



FULL REPORT

**Crisis, Opportunity, & Resilience
in NC's Local Food System:**

**A 2020 NC FARMERS
MARKET SURVEY &
ACTION PROPOSAL**

October 2020

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01. Project Introduction

Context

2020 has been a year of crisis and response—can we leverage this experience as a catalyst for change?

Our food system showed its fragility—we must learn from innovations in response to the COVID-19 pandemic. We are also at a moment of energetic and tragic racial awareness—we must seize this moment to confront what it means to be white, to be Black, and to grow racial equity with humility and compassion.

Farmers markets are one of the most visible, identifiable, and accessible parts of North Carolina’s local food system. They bring together small farmers, local businesses and a community of shoppers seeking healthy food and a way to contribute to their local economy. While overall sales at farmers markets hardly hold a candle to the billions of agri-food dollars generated in NC each year, farmers markets support the survival of thousands of small farms in our state, and create places where community itself is built and nurtured.

As we watched the world shudder in the early days of the COVID-19 pandemic, the mainstream food supply chains many of us rely on began to break down. Restaurants closed, school food systems scrambled to pivot to keep kids fed, and the entire food supply chain faced numerous shocks. In the face of this consumer uncertainty many North Carolinians turned to local food options such as home delivery boxes, on-farm pickups, and farmers markets.¹

Because of the importance of farmers markets in the overall system of community food and farming, we decided that we wanted to learn more about how they navigated COVID-19. We wanted to find the bright spots and share what we could to help farmers markets plan for success and future resilience.

At the same time that our nation grappled with early months of the pandemic, our attention snapped into sharp focus on racial issues and injustice—issues long simmering boiled up and over. Protests took over streets nationwide in the aftermath of the deaths of Breonna Taylor, George Floyd, Ahmaud Arbery, and far too many more Black victims of police violence.

The responses and growing attention to racial justice represent deep divisions in our nation around power, wealth, and privilege. Our shared history of slavery, exploitation, exclusion, and prejudice affects and infects us all, and the local food system is no different.² **Examined and unexamined racial bias is threaded into our everyday—farmers markets included.**

¹ Love, Hanna, and Nate Storing. 2020. *Farmers markets are vital during COVID-19, but they need more support*. Brookings. <https://www.brookings.edu/blog/the-avenue/2020/04/08/farmers-markets-are-vital-during-covid-19-but-they-need-more-support>.

² Rosenberg, Nathan, and Bryce Stucki. 2019. *How USDA distorted data to conceal decades of discrimination against black farmers*. The Counter. <https://thecounter.org/usda-black-farmers-discrimination-tom-vilsack-reparations-civil-rights>.

We know that for some markets the question of race will be far outside your comfort zone. **We ask that you begin to consider why this is, and what a different way forward might look like or involve.**

We know some other markets are finding energy and momentum toward deep examination and action around race. **We ask that you commit to a path of racial equity and move forward bravely.**

We are taking on questions of race in farmers markets because we believe in the opportunity to open new eyes, start new conversations, and intentionally broaden the benefits of farmers markets to truly and authentically include people of color. We don't expect to have clear answers, but instead know that we must focus on getting started. We ask that you find your own places to start.

We believe that farmers markets are vital local food system engines that bring people together, reflect their place, connect people to healthy food, and support the farms and farmers that are essential to the future of North Carolina. We are huge fans of the organizers and visionaries that start and run farmers markets, often at great personal effort and sacrifice. We have great faith in the supporting organizations that provide resources to keep farmers markets open. We take our hats off to the state-level policy makers that believe in the common good of farmers markets and are ready to help invest in their future.

Our hope in this report is to provide each of you ideas and actions that will help grow success, equity, and resilience for the next crisis, whenever that may be. North Carolina's small farmers depend on you.

