



Portland
Farmers Markets /
Direct-Market
Economic
Analysis



**SUMMARY OF
MARKET
MANAGER
INTERVIEWS**



September 2008

Prepared for: **City of Portland**

By: **Farmers' Markets America**

In association with: **Barney & Worth, Inc.**

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I. Executive Summary

Introduction

The City of Portland is conducting a study examining the capacity of Portland's farmers markets to expand into the future, looking at both local consumer demand and regional farmer/vendor supply. To complete the study, the City's Office of Sustainable Development (OSD) and the Portland Development Commission (PDC) have commissioned a consultant team led by Barney & Worth, Inc. In the early stages of the study, Farmers' Markets America conducted a series of interviews with farmers market managers representing fourteen markets across the city.

Summary of Findings

The following presents a summary of key points offered by thirteen representatives of the fourteen farmers markets that operated in the City of Portland in 2007 who were contacted during the interview process. More detailed responses are summarized in later sections.

Key findings from the interviews:

1. Small is not so beautiful.

Starting a market with a bountiful balance of supply and demand is imperative. Relative to other area markets, small markets have a difficult existence. This is a special challenge for new markets, since they are often small. One market studied in 2007 is not re-opening in 2008. Small markets learn how difficult it is to grow when both farmers and customers are disappointed in the market size. A critical mass is essential for satisfying each side, assuring market growth.

2. Build good markets and farmers will come – they want customer count.

Vendors constantly approach the more successful markets; other managers are forced to spend more time and money on recruitment, or report that there are not enough interested farmers. Markets that have done solid groundwork save money on sourcing the supply side. Success with producers hinges on developing personal relationships and a market foundation based on: good location, strong customer counts, advertising, easy vendor access and a pleasant atmosphere.

3. Customers want product quality, variety and depth.

Market managers indicate the keys to customers' hearts lie in five areas: quality and freshness, product diversity and choice, supporting local farmers, organic, and market atmosphere. Starting with those strengths saves advertising dollars since most customers come based on word-of-mouth.

4. Markets can use special events to lengthen the “see-saw” of supply and demand.

Market managers say they attract new customers by hosting special events. For optimal growth, they can simultaneously use that extra “demand” to justify expanding their “supply” with additional vendors that represent greater choice and diversity of products. Adding vendors without increasing customers can threaten the market's viability for existing producers.

5. Relationships are at the core of successful markets.

Essential to market improvement, according to most managers, is relationship building with vendors and customers, and also farm organizations, community partners, volunteers, sponsors, restaurants, and nearby businesses. Markets are strengthened by developing supportive partnerships, networking, education and communication, establishing a clear identity, improving access, and working across neighborhood lines.

6. Policymakers need to recognize that farmers markets are good for business.

The City knows that available land and market access are critical to food security, but managers say the City could be more pro-active in helping the farmers market community and neighborhood business districts to develop their naturally symbiotic relationship.

7. Establishing secure locations with sufficient space will solidify the future.

Markets have been at the crossroads of civilizations for millennia, often occupying the city center. Even today in Barcelona and Paris, major public markets anchor neighborhoods. Market locations might appropriately return to their historical roots in the city commons – a park, school, city street, empty lot or neighborhood roundabout. Many of Portland’s farmers markets lack secure, permanent sites or long-term commitments for their sites. The City of Portland could play a role in solidifying market sites – and the future. Managers also suggest the City assist with farmers market zoning, developing neighborhood market locations citywide, opening worksite markets, and providing pavilions for year-round protection from sun and rain.

8. A City liaison would smooth the relationships.

Stakeholders point to King County where a liaison has enhanced farmers markets coordination with the bureaucracy. Locally, many agencies are already involved: Portland-Multnomah Food Policy Council, Portland Parks & Recreation, OSD, Office of Neighborhood Involvement, Portland Development Commission, Multnomah County Health Department and others. A market liaison would make local government more “market friendly.”

9. A market development fund could facilitate expansion.

Participants note Toronto provides staffing assistance for markets in low-income areas. Seattle and Tacoma have offered funding for market start-up and operations. A Farmers Market Development Fund could assist new start-ups and market expansion. The City of Portland might also offer free sites (like Milwaukie, OR), and take other steps to better accommodate market activities.

10. Managers need professional education.

Strong markets provide managers job security. Lesser markets create manager turnover that further complicates smooth operation. Observers prescribe training and technical assistance to boost board and staff capacity to operate financially sustainable markets. Education in best management practices will lead to well-run markets, competent managers, better pay and benefits, and a visible future for themselves in farmers markets.

