

Key findings of the *Farmers Market Report*:

- There are significant differences among farmers markets in the county which impact a market's ability to attract the best combination of shoppers and vendors.
- All of the markets in King County, regardless of size, depend on some form of public and/or community financial support.
- Programs and efforts to support farmers markets must be matched with support for family farms in order for both to be successful. It will take resources from a broad network of organizations, local jurisdictions and community supporters.

In addition – attached to the staff report is a summary of research that was conducted to increase understanding of King County residents' opinions of and experiences with farms and farming in the county (**Attachment 2**). The Water and Land Resources Division, King County Department of Natural Resources and Parks, conducted a survey of county residents. Research results were then included in Appendix C of the report on ***Future of Agriculture, Realized Meaningful Solutions (FARMS)*** and in policy and program planning relating to agriculture in the county.

The information objectives of the survey on agriculture in King County included the following:

- Assess King County residents' opinions of the importance of having farms and farming in King County, and explore residents' impressions of farms and farming in the county;
- Assess residents' opinions of the importance being able to engage in selected activities related to local farms and farming, including purchasing farm food products and visiting farms;
- Examine the frequency with which residents purchase food produced on King County Farms, locations in which the food is purchased, and importance of selected factors in the decision to purchase food from local farms.
- Examine the frequency with which residents visit food-producing and horse farms in King County; and
- Assess residents' opinions of the importance of using and preserving land for agriculture in King County and continuing support for farmers in the county.

The results of the survey can be found in the ***Survey on Agriculture in King County Research Report***. The following are the key findings conclusions of the report:

Having farms and farming in King County and being able to purchase food produced on farms in King County are important to most county residents.

- Almost three-fourths of King County residents rated having farms and farming in King County a 4 or a 5 on a five-point scale where 5 means "extremely important."
- When asked about the importance of being able to do specific activities relating to
- farms and farming in King County, about three-fourths of the county residents rated being able to "enjoy rural scenery and open spaces provided by the agricultural landscapes in King County" and being able to "purchase fruit and vegetables grown in King County" a 4 or a 5 on the five-point scale where 5 means "extremely important."

Being able to “visit horse farms in King County” and “ride horses in King County” were the activities rated least important, and 23 percent of the residents rated these a 4 or a 5 on the five-point scale where 5 means extremely important.

- Asking about “farms and farming in King County” brought a variety of images to mind for county residents, but food crops and farms were mentioned most often, followed by dairy products and farms.

Purchasing food produced on farms in King County is a fairly common practice for many residents.

- Sixty-two percent of the residents said that they “purchase food produced on farms in King County” at least once a month, and 85 percent said that they “purchase food produced on farms in King County” more than once a year.
- These residents most often purchase food produced in King County at neighborhood farmer’s markets or grocery stores.
- Between 57 and 75 percent of the residents said that the freshness, safety, and environmental benefits associated with foods produced in King County, as well as wanting to support local farmers, were “extremely important” (5 on the five-point scale) considerations in the decision to purchase food from local farms.

Most residents support continuing county support for farmers in King County and using land for food-producing agriculture in King County.

- Eighty-five percent of the residents said that they “agree” or “strongly agree” with the statement, “King County should continue to provide services to farmers, such as assistance with permits, drainage improvements, promotion of local farm products, and grants to improve environmental practices.”
- Between 66 and 77 percent of the residents said that they “agree” or “strongly agree” with the statements, “It is more important to use agriculturally zoned land for producing food in King County than for horse farming,” “Farming in King County is economically challenging,” and “King County should preserve farmland by purchasing development rights to the land to insure that it will continue to be used for agriculture.”
- Forty-five percent of residents said that the amount of land used for all types of agriculture in King County should be increased, and 53 percent said that the amount of land used for all types of agriculture should be “kept about the same as it is now.”

Rural residents rated some activities and considerations as more important and more frequently engage in some activities that relate to farms and farming in King County than do urban residents.

- Rural residents engage in some activities relating to farms and farming more often and rate these activities as more important than do urban residents, including visiting food-producing and horse farms; the importance of being able to purchase plants, poultry, and meats from King County; and the importance of visiting farms and riding horses in King County.
- The freshness and safety of foods grown in King County, wanting to support local farmers, and being able to visit farms in King County were more important considerations in decisions to purchase foods produced in King County for rural than for urban residents.

ATTACHMENTS:

1. Farmers Market Report, February 2010 -
2. Appendix C, 2009 FARMS Report, Survey on Agriculture in King County Research Report.

Farmers Market Report

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February 2010



King County

Department of
Natural Resources and Parks

Water and Land Resources Division

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This report and supplemental materials can be found at
<http://www.kingcounty.gov/environment/waterandland/agriculture.aspx>

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Farmers Market Report

I. INTRODUCTION

A. Reason for the report

The Water and Land Resources Division (WLRD) hereby presents the findings of the 2010 study on King County farmers markets. The study was conducted in response to a budget proviso adopted as part of the 2010 budget approval process.

The report summarizes information gathered through questionnaires and meetings conducted by Agriculture Program staff to identify issues and determine what steps can be taken to improve the financial viability of farmers markets and farmer access to markets.

This report acknowledges the long-standing support of farmers markets by King County. The strength of the county's farmers markets is due to the sustained efforts of many individuals and groups, with significant support from the county over many years.

Budget Proviso Text

"Of this appropriation [for WLRD], \$1,000,000 shall not be expended until the agriculture marketing and economic support program convenes and completes a report about discussions with key groups representing farmers markets and farmers to determine steps that can be taken to improve the financial viability of farmers markets and to facilitate farmer access to such markets.

The agriculture and economic support program shall provide a report identifying challenges and potential solutions faced by farmers markets and farmers by March 15, 2010."

B. Information gathering

As directed by the budget proviso, King County Agriculture Program staff conducted extensive outreach to inform this report. An ad hoc Advisory Committee helped develop the outreach strategies and scope of the project. The committee represented all stakeholder groups: farmers market managers, farmers, support organizations, and Washington State University (WSU) Small Farms Program. The outreach included questionnaires, interviews and stakeholder meetings:

- Questionnaire sent to 39 King County farmers market managers. Responses were received for 29 King County farmers markets (75 percent response rate).
- Questionnaire sent to farmers selling at farmers markets in King County. Farmers were contacted through their market managers or through the Cascade Harvest Coalition's Puget Sound Fresh list serve. Responses were received from 43 farmers, 21 of whom are located in King County.
- Two small group discussions with 15 farmers.
- Three group discussions with 52 farmers market managers, assistants and board members.

- Interviews with eight staff and elected officials from four King County cities: Auburn, Bellevue, Carnation and Seattle.
- Individual interviews with nine farmers, six market managers, and four support organizations.
- Review and discussion with the King County Agriculture Commission at two meetings.

II. BACKGROUND

King County is home to an impressive selection of farmers markets (see map at end of report), several of which have been recognized nationally. These markets benefit local farmers by providing a place to sell their products directly to customers. They also benefit the communities in which they are located by providing a huge array of delicious fresh food and an enjoyable gathering place. Farmers markets in this region are generally operated a few hours one day each week in an open air location with a primary focus on food.

Mirroring national trends, the number of farmers markets in King County has grown dramatically since the early 1990s, increasing from nine in 1999 to 39 in 2009. Sales at these markets were \$20 to \$30 million in 2009, an increase from approximately \$3.5 million in 1999. King County conducted market research in the summer of 2009 to understand consumer interest in locally grown food. According to survey results, 85 percent of King County residents purchase King County grown food more than once each year. Of those, 89 percent buy it at farmers markets.

There has been a similar growth in the number of farmers who sell at farmers markets. For example, in 1993, the University District Farmers Market had 17 farmers and the Fremont Sunday Market had 8 farmers selling produce. In 2009, there were at least 250 farmers selling at farmers markets in the county; of those, approximately 100 were King County farmers who farm approximately 1,900 acres. The rest came from all over the state; some as far away as Colville.

Market crops are one of the fastest growing sectors of agriculture in the county, and farmers markets appear to be instrumental in that growth, and an essential part of the support needed for the county's agricultural industry as a whole.

III. FINDINGS—SUMMARY INFORMATION

Farmers Markets at a Glance (Table 1 at end of report), summarizes the information obtained from farmers market managers. It provides an overview of the county's farmers markets. Additional information collected from the farmers market managers and farmers questionnaires can be found at <http://www.kingcounty.gov/environment/waterandland/agriculture.aspx>

One of the most important findings of this report is the significant diversity among farmers markets in the county. Some have been in operation for twenty years; others have just opened. Shopper counts range from 6,000 to 380,000 and sales range from \$95,000 to over \$3 million per

season. Market managers have a wide range of market management experience, from one to sixteen years. Similarly, farmers that sell at markets vary widely in farming experience, from a few years to more than 30, and in farm size, from smaller than five acres to more than 100 acres under cultivation.

A. Farmers Markets

1. Organization

Some markets in King County are non-profit organizations, some are sole proprietorships, and some are programs of a sponsoring organization such as the Kirkland Downtown Association or local city government, such as Auburn or Renton. In Seattle, there are three associations that sponsor thirteen of the farmers markets. Each of the other markets in Seattle and the county is an individual entity, operated exclusively within its own community.

Some market managers are responsible for all aspects of market management. Some markets split the responsibilities between the sponsoring organization and the manager so that the sponsor is responsible for marketing, outreach and special events and the manager is responsible for vendor relations and on-site operations.

Most county markets operate on a shoestring budget with one paid, part-time manager. Revenues and expenses needed to operate a market vary significantly by market size and length of season. A market averaging 25 to 30 vendors, operating for five to six months, would expect to spend \$20,000 to \$30,000 per market season, with approximately 60% for management, 25% for marketing and 15% for other expenses. A manager at this market would expect to work 800 to 1,000 hours over the course of a year.

2. Revenue

Market revenues come from a variety of sources. They typically include stall fees from vendors, market merchandising such as reusable shopping bags and T-shirts, and grants, sponsorships and donations. Market revenues vary significantly by size of market and length of season. Over the course of a five to six month market season, a market averaging 25 to 30 vendors each week would expect to generate \$16,000 to \$24,000 from vendor stall fees, or sixty to eighty percent of total revenue. Markets generally use grant funds and market sponsorships to cover expensive equipment purchases, special events, market signage and marketing materials.

3. Management and staffing

Regardless of its size, a market needs staff to operate the market and handle bookkeeping and reporting functions. As markets get larger, they usually add staff to help at the market and to coordinate special events and marketing activities. Most markets use volunteers to help during the market day with special events, basic record keeping and answering shopper questions. Smaller markets tend to rely on volunteers much more than larger markets. In King County, all but three markets have paid manager positions.

All market managers and farmers responding to the questionnaires indicated that skilled market managers are essential to a well-run market. A skilled market manager keeps both vendors and shoppers satisfied. Shoppers want the best possible selection of products to purchase. Vendors want to sell all the food they bring to market. Success at achieving this balance can be transitory because the vendors, their products and the shopper mix can change from season to season and week to week as the harvest continues.

To create the festive, family-friendly atmosphere that draws hundreds and thousands of shoppers to the market, managers provide a set of services that are mostly invisible in a well-run market. Besides recruiting the right mix of vendors and delivering enough shoppers each week, these services include property management, governance, developing marketing campaigns, organizing special events, on-site supervision, monitoring food safety and the opportunity to participate in food assistance programs.

4. Community role

Farmers markets play an important and valued role in their community. While they differ in many ways, their missions are very similar: support for local farmers, bringing fresh, healthy food into their community, providing an opportunity for small businesses to sell their goods, and creating a lively, family-friendly community activity.

Markets play an important role within a neighborhood by providing access to fresh, nutritious food to residents. A number of markets are located in areas where there are few other options to find locally grown fresh food and there are high rates of chronic diseases. Studies show that communities with more opportunities for residents to purchase fresh food help successfully address many public health concerns.

