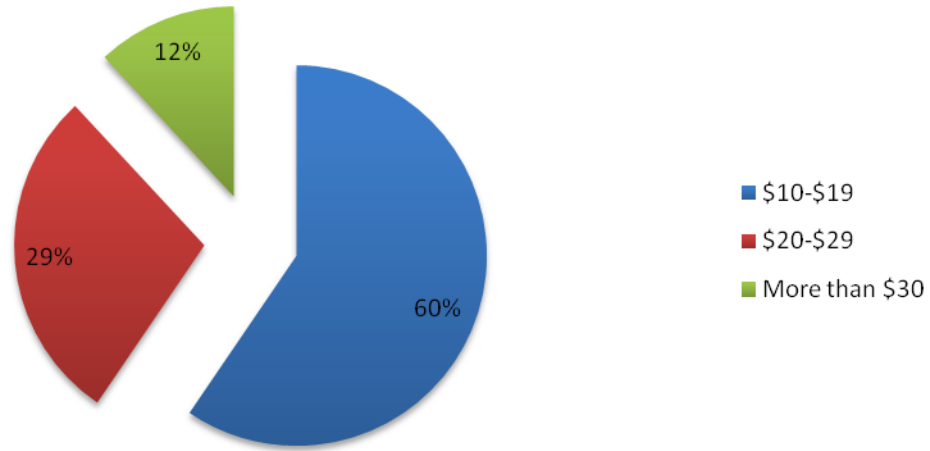
How much do you spend at the Eudora Farmers Market?



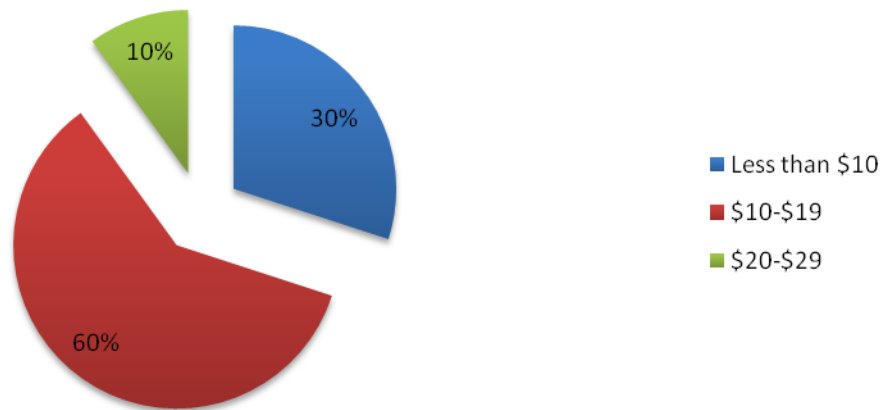
How much do you spend at the Clinton Parkway Farmers Market?



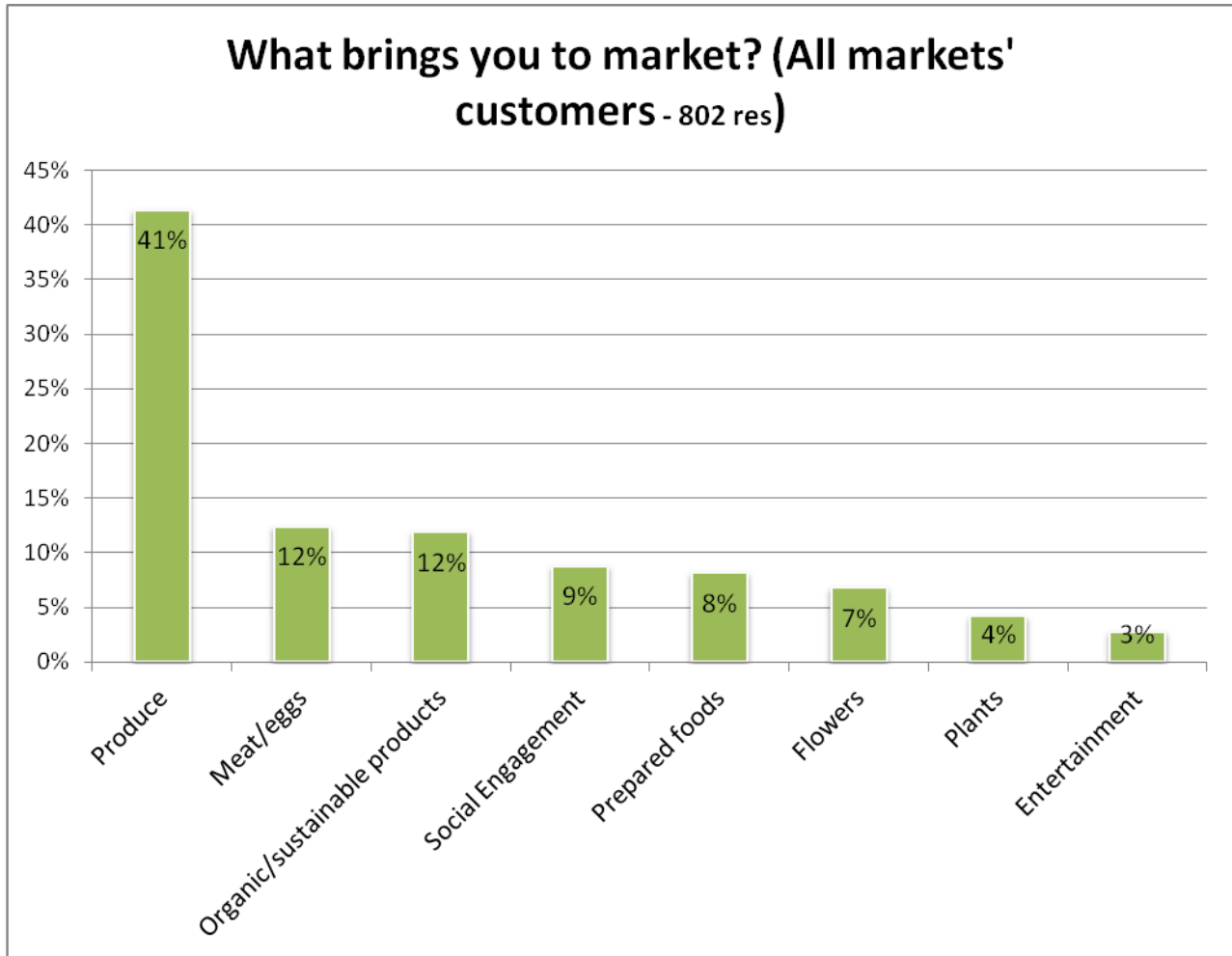
How much do you usually spend at the Cottin's Hardware farmers market?



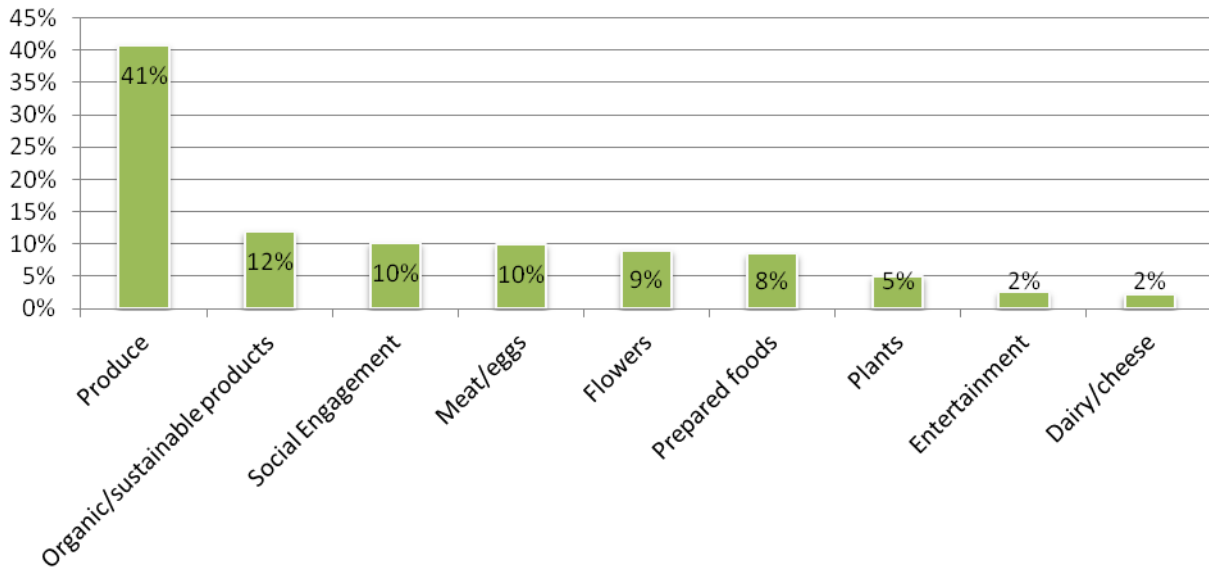
How much do you spend at the Perry Lecompton Farmers Market?



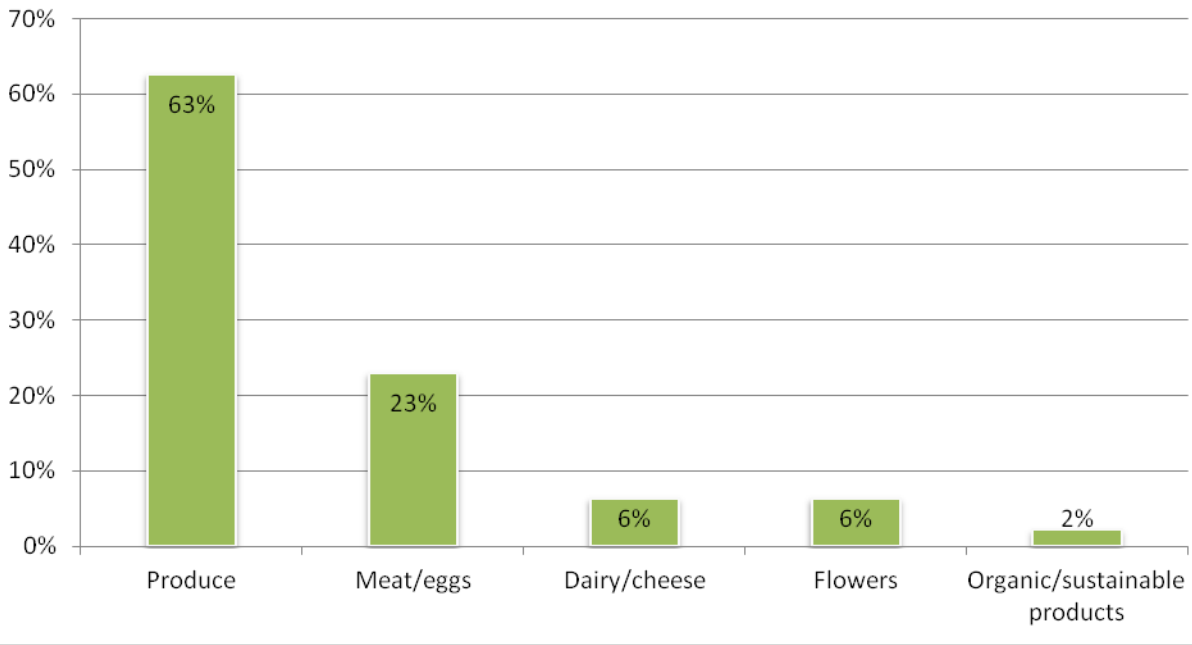
What brings you to this market?



