

\$3.09 Billion

**This was the
economic
impact of
farmers'
markets**

in Canada in

2008.

**Just one of the findings from a new national study—
and a number every policy maker should know.**

According to a new national study released in February 2009, the impact of farmers' markets on the Canadian economy was reported to be up to

\$3.09 billion.

That's why it makes sense to support farmers' markets at a time when consumer demand for locally grown food is on the rise.

Farmers Markets Canada is a new national organization dedicated to furthering the viability, growth and prosperity of Canadian farmers' markets, helping local farmers connect with their consumers.

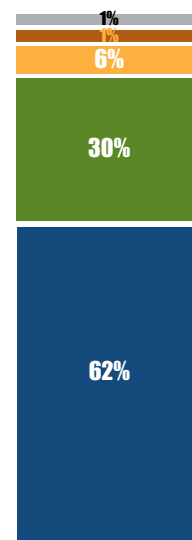
In 2008, FMC commissioned a national study with the help of Agriculture and Agri-Food Canada to take the pulse of the farmers' market industry in all 10 provinces and measure its importance to Canadians and the Canadian economy.

One of the most important findings was the value consumers place on being able to buy food directly from the farmer who produced it. While 92% of shoppers rated it as important, a full 62% rated it as "extremely important."

On the pages that follow are highlights of this landmark study into an industry that produces \$1.03 billion in annual sales, for a total economic impact of up to \$3.09 billion.

92% of shoppers say buying directly from a farmer is important.

Please rank the importance of buying produce from an actual farmer rather than buying produce from a person who buys the produce from a food terminal or farmer(s) and resells it to you at the market



National Average n= 3174

■ Extremely important ■ Somewhat important
■ Neither important nor unimportant ■ Somewhat unimportant
■ Not at all important

Source: *The National Farmers' Market Impact Study 2009 Report*

Agriculture and Agri-Food Canada was pleased to participate in the production of this National Farmers' Market Impact Study 2009 Overview. AAFC is committed to working with industry partners to increase public awareness of the importance of the agriculture and agri-food industry to Canada. Opinions expressed in the document are those of Farmers' Markets Canada and not necessarily of AAFC.



Farmers' Markets Canada
Les Marchés agricoles Canada



Agriculture and
Agri-Food Canada

Agriculture et
Agroalimentaire Canada



Research methodology and scope

The National Farmers' Market Impact Study 2009 Report was conducted in July 2008 by Experience Renewal Solutions Inc. with support from David J. Connell, PhD, Assistant Professor at the University of Northern British Columbia. Its purpose was to be a baseline study that would serve as a benchmark for measuring the contributions of farmers' markets across Canada as well as to assess trends and opportunities for future growth.

Research sample

70	farmers' markets visited
3174	shoppers interviewed
1308	non-users surveyed
487	vendors interviewed
282	market managers interviewed
10	provinces included in sample
27	small markets (<19 vendors)
25	medium markets (20–39 vendors)
18	large markets (40+ vendors)
2.5:1	ratio of female to male shoppers

Key economic findings

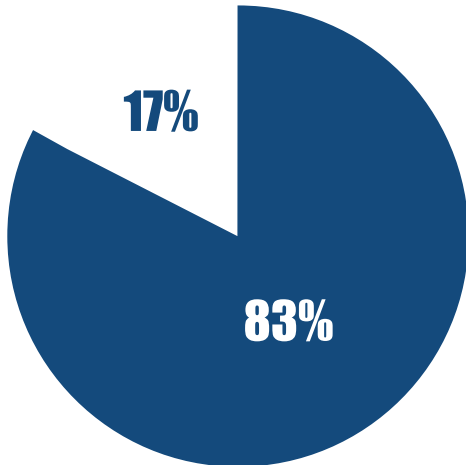
28	million shopper visits in 2008
\$32.06	avg. purchases per shopper visit
\$18.44	avg. additional expenditures per visit
1-5	avg. jobs created per vendor
50-199	avg. customers per day per vendor
\$100-\$999	avg. sales per day per vendor
7%	vendors accepting credit cards
5%	vendors accepting debit cards
53%	vendors who believe they'd sell more if there were an ATM at the market

Farmers' market facts in brief

- They make positive contributions to the economy and to Canadian communities.
- They play a key role in the marketing of Canadian agricultural products and a significant role in generating farm incomes.
- They have many opportunities for growth.
- They are very popular with their customers: 96% of customers said their farmers' market experience met or exceeded their expectations.