Farmers markets also help their communities achieve other health outcomes. Many markets around the county partner with local food banks to pick up donated food at the end of the market day. Over the course of a market season, the total food donated can reach four tons of food at some markets. Markets are also access points for the Women, Infants and Children (WIC) and Senior Farmers Market Nutrition Programs which help low income people purchase healthy food. More markets are becoming certified to accept Supplemental Nutrition Assistance Program (SNAP—food stamps) benefits. Markets can also provide nutritional education and information about how to stretch the value of the food dollar (how to shop, preserve food, how to prepare food, etc).

The city representatives we interviewed for this report all expressed pride in their farmers markets and recognized that the markets provide a significant contribution to their city's quality of life. Not only are markets an important community gathering spot, but they also play an important economic development role. They provide jobs and income, keep money within the local area to be re-spent, bring shoppers to other local businesses and help small, direct-market farmers and businesses get started. In Seattle, many neighborhoods have seen a significant increase in sales at other businesses within the local business district on market days. Market shopper surveys conducted by several Seattle markets have shown that a large percentage of shoppers will supplement their market shopping within the local business district. Markets also

provide other important community building functions by offering a place for non-profits and other social groups to interact with the public and provide education about their programs.

All cities provide in-kind staff support in various ways, much of it coordinated through economic development departments. For example, Seattle has developed an ordinance that reduces permitting fees for farmers markets and helps markets evaluate locations when they have to move. Among other things, Carnation includes market information in its utility mailings and hangs a banner across the main street. Auburn has negotiated with Sound Transit to locate its market at the transit center at no cost. Bellevue has worked with the Fire Department to address various issues related to its market.

B. Farmers

Farmers come from all over Washington State to sell at King County farmers markets because of the population density and because county residents are so interested in purchasing local produce. Farmers who completed the questionnaire said that their primary marketing efforts are directed to consumers in King County and the Puget Sound area. Sixty-five percent of the farmers earn at least 50 percent of their household income from their farm business. Direct to consumer sales (farmers markets, Community Supported Agriculture (CSAs), farm stands, etc) are the most important marketing channel for 87 percent of the farmers surveyed for this report. Almost half of the farmers surveyed earn at least 70 percent of their farm income directly from farmers market sales.

Farmers markets are an important marketing resource for our region's farmers. They provide the opportunity to sell crops and other farm products at prices sufficient to make a living. In urbanizing areas in particular, where land is expensive, farmers need to sell directly to the consumer to keep enough of the retail dollar to make a living and keep farming in the county.

"Farmers markets are great for building a business and have successfully done that for us over the last three years. What started as a simple hobby and passion quickly turned into a profitable business."

Snoqualmie Valley farmer

Farmers choose to sell at markets for many reasons and those reasons can change over time. For new farmers just getting started, a farmers market is a low cost way to meet the public, experiment with product mix and get customer feedback, develop marketing skills, and gain important farming and production skills while earning money and developing a customer base. For experienced farmers who have been selling at markets for years, the markets are a way to continually test out new products and crops, earn top dollar, market other parts of their farm business (such as CSAs, U-Pick, or restaurant sales), talk to other farmers and continue the relationships they have developed with customers and farmers over the years. Farmers markets also provide opportunities for larger farms that have lost wholesale market share due to changes in the retail industry. They can compensate for that loss by selling a portion of their crop directly to consumers, at full retail price.

Discussions and questionnaire responses showed that an overwhelming majority of farmers evaluate expected sales, market management and location when choosing a farmers market. Most farmers indicated they expect a minimum income of \$600 per market day in order to consider a market. A farmer will ask about marketing plans, market budget, and vendor and product mix. However, if a farmer has a reasonable expectation at a given market of having good customers, in adequate numbers, who spend sufficiently, then other concerns will be less important.

IV. FINDINGS - CHALLENGES TO FINANCIAL VIABILITY OF FARMERS MARKETS

Despite significant successes, markets are facing increased competition and pressures to perform successfully. Market managers report the following issues affecting their ability to meet financial obligations and earn a living.

A. Dual missions model creates financial challenges

Farmers markets operate in a manner similar to many non-profits, such as arts organizations, that intend to provide a public benefit and a business service. They are able to generate revenue from services provided but often not enough to cover all operational expenses. Because of their broad-based public benefit, communities and residents have high expectations for what a market can accomplish. Unfortunately there is often less understanding of the financial needs and organizational requirements necessary to run a successful weekly farmers market.

B. Fast growth

The growth in farmers markets throughout the county has happened so quickly there has not been time to do much research to understand what makes markets successful in different types of communities. This can make it difficult to identify and provide appropriate support. Furthermore, there has not been time to develop the regulations and land use policies to accommodate farmers markets, nor to develop the marketing support, infrastructure, and services that usually exist for more established industries. Although this work is beginning, more is needed, and there is no local or regional organization whose primary mission is support for farmers markets.

C. Professional training for managers

Most market managers start managing a market because they have a passion for farmers and fresh food and want to have a farmers market in their community. The enthusiasm and spirit they bring to the market is part of what makes it a valued community institution. As markets grow and become a stable business for a farmer and the shoppers, market managers need to develop better business skills to make sure they are making wise business decisions. Typical business training does not address the unique combination of needs market managers have. Market managers all agree that they need additional business training such as a series of

workshops and classes targeting business management, marketing, technology, data collection, vendor management and advocacy skills.

D. Insecure market locations

Many markets in the county are located in parking lots, or on city streets. Some market managers and farmers are concerned that their site will be developed and unavailable for the market in the future. In Seattle, six markets have moved in the past two years or are moving in 2010 because of development pressures. As with any small business, a good location is essential to success. Farmers build up sales, develop relationships and determine product mix based on a specific market and its shoppers. Even a small move can cause dramatic changes in the customer base and resulting sales. Market managers and farmers need political support in their local jurisdictions to help secure their locations.

E. Reliance on subsidies

All the King County markets depend in some way on subsidies, such as free rent, volunteers and reduced permit fees. This varies by market and by community. Public Health—Seattle & King County has worked diligently to keep the cost of farmers market permits as low as possible. Some markets depend on volunteers for bookkeeping and accounting services. All managers agreed that their dependence on subsidies of one type or another and the uncertainty of future subsidies make it difficult to plan for the future.

“Small markets are expected to be self-sustaining while other publicly delivered services do not have similar expectations. Public funds support services that enhance global trade of food but similar resources are not made available to support local agricultural markets.”

Enhancing the Success of NW Farmers Markets, pg. 11

F. Vendor integrity

Managers and farmers all agree that trust is one of the key ingredients in a successful farmers market. Managers and shoppers must trust that farmers are accurately representing their businesses, growing practices and the products they bring to market. As more markets open or expand, it becomes harder for market managers to know all farmers personally.

Most markets have strict policies that all farm products must be grown by the farm selling them, unless specific arrangements are made with the market manager to bring in another farmer's products. Some markets have discovered vendors who claim to grow the crop they are selling, but in fact are buying it from a packing house or other farmer. Besides not complying with the market's policies, these vendors tend to under-price the legitimate farmers at the market, who may decide to leave the market. It is extremely difficult for market managers to verify the accuracy of vendor claims. If a market gets a reputation for having vendors who misrepresent

themselves, it may have difficulty recruiting new farmers. Farmers understand this is a difficult and sensitive issue and wish market managers had better tools to address it.

G. Food safety

Managers and farmers recognize the increasing consumer concern about food-borne illness and food safety practices as more instances of such issues are reported in the media. Managers and farmers understand they need to document their practices in writing. Both WSU and Washington State Department of Agriculture (WSDA) have local programs to work with farms to implement Good Agricultural Practices and review food safety procedures. These are part of national efforts to assure shoppers of the safety of the food for sale. However, there is concern that reporting requirements may be a burden to small growers.

H. Competition

- **Product pricing:** Managers and farmers express concern about general perceptions that prices are higher at farmers markets than in grocery stores. In contrast, some local studies have shown otherwise. Managers and farmers understand that grocery stores have much more flexibility when it comes to pricing and would like some tools to help them compete more effectively. They believe more people would shop at markets if they understood how markets differ from grocery stores in pricing and quality.
- **Competition with other food retailers:** As farmers markets have grown in popularity, grocery stores have taken note and recognized the sales opportunity in marketing “locally grown.” Market managers report seeing many of the same marketing tactics they have used now being used at grocery stores. As a result, market managers want to reposition the farmers market brand so shoppers can understand the differences between markets and grocery stores.
- **Competition among farmers markets:** The number of farmers markets in King County has grown almost 400 percent in the past ten years. There has not been a comparable increase in the number of farmers able to attend these markets. Although many farmers have expanded their businesses in response to the sizeable consumer demand, there is a limit to the ability of existing King County farmers to support new markets. A recent survey of 82 direct market farmers in Seattle reported their lowest priority was opening new markets. There is concern among some managers that newer markets are pulling shoppers away from existing markets. Furthermore, if shoppers are stretched over too many markets, the ability for farmers to make the minimum required daily sales becomes more difficult. Some farmers report having to sell at more markets because they make less at a single market than they used to when there were fewer markets to choose from. If the number of farmers markets is to continue to grow successfully, it will have to be matched with increasing the shopper base and increasing the number of farmers available to sell at them.

I. Expanding the shopper base

Managers and farmers agree that expanding the shopper base is essential to the long-term health of farmers markets. The following are issues raised by managers and farmers that affect a market's ability to increase the number of shoppers.

- **Shopper expectations:** The visibility, size, and selection of Seattle's farmers markets have helped set a standard for what a farmers market should look like throughout the region. Market managers at some of the suburban markets talk about shoppers who are disappointed when their local market doesn't have the same depth of selection. Some markets have a difficult time finding vendors who grow all the products the market would like to offer.
- **Electronic technology:** More and more shoppers use credit and debit cards to shop. Food assistance programs also use electronic cards to provide benefits. Most market locations do not have electricity and telephone connections. Because of the large number of small dollar transactions that occur at markets, it can be difficult and expensive to adapt to electronic technology even though there is significant interest in doing so. Incorporating wireless technology to process SNAP (food stamp) benefits increases staffing and bookkeeping requirements and costs. Managers and farmers recognize they are missing significant numbers of shoppers by not being able to accept electronic cards.
- **Permitting and regulations:** In order to increase sales, King County farmers continually find new ways to prepare and sell their products. Often these new ideas are not addressed by current food codes and regulations. Current permitting concerns, for example, relate to farmers who want to slice cheese on-site and sell fresh meat products.

V. FINDINGS-CHALLENGES FOR FARMER ACCESS TO MARKETS

All farmers markets have an application process to select farmers to be part of the market. Market managers select farmers based on factors that will make their market more successful. A farmer's ability to participate in a market depends upon what s/he will bring to the market: something the market does not yet offer, a variety of products, a sufficient amount of products, appeal to the customers, etc. Markets want farmers who will add to the diversity they already have, and who will be successful at interacting with customers and meeting their needs. Quality, price, selection, and information about how the food is grown are also very important.

Farmers who have been selling at farmers markets for many years, who have a recognized product and an established presence, do not have trouble accessing markets and can often choose the markets at which they sell. New farmers can find it difficult to access markets, especially those which offer the highest sales. Some immigrant farmers face challenges getting into markets because they tend to grow the same products which are over represented at many markets. Other farmers who may have a specialized product that is in high demand can freely choose markets regardless of the farm's size or years selling. As one farmer noted in a small group discussion, "Goat meat can get you in at any farmers market."