The next sections provide a more detailed discussion of the results of the interviews conducted in March 2008 for the Portland Farmers Markets/Direct-Market Economic Analysis. A list of persons interviewed and survey questions appear as appendices.

II. Introduction

The City of Portland's Office of Sustainable Development (OSD) supports the development of farmers markets to enhance the lives of its citizens and promote local agriculture. To evaluate the potential to expand Portland's existing farmers markets and start new ones, OSD and Portland Development Commission have commissioned a *Portland Farmers Markets/Direct-Market Economic Analysis*.

To complete the study, the City has commissioned a consultant team led by Barney & Worth, Inc., with consulting partners Farmers' Markets America, Globalwise and Bonnie Gee Yosick, LLC. In the early stages of the study, Farmers' Markets America conducted a series of interviews with thirteen farmers market managers who operate fourteen markets across the city.

Three of the fourteen farmers markets participating in the survey have been in operation more than a decade (the longest running market began in 1991). Six of the markets have operated three years or less. The other five have operated four to nine years.

Only three of fourteen farmers markets currently have a full-time manager. The others rely on part-time staff (often .3 FTE to .7 FTE) and volunteers.

Interview participants were asked about characteristics of their farmers markets, followed by governance and organization, market volume and growth, customers, success factors and public/government involvement. Interviews were with market managers who had a range of one month to several years of experience in running markets. The issues covered in the interviews are explored in later sections of this report.

The local market managers responded to a lengthy survey, providing their assessment of the challenges and opportunities for market growth in the future. The observations, insights and suggestions provided by the individuals who participated will provide an overview of the current state of the farmers markets, and also contribute to subsequent phases of the study. This report reflects the advice, feelings and attitudes of the individuals interviewed. It is not intended to provide a scientifically valid profile of farmers markets as a whole.

III. Current State of Farmers Markets in Portland

Market Characteristics

Farmers market managers were asked a number of questions to better define key characteristics of their markets. The accompanying matrix summarizes some of their responses, and offers an overview of the fourteen markets.

PORTLAND FARMERS MARKETS: 2007 SEASON

Farmers Market	Calendar # of weeks	Vendors Avg/wk	Vendor Fees Per Stall	Customer Count (Avg. per Day)	Staffing	Year Founded
ALBERTA 1500 NE Alberta St (Alberta Co-op parking lot)	May - Sept 4:00 – 9:00 (20 weeks) Thursday	3	Free (not opening in 2008)	25	.1 FTE	2002
HILLSDALE 1407 SW Vermont (Wilson High School parking lot)	May - Oct 10:00 – 2:00 (38 weeks) Sunday (Nov - April alter. wks.)	41	\$37	2,400 (1,400 Winter)	.9 FTE (Manager & Asst Mgr combined)	2002
HOLLYWOOD NE Hancock at 44th & 45th	May - Nov 9:00 – 1:00 (29 weeks) Saturday	42	\$36-51	4,000	1 FTE (Manager, volunteer coordinator, token coordinator)	1997
INTERSTATE Overlook Park N Fremont/ Interstate	Mid May - Sept 3:00 – 7:00 (20 weeks) Wednesday	22	\$35	1,500	.62 FTE season, .38 FTE off-season	2005
LENTS INTERNATIONAL SE Foster and 92 nd , Lents Town Center	Mid June - Oct 9:00 – 2:00 (19 weeks) Sunday	8	\$12-20	400	.6 FTE (grant)	2007
LLOYD NE Holladay at 7th and 9th, Oregon Square Courtyard	July - Sept 10:00 – 2:00 (13 weeks) Tuesday	9	Free (\$25 in 2008)	1,000	.3 FTE (work subsidy)/ 2008 thru fees	2007