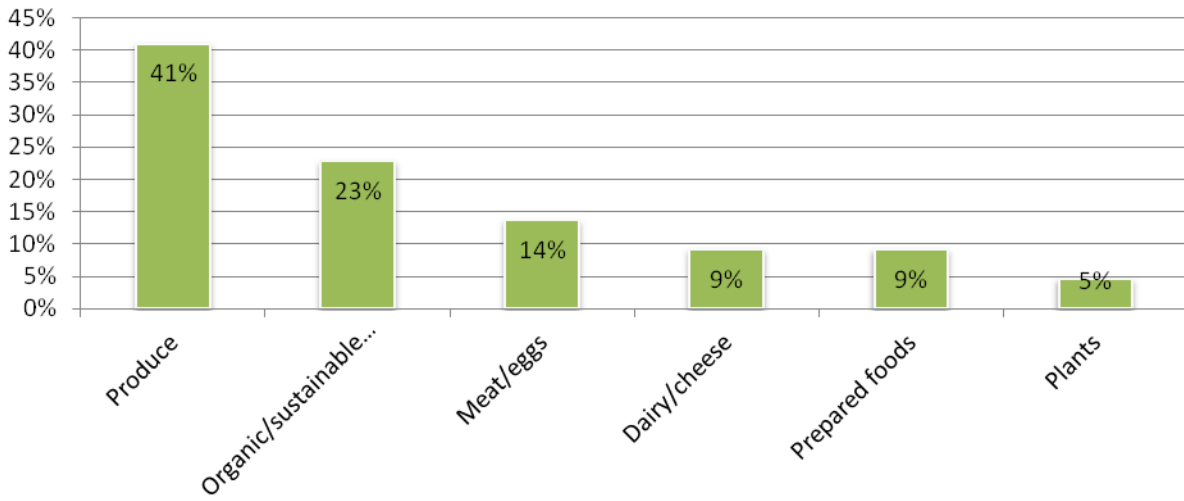
What brings you to the Lawrence Farmers Market? (Saturday)



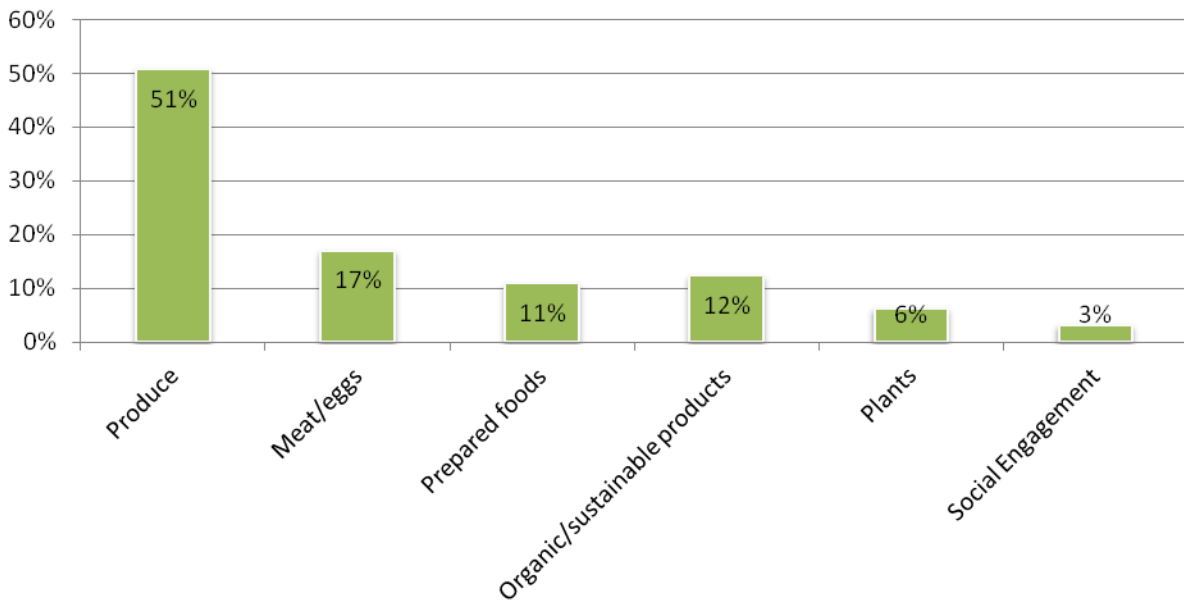
What brings you to the Lawrence Farmers Market (Tuesday)?



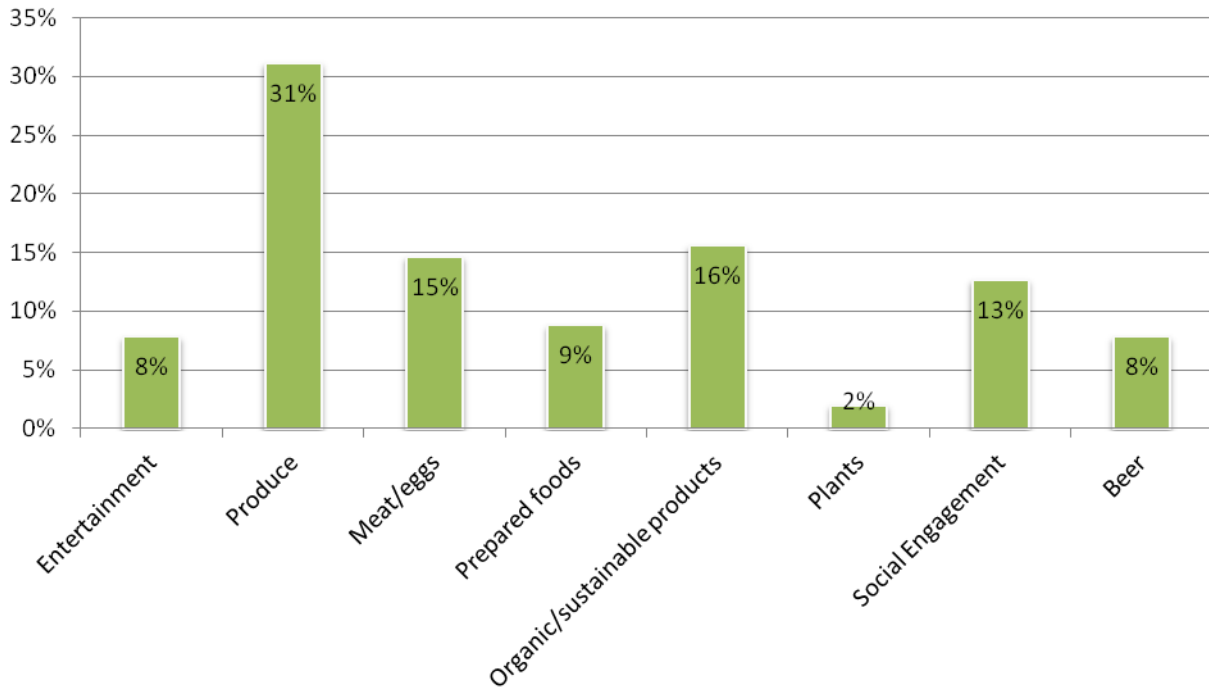
What brings you to the Eudora Farmers Market?



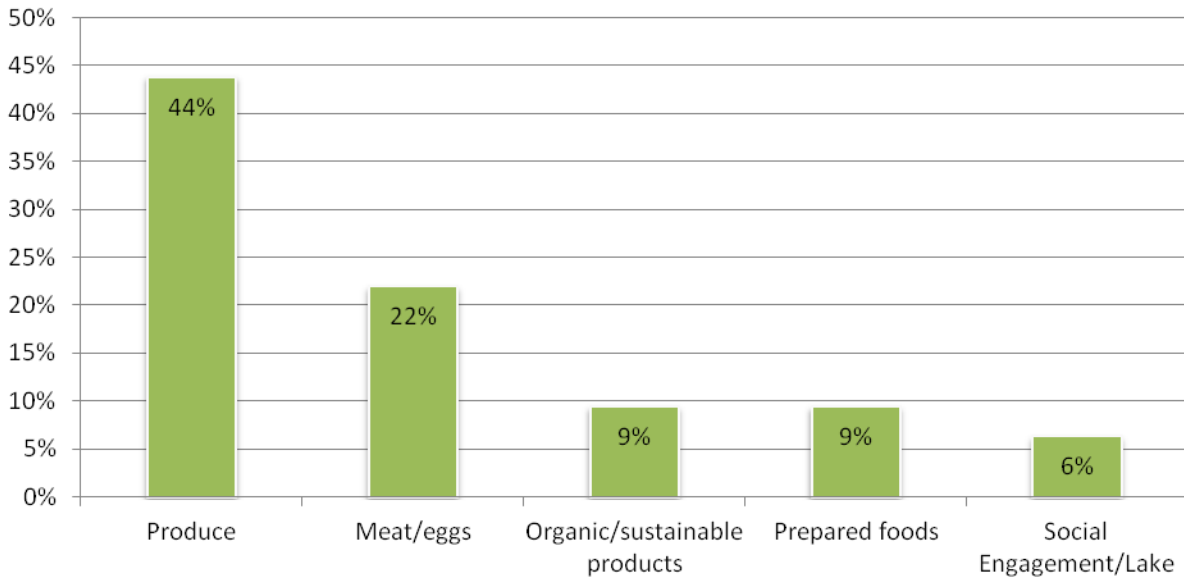
What brings you to the Clinton Parkway Farmers Market?



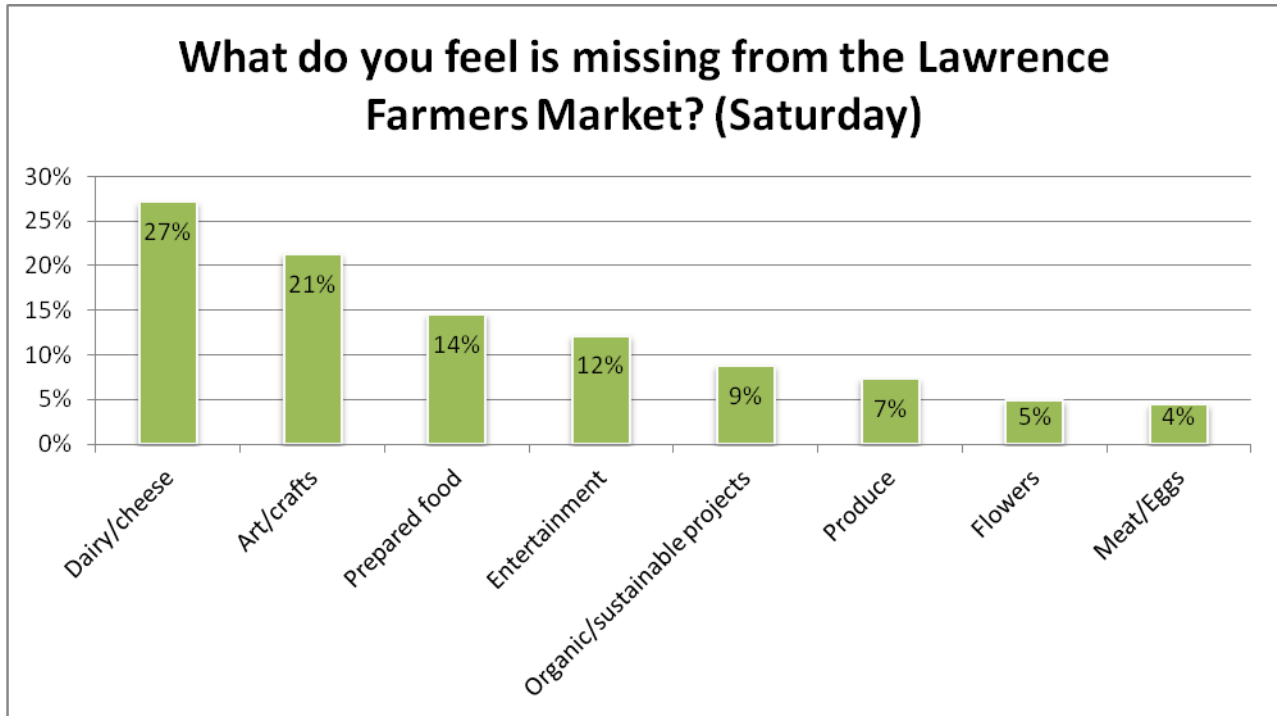
What brings you to the Cottin's Hardware Farmers Market?