The challenges to increasing diversity and quality of products are the same challenges faced by many farmers in King County: land affordability, ability to expand, access to needed infrastructure, availability of water or irrigation, and training. These challenges are described and addressed in the recently published *FARMS Report* (<http://www.kingcounty.gov/environment/waterandland/agriculture/documents/farms-report-future-of-agriculture.aspx>). The following are issues particularly important to market farmers:

- **New farmers:** With the high cost of land, it is difficult for new farmers to find land and generate enough income to stay there. Without adequate support for people who want to start farm businesses, it is unclear where some of the next generation of market vendors will come from and how agricultural land in King County will be kept in production.
- **Successful farmers markets:** Farmers need the markets they participate in to be successful. If they invest their effort in a market and it fails, it can be devastating to their business plan. It is important that the decision to create a new market is based on realistic projections; if a new market fails, it can be devastating to the farmers who planned around it.
- **Expected sales:** Most farmers need to earn a minimum of \$600 dollars per market day. Information from a number of county markets indicates their average vendor sales are less than \$600. Farmers also noted that sales are decreasing at some established markets so they need to sell at more markets to maintain their total weekly income. Staffing additional markets adds another level of stress, cost and logistical challenges to a farmer.
- **Agricultural infrastructure:** Without adequate infrastructure to support new products, it is difficult for farmers to expand their operations to respond to consumer demand. For example, the lack of inspected slaughter, cut and wrap, co-packing and processing facilities in this region has limited market opportunities for many farmers.
- **Refugee and immigrant farmers:** King County is home to a number of refugee and immigrant communities with members who want to start farming businesses. Farmers markets offer a good marketing opportunity for these businesses. The farmers need to build skills in communication, marketing, and raising crops that shoppers want to buy.
- **Access to irrigation:** Some farmers are limited in the crops they can successfully grow because they do not have access to irrigation. Most visible are the Hmong farmers who grow the flowers sold at Pike Place Market and all markets in the county. These farmers are unable to grow more valuable vegetables because the land they farm does not have access to water for irrigation.
- **Ability to be a successful direct marketer:** To be successful in a farmers market setting, a farmer must have a pleasing display and be skillful talking with people and promoting his/her products. They also need to be skilled at finding and retaining trustworthy employees who can represent the farm at farmers markets. These skills are beyond the traditional skills needed to be a successful farmer.

VI. RECOMMENDATIONS

The following are the key recommendations based on an analysis of the questionnaires and discussions with market managers, farmers, cities and organizations. Some of the

recommendations are funded under existing work programs in 2010, but are not secure for the future. Some are longer term needs for which there is no identified lead agency or funding.

A. Develop cross-jurisdictional support

The farmers market system functions across numerous jurisdictional boundaries. Most markets are located in cities while most farms are located in the unincorporated rural area. Many farmers cross county boundaries to sell at markets. For example, Puget Sound Fresh encompasses a multi-county area. A support system consistent with the cross-jurisdictional nature of farmers markets needs to be developed. King County should lead discussions to develop this new framework while continuing to support King County farmers and area farmers markets.

- Continue discussions with cities about their roles supporting farmers markets and work to identify opportunities for future partnerships.
- Support markets' efforts to secure their locations.
- Support *FARMS report* recommendation that the Agriculture Commission and King County work with cities and other stakeholders in 2010 to determine the best ways to provide for and fund marketing and economic development services that benefit farmers and shoppers in King County and the region. Funding might include increased support from the cities, King Conservation District, other counties and participating farmers.

B. Continue existing support to markets

Market managers identified the need for opportunities to learn from and communicate with their peers to address issues of mutual concern. They want to work together to strengthen their markets and increase their shopper base. King County has been facilitating quarterly meetings to provide these opportunities, and has been providing individual assistance to market managers and to groups wanting to start new markets. Although the King County Agriculture Program is funded in 2010 to provide the following assistance, the services are at risk in the future in the absence of inter-jurisdictional funding.

- Continue the quarterly Farmers Market Managers Forum.
- Continue close partnership with Public Health—Seattle & King County and farmers markets to continue looking at ways to incorporate new products and expand farm sales at farmers markets without jeopardizing public health and food safety.
- Continue consulting with market managers and others on best practices, strategies to resolve problems and business development.
- Help organizations who want to open new markets to understand what is needed to be successful.

C. Research and planning

There is a need for more research and strategic planning to help farmers markets adapt to a more sophisticated marketplace and to develop adequate, stable revenue streams. WSU Small Farms

Program is currently conducting state-wide research about farmers markets and farmers that will incorporate the findings and recommendations from this report. The results will help build long-term capacity to address the ongoing research and educational needs of farmers market organizations across Washington State.

- Support WSU Small Farms Program's research efforts, and participate in the research process to ensure it meets the needs of King County markets and farmers.
- Conduct a study of King County markets that evaluates such things as market performance, viability of locations, shopper support, farmer supply, vendor mix, business plans, budgets, subsidy supports, and other criteria needed to develop a long-term plan for farmers markets throughout the county.
- Research and identify other farmers market models that might work in different communities. There is a strong need to understand the relationship between numbers of markets and available farmers to sell at them.
- Work with local governments and organizations to identify policy objectives that can help farmers markets and direct-marketing farmers be successful over the long term.
- Expand efforts to conduct formal price comparisons between groceries and farmers markets.
- Identify new models for small farmer participation at farmers markets. This could include developing new methods to match farmers with markets looking for more vendors, supporting new farming projects, and methods to encourage farmers to sell at smaller markets. This is an important need that will help farmers and markets adapt to changing market conditions and communities' desires for successful farmers markets.

D. Provide needed education and training for individual market managers

Market managers want training in business and financial skills to help them understand and make better financial decisions. There are many organizations such as WSU, local community colleges, the Washington State Farmers Market Association, and Cascade Harvest Coalition that could provide training. However, without more staff and financial support there is no organization with the capacity to do so.

E. Increase visibility of farmers markets

A coordinated long-term effort is needed to develop and expand shopper interest in farmers markets. The first two items below are funded in 2010, but ongoing funding is uncertain. The remaining items are not funded.

- Continue to support the Cascade Harvest Coalition and the Puget Sound Fresh program to ensure that existing marketing and education programs about locally grown food, farm products, farmers markets and local farmers continue to build consumer awareness, interest and, enthusiasm.

- Expand the Puget Sound Fresh website to provide more information about farmers markets. King County developed and continues to maintain this very useful resource for farmers, markets and consumers.
- Support farmers markets' efforts to develop a highly visible, regional marketing campaign that helps markets position themselves with the focus on fresh food supporting Washington's family farmers.
- Evaluate incentive programs that offer "rewards" to shoppers at any farmers market in King County. Pilot programs over the past two years have shown this could be an effective way for markets to expand participation by lower income or infrequent shoppers.
- Develop partnerships with schools and kids. Identify ways to promote farmers and markets at schools, such as field trips to farms and markets, and farmer visits to schools.

F. Expand electronic card capabilities

Markets and farmers need to be able to accept electronic cards in order to be accessible to more shoppers. There is a possibility for a partnership with Public Health—Seattle & King County to help in this effort because it will expand opportunities for low-income residents to purchase fresh nutritious food.

Comprehensive Plan policy R-675

King County should collaborate with other organizations to further the development of programs that increase the ability of shoppers to use electronic forms of payment at farmers markets and farm stands.

- Identify additional ways that markets can be more accessible to low-income customers.
- Work with city-sponsored farmers markets and partners to identify new models for accepting credit, debit, and SNAP cards to allow city-run markets to accept electronic technology.
- Support efforts to help additional farmers markets start accepting credit, debit, and SNAP cards.

G. Expand support for farm viability

Markets that are well-managed and broadly supported offer important revenue options for local farmers. Further, without diverse and vibrant local agriculture, farmers markets cannot survive. The recommendations in the *FARMS Report* provide guidance for actions that can be taken to protect local agriculture and the availability of local farmers for the markets. These efforts are only partially funded in 2010 and have no clear future funding.

- Implement the recommendations in the *FARMS Report* to reduce the barriers to farming in King County, such as land affordability, irrigation, training, access to needed infrastructure, and financing opportunities.

- Provide training for farmers to enhance marketing skills and increase their success at farmers markets.
- Continue and fund efforts to support the county's new farmers, including refugee and immigrant farmers, who want to direct-market by connecting them with organizations and groups who can provide assistance.
- County staff should support ongoing work by partners to help county farmers to participate in food safety and Good Agricultural Practices programs.

VII. CONCLUSION

Farmers markets have grown dramatically in the past 10 to 15 years, not just in King County but around the state and the nation. They have become cherished institutions in their communities. Markets provide farmers with an opportunity to connect directly to their customers. Markets are essential to farming businesses and the viability of agriculture in the region. But even more than that, farmers markets serve the community: they provide a huge selection of tasty and nutritious food, they bring people together in a vibrant economic activity, and they offer opportunities for education and community involvement. Citizens and governments should support farmers markets both because of the benefits they provide to farmers, and because they improve the quality of life for citizens in the communities in which they are located.

The research for this report shows all farmers markets, regardless of their size, depend on public subsidy and support to sustain the many services they provide for farmers, consumers, and their communities. Farmers markets currently operate on shoestring budgets, and stall revenues do not cover the entire cost of the operation. Many markets locations are not secure for the future. Other needs include manager training, more visibility, technology to accept electronic payments, and research to better understand how markets can be successful in a variety of communities.

Most jurisdictions already provide some form of support to farmers markets. Every market manager recognizes this support and values it. However, more support from the cities in which markets are located is needed. Most of the farmers who participated in this report earn the majority of their income from selling at farmers markets and other direct sales to city residents. The future of farming and meeting the demand for locally grown food is integrally tied to the cities. This relationship needs to be recognized and cultivated.

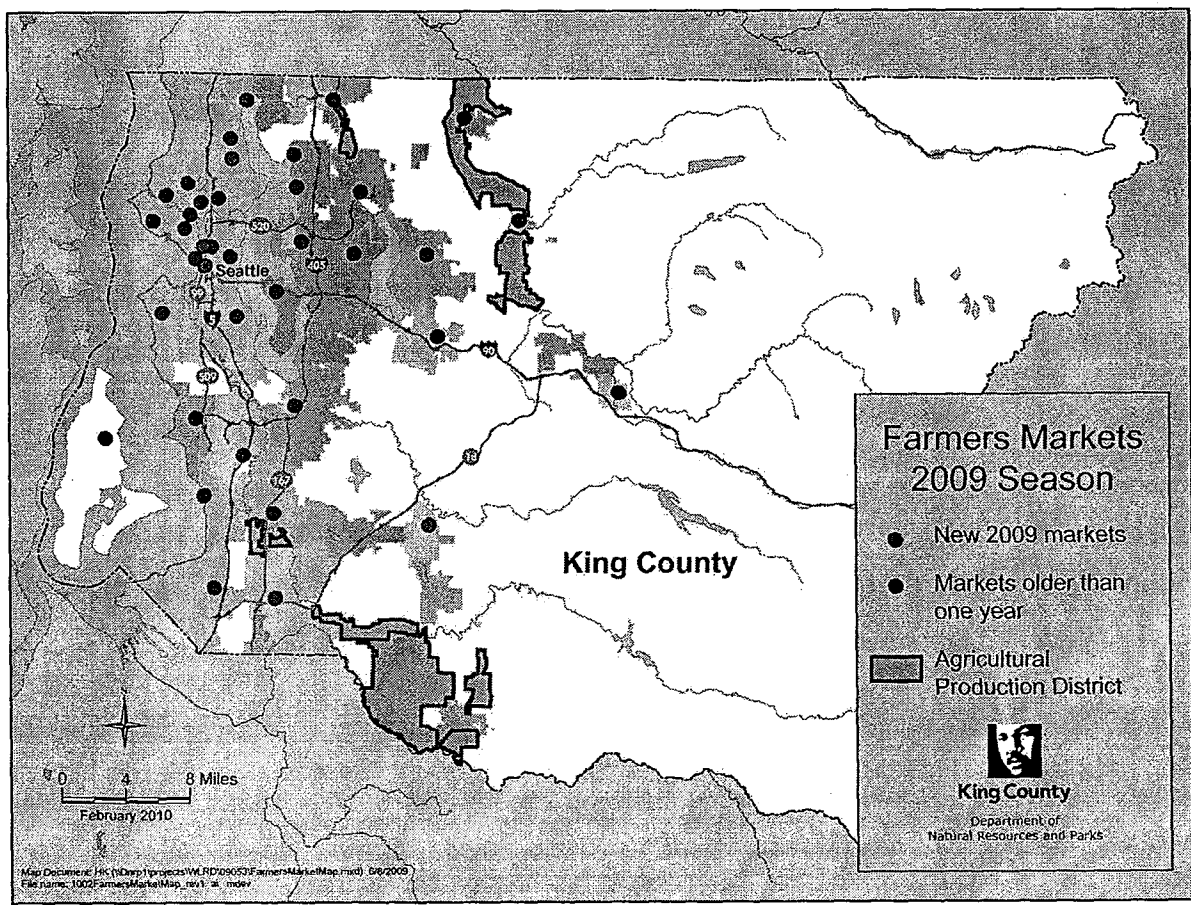
There is a network of organizations, including King County, Cascade Harvest Coalition, WSU, and Washington State Farmers Market Association, that provide important support to farmers markets. These groups can play roles in carrying out the recommendations in this report if they have the funding to do so.