Project Purpose

Through our findings and recommendations, we hope this report can:

1. **Provide actionable recommendations** to farmers markets looking to build resilience and impact
2. **Identify opportunities to grow racial equity** in NC's farmers market community.
3. **Provide policy and strategic recommendations** to sponsoring organizations and state level bodies for the resilience, innovation, and success of local food systems
4. **Shine a light on areas** for further research and engagement

Project Summary

In June 2020, Community Food Lab launched a self-funded study of North Carolina farmers markets. This study was designed to analyze experiences across NC and develop actionable recommendations for long-term resilience and racial equity in farmers markets. It was intentionally broad, to maximize participation and create jumping off points around three main questions:

1. How do the location, type and size of farmers markets affect their resilience and local impact?
2. What best practices at farmers markets will best support the post-COVID future of place-based food systems?
3. How might farmers markets be change agents in a racially equitable food movement?

From June 29 to July 22, 2020, we surveyed NC farmers market managers about their COVID-19 experiences and strategies, approaches to racial equity, and initiatives around food access. We also collected input on whether markets were performing as well as, worse than, or better than the 2019 season, opening the possibility of identifying successful measures.

After receiving 78 unique responses, we analyzed the data and discussed with advisors to develop the following recommendations.

We hope that these resulting actions, within their contexts, can be effective and meaningful steps toward a more just and resilient farmers market community.

<i>Theme</i>	<i>Recommendation</i>
1 Learn from COVID-19 for Resilient Markets	1.1 Invest in curbside pickup, online ordering, and email mailing list initiatives
	1.2 Right size your market to your nearby population
	1.3 Support increases in dedicated farmers market staffing for vendor retention
2 Learn from COVID-19 for a Resilient System	2.1 Grow market partnerships with local governments, organizations, and networks to share resources
	2.2 Explore virtual food hub platforms where innovative marketing links vendors and customers
	2.3 Develop and fund a dedicated statewide farmers market database, network, and resource platform
3 Work with BIPOC Communities to Build Racial Equity	3.1 Begin a conversation about race in your market
	3.2 Increase representation of BIPOC among market leadership and vendors
	3.3 Critically examine your market's structure and policies , focusing on equity and inclusion
	3.4 Provide support to markets for racial equity trainings, education materials, and conversations

Thanks

We are thankful and indebted to everyone who graciously completed our survey. We also send our gratitude to Stephon Beaufort for data analysis and to our advisors for their generous insights on racial equity and food policy:

LaShauna Austria

Kindred Seedlings Farm, Community Food Strategies

Ja’Nell Henry

Black Farmers Market NC

Lisa Misch

Rural Advancement Foundation International-USA

Morgan Wittman Gramann

NC Alliance for Health

Hannah Dankbar

NC State Extension

Ann Meletzke

Healthy Alamance

Samantha Winship

Mother’s Finest Farms

About Community Food Lab

Community Food Lab is a Raleigh-based design and planning firm focused on growing sustainable, equitable food systems. We often work with local governments and nonprofits, connecting creativity, strategic problem-solving, and systems thinking to the urgent and complicated needs of our food system. Our international, award-winning work includes food hubs, educational farms, farmers markets, urban agriculture plans and food security strategy.

In addition to our consulting practice, Community Food Lab has from the beginning committed time to self-generated or pro bono projects such as this Farmers Market Study. With this report, we felt an urgent opportunity to listen to and learn from North Carolina’s farmers markets. We wanted to share effective insights and ideas back to farmers markets and their supporting networks, and by doing so build lasting support for our small farmers.

communityfoodlab.org / white@communityfoodlab.org

02. Methods

Survey Development

For our central source for data and insights, we developed an 18-question survey targeting farmers market managers and other leaders. We designed the survey to be quick and easy to complete in order to maximize our response rate. We also designed the survey to cover a range of issues at a relatively high level, to help us quickly spotlight critical areas for action and further investigation. (See Appendix B for full survey text.)

Our survey questions grew from our food system experience, a targeted literature review on farmers market trends and issues, and from review and feedback from advisors.

Survey Distribution

The survey was open between June 29 and July 22, 2020, and received 78 unique responses for an approximate 45% response rate out of all NC farmers markets. The survey was distributed through farmers market and local food listservs, social media, the CFL website, and direct emails to market managers.