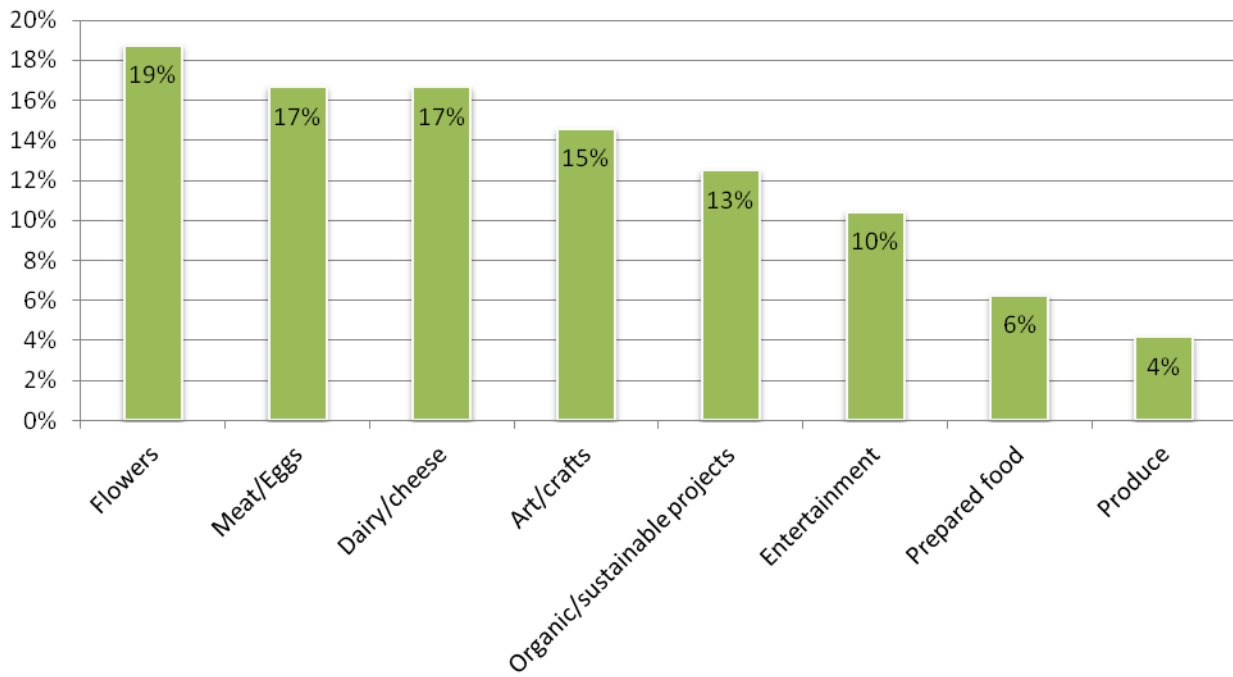
What brings you to the Perry Lecompton Farmers Market?



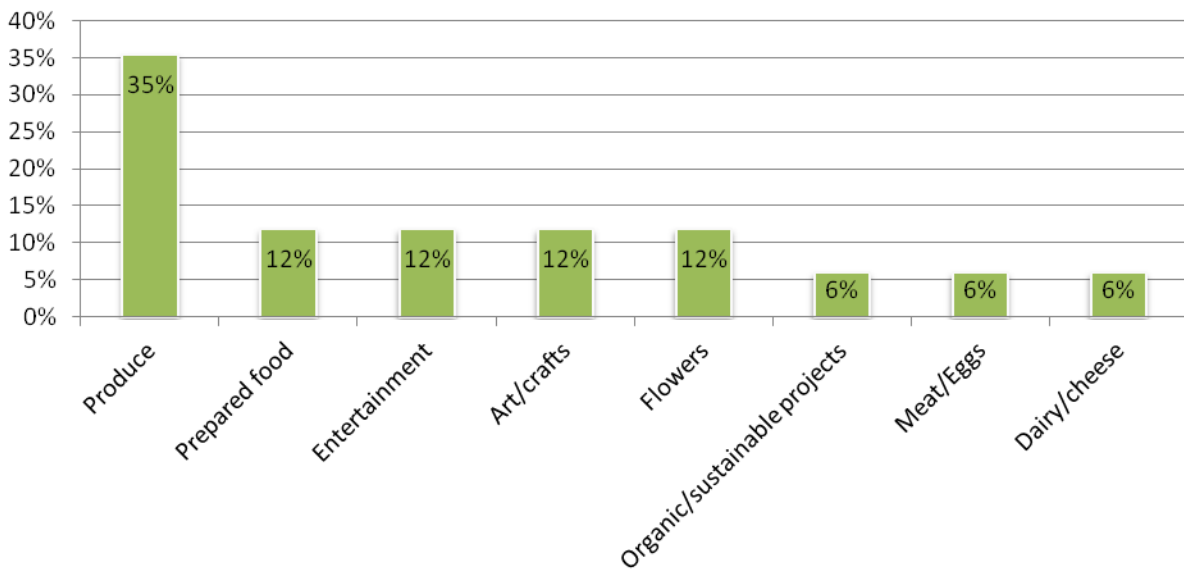
What's missing from the farmers markets?



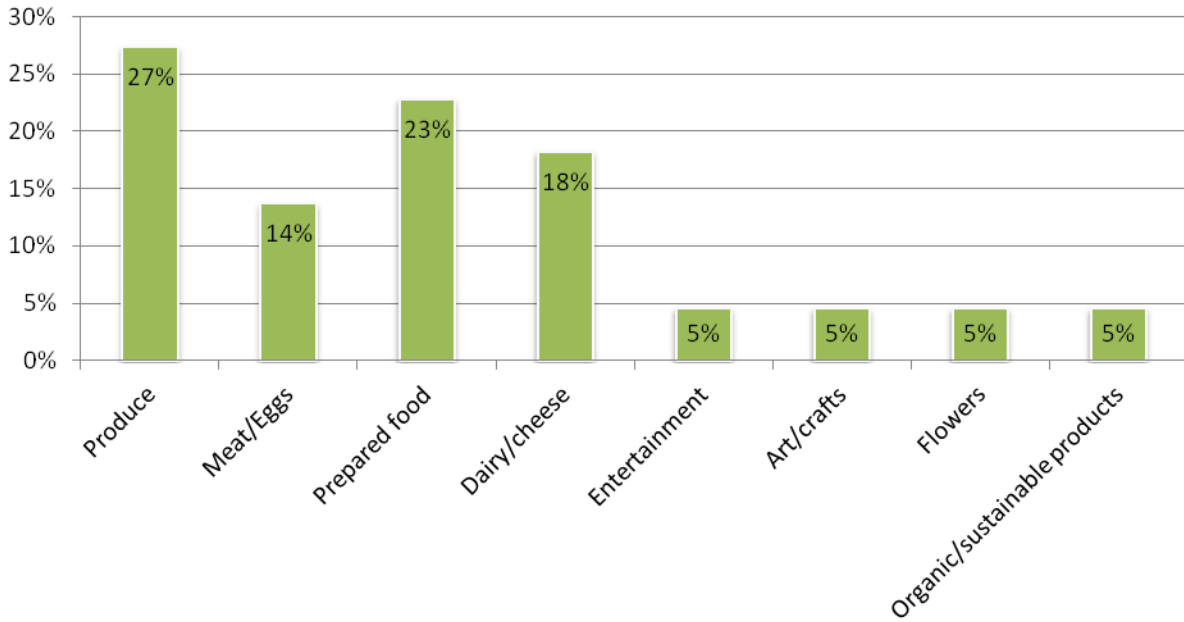
What do you feel is missing from the Lawrence Farmers Market (Tuesday)?



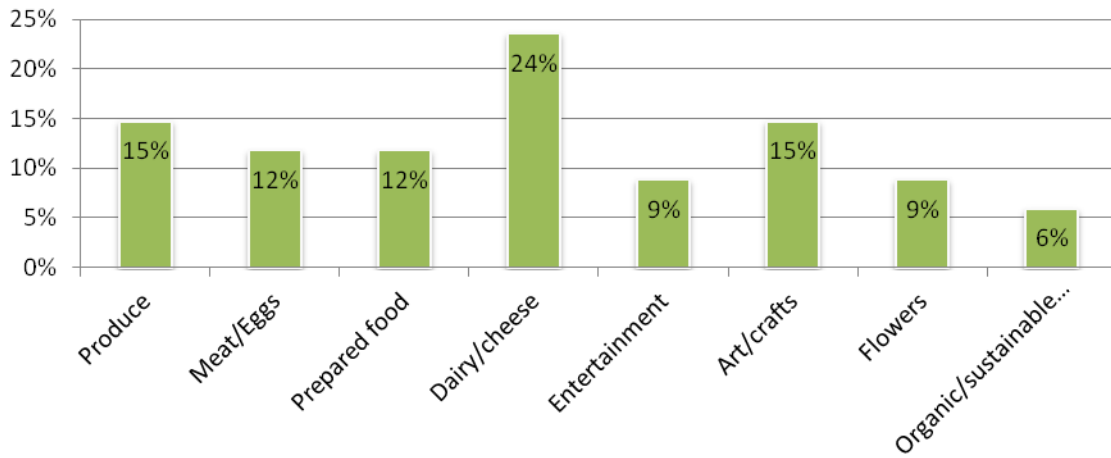
What do you feel is missing from the Eudora Farmers Market?

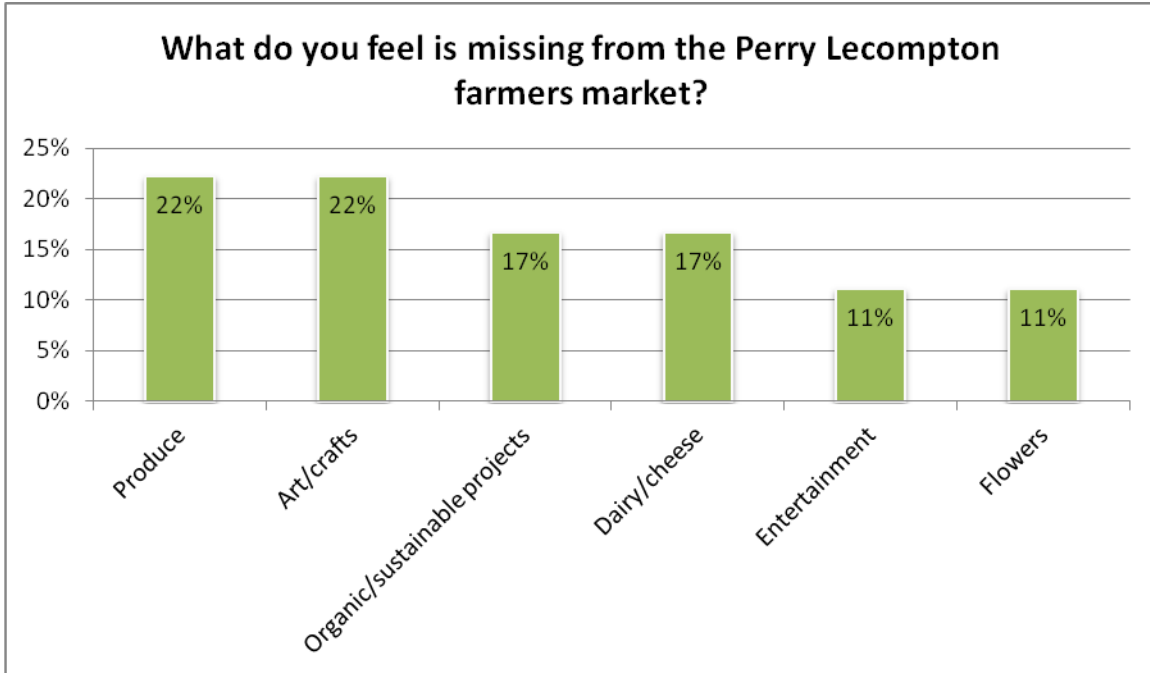


What is missing from the Clinton Parkway Farmers Market?

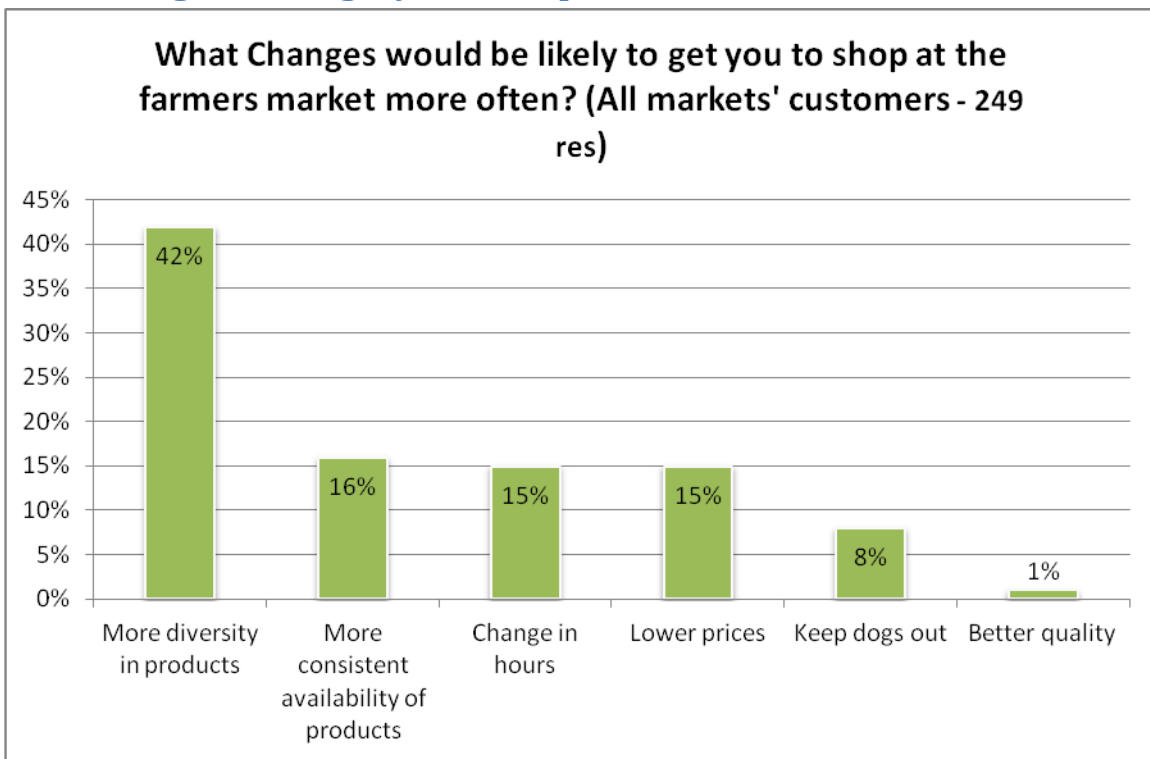


What do you feel is missing from the Cottin's Hardware farmers market?