Paying for the services and support needed to sustain farmers markets is a challenge. Funding could be a combination of public and private, local and regional. An inter-jurisdictional approach will be necessary to provide what is needed. King County should begin discussions with cities about funding services to farmers markets.

The future success of farmers markets is integrally linked to an ongoing commitment to retain farmland and ensure viable farming options. The *FARMS Report* identifies the barriers that farmers must overcome in order to stay on the land and be successful. The report notes that it is particularly costly and challenging to farm in urban counties. It provides many recommendations to help existing farmers and to support a new generation of farmers who can continue the tradition. At all levels, efforts to support farmers markets must be coordinated with efforts to support farming and food production.

King County and Washington State are full of creative entrepreneurs who are operating farmers markets, farming the land and managing support organizations that help both groups. Policy makers and local jurisdictions need to work together to promote farmers markets as part of a regional and sustainable food economy that can work for farmers, consumers and the region.

Comprehensive Plan policy R-672
 King County should prioritize its programs to help build and support a sustainable, reliable, equitable, and resilient local food system.



**Farmers Markets at a Glance
Questionnaire Results TABLE 1**

Farmers markets offer hundreds of small family businesses the opportunity to sell their products to hundreds of thousands of King County residents. The markets in King County represent over 250 farming families, many of whom depend on the sales from these markets to remain on their land and continue farming. In 2009, the combined sales from these markets generated \$20 to \$30 million for farmers and small food vendors. More information can be found at: <http://www.kingcounty.gov/environment/waterandland/agriculture.aspx>

Market name	Days Open	Years in operation	Organization structure	Manager's years of experience	Manager's status	Season	Daily shopper counts	Total shoppers 2009	Market site	Market site publicly or privately owned	Pay rent for site	Volunteers	Total vendors	Subsidized or donated support	Advisory Groups Manager Reports to
Auburn International Farmers Market	Sunday	1	City sponsored	1	Contractor, part time	June - Sept	1,000	20,000	Sound Transit Plaza	Public	No	8-10 people 500+ hours	Farmers: 50 Crafters: 20 Other: 10	Rent, advertising, volunteers, grants, donations (cash), in kind contribution, permitting	Auburn Dept. Parks, Arts, & Recreation
Bellevue Farmers Market	Saturday	1	Nonprofit, 501(c)(3)	6	Employee, part time	June - Nov	925	23,141	Parking lot	Private	No	5 people 2,127 hours	Farmers: 33 Other: 18.5	Rent, advertising, volunteers, grants, donations (cash), in kind contribution, permitting	Board of Directors
Bellevue Farmers Market	Thursday	6	Nonprofit, 501(c)(3)	6	Employee, part time	May - Oct	1,654	38,034	Parking lot	Private	No	See above	Farmers: 43 Other: 18	Same as above	same as above
Bellevue - Crossroads Farmers Market	Tuesday	6	Sponsored by shopping center	16	Contractor, part time	May - Oct	1,600	28,233	Parking lot	Private	No	0	Farmers: 28 Other: 7	Subsidized by ownership of shopping center	Shopping Center Property Director
Burien Farmers Market	Thursday	8	Nonprofit, 501(c)(3)	8	Contractor, part time	May - Oct	1,500	36,000	Street	Public	No	1 person	Farmers: 20 Crafters: 15 Other: 7	None	Discover Burien Board of Directors
Carnation Farmers Market	Tuesday	7	Program of Sno-Valley Tilth, nonprofit	4	Contractor, part time	May - Sept	1,200	26,400	Street/Lawn area	Public & Private	No	5+ people	Farmers: 20 Crafters: 1 Other: 10	Community donations, Sno-Valley Tilth fundraising	Sno-Valley Tilth Executive Committee & Board of Directors
Des Moines Waterfront Farmers Market	Saturday	4	In transition to nonprofit status	4	Contractor, part time	June - Oct	900	20,000	Shared marina parking lot	Public	No	25 people 3,000+ hours	Farmers: 11 Crafters: 6 Other: 8	Rent, volunteers, permitting	Board of Directors
Duwall Farmers Market	Thursday	5	Owner/operator	5	Owner operator	May - Sept	1,000	18,000	City Park	Public	Yes	5 people	Farmers: 10 Crafters: 6 Other: 5	Advertising, donations from local businesses	Privately owned

Market name	Days Open	Years in operation	Organization structure	Manager years of experience	Manager's status	Season	Daily shopper counts	Total shoppers 2009	Market site	Market site publicly or privately owned	Pay rent for site	Volunteers	Total vendors	Subsidized or donated support	Advisory Groups Manager Reports to
Federal Way Farmers Market	Saturday	6	Nonprofit, not a 501(c)(3)	6	Volunteer, part time	May - Nov	unknown	unknown	Parking lot	Private	Yes	0	Farmers: 25 Crafters: 15 Other: 21	Market management	No answer provided
Issaquah Farmers Market	Saturday	20	City sponsored	10	City employee	April - Oct	4,500	125,000	Parking lot	Private	No	100 hours	Farmers: 31 Crafters: 42 Other: 11	Grants, donations (cash)	Issaquah Parks & Recreation Department
Kent Farmers Market	Saturday	36	program of a nonprofit	2	Volunteer, part time	June - Sept	2,000	30,000	Streets and city park	Public	Yes	10 people	Farmers: 23 Crafters: 60 Other: 20	Subsidized rent and volunteers	Board of Directors
Kirkland Friday Night Market at Juanita Beach	Friday	3	City sponsored		City employee, part time	May - Oct	1,000	20,000	City Park	Public	No	3 people 600 hours	Farmers: 25 Crafters: 15 Other: 10	City support	Kirkland Parks & Community Services
Kirkland Wednesday Market	Wednesday	9	Program of Kirkland Downtown Assn.	2	Contractor, part time	May - Oct	2,500	52,000	City Park	Public	Yes	15 people	Farmers: 32 Crafters: 10 Other: 18	Grants	Board of Directors
Lake Forest Park	Sunday	5	Nonprofit, 501(c)(3)	16	Contractor, part time	May - Oct	8,000	200,000	Shopping Center Parking lot	Private	No	24 people 664 hours	Farmers: 35 Other: 6	Rent, grants, in kind contributions	Market Advisory Board, Friends of Third Place Commons
Maple Valley Farmers Market	Saturday	1	Nonprofit, 501(c)(3)	1	2 volunteers, part-time	June - Oct	950	18,000	School Play-ground	Public	No, pay for janitor	50 people 1000s of hours	Farmers: 30 Crafters: 31 Other: 12	Grants, donations (cash), in-kind & business sponsorships	Board of Directors
Mercer Island Farmers Market	Sunday	2	Nonprofit, 501(c)(3)	2	Contractor, full time	June - Oct	2,400	36,640	City street	Public	No	40 people 2000 hours	Farmers: 26 Other: 14	Volunteers, grants, in kind contributions, permitting	Executive Committee
North Bend Farmers Market	Thursday	6	City sponsored	new	City employee	June - Aug	350	5,000	Community Center Parking lot	Public	No	0	Farmers: 9 Crafters: 9 Other: 19	City support	St View Metro Park Director
Redmond Farmers Market	Saturday	35	Nonprofit	17	Contractor, part time	May - Oct	2000		Parking lot	Private	Yes	0	Total vendors: 135	None	Board of Directors
Renton Farmers Market	Tuesday	9	Sponsored by City and Chamber	2.5	City employee, part time	June - Oct	4,000	75,000	Park	Public	No	2,000 hours	Farmers: 40 Other: 11	Rent volunteers, permitting	Nonprofit group & city supervisor

Market name	Days Open	Years in operation	Organization structure	Manager, years of experience	Manager's status	Season	Daily shopper counts	Total shoppers 2009	Market site	Market site publicly or privately owned	Payment for site	Volunteers	Total vendors	Subsidized or donated support	Advisory Groups Manager Reports to
Sammamish Farmers Market	Wednesday	2	Program of Sammamish Chamber of Commerce	1	Two Chamber employees, part time	May - Sept	500	10,000	City Hall/Town Center Commons	Public	No	1,000+ hours	Farmers: 14 Crafters: 2 Other: 6	Rent, volunteers, financial donation from city	Steering committee
*Seattle-Ballard Farmers Market	Sunday	10	Nonprofit, not a 501(c)(3) (SFMA)	12	Employee, full time, SFMA	Year round	7,301	379,639	Closed city street	Public	Yes	0	Farmers: 44 Crafters: 15 Other: 17	Permitting	Board of Directors
*Seattle-Broadway Sunday Farmers Market	Sunday	6	Nonprofit, 501(c)(3) (NFMA)	16	Employee, full time, NFMA	May - Dec	1,330	43,928	Parking lot	Private	Yes	6 people	Farmers: 33 Other: 9	Grants, donations (cash), permitting	Board of Directors, Seattle Office of Economic Development (OED)
*Seattle-Cascade Farmers Market	Thursday	1	Program of Pike Place Market	10	Employee, full time	June - Sept	500	7,000	Closed city street	Public	No	10 people 29 hours	Farmers: 9 Crafters: 1 Other: 3	Grants	Steering committee
*Seattle-City Hall Farmers Market	Tuesday	1	Program of Pike Place Market	10	Employee, full time	June - Sept	1,500	22,500	City Hall Plaza	Public	No	0	Farmers: 11	Subsidized by Pike Place Market, Public Development Authority	Pike Place Market PDA
Seattle-Clean Greens Market	Friday Saturday	2	Program of Black Dollar Days Task Force	2	Employee, full time, BDDTF	June - Nov	25-30	1,500	in front of BDDTF office	Private	No	8 people 1,500 hours	Farmers: 1	volunteers, grants, donation	Director Black Dollar Days Task Force
*Seattle-Columbia City Farmers Market	Wednesday	11	Nonprofit, 501(c)(3) (NFMA)	11	Employee, full time, NFMA	May - Oct	1,766	45,940	Parking lot	Private	No	8 people 259 hours	Farmers: 36 Other: 12	Rent, volunteers, grants, donations (cash)	Board of Directors, Seattle OED
*Seattle-Lake City Farmers Market	Thursday	8	Nonprofit, 501(c)(3) (NFMA)	16	Employee, full time, NFMA	June - Oct	1,122	24,696	Public park and street	Public	Yes	8 people 46 hours	Farmers: 28 Other: 9	Grants, donations (cash)	Board of Directors, Seattle OED
*Seattle-Madrona Farmers Market	Thursday	8	Nonprofit, not a 501(c)(3) (SFMA)	12	Employee, full time, SFMA	May - Sept	1,272	25,442	grocery store parking lot	Private	No	0	Farmers: 22 Crafters: 3 Other: 13	Rent	Board of Directors
*Seattle-Magnolia Farmers Market	Saturday	7	Nonprofit, 501(c)(3) (NFMA)	16	Employee, full time, NFMA	June - Oct	812	17,070	Parking lot	Public	Yes	7 people 68 hours	Farmers: 26 Other: 9	Grants, donations (cash)	Board of Directors, Seattle OED