Big growth opportunity among non-Canadian-born

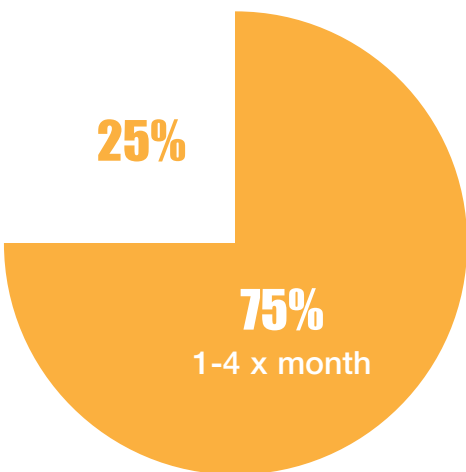
How long have you lived in Canada?



83% of shoppers were born in Canada, suggesting future growth potential among non-native-born Canadians.

75% of shoppers are regulars.

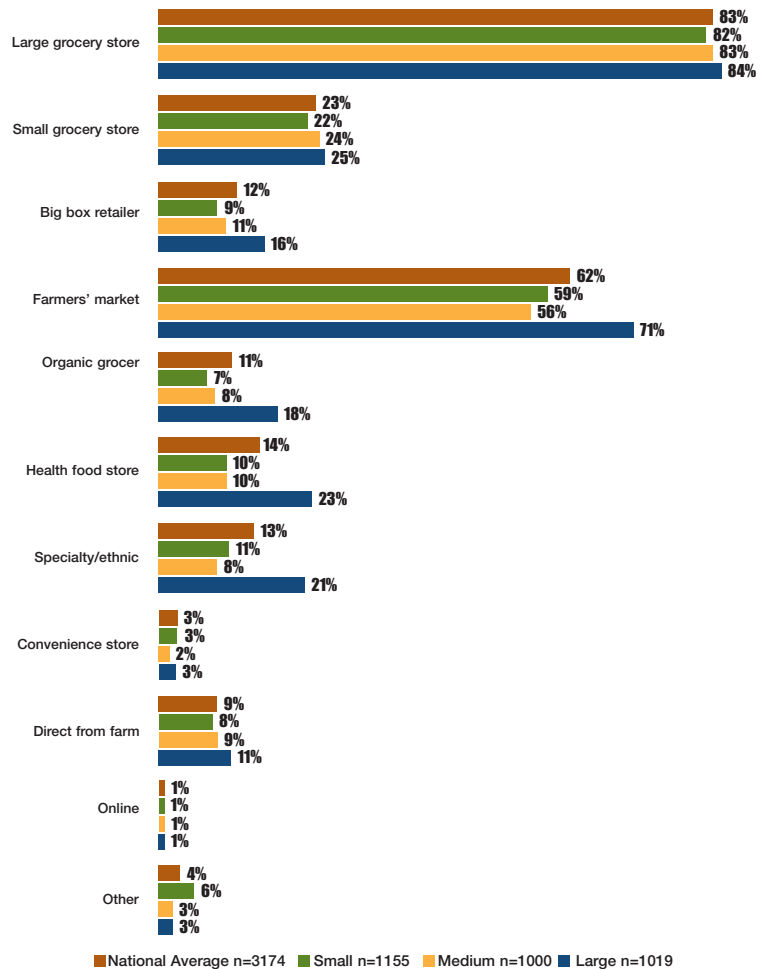
How often do you visit this market?