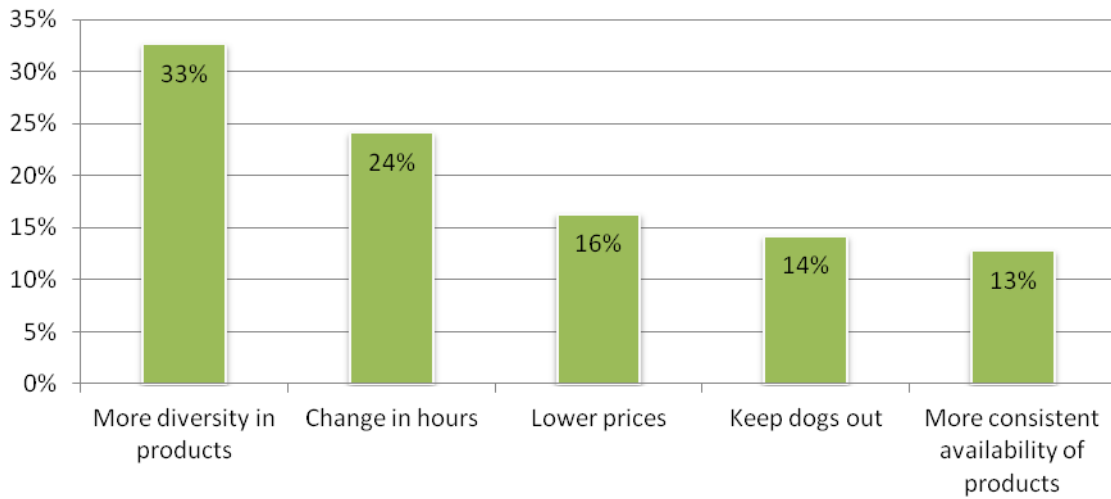




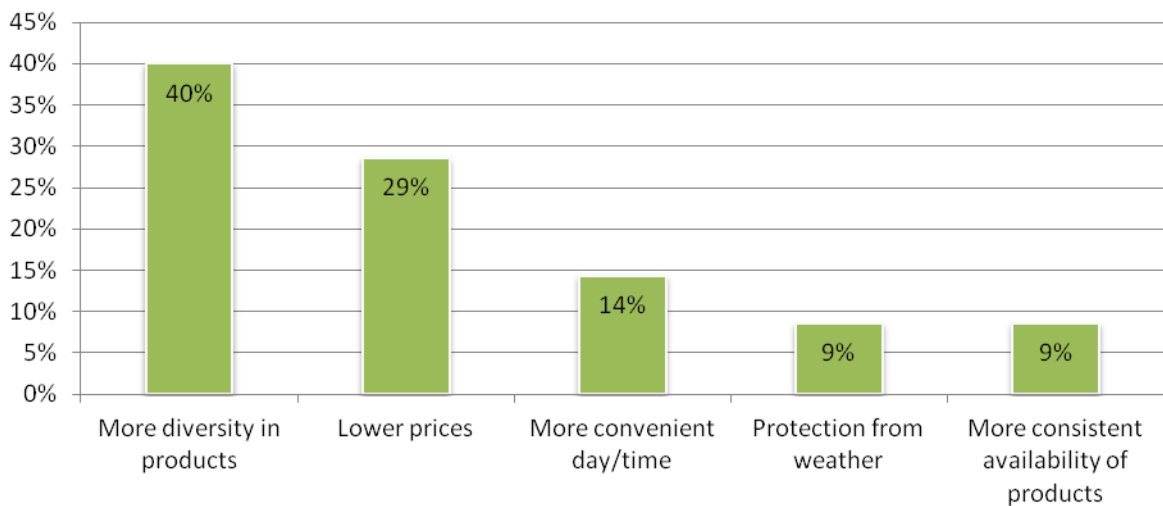
What changes would get you to shop more often?



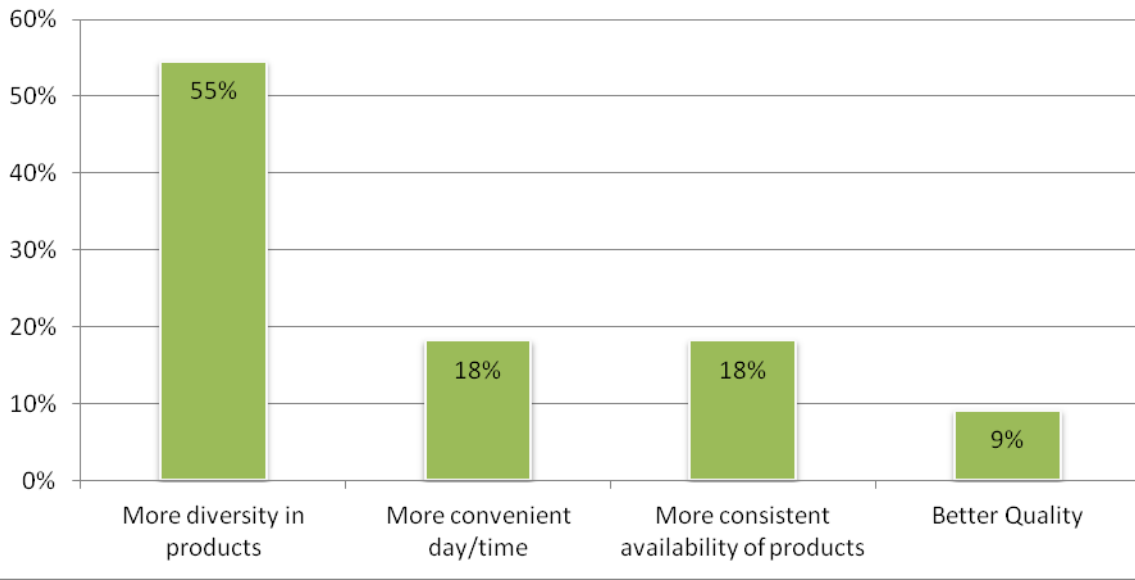
What changes would be likely to get you to shop at the Lawrence Farmers Market (Saturday) more regularly?



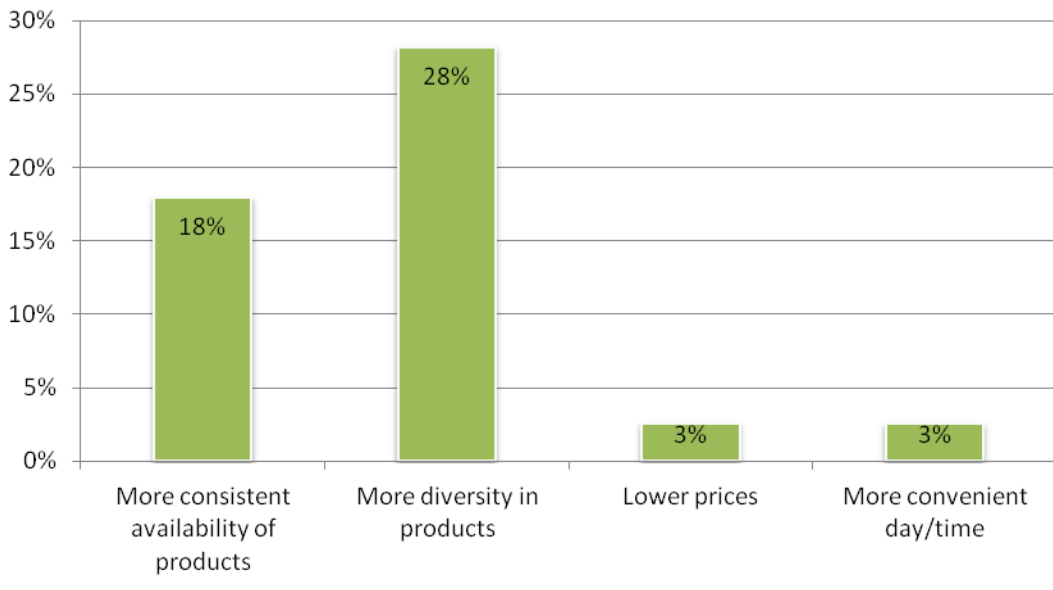
What changes would be likely to get you to shop at the Lawrence Farmers Market (Tuesday) more often?

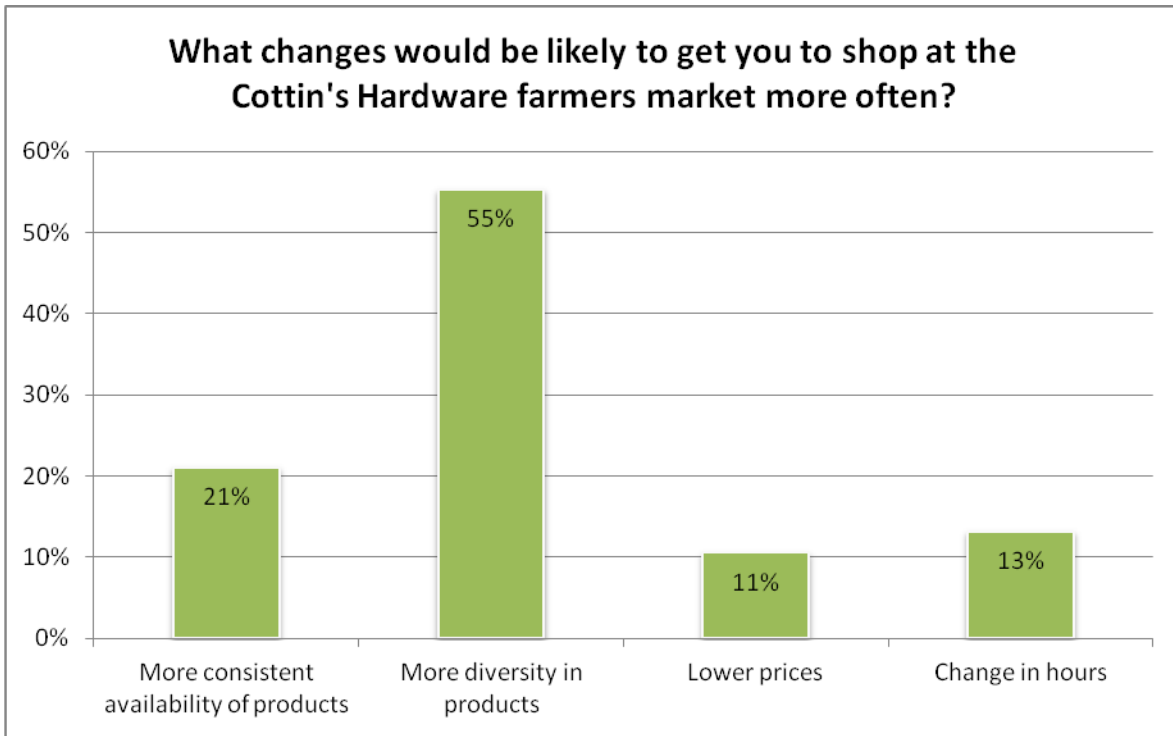


What changes would be likely to get you to shop at the Eudora Farmers Market more often?



What changes would be likely to get you to shop at the Clinton Parkway Farmers Market more often?