Market name	Days Open	Years in operation	Organization structure	Manager's years of experience	Manager's status	Season	Daily shopper counts	Total shoppers 2009	Market site	Market site publicly or privately owned	Pay rent for site	Volunteers	Total vendors	Subsidized or donated support	Advisory Groups Manager Reports to
Seattle Meadowbrook Farmers Market	Sunday	1	Nonprofit, not a 501(c)(3)	1	Volunteer, part time	May - Oct	300	6,000	School Play-ground	Private	Yes	2,500 hours	Farmers: 12 Crafters: 2 Other: 11	Rent, volunteers, donations (cash), in kind contributions, permitting	No answer provided
*Seattle-Phinney Farmers Market	Friday	3	Nonprofit, 501(c)(3) (NFMA)	16	Employee, full time, NFMA	June - Oct	993	18,882	Parking lot	Private	Yes	6 people 20 hours	Farmers: 28 Other: 8	Grants, donations (cash)	Board of Directors, Seattle OED
*Seattle-Pike Place Market	Everyday	103	Nonprofit, 501(c)(7)	2	Employee, full time, Pike Place	Year round	25,000	10 million (includes tourists)	Inside building and street	Public	No	0	Farmers: 81 Crafters: 200 Other: 300	The Market Foundation has 50 volunteers for special events & services	Pike Place Market PDA
Seattle-Queen Anne Farmers Market	Thursday	3	Nonprofit, 501(c)(3)	1	Contractor, part time	June - Oct	980	16,700	Street	Public	No	28 people 500 hours	Farmers: 22 Other: 7	Advertising, volunteers, grants, donations (cash), in kind contributions, permitting	Queen Anne Neighbors for Responsible Growth, Seattle OED
*Seattle-University District Farmers Market	Saturday	16	Nonprofit, 501(c)(3) (NFMA)	16	Employee, full time, NFMA	Year round	2,515	130,791	Parking lot	Private	Yes	22 people, 90 hours	Farmers: 50 Other: 14	Volunteers, grants, donations (cash)	Board of Directors, Seattle OED
*Seattle-Wallingford Farmers Market	Wednesday	4	Nonprofit, not a 501(C)(3) (SFMA)	12	Employee, full time, SFMA	May - Sept	1,619	32,371	Parking lot	Private	Yes	0	Farmers: 24 Crafters: 10 Other: 1	Rent	Board of Directors, Seattle OED
*Seattle West Seattle Farmers Market	Sunday	10	Nonprofit, 501(c)(3) (NFMA)	16	Employee, full time, NFMA	Year round	1,245	64,776	Parking lot	Private	No	6 people 18 hours	Farmers: 34 Other: 10	Rent, grants, donations (cash)	1 Seattle OED
Vashon Farmers Market	Wednesday Saturday	about 20	Program of Vashon Island Growers Assn, nonprofit	no answer provided	Employee, part time	March - Dec	288	15,250	Park	Public	No	10 people 200+ hours	Farmers: 21 Crafters: 33 Other: 5	Sponsor purchased land, donated to park district, can use it in perpetuity as a farmers market	Market Committee, VIGA Board of Directors
Woodinville Farmers Market	Saturday	16	Nonprofit, not a 501(c)(3)	16	Contractor, part time	May - Sept	2,000	48,000	Unknown for 2010	Unknown	unknown	0	Farmers: 9 Crafters: 11 Other: 3	None	Board of Directors

*In Seattle, several entities operate many of the farmers markets, as follows:

*SFMA: Seattle Farmers Market Association, operates three markets in Seattle

*NFMA: Neighborhood Farmers Market Alliance, operates seven markets in Seattle

*Pike Place Market: operates two additional markets in Seattle



2009 FARMS Report
Appendix C

King County Department of Natural Resources and Parks

Water and Land Resources Division

SURVEY ON AGRICULTURE IN KING COUNTY

RESEARCH REPORT

May 5, 2009

Prepared by:

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**King County Department of Natural Resources and Parks
Water and Land Resources Division
SURVEY ON AGRICULTURE IN KING COUNTY
RESEARCH REPORT**

May 5, 2009

In order to increase understanding of King County residents' opinions of and experiences with farms and farming in the county, the Water and Land Resources Division, King County Department of Natural Resources and Parks, conducted a survey of county residents. Research results will be used in the report on *Future of Agriculture, Realized Meaningful Solutions (FARMS)* and in policy and program planning relating to agriculture in the county.

This report describes the survey on agriculture in King County. Research objectives are discussed first, followed by research methods, results, and key findings and conclusions. The appendix contains a copy of the questionnaire used in the survey.

Objectives

The information objectives of the survey on agriculture in King County included the following:

- Assess King County residents' opinions of the importance of having farms and farming in King County, and explore residents' impressions of farms and farming in the county;
- Assess residents' opinions of the importance being able to engage in selected activities related to local farms and farming, including purchasing farm food products and visiting farms;
- Examine the frequency with which residents purchase food produced on King County Farms, locations in which the food is purchased, and importance of selected factors in the decision to purchase food from local farms.
- Examine the frequency with which residents visit food-producing and horse farms in King County; and
- Assess residents' opinions of the importance of using and preserving land for agriculture in King County and continuing support for farmers in the county.

Research Methods

Between March 16 and March 26, 2009, a total of 450 telephone interviews were completed with residents of King County. The first 400 interviews were completed with individuals who were randomly selected from lists of county residents; 360 interviews

were-completed with residents of urban areas, and 40 with residents of rural areas. Then, an additional 50 interviews were completed with individuals who were randomly selected from zip codes in rural parts of the county and who said they lived in rural areas. Thus, interviews were completed with a total of 360 residents of urban areas and 90 residents of rural areas in King County. The additional interviews with rural residents permitted more accurate assessment of the views of rural residents and comparison between urban and rural residents.

The questionnaire used in the research sought information about residents' opinions of and experiences with farms and farming in King County. It was developed with the input and approval of the King County Water and Land Resources Division. A copy of the questionnaire used in the survey is included in the appendix.

Limitations

If the 450 survey respondents comprised a random sample of all county residents, the maximum margin of error would be expected to be less than ± 4.7 percent at the 95 percent confidence interval ($p < .05$). If the 360 residents of rural areas comprised a random sample of the 1,738,195 residents of rural areas, the maximum margin of error would be expected to be less than ± 5.2 percent for urban residents at the 95 percent confidence interval. If the 90 residents of rural areas comprised a random sample of the 144,000 rural residents, the maximum margin of error would be expected to be less than ± 10.3 percent for rural residents at the 95 percent confidence interval.¹

Results

The responses to the survey on agriculture in King County are presented below for each of the information objectives addressed by the survey

Since additional interviews were completed with rural residents, there was a higher proportion of rural residents among the survey respondents than is found among the population of county residents. Therefore, the responses of urban and rural residents were weighted according to their actual representation in King County (urban – 92.3%; rural – 7.7%), so that the overall survey results presented below reflect the actual composition of urban and rural residents in the county.

In addition, the survey responses of urban and rural residents were analyzed to identify statistically significant differences between the two groups. When survey results differed significantly between urban and rural residents, those differences are discussed below.² Tables detailing responses to all questions in the survey are available separately.

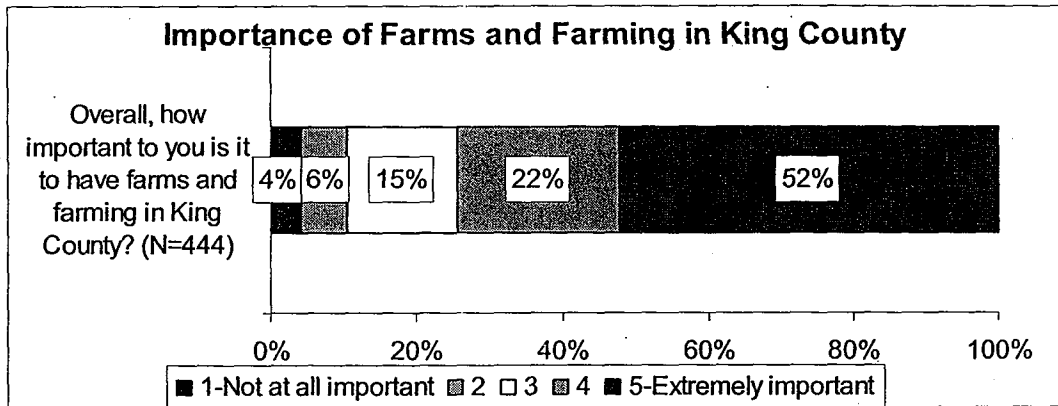
¹ Population estimates are taken from the 2008 Annual Growth Report.

² Differences between the responses of rural versus urban residents were tested using a t-test for independent samples or a chi-square test (*SPSS 15.0 for Windows*, Release 15.0.1.1, 3 July 2007). Results were considered statistically significant when the probability of that outcome occurring by chance was less than .05 ($p < .05$).

All of the survey results presented below are based on the number of residents answering each question, which usually was less than 450 since not all respondents answered every question. The number of respondents answering each question is noted in the charts and tables (e.g., N=444).

Importance and Impressions of Farms and Farming in King County

First, King County residents were asked, “Overall, how important to you is it to have farms and farming in King County?” Respondents used a five-point scale, where 1 means “not at all important” and 5 means “extremely important,” to answer this question. As the next chart shows, half (52%) of the residents stated that “to have farms and farming in King County” was “extremely important” to them, and almost three-fourths of the residents rated the importance of having farms and farming in King County a 4 or a 5 on the five-point scale where 5 means “extremely important.” Unless otherwise noted, percentages do not total 100 in this and subsequent charts due to rounding.



Ratings of the importance of farms and farming in King County provided by residents who live in rural areas did not differ significantly from the ratings provided by residents who live in urban areas.

Next, residents were asked, “When you think of farms and farming in King County, what comes to mind?” The most common responses to this question are summarized in the next table. As this chart shows, residents most frequently said that food crops or farms come to mind when thinking of farms and farming in King County, followed by milk, cheese, and dairy products or farms. Only 12 (3%) respondents said that they didn’t know King County had farms, and only 2 (<1%) said that “nothing” comes to mind when they think of farms and farming in King County. Percentages total more than 100 in the following table because some respondents gave more than one answer to this question.

**When you think of farms and farming in King County,
what comes to mind?**

(N=444)

Food crops, farms (fruit, berries, vegetables)	49%
Milk, cheese, dairy products, farms	22%
Disappearing farm lands - concrete, development	18%
A specific town or area (Carnation, etc.)	17%
Small farms, family, not big business	16%
Fresh, local, sustainable products	15%
Open spaces - fields, pastures, acreage, rural areas	15%
Farmer's markets	11%
Livestock	11%
Organic farming, healthy, good for environment	8%
Truck farms - general	8%
Animals - general	7%
Horse farms, stables	6%
Plants, flowers	5%
Gardening - backyard, community	5%
Farm lifestyle, hard work	4%
Chicken farms	3%
Farming is of little, no concern to me	3%
Agriculture - general	3%
Wheat, hay, grain farms	3%
Didn't know King County had any farms	3%

Activities Relating to Farms and Farming in King County

Residents were asked to rate how important it is to them personally to be able to do each of ten activities that relate to farms and farming in King County. As the next chart shows, the activity rated most important was, "Enjoy rural scenery and open spaces provided by the agricultural landscapes in King County." Over half (55%) of the residents rated this "extremely important," and three-fourths (77%) rated enjoying rural scenery and open spaces a 4 or a 5 on the five-point scale where 5 means "extremely important."