Farmers Market	Calendar # of weeks	Vendors Avg/wk	Vendor Fees Per Stall	Customer Count (Avg. per Day)	Staffing	Year Founded
MONTAVILLA 7600 block of SE Stark	June - Oct 10:00 – 2:00 (17 weeks) Sunday	21	\$30	1,452	Volunteer (.5 FTE 2008 total for 3 staff)	2007
MORELAND SE Bybee & 14th	Mid May-Sept 3:30 - 7:30 (20 weeks) Wednesday	24	\$35	1,350	.5 FTE/ .2 FTE off-seas.	2006
OHSU - Marquam Hill Auditorium Courtyard	Mid May - Oct 11:30 - 3:30 (16 weeks) Tuesday	13	\$30	600	.5 FTE	2006
PEOPLE'S 3029 SE 21st	Year Round 2:00 – 7:00 (52 weeks) Wednesday	16	\$18	200	.3 FTE	1999
PORTLAND - Eastbank SE 20th & Salmon	Mid May - 3:30 - 7:30 (20 weeks) Thursday	27	\$30 - 45 10%	950	.7 FTE	2003
PORTLAND - PSU South Park Blocks at PSU Campus	April - Dec 8:30 – 2:00 (38 weeks) Saturday	110	\$34 - 59 10%	11,000+	3 FTE	1991
PORTLAND - Downtown South Park Blocks SW 9th & Salmon (Shemanski Park)	April - Oct 10:00 – 2:00 (27 weeks) Wednesday	30	\$31 - 51 10% of gross sales for hot food	3,000	1.3 FTE	1997
PORTLAND - EcoTrust NW 10th & Irving	June - Sept 3:30 – 7:30 (17 weeks) Thursday	26	\$30 - 45 10%	730	.7 FTE	2003

Market Sites

Half of the Portland's farmers markets are staged in public or private paved parking lots (one is on gravel). Other market sites are public parks, streets and worksite courtyards.

Most Portland farmers markets are located immediately adjacent to or very near local businesses. Nearly all markets also have other important landmarks and amenities nearby: anchor businesses, shopping centers, major employment centers, restaurants, museums and galleries, parks, schools, freeway access, MAX service, theaters.

On a scale of 1 (low) to 10 (high), market managers generally rate their sites as "fair" to "good." Individual site characteristics score, on average, 6.0 (for storage) to 8.2 (slope and surface). Overall market "site satisfaction" scores range from a low of 5.3 to a high of 8.6.

The range of scores from market-to-market on individual site characteristics is great, however. For example, water and electricity are rated from "0" for one market to "10" for three markets. Storage is rated "0" at two markets and "10" for three others.

Portland Farmers Markets Site Characteristics	
Slope & surface	8.4
Restrooms	7.4
Water & electricity	7.4
Aesthetics	7.4
Vendor access	7.3
Signage	7.3
Visibility	6.9
Parking	6.3
Storage	6.0

About half of the managers rate the success of their market as excellent, a "9" or "10," even while 2007 gross sales for these markets ranged from \$177,000 to more than 25 times that amount. Five managers give their market a "7" overall, while their 2007 market sales ranged from \$40,000 to \$400,000. One manager gives a candidly low "1" to a market that – after six years – has decided to stop operating.

Promotion

Good marketing requires an abundance of tools. The best promotional tool, managers agree, is a word-of-mouth campaign. The challenge for most markets is creating a multi-faceted campaign that targets the local populace within a limited budget. Among the plethora of potential promotional and advertising tools used by Portland markets:

- Event-centered marketing – GrazeFest, Tomato Fiesta, The Wedge, The Great Pumpkin Event, Thanksgiving Festival, Winter Solstice Market

- Newspaper ads, inserts & sponsorship requests – The *Oregonian* (inc. monthly Portland section), *Portland Tribune*, *Southwest Community Connection* with specific radius circulation
- Radio ads, show mentions, live interviews, New Seasons Market ad tag for farmers markets
- Community group outreach (neighborhood associations, Ecotrust, churches, etc.)
- Posters, flyers, recipes, postcards, brochures, bookmarks and business cards
- T-shirts, hats and aprons (for sale)
- Banners and signs including A-frames; billboards (stationary and mobile)
- Neighborhood, business association newsletters, e-newsletters & print – return envelope inserts
- Website and blog with weekly expected market items
- Shopping bags and doorhanger bags
- Kaiser Permanente “Thrive” campaign: full-page ads and maps mention farmers markets
- Appearances by world class authors – Michael Pollen, Eric Schlosser
- Bicycle rack donated by Portland Parks
- Hitchhiker envelopes – sponsorship requests within local newspaper
- Sponsor packet – logo on poster, sponsor banner, posters, letterhead, newsletter
- Donation forms and donations to local boosters groups
- Theater marquee and parade

Multiple marketing approaches provide visibility that leads to credibility that, in turn, brings media attention. The Portland Farmers Market at PSU opened its 2008 season with 9,300 customers in early April, and with good press coverage (among other factors) grew 40% to 13,000 customers the following week.