Customer comment cards left at Lawrence Farmers Market:

Cold brew

Non dairy

Tables, more seating areas to enjoy food, preferably in the shade (2 votes)

Sheltered venue, preferably near South Park

Shells beans

Library location or another location would be better

Opportunity for more packaged, prepared options

Hour without kids/strollers (2 votes)

Longer season for market - year round market is my preference

Would buy all produce here at FM if she could use her credit card to sell; tokens are too cumbersome

Makes her angry she can't use CC

This is where the world is moving so adapt

Vendors should show that they can accept CC when it's possible

More space for people and vendors

New location

More people

More ready-to-eat

Farmers Market Shopper Interview Highlights

Interviews with **10 self-identified regular farmers market shoppers** from Lawrence Farmers Market (Saturday and Tuesday), Clinton Parkway, and Cottin's Hardware.

Nine of the 10 shoppers shop regularly at the Lawrence Saturday Market and identify this as their main market for shopping

One of the 10 shoppers reveals he shops at Cottin's most regularly.

The shoppers say that they occasionally visit other markets (Clinton Parkway and the LFM Tuesday market) when it's convenient for them.

These customers shop at the farmers market for the following reasons:

- Desire for freshness of produce and other goods

- Dedication to supporting local economy and local farmers
- Likes having a direct relationship with farmers and source of food – they like knowing where their food comes from
- Market has become part of their routine and social structure
- Diversity of product available and high quality compared to grocery stores (during peak market season)
- Care about eating organic and unprocessed, healthy food

Source of groceries?

Only one of these people considered the farmers market to be the main source of their shopping. The rest consider it to be supplementary and revealed they go there for seasonal or specialty items mostly. The one person who did source most of her groceries at the farmers market only does so during peak season.

Changes, improvements, suggestions, etc.

These customers want more regular communications between the market and customers. Several would like to see a regular update about what's fresh, in season or being featured at market each week.

They like regular newsletters, text reminders, tweets, facebook posts, instagram, etc. but they stress the ability to know what is available at market, they stressed the importance of this and also having more regular presence in all of these efforts.

They would also love to know prices, so they can do some comparison shopping before they come, and potentially understand what their budget will allow – this could get them to buy more.

Several mentioned having more prepared food vendors is desirable.

No clear direction on dogs at market – most of these shoppers like the dogs at market

Some discussion among these shoppers about the Tuesday market happening too soon after Saturday, that they aren't ready to shop again at that point, or that it competes with a mid-week CSA pick up. Several also reveal that Tuesday market doesn't have the quality or variety to draw them there.

Location – it's important for all of these folks that the location stay downtown, and having shade, a partial covered pavilion and a welcoming ambiance is all very important. South Park was well-received. One shopper actually said she would not go to the market if it was not downtown.

Those who shop at Cottin's do so because it has a neighborhood feel and it is close to where they live, and see it as more of a social event.

Shoppers also suggest that they would buy more if there was more information provided by vendors about what they're selling at their booths. Ex) organic or not, images, recipes, samples, etc.

Some shoppers say that vendors taking more credit cards could also get them to spend more

None of these shoppers were opposed to the time frame currently held by the LFM.

Farmers Market Shopper Focus Group Summarized Notes

Number of Focus Group Participants: 10

Not primary grocery shop – supplementary

Most shoppers also shop at the Merc as their grocery store, with others shopping at Checkers and Dillon'

Some shoppers feel like farmers market prices are on par with the Merc or less expensive; others feel like the prices are more expensive and the quality is lower

Preference on times:

There is no clear preference between starting at 7am or 8am, however, most shoppers feel the hours could be extended

Meats:

General aversion to buying meat due to higher prices, inconvenience and distrust of vendors, poor display, etc.

Meats – Ariel loves weird meat but she sometimes feels intimidated to buy it sometimes because of the prices being unclear and she's been concerned about spending too much

Meat display is poor, confusing and makes it hard to decipher what's available and how it's packaged, etc.

Purchased meats occasionally, but not all that often

Sampling:

All customers would love to be able to sample and try new things; it's something that sets market apart from going to the stores.

Makes people more excited to buy

LFM Saturday:

Growth downtown and lack of parking is perceived as a barrier – this is what Susan says is preventing her other, early risers from attending the market as they used to go – she knows that others have been dedicated shoppers are not going anymore

The construction is a turn off right now - He views the current site as being less desirable, less safe and more restricted

Ariel likes the fact that it's fully outside and she likes it being downtown because she can go do other things downtown in addition to shopping

Overland Park set up – it's a covering, but not enclosed – rain protection and shade is nice; there's a public restroom.

We would like to see more new products offered and more variety offered, or if vendors tried new things; she's been shopping regularly for years, but she gets bored of the selection

View of LFM Saturday as "less friendly"

Problems parking for older people who view parking as farther away and less desirable.

Doesn't feel like the organic identification is clear at the Sat market

Market customers perceive that there are holes in vendors on Sat, and also that market is shrinking in size

Primary concern is that he's seeing a decline in vendors and feels concerned that there aren't new vendors coming on – they feel that the quality and quantity is not what it used to be.

He has not also felt welcome that they're seeking new vendors and taking new vendors – how to they promote that aspect of the market too??

Prices are inconsistent

Quality is not all that good

Selection is boring; not much change

Having a permanent location with regular hours with a sign would make it more attractive and will draw more people

Tuesday LFM:

Thinks Tuesday is too soon in the week to have a market because the customers don't have a need for anything else

Doesn't like having it inside of the parking lot because it seems grungy, dark, etc. and there is no signage that brings you in. Perception that it's dangerous.

There is a small sign that Ariel noticed

Cottins:

Viewed as a neighborhood market; limits to what you can buy, but viewed as a gathering place, he feels they cater to neighborhood; feels like it's a friendly environment.

Other customer suggestions for improvement:

Events – draw in potential new customers

Look at ways to add value to the experience – ex. you're buying beans, but you're learning about what to do with it, making a personal connection, etc.

Value added is what the market has going for it.

How to get KU students – coupons

University newspaper advertising

Watkin's Health Center – they have a newsletter (student health clinic)

Student rec center – place to put fliers

The farmers market could table on campus and hand out coupons, do demos, hand out food

Want animals at the farmers market – ex. horses, humane society

Get 4-H more involved

No one was aware of the LFM newsletter

One person gets the Pendleton's newsletter

Looking for consistency in media presence for all markets

More variety, value for dollar

Better engagement between vendors/customers – view is that some vendors aren't approachable / friendly and have poor customer services skills

10 years ago the LFM was the only market in town; and now there are 5 markets to choose from, so people don't have to "fight traffic" and go downtown... some vendors and customers don't like to be downtown, so it's pulling customers and vendors away

Appendix 2: List of Publications and Reports Used in Research

1. "A Guide to Operating Farmers Markets in Kansas", KC Healthy Kids & the Public Health Law Center, May, 2014
2. "An Exploration of Permanent Farmers Market Structures: A comprehensive study of successful permanent farmers markets, their strengths and the systems that support them", Smith College, May, 2014
3. "An Evaluation of Consumer Segments for Farmers Market Consumers in Indiana and Illinois", Selected Paper prepared for presentation at the 2010 WERA-72 Agribusiness Research Emphasizing Competitiveness and Profitability Meeting, Santa Clara, CA, June 13-15, 2010.
4. "Building Healthy Foundations for Farmers Markets: Recommendations for Cities and Counties", Food Security Coalition and Farmers Market Coalition, 2011
5. "Catching the Local Bug: A Look at State Agricultural marketing Programs", Agricultural and Applied Economics Association, 2016
6. "Characteristics of Successful Farmers Markets", Farmers Market American, 2008
7. "Douglas County Farm Fresh Challenge, Final Report", Department of Health, Sport and Exercise Sciences, University of Kansas, December 2015
8. "Engaging the Community for Farmers Market Success", NOFA-Vermont (no date on publication)
9. "Examples of State Legislation that Supports Farmers Markets", National Council of State Legislators, January, 2015
10. "Farmers Market Talking Points", Farmers Market Coalition, 2016
11. "Feeding Kansas: Statewide Farm and Food Assessment with a Plan for Public Action", Kansas Rural Center, 2014
12. "Food Safety for Kansas Farmers Market Vendors: Regulations and Best Practices", Kansas State Cooperative Extension and the Kansas Department of Agriculture, February, 2014
13. "From the Ground Up: Land Use Policies to Protect and Promote Farmers' Markets", Change Lab Solutions, 2013
14. "Good Food Champion: Eat Healthy, Support Local", King County Department of Natural Resources, April, 2016
15. "Increasing Customers and Sales at Farmers Markets: Targeted Marketing Campaign with Pacific Coast Farmers Market Association", USDA Agricultural Marketing Service, May, 2011
16. "Mapping Competition Zones for Vendors and Customers in US Farmers markets", USDA Economic Research Service, September, 2011
17. "Market Forces: Creating jobs through Public Investment in Local and Regional Food Systems", Union of Concerned Scientists, November, 2013
18. "Measuring the Impact of Public Markets and Farmers Markets on Local Economies", Project for Public Spaces, 2002
19. "Organizational Details: Governance", Market Umbrella, October, 2013
20. "Pacific Coast Farmers Market Association, Special Report", Market Thymes, 2009
21. "Research Brief: How Do Farmers Markets Affect Neighboring Businesses?", Oregon Small Farmers Technical Report #16, December, 2003
22. "The Average American Spends This Much on Groceries: How do You Compare?", The Motley Fool, March, 2015
23. "The Association Between the Food, Environment and Weight Status Among North Carolina Youth", Public Health Nutrition, April, 2011
24. "Trends in Local and Regional Food Systems: A Report to Congress", USDA Economic Research Service, January, 2015

25. "When Things Don't Work: Some Insights into Why Farmers Markets Close", Small Farms Technical Report #25, December, 2006
26. "Your Edge in a Changing Marketplace: Thinking Like a Retailer", Power Point presentation

Appendix 3: Sampling Rules for Vendors at KS Farmers Markets

No license is required and vendors can sample an unlimited amount of days at markets, so long as the samples are given away rather than sold, and the samples are not 'meal-sized' portions. (Vendors would fall under the "Chef Demonstrations" section of the KSU Food Safety for Kansas Farmers Market Vendors: Regulations and Best Practices Publication page 6 and the "Offering product samples section page 7.) **Note KSU updates this document regularly. 2014 version has less confusing wording regarding vendor samples but 2016 includes more resources and is re-organized a bit – probably leading to some of the confusion.*

Food product licenses – any that require a license to manufacture (Cheeses, low acid pickles, etc.) would require the same additional licensing required to produce. Wine can also be sampled, but they must obtain a special event permit

Sampling for vendors:

- If food is offered as a sample (no cost, small quantity) – there is no limit to the number of times/year that they can be offered and no license required unless they are producing a product that requires a license to manufacture.
- Must have the necessary sanitary facilities
 - Handwashing station if samples are being given out (requirements listed on page 7 of Farmers Market Guide)
 - **If prepared ahead of time** (ie. Sample in closed sample cups)
 - 5-gallon cooler modified with a hands-free spigot,
 - Catch basin for waste-water
 - Liquid soap
 - Paper towels
 - Adequate supply of warm water
 - Trash receptacle
 - Three compartment sanitizing station for all utensils.
 - **If product is being prepared/cut at the market or utensils are used** (ie. Cutting up tomatoes at the stand, scooping out samples. – must be done by vendor)
 - Three tubs/basins
 - Adequate supply of potable hot water
 - Liquid soap
 - Approved sanitizer (sanitizing tablets or unscented bleach)
 - Paper towels
 - **Clarification re: # of sanitary facilities needed**
 - The total number will depend on how many vendors are offering samples. KDA doesn't specifically dictate how many can use each facility – depends on location and what is "within reason".
 - Handwashing it needs to be a clear and line of movement/access to the facility – Recommends 2-3 vendors if they are close by could use the same one.
 - Sanitary wash stations – similar, vendors need easy access but several could share if in proximity.

- A best practices is the markets look at the costs of purchasing appropriate facilities and letting vendors use them if desired to lower costs.
- Must be under cover, use gloves etc. (page 8 of Farmers Market Guide)

Contact at the KDA

Happy to answer any questions and share information with markets on how others have managed this.

Adam Inman, Assistant Program Manager
Kansas Department of Agriculture, Division of Food Safety and Lodging
1320 Research Park Drive
Manhattan, KS 66502
Main: (785) 564-6767
Direct: (785) 564-6764
adam.inman@ks.gov

Note about product bagging

Cutting loose leaf lettuce is not considered processing as long as it is only cut once from harvest. Ie. Bagged leaf lettuce would be allowed but chopped and romaine would not without a license.

Appendix 4: Farmers Market Comparisons

The table below summarizes information gained from emails and phone interviews from a small range of farmers markets deemed to be relatively comparable to the Saturday LFM. The gaps in data are due to the fact that farmers market managers did not have this information, rather than being unwilling to share it.