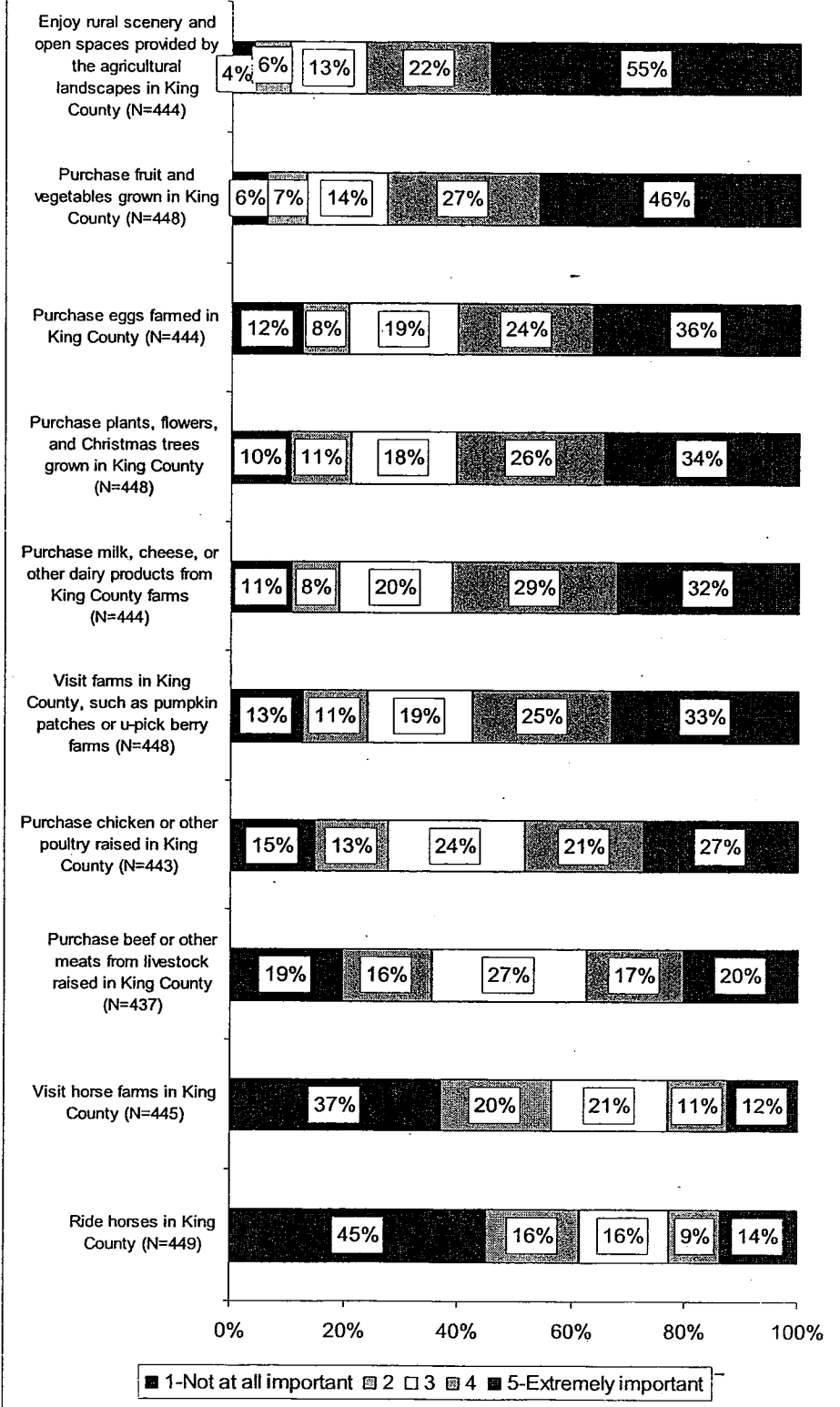
Almost three-fourths (73%) of the residents rated "purchase fruit and vegetables grown in King County" a 4 or a 5 on the five-point scale where 5 means "extremely important."

Between 58 and 61 percent of the residents rated four activities a 4 or a 5 on the five-point scale where 5 means "extremely important": "Purchase eggs farmed in King County," "Purchase plants, flowers, and Christmas trees grown in King County," "Purchase milk, cheese, or other dairy products from King County farms," and "Visit farms in King County, such as pumpkin patches or u-pick berry farms."

Purchasing chicken or other poultry and purchasing beef or other meats from livestock in King County were rated somewhat lower in importance (48% and 37%, respectively, rated these a 4 or 5 on the five-point scale).

Visiting horse farms and riding horses in King County were the activities rated lowest in importance by residents (23% rated these a 4 or a 5 on the five-point scale).

Importance of Being Able To Do Each Activity

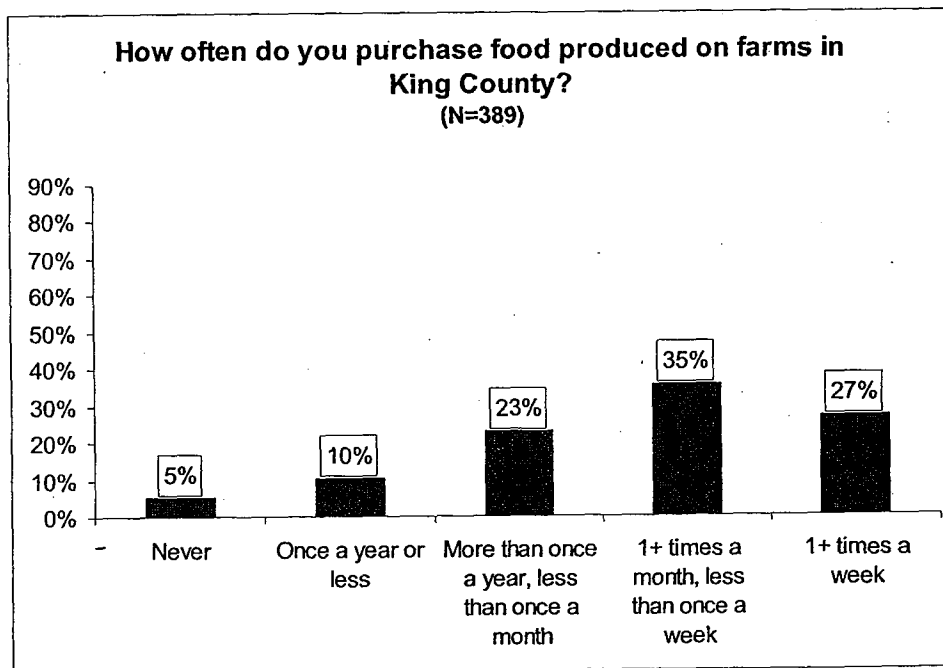


Six of the ten activities relating to farms and farming in King County were rated significantly higher in importance by rural residents than by urban residents:

- “Purchase plants, flowers, and Christmas trees grown in King County,”
- “Visit farms in King County, such as pumpkin patches or u-pick berry farms,”
- “Purchase chicken or other poultry raised in King County,”
- “Purchase beef or other meats from livestock raised in King County,”
- “Visit horse farms in King County,” and
- “Ride horses in King County.”

Purchasing Food Produced on King County Farms

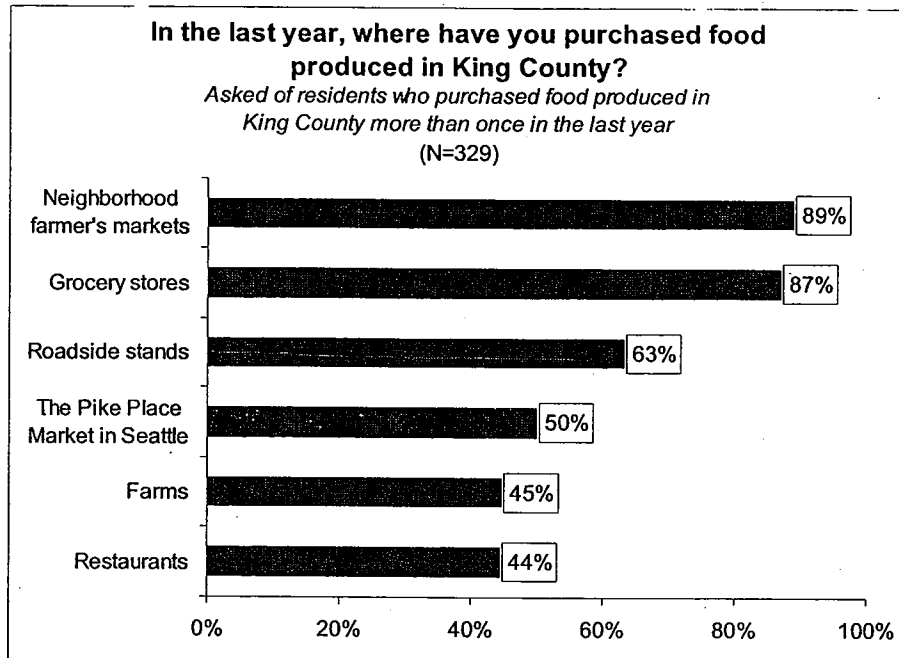
Residents were asked, “How often do you purchase food produced on farms in King County?” Eighty-five percent of the residents who answered this question said that they purchase food produced in King County more than once a year, and 62 percent purchase food produced in King County at least once a month, as shown in the next chart.



Urban and rural residents of King County did not differ significantly in how often they purchase food produced on farms in the county.

The survey respondents who purchase food produced in King County more than once a year also were asked about the places in which they have purchased the food and the importance of several considerations in their decision to purchase food from local farms.

As the next chart shows, most of the residents who have purchased food produced in King County more than once in the last year said that they have purchased it at neighborhood farmer's markets (89%) or in grocery stores (87%). Sixty-three percent said that have purchased food produced in King County at roadside stands, 50 percent at the Pike Place Market, 45 percent on farms, and 44 percent at restaurants.

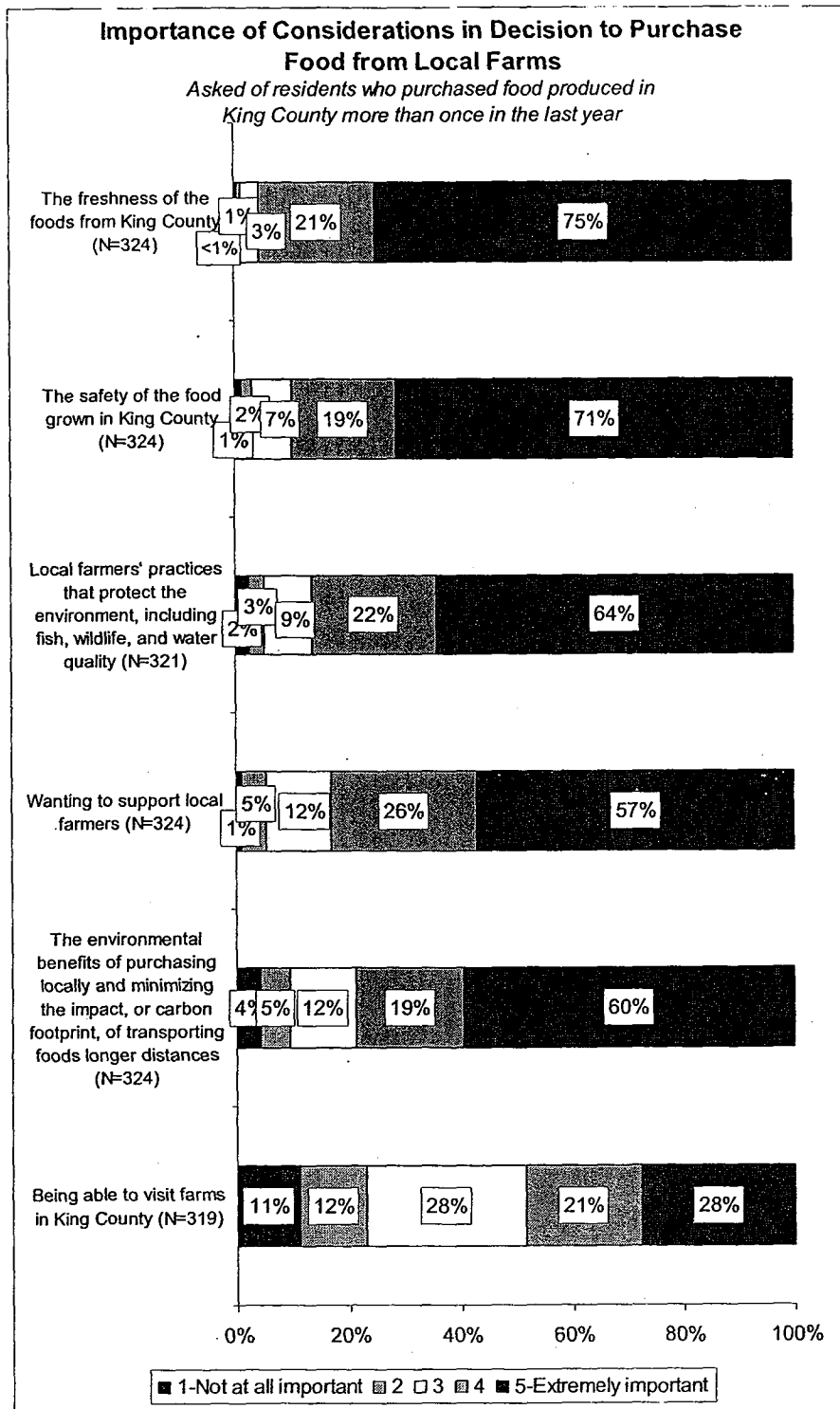


Urban residents were significantly more likely than rural residents to say that they have purchased food produced in King County at the Pike Place Market. On the other hand, rural residents were significantly more likely than urban residents to say that they have purchased food produced in King County at roadside stands. Rural and urban residents' responses did not differ significantly for the other purchase locations.