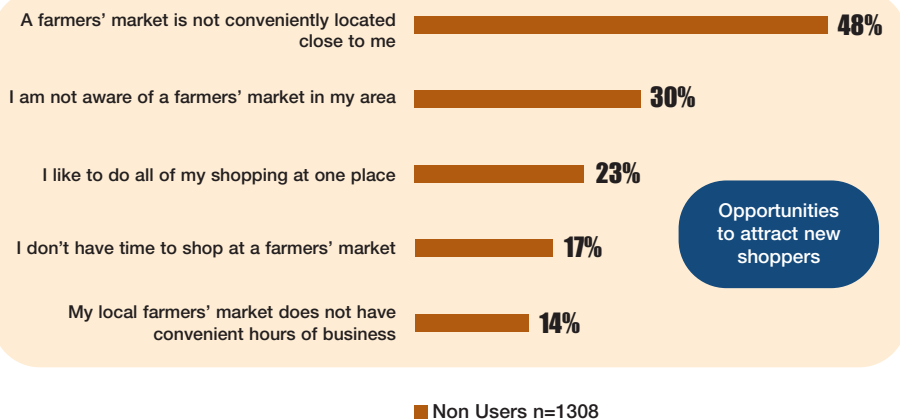
48% visit the market almost weekly
27% visit 1-3 times a month
25% are new or infrequent users (indicating opportunity for growth)

Farmers' markets are the #2 source for groceries for 62% of shoppers.

Where do you primarily shop for groceries?



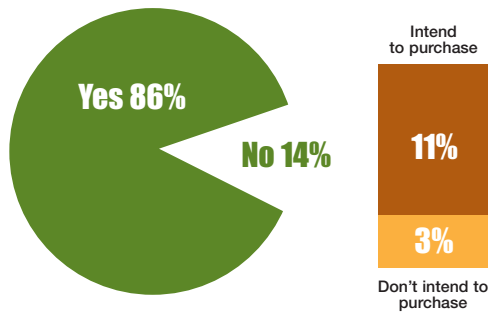
Why are non-users non-users? 48% say there are no farmers' markets nearby.



Key growth opportunities: more markets, more convenient hours

97% of market visitors are there to buy.

Buy anything today?



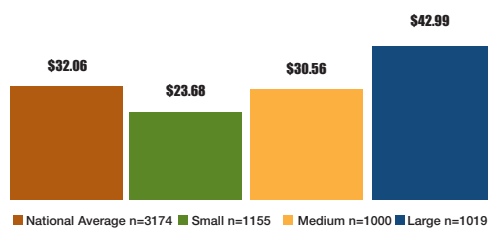
86% of shoppers had already bought something.

11% of shoppers were about to buy something.

Only 3% were just browsing.

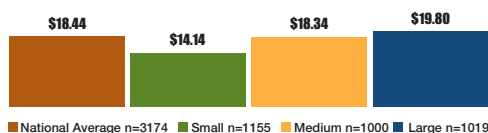
Average farmers' market purchases: \$32.06/visit

How much did you/do you intend to spend today?



Average additional purchases: \$18.44/visit

How much else did you/do you intend to spend on other purchases today?



Economic impact: Farmers' markets benefit other retail businesses nearby.