A note on counting farmers markets: We estimate there to be 175 farmers markets in North Carolina. This figure is approximate, as the decentralized and often informal nature of farmers markets makes it difficult to get an exact count. While databases do exist³ we found that they were often incomplete or featuring outdated entries, and wanted to generate a more accurate count. Through the USDA Local Food Directory,³ Local Foods Infrastructure Inventory,⁴ and NC State Extension⁵ county center resources, we compiled a list of markets, from which we were able to verify 175 active markets by removing any market that had announced its closing.

Data Analysis & Recommendation Development

Exploratory data analysis was completed with assistance from Stephon Beaufort.⁶ The data and findings covered in this report are highlights of analysis which informed our recommendations. For further information on data or analysis, reach out to us at white@communityfoodlab.org.

We believe that our sample of 78 markets is roughly representative of all NC farmers markets, though have not proven statistical significance at this point. Without specific data on non-responding markets or a true overall count of markets in the state, our conclusions are only able to point to general associations and experiences of our sample markets.

Recommendations were developed from analysis of our survey data, combined with input from advisors and continued background research, focusing on practicality and impact of potential actions.

³ <https://www.ams.usda.gov/local-food-directories/farmersmarkets>, <https://www.ncfarmfresh.com/index.asp>, <https://gottobenc.com/find-local/farmers-markets/>

⁴ <https://www.arcgis.com/apps/webappviewer/index.html?id=f62735865c1c4d0f83ad40baeb66d864>

⁵ <https://www.ces.ncsu.edu>

⁶ Find Stephon's LinkedIn here: <https://www.linkedin.com/in/stephon-beaufort-299b0511>, and his website: <https://lookingatnumbers.com>.

Notes on Race & Accountability

on Community Food Lab:

We are a white-led organization trying to do our part for a more equitable and just future.

We know that, being white, **we must move forward on issues of race and justice with humility, accountability, and recognition** that we will likely still make mistakes.

We know that **it will take all of us working together and individually** to create change.

We know that **our best work will come through our natural spheres of influence—**ours is the food system.

With that in mind, our approach to equity work is multi-layered:

First, we work to educate and open ourselves to understanding history, racism, and the structures that perpetuate injustice.

Second, through our sphere of influence as planners and designers, we seek accountability for our work through clients or invited partners or advisors. On this project, advisors of color as paid consultants have helped us develop a set of actions that reflect experiences of color that we would never know on our own. Our advisors have helped us identify blind spots and find some measure of accountability. We will continue these relationships—and accountability—as we look to next steps in this work.

Finally, as a white-led team, we actually see our highest value in speaking to white people and white-led groups struggling to find the first steps in a racial equity process. We can share our missteps, our frustrations, and our sense of hope with folks who may really benefit from hearing them.

We are not racial equity experts, but we know enough to say that race matters, that we must confront race with constructive humility, that white people must lift their voices, and that we all share in making change together.

on Language:

In this report, we are using “**BIPOC**”, or “**Black, Indigenous and People of Color**” — a term that acknowledges that people in Black and Indigenous communities face different, and often more severe, forms of oppression and erasure within our food systems.

For more information, check out <https://www.thebipocproject.org>.

03. Findings

Summary of Markets

Location:

We heard from 78 markets, representing 47 counties across NC.