Promotion is still largely an individual market effort. While markets gain visibility from the Oregon Farmers Market Association website and brochure, managers would like to see combined local advertising and promotional efforts. King County may serve as a viable model.

Market Operations and Growth

Portland’s market system has grown rapidly in recent years. Four markets were started in the 1990s, followed by two in 2002 and 2004, one in 2005 and 2006, and four in 2007 alone. The largest markets also have the largest sales average per vendor per day. These tend to be the most established markets, although years of operation is no absolute indicator of strength; the 2005 Interstate market is strong, perhaps a result of Kaiser Permanente’s substantial contributions, while two older markets are much weaker as measured by total sales or average vendor sales.

Large markets also tend to have a stronger percentage of farmers and other food producers, even though many other vendors would like to take advantage of their customer base. The smallest markets can have difficulty attracting growers and other vendors. Large markets also tend to have more large spaces – doubles, triples and larger – to accommodate farmers who need more display space for their products. (This is highly desirable from the farmer standpoint since farmers routinely acknowledge that sales increase with the size of their market presence.)

Generally, large and medium size markets have 10,000 square feet of space or more, up to more than one acre. Shemanski Park is one exception (7,000 s.f.) where limited space requires farmers to unload then move their trucks. On the other hand, small markets often have less than 5,000 square feet of space, potentially limiting their sales potential. Large markets usually have substantial parking nearby, although that does not seem an absolute pre-requisite. Large markets are more generally operated by nonprofits with a board whereas most smaller markets have committees giving the manager feedback and direction.

Only one market manager reports holding an annual retreat for general planning as a format for considering how to expand, increase customer and/or farmer involvement, target ad dollars and focus other growth strategies. Most large markets project 10-15% growth in vendor sales for 2008, largely through increased per-customer purchases, aided by chef demonstrations and constant sampling. Mid-size markets seek specific growers, if they have space, to improve their product mix, and thus attract more customers. Smaller markets target a percentage increase in customers and/or their budget. The smallest markets seek a major vendor increase combined with strong customer outreach, something that is difficult without financial backing.

Strong markets spend little time on recruitment of vendors since they are constantly approached by vendors wanting space or referred by other vendors. Weaker markets have difficulty no matter their methods because vendors hear about poor past sales. Most markets gain vendors through a variety of methods (with follow-up phone calls or e-mail):

- Visits to other farmers markets, and checking their websites
- Organizational websites including industry sites such as OFMA, PACSAC, Public Health, etc.
- On-line product searches and food community listserves
- Office of Sustainable Development database
- Word-of-mouth; manager and vendor referrals; Mercy Corps
- Personal connections to make sure people know who you are “even at the seed store”
- Conferences, the Better Living Show, Farmer-Chef Connection every March

Weaker markets “need everything” in terms of products while stronger markets can be selective about allowing new products. All markets have a few items they desire or that need competition, and during the height of the season, there is often too much replication among participating vendors so managers seek more diversified small farmers. From large to small, markets have a varied list of what they want including specialty products such as Asian vegetables, okra, garlic, mushrooms, cheese, meats, poultry, eggs, honey, dairy, fish, shellfish, and medicinal plant starts. Some also seek baked goods, value-added products, and prepared and ready-to-eat foods.

Customers

Farmers market customers appreciate trustworthy, local food sources; almost all managers mention how important it is for customers to have direct face-to-face contact with local producers they can trust. One market manager outlines these key elements: a critical mass of farmers, site visibility and parking, and strong marketing to attract customers.

There are many motivations for shoppers – sometimes simply to patronize a particular vendor. Factors include:

- Quality/freshness
- Product diversity
- Supporting local farmers
- Organic
- Community atmosphere – fun, music, cooking demonstrations, education, etc.
- Price
- Convenience
- Healthy lifestyle
- Ease of shopping
- International theme
- Hot foods

Market managers have little data that explains the motivations of shoppers. This will be analyzed in another portion of the study, *Characteristics of Successful Farmers Markets*.

Managers report customer attendance from the low hundreds to more than 10,000 per day. While these numbers give a sense of market size and success, not all customers are shoppers. The PSU market may have some people come simply for the atmosphere in a lovely park (and buy something) whereas the Hillsdale market has stronger sales per customer as a destination market without the same park environment.