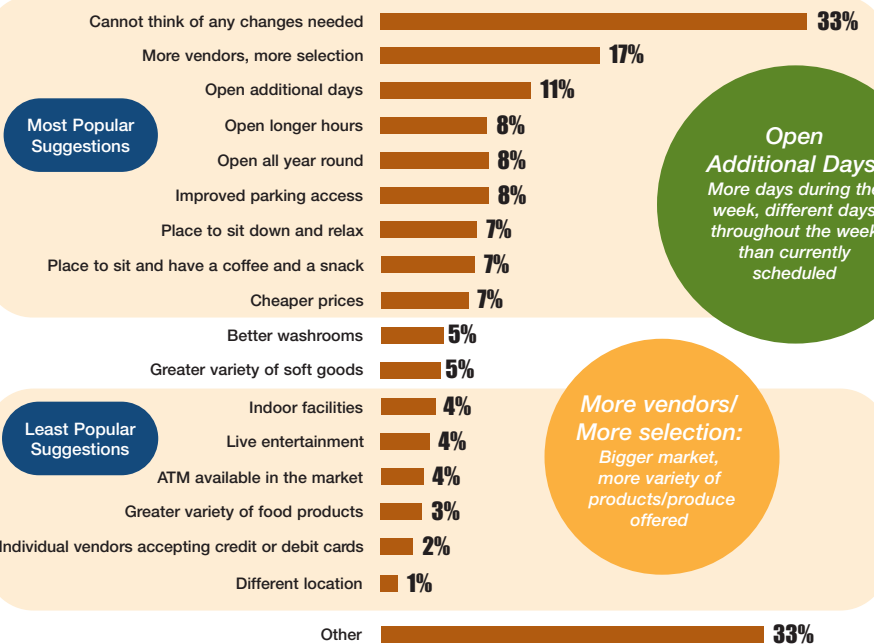
Fresh, in-season products and locally produced products top the list of what shoppers want.

How important are the following to you?



Low price is the least important factor in drawing customers to farmers' markets. It scored last when shoppers were asked to rate 14 different factors.

Shoppers just want more: more vendors, more opportunities to shop.



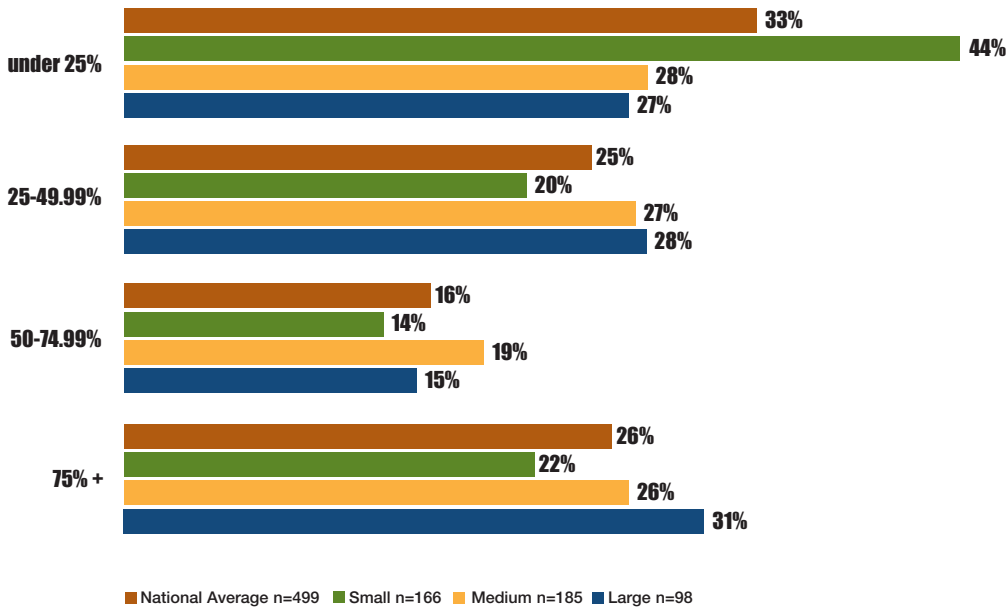
Open Additional Days:
More days during the week, different days throughout the week than currently scheduled

More vendors/ More selection:
Bigger market, more variety of products/produce offered

"Other" responses differed greatly by market.