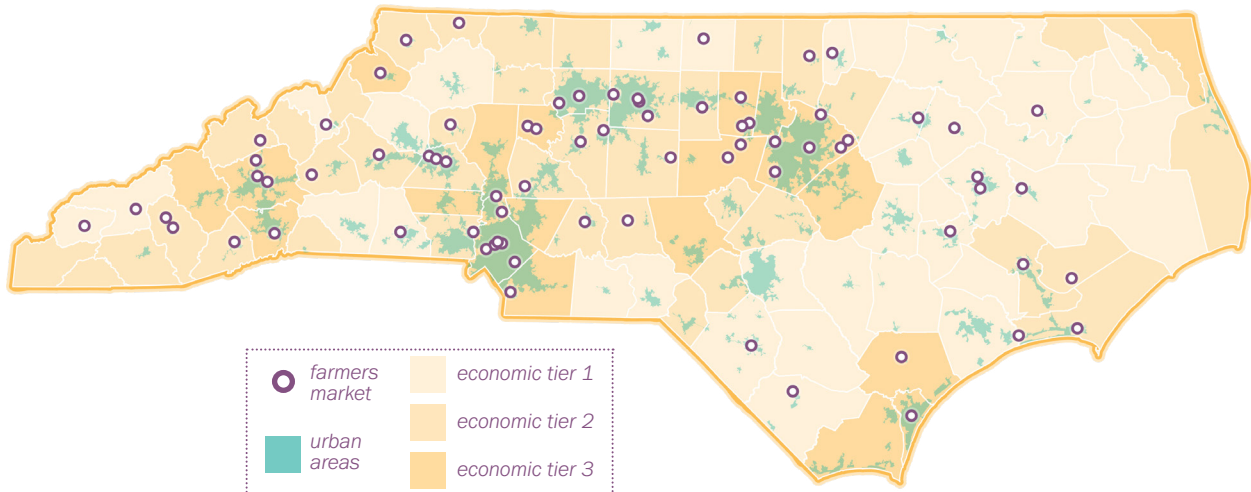


Fig 1. Map of market locations in survey sample

Markets were relatively evenly distributed among county economic tiers, though fewer markets were in Tier 1 counties. These designations are a NC Department of Commerce ranking around economic distress, with Tier 1 most distressed and Tier 3 least.⁷

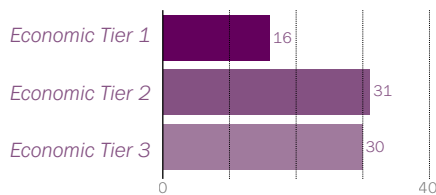


Fig 2. Market county economic tier by count: survey sample (n=78)

⁷ NC Department of Commerce. 2020. *County Distress Rankings (Tiers)*. <https://www.nccommerce.com/grants-incentives/county-distress-rankings-tiers>.

Size:

Markets had an average of 25 vendors, equal to the national average of 25 vendors, based on the USDA 2019 Farmers Market Managers Survey.⁸

To aid in analysis, we grouped markets by size based on clusters in the data: Small, with 0-14 vendors; Medium, with 15-34 vendors; Large, with 35+ vendors.

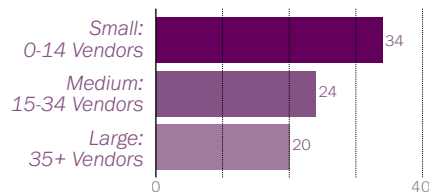


Fig 3. Market size by count: survey sample (n=78)

Organizational Structure:

Most markets were independent nonprofits, with a smaller proportion of government-sponsored markets, and very small numbers of for-profit, organization-sponsored, and unincorporated markets. The distribution of national organizational structures is similar, though slightly more evenly distributed.⁸

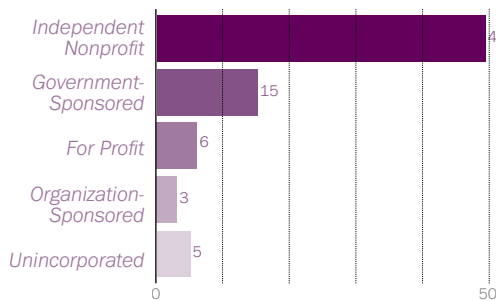


Fig 4. Organizational structure by count: survey sample (n=78)

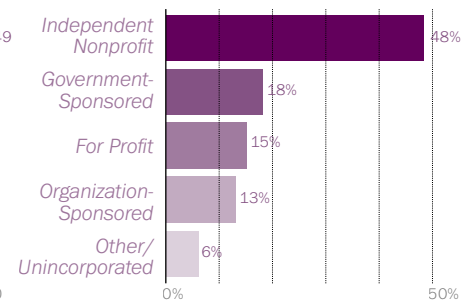


Fig 5. Organizational structure by proportion: national sample⁹

Facility Type:

Most markets were popup, and most permanent markets were outdoor rather than indoor. This is similar to the national distribution.⁸

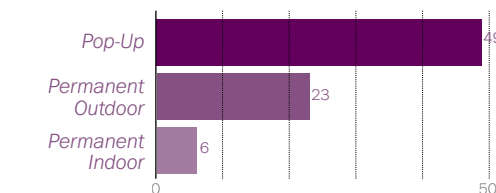


Fig 6. Facility type by count: survey sample (n=78)

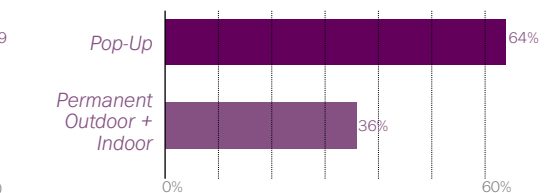


Fig 7. Facility type by proportion: national sample⁹

⁸ USDA Agricultural Marketing Service. 2020. *National Farmers Market Managers Survey*. <https://usda.library.cornell.edu/concern/publications/pz50hd694>.

Key Findings: Sales & Visitors in 2020 vs 2019

Sales & Visitor Estimates:

Overall, in our sample, markets estimated higher sales and fewer visitors in 2020 compared to 2019.

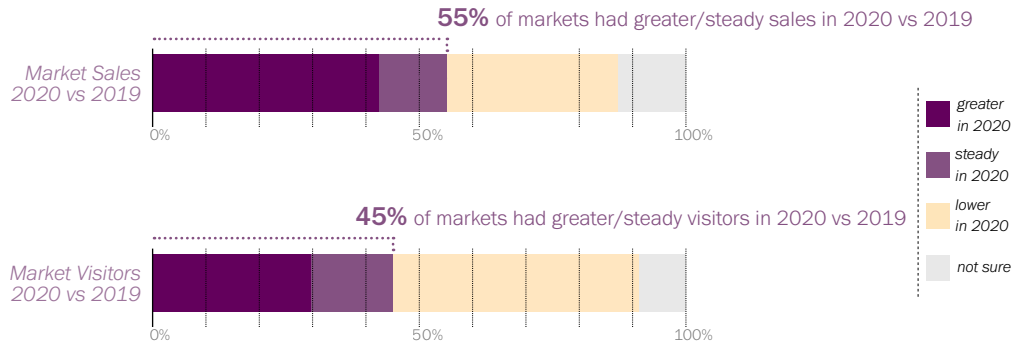


Fig 8. Sales (top) and visitors (bottom) in 2020 vs 2019: survey sample (n=78)

These were self-reported, midseason estimates, chosen out of a “far greater, slightly greater, same, slightly lower, far lower, unsure” scale, to compare 2020 and 2019.

According to a Farmers Market Coalition COVID-19 impact assessment, this trend of higher sales and fewer visitors has been reported nationally, though there are no exact figures at this time.⁹

Sales by Market Size:

Markets with 0-34 vendors trended toward greater/steady sales in 2020 vs 2019, while markets with 35+ vendors were more likely to report lower sales in 2020.