IV. Future Vision

Challenges/Opportunities

“While permanence is an issue, we can respond to change quickly.”

Smaller markets fail to build a consistent customer base because they lack the volume of vendors and variety of products to meet customers’ needs. Large markets face parking challenges, space limitations and overcrowded aisles. Most markets are concerned about their lack of site permanence based on handshake agreements or short-term leases, and uncertainty around the future lease cost. A variety of bugaboos exist as defined by managers:

- Site uncertainty: impermanent leases, need to renegotiate periodically; increase in lease cost, even due to landholders’ increased taxes; and physical limitations – dry, hot, windy, exposed.
- Desire for solid organization with a future; needed visioning process during market planning.
- Managing consumer expectations because of large market size while having small staff and limited/fixed income from vendor pool based on current space.
- Space constraints prevent vendors from expansion; overcrowding, dogs and day-care kids; distant loading area for farmers.
- Split between food-based and community-based market; a board may be focused on benefiting food producers while some community members may want to serve others.
- Conflict with neighboring vegetarian store; meat is limited in market vendor guidelines, so some vendors have been turned away, probably hurting customers.
- Attracting vendors to a lower-income neighborhood with projected low sales per customer.
- Stall fees are the only source of income.
- The Health Dept. wanted to shut down a vendor because of hand-capping bottles. The code was established long ago when there was concern over a health liability since caps came off. The verbiage is no longer relevant and hand-capping is a feature the producer uses to sell his soda.

Managers see many improvements that they will need to make in response to the changing retail grocery sector.

“Maintain diversity while keeping our focus of mission on fresh agricultural products. New applicants are mainly local food entrepreneurs; there is the risk of over-running the market if we don’t stay focused on short-season farmers. We need to use good management and fill the shopping cart.”

With increasing fuel prices, food prices are certain to increase. Local food would seem to have the advantage. Overall prices are not generally higher at farmers markets for comparable quality; in other cases, prices are lower because of no middleman, which is what the price-conscious shopper expects. Below are stakeholders’ key suggestions to stay competitive:

- Emphasize more local and organic; as retailers try to copy us, there is a need to continue niche education with local buying messages that media are focused on.
- Provide a more complete shopping experience with more food choices and an enjoyable shopping experience with educational and community opportunities.
- Educate customers about distance food travels and how to cook; pay attention to their wants.
- As price becomes a bigger issue, farmers with basic food items are crucial.
- Wireless EBT (Electronic Benefits Transfer)/debit system will be an important change – farmers need EBT individually to handle lower-income shoppers; debit card machines keep dollars in market serving all customers.
- Food safety concerns – need to have ongoing discussion with Health Department.
- Save money for future changes.

“Regular outreach with ads, but most effective is word-of-mouth.”

To attract new customers, successful markets use a guerrilla marketing approach with advertising and numerous means of free promotion. Some markets are trying to expand their niche market by serving the price-conscious shopper even as they hold onto the loyal “local” shopper. Markets need to do the following and more:

- Look at diverse neighborhood not reflected in market vendors – attract customers through events, food stamp access, and having desired second-grade (#2) products.
- Treat volunteers well to create word-of-mouth.
- Good signage – permanent sign on-site, A-frames and banners all season.
- Target immigrant community through churches.
- Incorporate market into end-of-school celebrations.
- Design posters to include music schedule.
- Online marketing for website hits.
- Outreach to Oregon Trail food stamp card recipients.
- Radio show interviews; fliers, bookmark distribution in parade.
- Work with business association – share advertising and event notices, tag on radio ad.
- Neighborhood association – meetings and newsletters.
- Target wider area to promote as a destination market.

Public Role

“Markets are good for business and the City knows it.”

“While market sales don’t hit their radar, the City is recognizing that farmers markets may impact underserved areas.”