At least 79 percent of the residents who purchase food produced in King County more than once a year rated five of the six considerations in the decision to purchase food from local farms a 4 or a 5 on the five-point scale where 5 means "extremely important":

- "The freshness of the foods from King County,"
- "The safety of the food grown in King County,"
- "Local farmers' practices that protect the environment, including fish, wildlife, and water quality,"
- "Wanting to support local farmers," and
- "The environmental benefits of purchasing locally and minimizing the impact, or carbon footprint, of transporting foods longer distances."

About half (49%) of the residents rated “being able to visit farms in King County” a 4 or a 5 on the five-point scale where 5 means “extremely important.” These results are shown in the next chart.



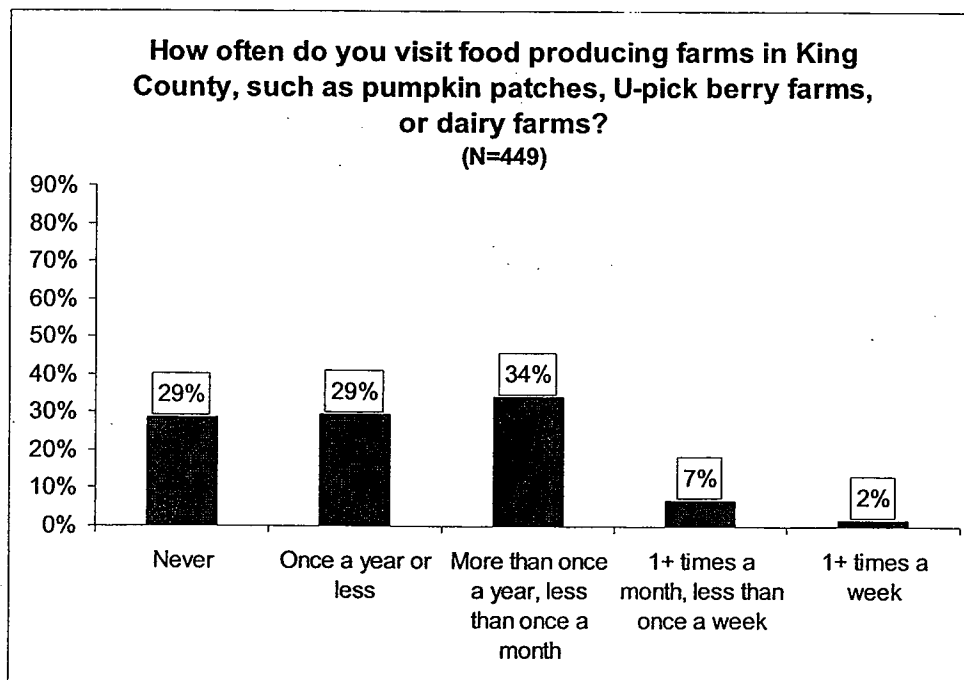
Four of the considerations in decisions to purchase food from local farms were rated significantly higher in importance by rural residents than by urban residents:

- “The freshness of the foods from King County,”
- “The safety of food grown in King County,”
- “Wanting to support local farmers,” and
- “Being able to visit farms in King County.”

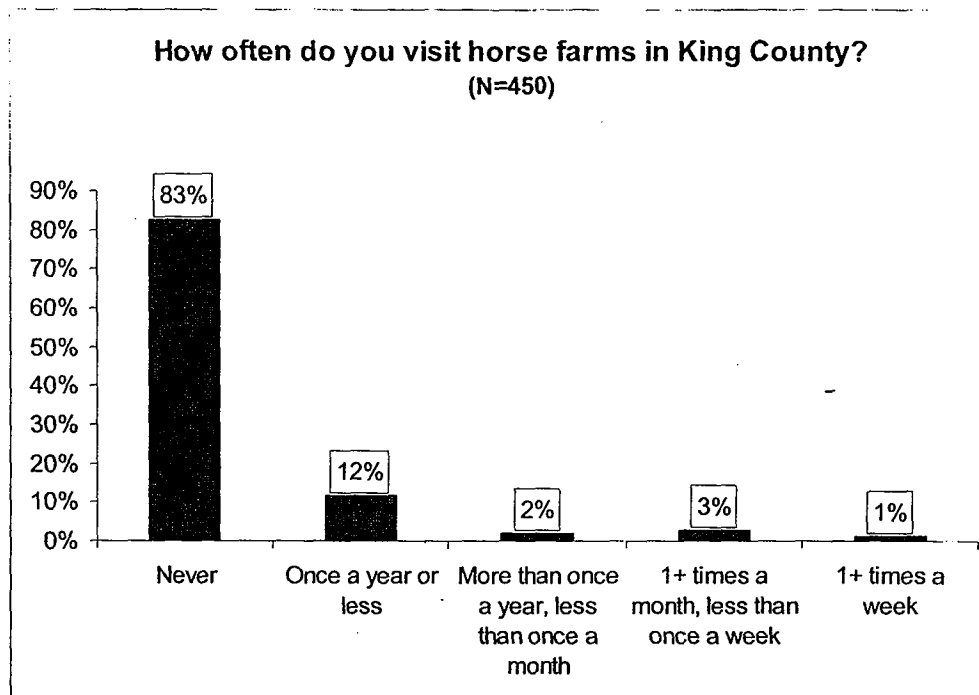
Ratings of the other two considerations, which related to environmental considerations, in decisions to purchase food from local farms did not differ significantly between rural and urban residents.

Visiting Farms in King County

Residents were asked how often they visit food-producing farms and horse farms in King County. As the next chart shows, over 40 percent of the residents said that they visit food producing farms in King County more than once a year.



Just six percent of the residents said that they visit horse farms in King County more than once a year.



Rural residents said that they visit food producing and horse farms in King County significantly more often than urban residents.

Using and Preserving Land for Agriculture

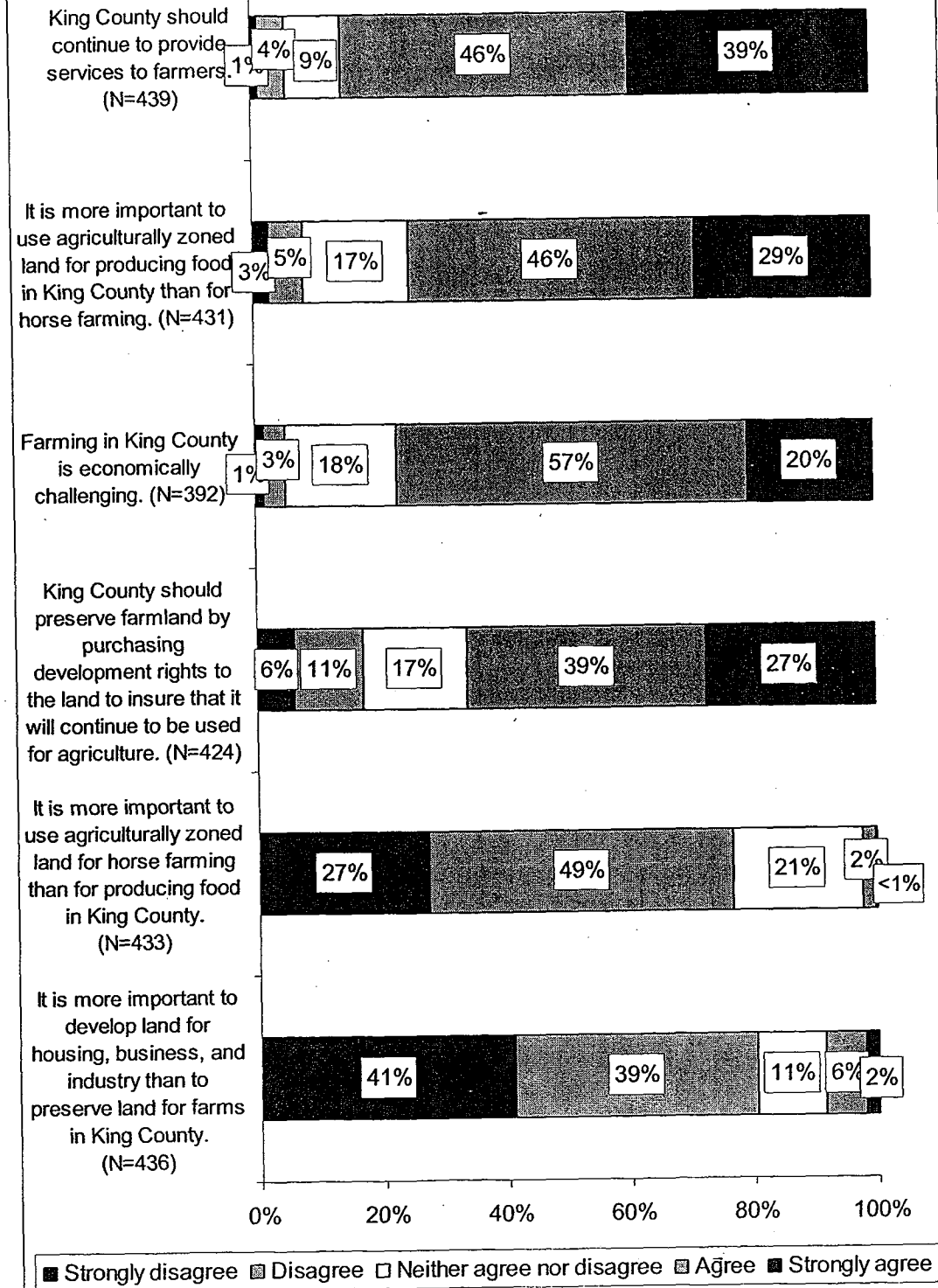
Residents were asked to indicate their level of agreement (“Strongly agree,” “agree,” “neither agree nor disagree,” “disagree”, or “strongly disagree”) with six statements about agriculture in King County, which are shown in the next chart.

Eighty-five percent of the residents said that they “agree” or “strongly agree” with the statement, “King County should continue to provide services to farmers, such as assistance with permits, drainage improvements, promotion of local farm products, and grants to improve environmental practices.”

Between 66 and 77 percent of the residents said that they “agree” or “strongly agree” with the statements, “It is more important to use agriculturally zoned land for producing food in King County than for horse farming,” “Farming in King County is economically challenging,” and “King County should preserve farmland by purchasing development rights to the land to insure that it will continue to be used for agriculture.”