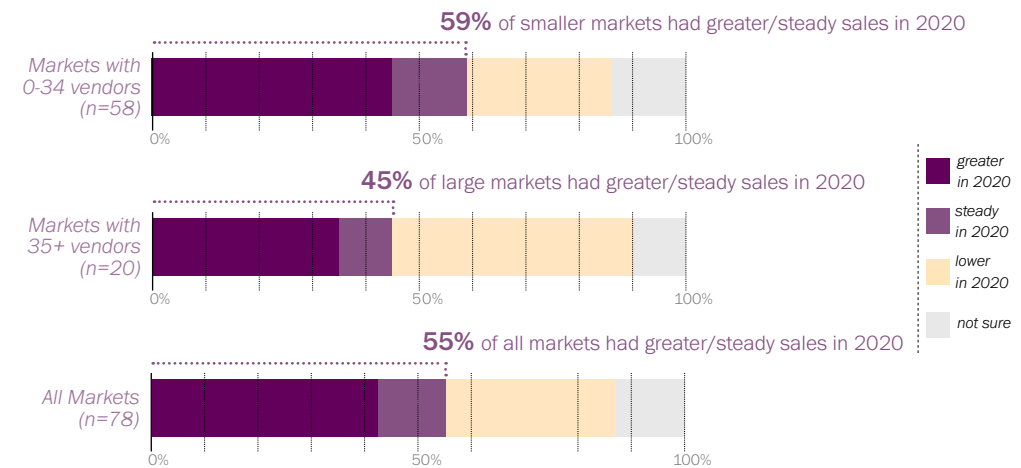


Fig 9. Sales in 2020 vs 2019: markets with 0-34 vendors (top), markets with 35+ vendors (middle), all markets (bottom)

⁹Farmers Market Coalition. 2020. *August 2020 Impact Assessment*. Local Food Systems Response to COVID. https://ifscovid.localfoodeconomics.com/impact_assessments/farmers-market-coalition-fmc.

Sales by Organizational Structure:

Markets with government sponsorship trended toward greater/steady sales in 2020 vs 2019, while independent nonprofit markets were more likely to report lower sales in 2020.

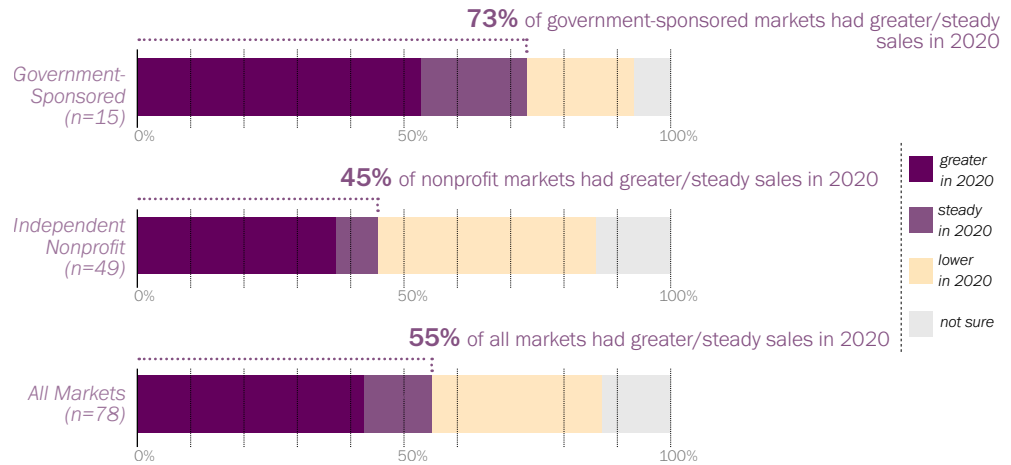


Fig 10. Sales in 2020 vs 2019: government-sponsored markets (top), independent nonprofit markets (middle), all markets (bottom)

Note: Due to small sample sizes of for-profit, organization-sponsored, and unincorporated markets (Fig. 4), this analysis focuses on nonprofit and government-sponsored markets.

Sales by Facility Type:

We did not find any clear relationship between facility type and sales in 2020 vs 2019.