City/town & population	# of Sat vendors	# of mid-week vendors	Avg vendor sales, Sat	Est customer numbers/mkt	Vendor fees, full season
1 -115,000	60	5	N/A	N/A	\$625
2 - 83,000	100 (+ craft)	10	N/A	N/A	\$\$425 (+ \$120 for mid week)
3 - 72,000	120	55	N/A	N/A	\$364
4 - 87,000	40 - 45	none	Estimates: Farm - \$1000+ Bakers - \$500 Other - \$300 - \$500	1500 - 2000	\$30/day (= to appx \$900/season)
5 - 44,000	110	28	\$507 (\$775 for farm vendors)	3,000	6% of sales (\$1000 - \$1500 on avg, season)
6 - 8000	45 - 50	25 - 35		1,700 - 1,800	\$200 - \$270

1. Columbia, Missouri – Population 115,000, no cover for vendors
2. Bloomington, IN – Pop 83,000; facility offers outdoor cover for half of vendors
3. Iowa City, IO – Pop 72,000 Covered facility (parking garage) for nearly all vendors
4. North Asheville, Asheville, NC – Pop 87,000
5. Charlottesville, VA – Pop 44,000; Sat mkt includes high proportion of craft and prepared food; mid-week is farmers only
6. Abingdon, VA – Pop 8000

Appendix 5: Preliminary Summary of KU Intercept Surveys Regarding Farmers Market Shopping Habits

November, 2016 (Data collected in early September, 2016)

A total of 215 surveys were collected in September at 10 Douglas County grocery stores to assess a number of variables related to perceptions and access to local foods. A frequency distribution was conducted to analyze results for the categorical questions. Below are the aggregate data results for 4 of the questions requested by SCALE. It should be noted that these results are preliminary as the data has not been cleaned and edited for accuracy.

How important is it to you to purchase locally-grown or raised foods?

- Very important = 30.7% (n = 66)
- Important = 33.0% (n = 71)
- Somewhat important = 28.4% (n = 61)
- Not very important = 5.6% (n = 12)
- No response/missing data = 2.3% (n = 5)

Almost two-thirds of the respondents (63.7%, n = 137) indicated that purchasing locally-grown or raised foods was very important or important to them.

How frequently do you shop at farmers' markets?

- Regularly = 13.5% (n = 29)
- Occasionally = 39.5% (n = 85)
- Rarely = 27.0% (n = 58)
- Almost never = 18.1% (n = 39)
- No response/missing data = 1.9% (n = 4)

A majority of respondents (84.6%, n = 182) indicated that they occasionally, rarely, or almost never shop at farmers' markets.

If you **DO NOT SHOP REGULARLY** at farmers' markets, what keeps you from shopping there more often? Please check all that apply.

Response Option	Yes
The market day is not convenient for me	64 (35.2%)
The market hours are not convenient for me	80 (44.0%)
They don't usually have what I want	16 (8.8%)
The products are too expensive	36 (19.8%)
I don't know when the market is	33 (18.1%)
I don't know where the market is located	24 (13.2%)
I am happy with shopping at the supermarket	51 (28.0%)
The quality of products is not consistent	8 (4.4%)
I grow my own garden	22 (12.1%)
The location of the market is not convenient	31 (17.0%)
The parking is limited/too much of a hassle	30 (16.5%)
I don't cook much, so most of the items at the farmers' market don't work for me	14 (7.7%)
I don't like crowds	15 (8.2%)
I don't have transportation to get me to and from the market	6 (3.3%)
I subscribe to a CSA program and don't need much else from a farmers' market	4 (2.2%)

For those respondents that answered this question, the most frequently cited reasons (e.g., >25.0%) as to why residents do not shop at the farmers' market on a regular basis included:

- The market day is not convenient for me = 35.2% (n = 64)
- The market hours are not convenient for me = 44.0% (n = 80)
- I am happy with shopping at the supermarket = 28.0% (n = 51)

Interestingly, availability of products (8.8%, n = 16), cost (19.8%, n = 36), quality of products (4.4%, n = 8), or location (17.0%, n = 31) and parking (16.5%, n = 30)

**What could farmers' markets do to make it more likely that you would shop there REGULARLY?
Please check all that apply.**

Response Option	Yes
Advertise/promote the market better so that I know when and where it takes place	66 (36.2%)
Use more social media to inform people what is at the market each week	53 (29.1%)
Use more traditional media to inform people what is at the market each week	35 (19.2%)
Move to a location that is more convenient for me	34 (18.7%)
Improve parking access to the market	36 (19.8%)
Build a covered pavilion to provide shade and cover from weather elements	34 (18.7%)
Nothing, I don't have an interest in shopping at the farmers' market	7 (3.8%)
Offer lower-cost items	57 (31.3%)
Make it easier to shop without having cash	54 (29.7%)
Change the hours	44 (24.2%)
Change the day	27 (14.8%)
Provide suggestions for storing and preparing fresh food items	18 (9.9%)
Improve the variety of product offerings	23 (12.6%)

While 35.2% of respondents indicated in the previous question indicated that the market day is not convenient for them, with this question, only 14.8% (n = 27) indicated that changing the day the market is held would motivate them to shop regularly at the farmers' market. However, in line with the previous question, almost one-quarter of respondents (24.2%, n = 44) indicated that changing the hours in which the markets were offered might motivate them to shop more regularly.

Similarly, while cost was not cited as a primary reason for not shopping regularly at the farmers' market (19.8%), respondents indicated that offering lower-cost items might motivate them to shop more regularly (31.3%, n = 57).

Other responses indicating that respondents would frequent farmers markets' more regularly included:

- Advertise/promote the market better so that I know when and where it takes place = 36.2% (n = 66)
- Use more social media to inform people what is at the market each week = 29.1% (n = 53)
- Make it easier to shop without having cash = 29.7% (n = 54)

Appendix 6: Non farmers market shopper focus group results, Sept, 2016

Non Farmers Market Shoppers Focus Group – Three participants
September 1, 2016

Elizabeth
Bonnie
Kim

Eats at home – cook simply; nothing elaborate; focuses on healthy and simple healthy food; organic
Doesn't find a lot of restaurants appeal to her here

Cooks a lot; but simply, despite heavy work schedule; often eats later in the evening
Cooks at home because it's healthier and less expensive – lots of vegetables
PhD in health and human performance

Where do you buy food? Merc and Natural Grocers, and she has a small garden
Likes that produce is all organic and she doesn't have to sort thru it (at Natural Grocers); she has to sort through it at the Merc
Organic is more important to her than local produce
She can't tell the difference – organic or not - clearly enough at the markets or at the Merc

She's very into farmers markets and came from OR and CA where everyone is more into organic
She finds it frustrating that it's difficult to find organic here

Organic is not as important to her as local is; she doesn't think that organic food makes that much difference healthwise –
She grew up in a frugal environment and she hasn't been able to get over that upbringing, even though she can now afford to pay more for food
She can't bring herself to pay more for organic
She lives northwest of Lawrence and she works in Topeka so shopping downtown or anywhere in Lawrence is hard
Shops at Dillons and Sprouts – she tries to buy local at the farmers markets; she's looking for deals and healthy food and trying to find local
She was a part of CSA where pick up is easy and she liked that model but she's not now

NFMS One:

Tried to shop Saturday LFM and Cottin's
She's lived in Lawrence for 13 years
She is also price shopping so she finds it hard to pay more than she pays at the grocery store – she doesn't perceive FM prices are that much more and her belief is that the FM prices should be less because getting rid of the middle man
She also finds it uncomfortable to pick and choose among vendors
Leaves frustrated because she finds that you have to pick and choose between stalls without knowing for sure who is organic and who is not

She doesn't like being put in the position that she feels like she should buy something just because it will make someone feel good; she feels awkward about this personal level interaction – this is a drawback for her.

She loves the market ambiance or locations and appreciates having a nice, friendly crowd and having a place where she can go hang out and listen to music

She lives in the neighborhood near Cottin's but doesn't shop there

She feels consciences about reading the fine print about what ingredients in front of the person who made it – she doesn't want to make people feel bad

She is a vegetarian so doesn't buy meat

NFMS Two:

She runs with a group of women who are devoted farmers market shoppers; they start their jog from the market and on those instances she could stick around and shop, but usually she is busy

She thinks her eating style is European but her shopping style is American. She is more introverted and she prefers to have the faceless interaction and feels like she just doesn't have enough time to spend browsing a market

She's appreciated having coffee at the farmers market and a place to sit and drink it

Meat? They don't eat a lot of meat – but she would factor in price as the main factor to buying it; she isn't disturbed by vendors at the market selling meat

She would go to the farmers market to buy edible insects

What would get her to shop at markets?

Clearly labeling and dividing up organic products

Making baked goods healthier

Reduced personal interaction

She's tried CSA's before but she's just one person and it goes bad – she buys a lot of frozen veggies/fruit

Price point of local isn't normally a barrier – mostly organic is just too expensive to her

It's more a convenience factor and she's a planner, and she plans out her meals each week, and she wouldn't know how to plan for spontaneity, and likes to know what's at the farmers market

She would prefer to have more info about what's available week to week and what the prices are (range, not necessarily specific price information)

If the food were better organized in a way that mimicked grocery store layout; putting produce in one area, baked goods in another, organizing organic "sections"

Is any other farmers market trying more of a grocery store style layout?

If it wasn't the grower selling the food it would be easier to buy or make a decision

More convenient and more transactional

Has stopped by the Clinton Parkway market once but wasn't

Cottin's winter market – Thinks it's way too small a market, way too personal and makes her feel uncomfortable

What about an all-organic market? Would feel more comfortable shopping there because then she could focus on looking at prices

Speaking on behalf of one of her friends with kids –

It's hard for families with young kids to go and stay at FMs and shop, but it's hard with kids with short attention spans so it turns out to not be as much of a family friendly event as people imagine it is

Think about ways to engage families and keep families there in a safe and educational way – ex. what about bringing animals to the farmers market;

Ex. what about a “play” space where kids could feel safe leaving their kids or other activities that

Thinks the market closes too early

She didn't feel like the market leadership or vendors are open to feedback – she thinks comment cards would be important

Feels like some of the market vendors have a chip on their shoulder and feel like they're doing her a favor by being there... She feels like demeanor and appearance of some vendors is off-putting

But, she does like an opportunities to learn about the vendors. She likes the signs that Dillons and Hyvee have – “farmers profile”

NFMS Three:

Cooks almost every night; trying to eat less meat – pasta, stir fry, burgers, quesadillas are more common meals

Part of a CSA – Jill's Moon on the Meadow

Started last year (when it started) – 24 weeks long

Shops at Dillon's and sometimes at Merc (for more specialty items, better meat); doesn't go to Merc but about once every 2 months.

Why does she shop there? Because it's convenient for her

She's gone through periods of being very dedicated to local; but now she's not as much – she's happy with the CSA

What's changed? Sharing grocery shopping and menu planning with her husband has made it harder – it's not as important to him

She's had less time and feels like she struggles just to get a meal plan together

Organic is important but – considers sustainable seafood is more important, but not so much meat – she doesn't want to spend more on meats

She has been to the market before but doesn't go now... not to any of them because:

Early hours are hard on Saturday – she doesn't want to feel like she rushes out of the house on the weekends

She sends her husband to the store for all the grocery store shopping on Saturday. Then they get their CSA (on Thursday) to inform what else they need to shop for

Appendix 7: Farmers Market Focus Group Results, Sept, 2016

Shopper focus group – six participants Sept. 1

Intros: At what markets do you do shop? How often?

- Julie – she works for a local farm and she is also a shopper; Shops at Downtown and Cottins
- Susan – shops at downtown market regularly; gone to the Tuesday market once or twice, and Cottin's once
- Vicki – 30 year customer market at LFM Sat. sometimes shops at Cottin's; early bird shopper
- Emily – she does some farmers market shopping; early bird, occasionally on Saturdays; born and raised in Lawrence, but has been living in Johnson Co. lately and just moved back to town- attends KU
- Ariel – farmers market shopper since college; goes to Sat LFM; works on Thursdays, she wasn't aware of the Tuesday market
- Don – involved with Johnson County farmers markets, new to Lawrence; has attended the LFM Sat.