The City of Portland has taken steps in the past to assist farmers markets, on a case-by-case basis. Yet, most market managers are barely aware of the City’s supportive measures. Farmers markets are still non-existent or poorly addressed in zoning and economic development arenas. Collectively, however, managers listed numerous signs of City support for farmers markets:

- Portland-Multnomah Food Policy Council and Office of Sustainable Development support
- Office of Neighborhood Involvement (ONI) grant to Moreland and Ride Connection – Project Linkage to get seniors to market in 2008
- Use of City park (South Park Blocks), easier street closure permits (Interstate, Hollywood), Portland Development Commission assistance with market site (Lents)
- Discussions on permanent market sites and use of public spaces
- City leadership on global warming; “Councilman Dan Saltzman ringing our market’s season-opening bell,” and commissioning of this study
- Portland Office of Neighborhood Involvement community organizing and administrative services; Bureau of Environmental Services installing bike racks in 2008

Other governmental agencies’ support is also noted here:

- County Health promoting markets
- Metro – mission of saving green space; Green Streets Project pilot project with City to install aesthetically useful bio-swales at Peoples Coop
- Supportive state legislators; Oregon Department of Agriculture opening up discussions; Oregon State University’s rapid market assessments and direct marketing conference; OSU staff serving on Oregon Farmers Market Association board
- Oregon Department of Health Services; WIC Food Stamp Program; Farmers Market Nutrition Program and EBT (Electronic Benefits Transfer) Program
- Grant programs including USDA FMPP (Farmers Market Promotion Program)
- School district rental at fair rate; City, state and federal (Bonneville) volunteer help at worksite market

“The City should help make it viable for farmers to make a living.”

“I want farmers markets to be ordinary rather than being special events. They should be part of everyday life.”

Most market managers are caught up in the daily demands of their jobs for lower-than-average pay. They wear so many hats – frequently as one-person offices – that they could use an array of City and other support in expanding and stabilizing farmers markets:

- Farmers markets should be recognized for helping to define the City’s livability and for their positive impact on Oregon and Washington agriculture.
- Market Development Fund – start-up funding and technical assistance for new market creation and market expansion, manager training program, vendor training program, etc.
- Open space planning and development – allow for market development or growing fruits and vegetables
- Low-income grants – cover low-income vendor fees, budget support, debit machine, staff
- Long-term or permanent leases at reduced, stabilized rates
- Farmers market zoning for streets, parks, schools, churches, etc.; free use of City property
- Assistance in site development and permanent site acquisition
- Tax waiver or reduction for property owner providing free farmers market site
- City-wide marketing campaign for all farmers markets
- Neighborhood poll of interest level
- Updated resource list of potential market farmers
- Free parking for vendors and customers in immediate area
- Telephone line into market site
- One distinct token for all Portland markets
- Directors and officers liability insurance for farmers market board members
- Multnomah County Food Licensing – develop farmers market-specific code and fees that are restrictive and frequent (5-week cycle)
- Match program for food coupon programs (FMNP, SFMNP, WIC) – Lents promotion in July to match up to \$5 for food stamp expenditures could be done citywide.

Some examples of other cities’ assistance were noted by managers:

- Toronto – Food Security Investment Fund pays manager salary in low-income areas
- Corvallis – re-design of parking structure to allow wider farmers market walkway
- Milwaukie – free site and use of City Hall restrooms
- Seattle – County liaison; City operational and start-up budget support

V. Final Thoughts

As a wrap-up, market managers were asked to share their insights and summarize their most important advice for the City and the industry.

“Good planning – a way for interested community members to assure that a market is feasible and create the plans for success.”

“Recognize markets as greater than concessions.”

“If we plan places for people, we will end up with places that are people-centric rather than auto-centric. Farmers markets should be actively engaged with other downtown leaders planning a more sustainable future.”

The farmers market can be a marketing tool for local businesses who need consumer traffic even as it promotes healthy food and supports farmers. It can serve the City and its neighborhoods more fully if the benefits for the surrounding business area and community are better recognized.

Many of the managers are aware of the City’s good intentions toward farmers markets through the existence of the Food Policy Council, yet they also register hesitancy about whether the City will enact policies and programs to make sites more available and markets more feasible. Only a few managers cite concrete actions by City government that truly assist their markets. They want the City to become a better communicator of all the programs, support and real assistance that it can offer.

The City of Portland could convene a short-term blue ribbon panel (much like the City of Vancouver’s Green Ribbon Panel) representing City agencies, farmers markets, growers, community-based organizations, academics and foundations to address how best to nurture farmers markets. In short order this panel could review zoning codes, create a joint public-private funding source, and develop training and technical assistance that leads to thriving markets and permanent sites with structures that serve farmers and community. The concept incorporates a number of suggestions from market managers:

- Establish a City or County farmers market liaison (much as the Portland Multnomah Food Policy Council’s city-county orientation) to facilitate agency information, development and support. Minimize rules and bureaucracy to encourage market development. King County’s liaison has taken the lead with numerous projects:
 - Puget Sound Fresh campaign – farmers markets are integrated (including 10,000 polypro bags for distribution through farmers and markets)
 - Eat Local for Thanksgiving – farmers markets are playing a larger role among the 30 participating organizations
 - Farmers market joint radio ad campaign planned for 2008
 - Farmers markets sponsored Heart of Washington cooking show on KOMO-TV
 - Technology – advance consistent signage and improvements of EBT and debit system with individual farmers through the \$50,000 appropriation under the Local Farms, Healthy Kids Act of 2008.