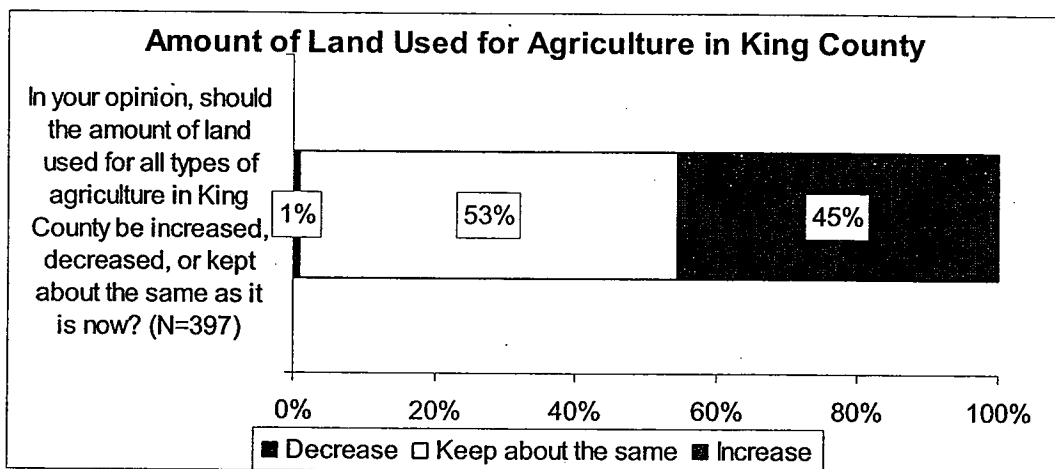
Conversely, 75 and 80 percent of the residents said that the “disagree” or “strongly disagree” with the statements, “It is more important to use agriculturally zoned land for horse farming than for producing food in King County,” and “It is more important to develop land for housing, business, and industry than to preserve lands for farms in King County,” respectively.

Agreement with Statements About Agriculture in King County



Larger proportions of rural than urban residents said that they “agree” and “neither agree nor disagree” with the statement, “It is more important to use agriculturally zoned land for horse farming than for producing food in King County,” while a larger proportion of urban residents said that they “strongly disagree” with this statement. Agreement with the other statements about agriculture in King County did not differ significantly between rural and urban residents.

Forty-five percent of residents said that the amount of land used for all types of agriculture in King County should be increased, and 53 percent said that the amount of land used for all types of agriculture should be “kept about the same as it is now.” Only one percent of the residents said that they thought the amount of land used for agriculture in King County should be decreased, as shown in the next chart.



Responses to the question about whether the amount of land used for agriculture in King County should be increased, decreased, or kept about the same did not differ significantly between rural and urban residents.

Key Findings and Conclusions

The results of the survey on agriculture in King County suggest the following key findings and conclusions:

Having farms and farming in King County and being able to purchase food produced on farms in King County are important to most county residents.

- Almost three-fourths of King County residents rated having farms and farming in King County a 4 or a 5 on a five-point scale where 5 means “extremely important.”

- When asked about the importance of being able to do specific activities relating to farms and farming in King County, about three-fourths of the county residents rated being able to “enjoy rural scenery and open spaces provided by the agricultural landscapes in King County” and being able to “purchase fruit and vegetables grown in King County” a 4 or a 5 on the five-point scale where 5 means “extremely important.” Being able to “visit horse farms in King County” and “ride horses in King County” were the activities rated least important, and 23 percent of the residents rated these a 4 or a 5 on the five-point scale where 5 means extremely important.
- Asking about “farms and farming in King County” brought a variety of images to mind for county residents, but food crops and farms were mentioned most often, followed by dairy products and farms.

Purchasing food produced on farms in King County is a fairly common practice for many residents.

- Sixty-two percent of the residents said that they “purchase food produced on farms in King County” at least once a month, and 85 percent said that they “purchase food produced on farms in King County” more than once a year.
- These residents most often purchase food produced in King County at neighborhood farmer’s markets or grocery stores.
- Between 57 and 75 percent of the residents said that the freshness, safety, and environmental benefits associated with foods produced in King County, as well as wanting to support local farmers, were “extremely important” (5 on the five-point scale) considerations in the decision to purchase food from local farms.

Most residents support continuing county support for farmers in King County and using land for food-producing agriculture in King County.

- Eighty-five percent of the residents said that they “agree” or “strongly agree” with the statement, “King County should continue to provide services to farmers, such as assistance with permits, drainage improvements, promotion of local farm products, and grants to improve environmental practices.”
- Between 66 and 77 percent of the residents said that they “agree” or “strongly agree” with the statements, “It is more important to use agriculturally zoned land for producing food in King County than for horse farming,” “Farming in King County is economically challenging,” and “King County should preserve farmland by purchasing development rights to the land to insure that it will continue to be used for agriculture.”
- Forty-five percent of residents said that the amount of land used for all types of agriculture in King County should be increased, and 53 percent said that the

amount of land used for all types of agriculture should be “kept about the same as it is now.”

Rural residents rated some activities and considerations as more important and more frequently engage in some activities that relate to farms and farming in King County than do urban residents.

- Rural residents engage in some activities relating to farms and farming more often and rate these activities as more important than do urban residents, including visiting food-producing and horse farms; the importance of being able to purchase plants, poultry, and meats from King County; and the importance of visiting farms and riding horses in King County.
- The freshness and safety of foods grown in King County, wanting to support local farmers, and being able to visit farms in King County were more important considerations in decisions to purchase foods produced in King County for rural than for urban residents.

Appendix
Questionnaire

Survey on Agriculture in King County

Phone: () - - -	Zip Code (from list) _____	Zip Type (see list) Urban 1 Rural 2 Both 3
Name: _____		Gender Male 1 Female 2
Interviewer _____ Date _____		Area Type (Q. 2) Urban 1 Suburban 2 Rural 3

Hello, this is _____ with Consumer Opinion Services, a research firm in Seattle. I am calling on behalf of King County as part of a research study. For this study I need to speak with the [male/female] head of this household. Would that be you?

- CONTINUE -- Yes 1
ASK TO SPEAK TO PERSON/FOR TIME TO CALL BACK -- No 2
ASK TO SPEAK TO PERSON/FOR TIME TO CALL BACK -- DK/REF 3

[REPEAT FIRST PARAGRAPH IF NECESSARY.] I am calling on behalf of King County strictly for research purposes. Your answers will be completely anonymous and confidential and will be used by King County in developing policies and programs relating to agriculture in the county. This is not a sales call, and no sales calls or solicitations will result from this call. King County is very interested developing the best possible programs and policies that relate to agriculture.

Note: If respondents ask, they can direct any questions about the survey to Steve Evans, King County Water and Land Resources Division, 206-296-7824.

1. First, do you live in King County?

- CONTINUE - Yes 1
THANK & TERMINATE - No 2
THANK & TERMINATE - DK/REF 3

2. Would you say that you live in an area that is mostly urban, suburban, or rural?

- CONTINUE - Urban 1
CONTINUE - Suburban 2
CONTINUE - Rural 3
THANK & TERMINATE - DK/REF 4

3. Overall, how important to you is it to have farms and farming in King County?

Please rate the importance of farms and farming on a five-point scale, where 1 means "not at all important" and 5 means "extremely important." Would you rate having farms and farming in King County a 1, meaning "not at all important," a 5, meaning "extremely important," or some number in between?

DK/REF 6

4. When you think of farms and farming in King County, what comes to mind? What else? PROBE FULLY.

5. Next I'm going to read a list of activities. Please tell me how important it is to you personally to be able to do each of the activities. Please use a five-point scale where 5 means "extremely important" and 1 means "not at all important." First, how important is it to _____: READ AND ROTATE.

	Not at all important				Extremely important	DK/REF
	1	2	3	4	5	6
Purchase fruit and vegetables grown in King County	1	2	3	4	5	6
Purchase eggs farmed in King County	1	2	3	4	5	6
Purchase chicken or other poultry raised in King County	1	2	3	4	5	6
Purchase beef or other meats from livestock raised in King County	1	2	3	4	5	6
Purchase milk, cheese, or other dairy products from King County farms	1	2	3	4	5	6
Purchase plants, flowers, and Christmas trees grown in King County	1	2	3	4	5	6
Visit farms in King County, such as pumpkin patches or u-pick berry farms	1	2	3	4	5	6
Visit horse farms in King County	1	2	3	4	5	6
Ride horses in King County	1	2	3	4	5	6
Enjoy rural scenery and open spaces provided by the agricultural landscapes in King County	1	2	3	4	5	6

6. How often do you purchase food produced on farms in King County? Please include vegetables, fruits, meat, chicken, eggs, and dairy products. Would you say:

SKIP TO Q. 9 - You never purchase food produced on farms in King County 1

SKIP TO Q. 9 - You purchase food produced on farms in King County once a year or less 2

CONTINUE - More than once a year but less than once a month 3

CONTINUE - One or more times a month but less than once a week 4

CONTINUE - One or more times a week 5

DO NOT READ, SKIP TO Q. 9 - DK/REF 6

7. In the last year, where have you purchased food produced in King County? Have you purchased food at least once during the last year at _____: READ AND ROTATE.

	Yes	No	DK/REF
Neighborhood farmer's markets	1	2	3
The Pike Place Market in Seattle	1	2	3
Roadside stands	1	2	3
Farms	1	2	3
Grocery stores	1	2	3
Restaurants	1	2	3

8. How important to you are the following considerations in your decision to purchase food from local farms? Please use a five-point scale where 5 means "extremely important" and 1 means "not at all important." First, how important is _____: READ AND ROTATE

	Not at all important					Extremely important	DK/REF
	1	2	3	4	5	6	
The safety of the food grown in King County	1	2	3	4	5	6	
The freshness of the foods from King County	1	2	3	4	5	6	
The environmental benefits of purchasing locally and minimizing the impact, or carbon footprint, of transporting foods longer distances	1	2	3	4	5	6	
Local farmers' practices that protect the environment, including fish, wildlife, and water quality	1	2	3	4	5	6	
Being able to visit farms in King County	1	2	3	4	5	6	
Wanting to support local farmers	1	2	3	4	5	6	

9. How often do you visit food producing farms in King County, such as pumpkin patches, U-pick berry farms, or dairy farms? Would you say:

Never 1
Once a year or less 2
More than once a year but less than once a month 3
One or more times a month but less than once a week 4
One or more times a week 5
DO NOT READ - DK/REF 6

10. How often do you visit horse farms in King County? Would you say:

Never 1
Once a year or less 2
More than once a year but less than once a month 3
One or more times a month but less than once a week 4
One or more times a week 5
DO NOT READ - DK/REF 6

11. Next, I'm going to read several statements about agriculture in King County. Please tell me whether you agree or disagree with each statement. First, _____
Do you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree with this statement? READ AND ROTATE.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	DK/REF
It is more important to develop land for housing, business, and industry than to preserve land for farms in King County.	1	2	3	4	5	6
It is more important to use agriculturally zoned land for horse farming than for producing food in King County.	1	2	3	4	5	6
Farming in King County is economically challenging.	1	2	3	4	5	6
King County should preserve farmland by purchasing development rights to the land to insure that it will continue to be used for agriculture.	1	2	3	4	5	6
It is more important to use agriculturally zoned land for producing food in King County than for horse farming.	1	2	3	4	5	6
King County should continue to provide services to farmers, such as assistance with permits, drainage improvements, promotion of local farm products, and grants to improve environmental practices.	1	2	3	4	5	6

12. In your opinion, should the amount of land used for all types of agriculture in King County be increased, decreased, or kept about the same as it is now?

- Increase 1
- Decrease 2
- Keep about the same 3
- DK/REF 4

13. This last question is for classification purposes only. What is your home zip code?

_____ DK/REF 99999

14. Thank you very much for your time and opinions. Your input will be very helpful to King County as it works to develop the best possible policies and programs for agriculture.

15. Record gender (DO NOT ASK):

- Male 1
- Female 2