Likes the earlier hours 7-11 during DLS; and 8-12 is good

Feels like the time change isn't too bad, but she feels like it's the vendor's responsibility to educate their customers about it; does feel like the hours could be extended

Likes being able to eat with the seasons and appreciates the market's ability to keep her in touch with farmers who grow the food; likes the personal interaction, and likes it reminding her about the seasons. Loves cut flowers and it used to be the main reason she would go to market. She's sorry that the number of flower vendors have diminished, but she still buys from the Pendletons

Occasionally she buys baked goods, but primarily produce and flowers

Not primary grocery shop – supplementary – would need milk, cheese, beef, etc. – she feels like the variety isn't there so she wouldn't be able to buy all that she needs. She's never tried to buy meat at the farmers market – she perceives the choices to be odd – ex. elk, bison, and goat – these are things she doesn't want to eat.

Doesn't go as much, but it's because she is ill not because of something the market has done

There isn't even a chicken vendor there

She loves the variety of what's available – at LFM and at Cottin's too – likes the beer and music too

Thinks the produce selection is excellent and quality is good

She does most of her grocery shopping at the market now, in season, but off season she's a grocery store shopper

She doesn't buy meat at the market anymore because the girl isn't there anymore, but also because it's not as convenient for her

She would like more flower vendors; she would like to see more new products offered and more variety offered, or if vendors tried new things; she's been shopping regularly for years, but she gets bored of the selection

What marketing ideas work for you?
What communication ideas work for you?

Do you participate in a CSA?
Shop at the Merc

How could farmers markets/vendors get you to buy more? Not sure; she notices there are fewer farmers who are vending now
Buy more regularly?

How can we get your friends to buy more or visit the market?
Who is your network and how can the farmers market reach them?

Farmers market location preferences?

Long-time shopper reveals that she still gets confused by the time change mid year; she's an early shopper and she loved to shop at the 6:30am hour.

She feels like marketing would be helpful to have a regular feature about farmers, other things

Thinks the later times or having more flexible times/options are better; it's hard for her to make it early

Some newspaper coverage at the beginning of the season, but no regular presence

Younger audience isn't reading the newspaper
They weren't aware of the newsletter – relies heavily on weekly updates and newsletters that come into her inbox regularly

Feels like community interaction and engagement with market is lower – ex. she mentioned the Boys Club or Fly Fishing Club (could have a presence at the market)

Growth downtown and lack of parking is perceived as a barrier – this preventing other, early risers from attending the market as they used to go – she knows that others have been dedicated shoppers are not going anymore due to parking concerns

She's never had a problem parking, but she's willing to walk further than others

Location??

The construction is a turn off right now

Likes the fact that it's fully outside and she likes it being downtown because she can go do other things downtown in addition to shopping

Overland Park set up – it's a covering, but not enclosed – rain protection and shade is nice; there's a public restroom.

Outside is desired – partial covering is o.k.

Like the location, wouldn't like being indoors

Thinks Tuesday is too soon in the week to have a market because the customers don't have a need for anything else

Doesn't like having Tuesday market inside of the parking lot because it seems grungy, dark, etc. and there is no signage that brings you in. Perception that it's dangerous because of cars moving in and out. There is a small sign that she noticed

She used to do CSAs and she is a frequent Merc shopper; she is so dedicated to her farmers market shopping experience that buying produce at the Merc seems wrong. She likes to have the purchasing experience that's more personal and likes to get to know farmers.

What draws you there?

Shops at Merc and FM interchangeably and she likes getting to see that some of the vendors also selling at the Merc too

She likes to have the personal touch, she told a story about getting goat and then having Jen help her with recipes and cooking;

Comparing the LFM to the Overland Park market - she likes the system of flags and proper signage that the vendors at OP have and likes that the market manager checks on this (flags indicate types of vendors, organic, etc); the flag and signage helps customers make the right decisions .
Token system is helpful

There's a great amount of trust that these shoppers have with the vendors

Feels like farmers markets are outcompeting themselves with CSAs

Meats - loves weird meat but she sometimes feels intimidated to buy it because of the prices being unclear and she's been concerned about spending too much

Meat display is poor, confusing and makes it hard to decipher what's available and how it's packaged, etc.

Purchased meats occasionally, but not all that often

Likes the surge of food trucks and prepared foods offered.

There were food trucks parking in the parking lot and they liked this but there isn't anyone else coming

Sampling? Is this important to them?

Would love to be able to sample and try new things; it's something that sets market apart from going to the stores.

Makes her feel obligated to buy it if she samples the product

It's the whole market thing - it's so hard to walk up to a table, try something, or not try it, and look someone in the eye and not buy something...

Perceives that the vendors are pricing goods to be similar so they're not competing.

She's always surprised at how much money she spends - easily spends \$60-\$80 - doesn't feel like she's buying a lot, but doesn't feel like she's spending too much

Still figuring out how much food costs so isn't sure

Sees it as a support mechanism for the local community and economy

No one perceives this as bargain shopping – they aren't going to get a bargain

They feel like it's on par with the Merc or less expensive

Look at ways to add value to the experience – ex. you're buying beans, but you're learning about what to do with it, making a personal connection, etc.

Value added is what the market has going for it.

Meats – still not a huge customer base among this group

Events – draw in potential new customers

How to get KU students – coupons

University newspaper advertising

Watkin's Health Center – they have a newsletter (student health clinic)

Student rec center – place to put fliers

The farmers market could table on campus and hand out coupons, do demos, hand out food

Want animals at the farmers market – ex. horses, humane society

Get 4-H more involved

Groups that would be receptive –

Lawrence Civic Choir

Orchestra

High schools

Kansas Womens Environmental Network – list serve, based out of Lawrence

City rec centers, gyms

Lawrence Memorial Hospital – they have lots of outreach, regular ads, they have a room

Health Dept.

Shopper Focus Group

September 2, 2016

Pam – Clinton Parkway – lived here 2 years, she lives near there; Saturdays – goes after her run

Betty – lived here 40 years, lives near Cottin's but goes to Saturday market; too hot to go to Cottin's in the afternoon

She takes the bus downtown, walk home and knows a lot of the vendors

Ken – lived here 4 years, farmers market enthusiast, bee keeper, sees FM as cultural entertainment, primarily Sat market but also goes to CP and Cottin's

Fred – long time res. Cottins and Saturday market, lives near Cottin's

Likes:

Sat – social aspects, prepared food

Wed – she perceives that the vendors are more friendly than at Sat market; finds that some Saturday vendors are short with you and seem agitated

Cottin's – viewed as a neighborhood market; limits to what you can buy, but viewed as a gathering place, he feels they cater to neighborhood; feels like it's a friendly environment.

LFM – likes the wider range of products; problems parking for older people who view parking as farther away and less desirable.

He views that Cottin's isn't trying to compete with downtown

LFM – biggest positive is the people and social aspect; loves that the size has gotten smaller and loves the variety; likes prepared food

View of LFM Saturday as "less friendly" has been echoed

Location has lost some of its appeal now that the building has encroached upon the market; there isn't an open market feel anymore

He likes the idea of moving to the fairgrounds

He views the current site as being less desirable, less safe and more restricted

None of the markets advertise themselves very well...

Entertainment is spotty / not regular – he likes the entertainment

Views that he can buy better quality of produce for a lower prices at the Merc, than at the FM; he doesn't feel like the organic identification is clear at the Sat market, he also shops at Checkers which has more selection of local, organic now at a lower price

He's also looked at becoming a honey vendor but feels like he would be paying too much \$ to test the water

Market customers perceive that there are holes in vendors on Sat, and also that market is shrinking in size

Primary concern is that he's seeing a decline in vendors and feels concerned that there aren't new vendors coming on – they feel that the quality and quantity is not what it used to be.

He has not also felt welcome that they're seeking new vendors and taking new vendors – how to they promote that aspect of the market too??

No one was aware of the LFM newsletter

One person gets the Pendleton's newsletter

Channel 6 – perception is that this station doesn't ever feature any stories on the LFM; local newspaper runs occasionally about LFM but that's the only market they ever talk about.

Looking for consistency in media presence

She commented that the city supports market with \$10,000

Prices are inconsistent

Quality is not all that good

Selection is boring; not much change

She views that farmer's market produce is overpriced and not as good quality

Main reason for market shopping

Social and a few items, specialty items – some people grow their own or do CSAs

Why doesn't anyone buy meats here?

Protein is a big part of her diet but she views meats at markets as expensive

Don't trust the vendors (food safety); perception of this and it comes from the poor presentation at the market; sometimes there's trash on the ground, presentation doesn't make it clear that they're selling a safe and healthy product; vendors aren't telling customers enough information; problem is that they can get something that has a better price and is safer to eat.

10 years ago the LFM was the only market in town; and now there are 5 markets to choose from, so people don't have to "fight traffic" and go downtown... some vendors and customers don't like to be downtown, so it's pulling customers and vendors away

Incredible competition from grocery stores here

What would it take to get these people to buy more?

More variety, value for dollar

Better engagement between vendors/customers – view is that some vendors aren't approachable / friendly and have poor customer service skills

Samples would help get me to try new things, including meats

Wonders if the homeless populations turn some people away

Price

Selection

Willing to pay a little bit more within reason for access that's closer and supporting local farmers;

Organic is important to most of these folks, but there's also loyalty to the Merc from some of these long-term residents.

Downtown location? Mixed response on whether the market needs to stay downtown; one participant pretty adamant that it stay downtown and keeping downtown the center of town.

Clinton Parkway market is successful; fewer vendors but a lot more customers in a shorter time. Is accessibility to the CP market important here; and this market is the only one on that side of town.

Supermarkets offer senior a Champs program – Hyvee / Dillons offers \$6 meals

Accessibility of the markets that are outside of downtown may be difficult

Generally it's the ambiance that's most important, could be downtown at a park, but the downtown location is less a concern than the facility itself.

Absolutely thinks there should be a shelter from the elements for vendors and customers – would help with consistency in vendor and customer attendance

Having a permanent location with regular hours with a sign would make it more attractive and will draw more people

Location Suggestions:

East of downtown; art project area – 9th street area east of Massachusetts is planned as an arts district to be developed – kind of river arts warehouse area – could look at the planned growth of this area

Douglas County Extension – is perceived by the community as being welcoming and a center of activity, why don't they just partner with Extension and have the market here. It's not far from downtown and can partner with more appropriate events and programming, etc. But this location might lose downtown shoppers

Suggested groups that the farmers markets can reach out to / present to

LMH – they do a newsletter; they hold health oriented events every month

Civic groups

Aynsley Anderson Sosinski – in LMH education department

Public schools

Mass media

KU

Contact information:

Aynsley Anderson Sosinski number – Lawrence Mem Hospital education contact
785-505-3066

Appendix 8: Vendor Focus Groups, August/September, 2016

Vendor Focus Group #1 August 31, 2016 7:30pm

Twelve participants

How has this year been?

One - selling more flowers – back to pre-recession levels; selling less produce this year at LFM...

Two – flower sales have been higher

Three - Kettle corn – 1% of people at market buy kettle corn... 3 years ago he would sell 75 lbs, two years ago he'd sell 50lbs, this year lucky to sell 25 lbs per market

Four – increasing sales at both markets; substantial increase because increasing more product and have more help to do it; why? Added organic cert; Cottin's there is less competition selling produce there; could also be because people are used to seeing them there – marketing certified organic has increased sales potentially; increasing use of facebook

Five – sales have been about the same the past 6 years; maybe have gone down a bit because they are also pulling product to add to their CSA; only doing LFM on Saturdays and feels like the construction is hitting them hard; driving customers away – feels the customer base is shrinking

Six - Sales for lavender have been the same, and they haven't been to market as much as they used to do; they spend more time at KC City Market now.

Customer base?

LFM

Most people think that there are far fewer people coming

Former market manager (who still attends) has observed sparser crowds

Fewer vendors; even at peak season still have large gaps – consistently about 12 spaces missing

In previous years there has been an early crowd from 7am-8am and they aren't coming back; identified as older people; During this hour, there would be fewer sales but higher dollar amounts

Five – in past four or five weeks it's gotten really busy; and she is seeing larger crowds coming later in the market time

Seven - does not see the same pattern; she sees that it has been busy lately but she's not seeing the same pattern

Eight - notices more credit card scanning between 10:30 and 11am

Five – thinking that Sprouts and Hyvee are attracting the vaguely concerned and sporadically motivated shoppers

Seven – Lawrence's farmers market is unique for KS; but the marketing for how unique this is has not taken off

Eight – some people also want to get in, shop, and get out and desire convenience

Eudora

Market had to move the location and changed the night when they have the market; they had a rough start but they're starting to see customers coming back – they have built their vendor base – 13 vendors that have come so far.

What are you doing individually to promote your booth?

What are you doing to help promote the market?

What's your perception of what the market is doing to promote?

What's working and what's not?