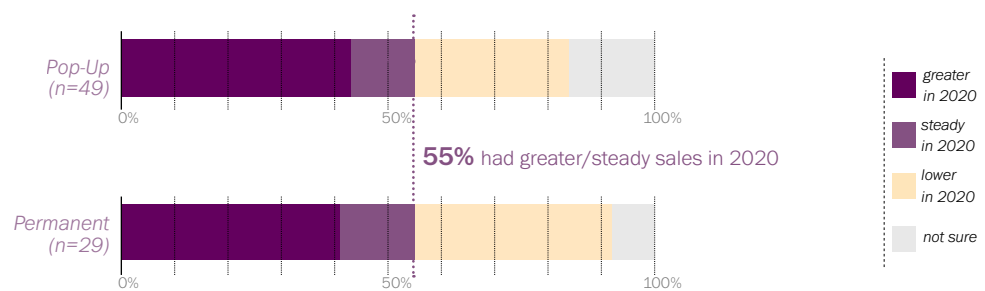


Fig 11. Sales in 2020 vs 2019: pop-up markets (top), permanent markets (bottom)

Note: Due to small sample sizes of permanent indoor markets, this analysis combines permanent outdoor and indoor markets into one category.

Sales by Market Size Relative to Population:

No matter the location, markets did best if their number of vendors aligned with the nearby population.

We calculated a nearby population to vendor ratio for each market by dividing the total population within a 10-mile radius by the number of market vendors. Markets with 3,000-20,000 people within 10 miles per vendor trended more toward greater/steady sales in 2020 vs 2019. Markets with fewer than 3,000 or more than 20,000 people per vendor trended dramatically toward lower sales.

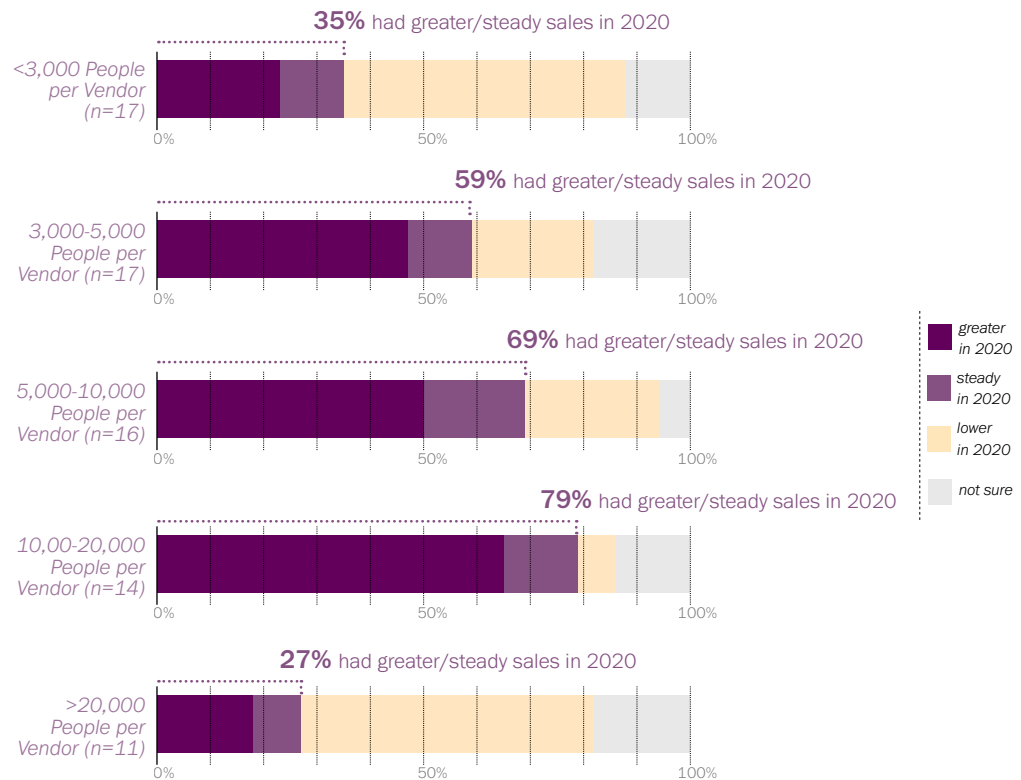


Fig 12. Sales in 2020 vs 2019 by nearby population to vendor ratio: <3,000 (top), 3,000-5,000 (second), 5,000-10,000 (third), 10,000-20,000 (fourth), >20,000 (bottom)

Sales by Associated COVID-19 Response and Communication Factors:

The following were the COVID-19 response and communication factors most associated with 2020 vs 2019 sales.¹⁰

Markets who implemented curbside pickup/preorder programs trended toward greater/steady sales in 2020 vs 2019.