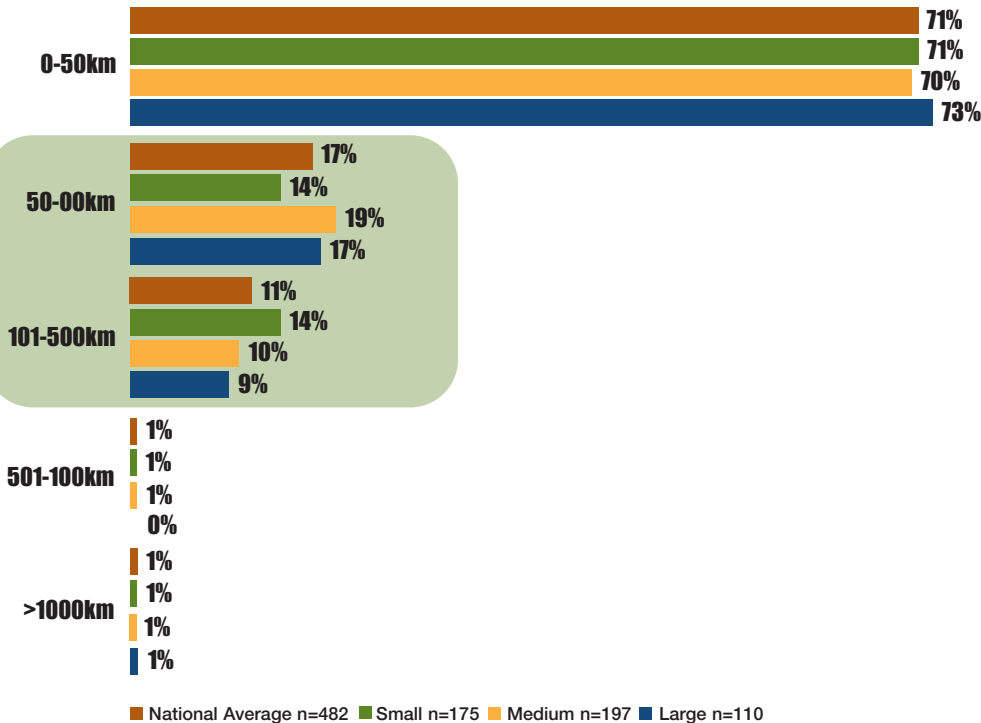
Farmers' markets are an important source of revenue for vendors, providing 1/3 of their income.

How much of your income comes from farmers' markets?



51% of vendors serve between 50 and 199 customers a day and 67% sell between \$100 and \$999 worth of goods a day.

29% of vendors have to drive more than 50 km to market.



More markets would mean shorter drives.

Quick Facts

95% of vendors sell at their market every week it is open.

60% of vendors sell at more than one market.

57% of markets are open on Saturday, 24% on Friday, 17% on Thursday

34% of markets are open more than 26 days a year; 40% are open 16-20 days

56% of markets are outdoor
20% of markets are indoor
24% are indoor/outdoor

46% of markets serve municipalities <10,000



Karen Whitty
Whitty Farms, ON

Managers

80% of market managers report that the number of shoppers at their markets has increased (56%) or remained the same (24%).

81% of market managers report that the number of vendors at their markets has increased (48%) or stayed the same (35%).

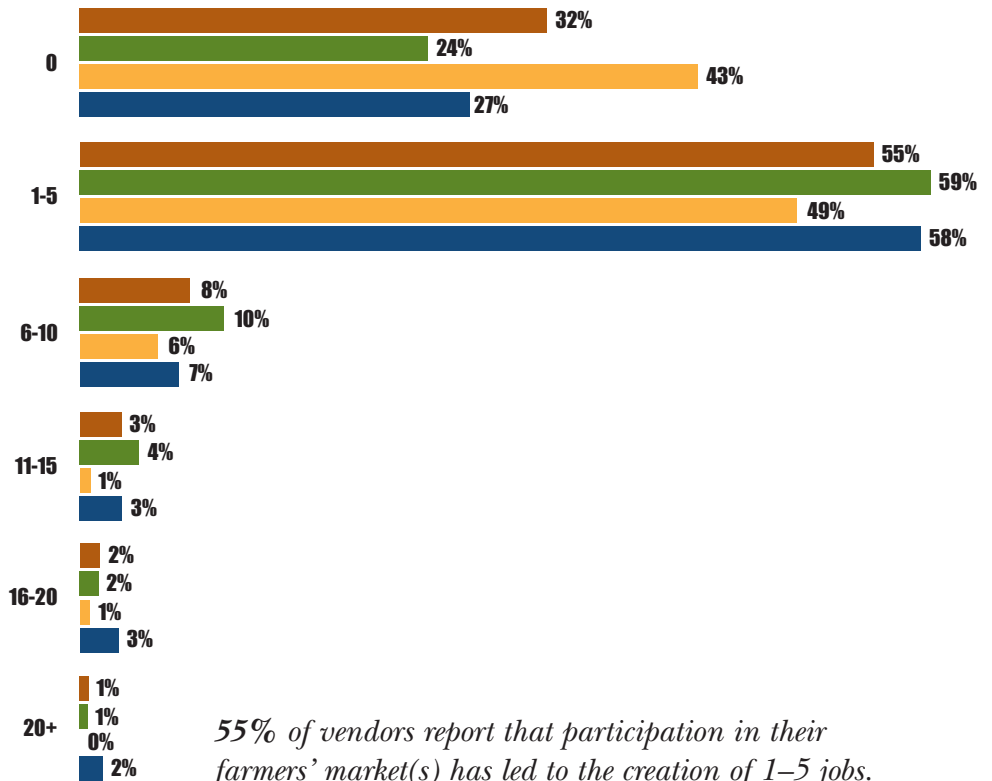
68% of market managers report no financial support from governments or associations in recent years.