Nine - recently tried selling at Cottin's with a produce vendor – tried cross promoting their sales – ex. the guy she brought sold tomatoes and she sold bacon
She's seen her sales increase the past two weeks

Seven – Instagram has made her flowers / product look good. They're using videos and that seems to be drawing attention to them; she's encouraging customers while they're standing there to follow them on Instagram and she's seeing people actually pulling out their phones to do it. They're focusing less on FB and Twitter; She thinks it's creating more consistent customers because they can feel like they're more a part of the farm.

Six – she'll do a live video of the market on her phone and post it on FB; post videos of musicians – getting shares and over 2,000 views; and she sees likes of the LFM FB page rise for a few days afterward. The FB posts link up to Twitter but she sees FB as a better outlet for her – except for making a short term offer on Twitter
Instagram and there is a #lawrencefarmersmarket that a customer created

Customer Newsletter – she wants to do it twice a month but she thinks the website also needs to be improved so that those two things can work better together; wants to update the events calendar and make customer outreach more regular and effective

Nine – focuses on making people feel like they're a part of the farm; uses FB to do this; sends out a CSA email every week that's linked to FB and Twitter; then she sends out a customer email once a month – they're at 45%

Hard to track online / social media but hard to track how much money that translates in to.

Lavender – they hear from their customers that they are following them online

Eight – they did print advertising for their Christmas Wreaths and they know it was not effective at all – KC Spaces Magazine; Better sales when people can see them, interact with them and see them making their product

LFM runs ads through paper and radio; some think they are effective. Several saw a rise in customers coming for a specific product when the farmers market was featured on LJW – free media and stories published have been effective.

Marketing plan?

Ads and radio at beginning of market, but really haven't done anything since (LFM)

Relationships with media people have changed so they'll have to work on building those relationships again – Tenused to do shows on TV

Good relationship with LJW – but board has to help develop those relationships with these media people so they can keep this up

Eight feels like most vendors are not increasing their knowledge / capacity in marketing

Cottin's is mostly word of mouth; the store is always talking about it, putting it on her social media pages; emails Next Door

No market fees – Several Cottin's vendors think there should be market fees to help pay for marketing. Cottin's vendors aren't really pushing the market either individually or as a group with coordinated approach

Eight - wants to add a question on the LFM market application that asks them to give their social media accounts / desired marketing interaction – ex. ask people to send her pictures, specials, etc.

Most effective market newsletter was profile on the meat vendors for grilling season; told their story

The market used to send out an email that announced what they had this week but the list got long and seemed overwhelming

Fees:

Saturday season stall fee; \$300; Tuesday season stall fee – pay an advertising and membership fee

No fee at Cottin's

\$20 for season at Eudora

\$45/season at Perry

Would people be willing to pay more if there was confidence that the fee would be used for more marketing? Yes, maybe not significantly more – they have done more research on other fees at other markets and the LFM seem reasonable

Fee increase would be supported as long as they have transparency and a plan to use it for marketing

Between \$23,000-30,000 to run the LFM every year

In 2014 they were in the red by \$10,000 and did a fundraiser to work through that

The LFM customers supported the market and this was the first time they did community fundraising

What about donating online?

Seven - would be willing to pay \$100 more a season so she would be comfortable knowing that the market would be there in 10 years

This year there were fewer vendors so they didn't have a hard number of what their marketing/advertising fund should be –

They have a fund, but not a real marketing plan – Courtney Skeebea – treasurer has the numbers – about \$6,000 is average

They had a grape stomp event last year that made about \$5,000 but it was too much work and the board voted not to do it again; advertising and press was a good result of this event but

Matthew views it that there is a great disparity between the number of vendors who benefited from it and the number of people who worked to put it on

Ten – using events and fundraising to float the market isn't the best strategy; needs to focus on supporting the market thru building customers and adding more support from vendors themselves

Tuesday Lawrence market - Library location is perceived by these vendors as undesirable; the vendors don't want to be on the grassy lawn because of the parking, drop off logistics would be challenging

LFM location - are there general opinions about location? - having the market downtown is important; it would be hard to market if it moved out of downtown. Parking lot is getting surrounded by future customers hopefully?

They are hoping for partnerships with the new development that will help them grow - ex. electricity, cover, etc.

Where ever they go or stay, they need a more permanent look/feel and they want to feel confident that they'll be there and supported 10 years from now.

They've never had a permanent sign

What about the resident parking? Will this complicate things for the market and detract from parking for the market eventually?

How do you feel about having markets every day of the week in Lawrence?

Eight - feels like the weekday markets are "starter" markets and allow for people just getting started in their businesses to do so without

What could be done county wide to help promote themselves? What could people do jointly?

The County does no promotion of the farmers markets at all right now so doing anything would be better than nothing

Nine - she wouldn't have any opportunity to sell at markets if she just relied on Saturday markets
She moves around with 5 others to go around to different markets throughout the region.

Seven - sees that CSAs pull more from markets than the other markets. She sees the market locations are spread out enough to help.

Eleven - there aren't enough people here to support all these markets and make vendors profitable

Five - need more education for farmers/vendors from the County to help them expand their businesses and help them understand how they can participate in markets and what market might be a fit for them.

Clinton Parkway is limited to 8 vendors because of City code
Cottin's is limited to 24 vendors

Six - does think there are too many markets and they spread vendors too thin.

Vendor Focus Groups September 1, 2016

Eight Participants

How has the past year been?

Eudora market is better – more organized, consistent and started earlier this year
Need for education in Eudora to educate consumers

Tuesday market – people are not aware of it; for her the market is not successful; low customer base;
sometimes selling only a couple of jars of jam
She thinks the location for Saturday market is a good market

One -Higher for meat sales; lower for vegetable sales – but she’s been bringing less produce due to crop problems
Sales have been at or above what they have been in the past

Two – sales have been down so that’s a contributing factor to why he’s only going about monthly

Three – people are willing to come and pay for the premium items like tomatoes and asparagus but the other things like peppers and cabbage, etc. are not moving – flower sales are up, but produce sales are flat
Clinton parkway sales are flat

They’ve lost another main flower vendor so flower sales could be going up because of a vacancy

Four -sales are up, too, but they skipped spring

Are there too many midweek markets?

Five – don’t think there are too many; but think the task is to educate more customers

LFM Tue – 8 signed up and between 6-8 vendors come

Six - feels like the quantity and selection of vendors is too small so people don’t come
Having more than one market is good because it fits other people’s schedules

LFM Tue – better location is needed

Two – he managed the market for years and he thought the market on Tues was going to fail from the beginning but he kept it going because of one vendor that was adamant that it remain open – this was 2009

LFM – 90 vendors on the list for the season but only about 45 come on a given Saturday

What are farmers doing midweek? Switching to restaurants or selling thru CSAs

Six – she shops at the market on Saturday – sees it as part of a fellowship thing

Four –customers are stay at home moms

Midweek shoppers want to get in and get out – parking is a barrier, convenience perception is important

County level promotion?

Help with educating customers about produce, seasonal, what to do with products

Live Well Lawrence partnership

Slice of Ag Days with 4th grade county students; understanding where food comes from, seeing animals at Extension office

Eudora market is seeing regular customers now that the season is underway

Seven - County could host or fund behind the scenes vendors to help manage their businesses and help grow their business – ex. social media for food and farm sales; setting up an attractive booth, quality control for market – education to make vendors be the best they can be and contribute toward making the market the best it can be

Ex. what about grants?

No single source for accessing information about DC farmers markets – ex. website; branding, etc. – need to have the same consistent look and feel for the way markets present themselves.

Five - Specialty crops are what's a feature of Lawrence and DC – vineyards, asparagus, rhubarb, sweet potatoes, orchard fruit, etc. –

Three disagrees – his neighbor / orchard is failing because of climate change

Four - Social media, recipes and sampling help; talking to people about it

Thinks having something physical at the booth and then talking to people about it helps sales

Eight – she samples everything and this helps her

Food safety perception is a barrier to sampling – they don't have electricity and so making sampling a regular part of market is difficult

County – should/could hold a class about how to be food safety compliant for farmers market sampling

Three has seen sampling boost his sales

How can multiple markets work together to support each other?

What about the markets themselves? What could markets do to help?

They haven't really ever had any support from the City to help boost. Need help from City to find a permanent location –

New city manager is open to considering more support to FM

Intern is helping push this support.

Looking at the new development across the street as an opportunity

Four – Location that they are in now is sitting idle all week. No one is letting anyone know all week long that there is a market there on Saturday (with signage).

They don't have a permanent sign

They need electricity, permanent, covered structure, etc.

Three – advertising should be all over the community, not just downtown; ex. interstate or highway signs, etc.

Off – season promotion? What's happening then?

Cottin's sends out an email every week to the same list every week all year around; includes customers and neighborhood associations – includes who is going to be at the market, what they are selling, etc.

Use holiday market as an opportunity to continue the marketing of markets and talk about upcoming season prep

Unified marketing thought process that includes personal outreach and videos – rely on the board and other advocates to help spread the message

Promotional goods to help with branding + advertising

Calendar for market at LFM that is a magnet – will that help with marketing

No other “hand outs” or give-aways have been tried – ex. bumper stickers, bags, etc.

Are people willing to pay more if they knew there was a marketing plan that they felt comfortable with

List of vendor fees

Overland Park - \$900 / season – perceived as high but she (vendor who sells there) thinks it’s worth it; half season is \$450 – but they have electricity, more people, each vendor is required to have \$2M liability insurance; and it’s very strict

LFM limitations -

Porta-johns and hand washing stations are significant expenses

Need storage area as well

Stall fees – goes back to who you want your vendors to be? They want them to have skin in the game and consistent...

Do you want hobby businesses? People that sell out by mid season? Do you want a mix of this?

Four would be willing to pay \$450 - \$100 more

They view that the city or county should be helping with advertising of the market

Six – sells higher end steaks at the Leavenworth market than at Lawrence

Appendix 9: Common Characteristics of Farmers Market Shoppers and Non-shoppers in Douglas County

There is no single 'type' of shopper attending farmers markets in Lawrence and Douglas County. Motivations, priorities, and shopping habits all vary. Nevertheless, certain characteristics were relatively common among shoppers surveyed, including:

- **Fresh, seasonal produce is the single most important draw** for customers. The more types of produce available and the higher the quality, the more attractive the market is.
- **Most shoppers would like to see more product diversity and more consistent availability of products at market.**
- **Customers view farmers markets quite differently from how they perceive grocery stores.** This helps markets, as customers are more loyal compared to grocery stores, and they view the market as a social outing, something to do. But it also hinders markets in that most customers spend the majority of their food dollars elsewhere, at more traditional stores.
- With some exceptions, the **social dimension of farmers markets also brings people in**
- **Most people are hesitant about buying meats** at farmers market, in many cases based on misunderstandings about quality and safety
- **Most shoppers are not in the habit of attending mid-week markets**, and are uncertain about when and where they take place. **For most shoppers, "farmers market" equates to the Saturday market.**
- **The vast majority of farmers market customers** come to market for specific items, usually seasonal or specialty items, and **do not view the markets as a primary grocery source.**
- **Products are perceived to generally be more expensive at farmers markets.** While many people show some understanding as to why that might be, it also appears to limit their shopping.
- **Farmers market customers are staying close to home:** More than three fourths come from Lawrence, and very few are traveling more than 20 minutes to get to a DC farmers market.
- **Some shoppers linger while others prefer to 'get in and get out' with their purchases**
- **Many shoppers would like to be able to sample products, especially meats and items with which they are not very familiar.**

Common Characteristics of Non-farmers Market Shoppers (NFMS):

- **Farmers markets are considered to be much less convenient** than supermarkets and grocery stores - even among NFMS who seek healthy food, organic or local food – in at least two ways:
 - Far fewer hours of operation, leading people to conclude that the hours just don't work well for them
 - Locations are either out of the way, not on the way home, or too far from convenient parking
- **Uncertainty about what will be available** at farmers markets makes meal planning more difficult, part of a larger concern that **farmers markets just don't have sufficient range of products** compared with grocery stores
- **NFMS value speed and efficiency of shopping transactions far above social interaction**

- **Price is a barrier**, as many NFMS perceive farmers markets to be much more expensive than grocery stores
- **There is more concern and uncertainty about food safety, sanitation and food quality**, especially for meat items, but more broadly as well.
- **A number of NFMS want farmers markets to be better organized (spatially, for example with product sections like a grocery store), with better, clearer information about products.**

Both shoppers and NFMS feel that they do not have enough information about markets - locations, times, product mix, rules - and believe that they would shop, or shop more regularly at markets if they had more consistent and detailed information.