- Host market manager forum four times per year to develop joint plans and solve individual market problems
- Actively consult on market start-ups
- Conduct market research as desired by the industry
- Portland Office of Neighborhood Involvement could potentially provide administrative and community organizing services for new markets, and ensure ongoing fiscally responsible operation.
- City government (and other levels) could also formulate policies to save productive land. Help farmers grow – make land more accessible for farmers, make taxation strongly in favor of farmers and provide tax incentives for people to farm.
- Provide start-up funds and technical assistance – site location tools and site leasing.
- Build neighborhood market locations throughout the City so food is more local. The City is filled with properties that might host markets – schools, parks, streets and vacant lots.
- Provide free pavilions for heat and rain protection to accommodate year-round operation.
- Develop worksite farmers markets.
- Keep both sides – supply (farmers) and demand (customers) – balanced and benefitting from all decisions.
- Study the impact of farmers markets on the business community; help businesses to develop connections to markets.
- Develop a clear non-profit designation for farmers markets.

Managers say stability will be enhanced if the farmers markets can respond to this advice:

- Managers need respectable salaries and benefit packages to support their families.
- Managers should be hired for their passion to keep people connected to their food source.
- Promote markets as a healthy lifestyle choice to eat healthy fruits and vegetables.
- Promote area businesses with the market; let businesses volunteer and promote establishments.
- Encourage markets citywide to have the same rules/guidelines and cost structure.
- OFMA should provide start-up support; Oregon Downtown Association could give seminars.
- American Marketing Association is doing marketing assessment in 2008 for Moreland; other markets could benefit from the results.
- “We all need to be innovative and collaborative, look clearly at barriers and address them, and have all sides look at farmers markets as valuable in order for them to thrive.”

“Some of our vendors need to commit with larger stores – positive on one level – but it squeezes out smaller vendors and markets. We need a larger range of market sizes and farm sizes, for customers and market diversity. There is a role for government in helping small farmers to exist, rather than just helping larger farms.”

“Our imagination is limited by own lack of experience.”

Managers were asked one final question about how long they expected to continue in their role, since consistent managers help stabilize a market. The results do not allay concerns about the future of Portland’s markets.

“I hope a long time.”

“I need a year-round salary and pension, so I go through angst every year.”

“Definitely through this season.”

Managers generally describe the love and passion they feel for their work, but also some discomfort with the low pay. The quotes above are representative of a range of comments that reflect the larger markets’ strength and weaker markets’ uncertain financial picture. To support an acceptable pay scale, markets must attain a certain size and, ultimately, a location that can sustain vendors and appeal to customers.

Portland Farmers Markets/Direct-Market Economic Analysis

Market Manager Interview Participants

Eecole Copen	OHSU Farmers Market
Jaret Foster	Portland Farmers Markets
Tom Griffin-Valade	North Portland Community Works (Interstate FM)
David Hudson	Lloyd Farmers Market
Gretchan Jackson	Montavilla Farmers Market
Ariana Jacob	Peoples Farmers Market
Jill Krueger	Lents International Farmers Market
Daurie Mangan-Dimuzio	Hollywood Farmers Market
Eamon Molloy	Hillsdale Farmers Market
Bob New and Kevin McGovney	Interstate Farmers Market
Liz Shannon	Alberta Farmers Market
Laura Wendell	Moreland Farmers Market

Additional Interview Participant

Karen Kinney	King County Agricultural Marketing Specialist
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Portland Farmers Markets/Direct-Market Economic Analysis Market Manager Survey Rev. 3/11/08

Enter contact information for each stakeholder. Be as complete as possible, including: name, address, phone numbers, and email address.