Managers' #1 suggestion to help grow their business: advertising and marketing support, followed by attracting new vendors—especially food vendors.



Jobs are created when vendors participate in farmers' markets.

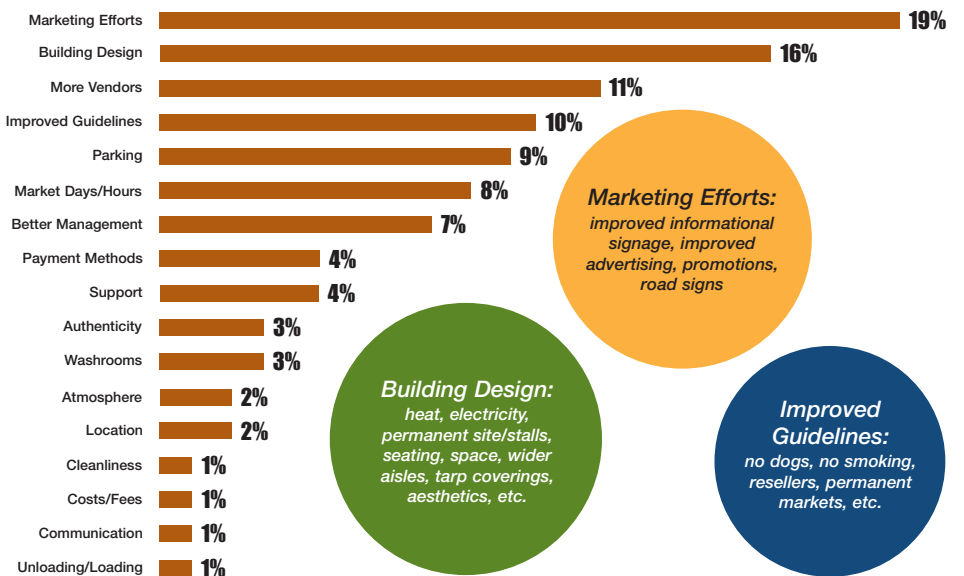
How many jobs have been created by your participation in this market?



■ National Average n=3174 ■ Small n=1155 ■ Medium n=1000 ■ Large n=1019

Topping vendors' wish lists: more marketing support, upgrades to facilities and more vendors.

How could your market be improved?



■ National Average n=487

These are the priority areas for Farmers' Markets Canada.



Farmers' markets in Canada are meeting the needs of consumers who are increasingly seeking out fresher foods grown locally.

They're also important sources of farm income, create incremental sales for businesses near the markets, create jobs and are poised for growth. All that's lacking to take them to the next stage is more marketing support, and in many cases, improvements to the markets' facilities.

The number one reason non-users don't shop at farmers' markets? They're not aware of any nearby. With our support—and yours—we can help farmers' markets make an even greater impact on the Canadian economy than they already do.



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