Name
Company
Address
Telephone
Email

Characteristics of your market:

1. What day of the week is your market? **M T W Th F Sat Sun**
Hours:
2. What months do you operate (how many weeks)?
3. Your Vendors:
 - a. What was your total number of vendors on opening day of the 2007 season?
 - b. What was your highest number of vendors during the 2007 season?
 - c. What was your average number of vendors throughout the 2007 season?
4. How many spaces exist for vendors in your market?
Area size incl. aisle (sq. ft.)?
Aisle width?
5. How many vendors are allowed double spaces:
triples?
larger?
6. What percentage (or number) of your vendors are: *(Check percentage against actual numbers)*
 - a. % Farmers – fruits/vegetables Number:
 - b. % Ranchers – beef/pork/lamb? Number:
 - c. % Cheese/dairy/eggs Number:
 - d. % Value-added producers (jam) Number:
 - e. % Bread/baked goods Number:
 - f. % Hot/ready-to-eat foods Number:
 - g. % Fish/seafood Number:
 - h. % Crafts/artisans Number:
 - i. % Local business Number:
 - j. % Non-profit organizations/other (describe) Number:
7. Is your current list of vendors and their contact information available? To whom?
8. Could you describe your market location (what/where):
9. How far (number of blocks) are you from a local business community? Impact/connections:
10. Do you know the traffic count on your market street on market day (cars per hour/day)?
11. How would you rate your site characteristics on a scale of 1(low) to 10 (high):
Visibility:

Parking:
Slope & Surface (level, finished):
Aesthetics:
Vendor Access (load & park):
Restrooms:
Water & Electricity:
Storage:
Signage - potential 24/7:
Other:

12. What (if any) community landmark(s) help identify your location? Please describe:
13. How many parking spaces are available adjacent to the site?
Within 2 blocks:
4 blocks:
14. Cost/terms of site:
b. Cost for vendors:

Information about your market's governance and organization:

15. What year did your market first open?
of years in operation through 2007:
16. How is the market governed (committee, board)?
17. Has your board ever considered:
a. Combining with another market governing board? **Y / N**
b. Adding another market location? **Y / N**
18. Have you ever been approached for ideas/help in starting other markets? **Y / N**
19. When did you begin as manager?
b. What is the compensation structure?
20. What is the total value of your market advertising in 2007 (paid/free/trade)?
b. How much did you actually spend on advertising in 2007?
21. What other types of promotional tools did you use in 2007 to increase your customer base?

Vendor sales volume and market growth projections:

22. What was your total sales volume in the 2007 season?
Estimate based on:
b. Your market sales growth from 2006 to 2007? (percentage/number)
c. Your market sales growth from 2005 to 2006? (percentage/number)
23. Does your market plan growth each year? **Y / N** If yes, what do you project for 2008?
24. Do you have a vendor waiting list? **Y / N** If yes, how many are on the list & how do you select new vendors??
25. How do you reach out to recruit new vendors?

26. Are there particular food/plant products that you feel are currently under-represented in your market? **Y / N**

Information about your market's customers:

27. Have you done customer counts at your market? **Y / N** If yes, what methodology did you use?
Are the results available?

28. How many adult customers do you have on average per day?
high?
low?

29. What percentage of your customers come from within a 2-mile radius?
5-mile radius?

30. What are the most important aspects of farmers markets for customers (prioritized)?
Is this from research? **Y/N**

Important factors for successful markets:

31. What are the most important factors of farmers markets for producers/vendors?

32. What are the characteristics of the best markets in the Portland area?
Why?

33. Please identify the three most significant actions that market managers can do to expand/improve their market:

34. How do rate the success of your market on a scale of 1 (low) to 10 (high)?

35. To what do you attribute the (relative) success of your market system?

36. What is your Achilles' heel? What problems or weaknesses do you or others perceive in your market(s)?

37. What improvements/changes must you make to adjust to the changing retail grocery sector?

38. What steps are you taking to attract non-customers?

Public Role:

39. Is Portland City government generally supportive of farmers markets? **Y / N**
a. Why do you say that?
b. Are other governmental agencies supportive? (How?)

40. Are the City of Portland or other agencies currently providing any specific support or assistance to your market? **Y / N**
If so, what has been most helpful?

41. Does your market face any challenges or barriers that you feel the City (or another agency) could help overcome?

Wrap Up:

42. Would you be willing to review a "SITE EVALUATION TOOL" to assess possible sites for new markets?
Y/N
43. Any other comments about farmers markets that we have not yet discussed?
44. What is the most important advice that you can give for the City and the industry to help both develop and solidify farmers markets?
45. How long do you think you will continue as a market manager?