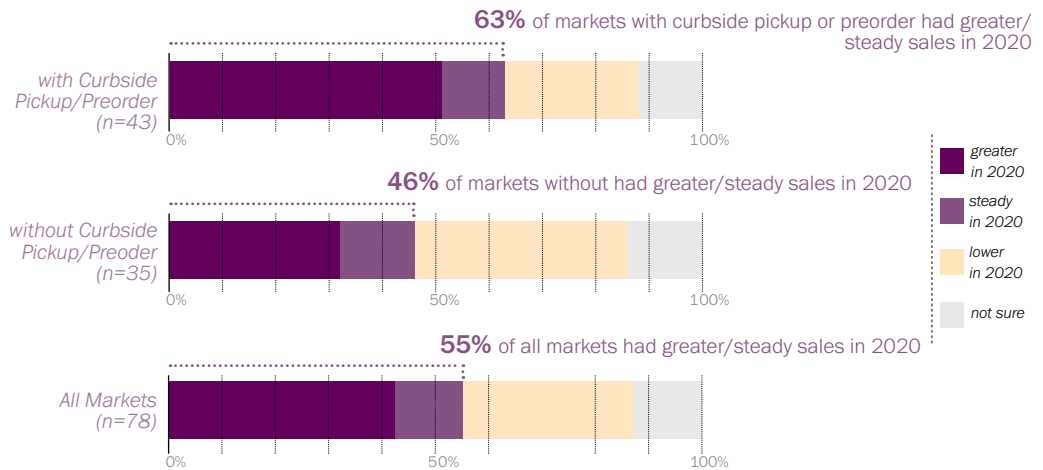


Fig 13. Sales in 2020 vs 2019: markets with curbside pickup/preorder programs (top), markets without these programs (middle), all markets (bottom)

Markets with email mailing list communication trended toward greater/steady sales in 2020 vs 2019.

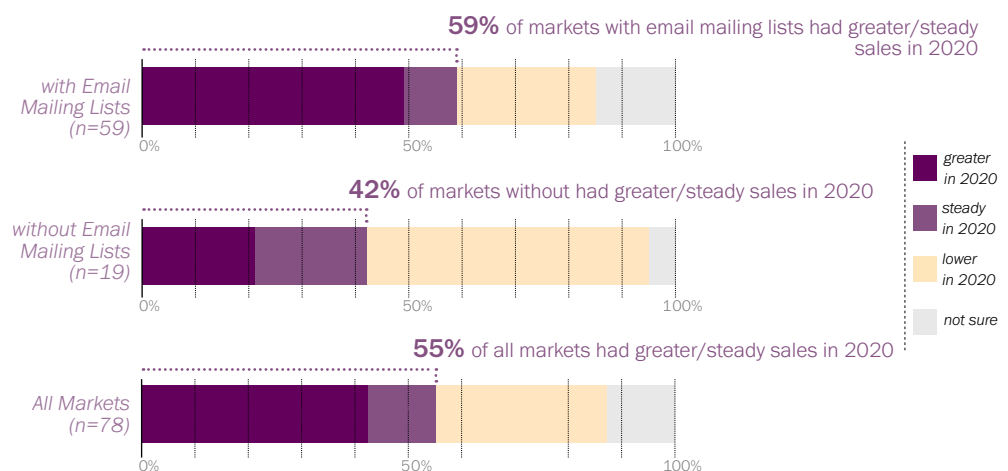


Fig 14. Sales in 2020 vs 2019: markets with email mailing list communication (top), markets without email mailing lists (middle), all markets (bottom)

¹⁰Contact us for further information on sales data.

Markets who had to cancel market days to develop a COVID-19 strategy were much less likely to estimate greater/steady sales in 2020 vs 2019.

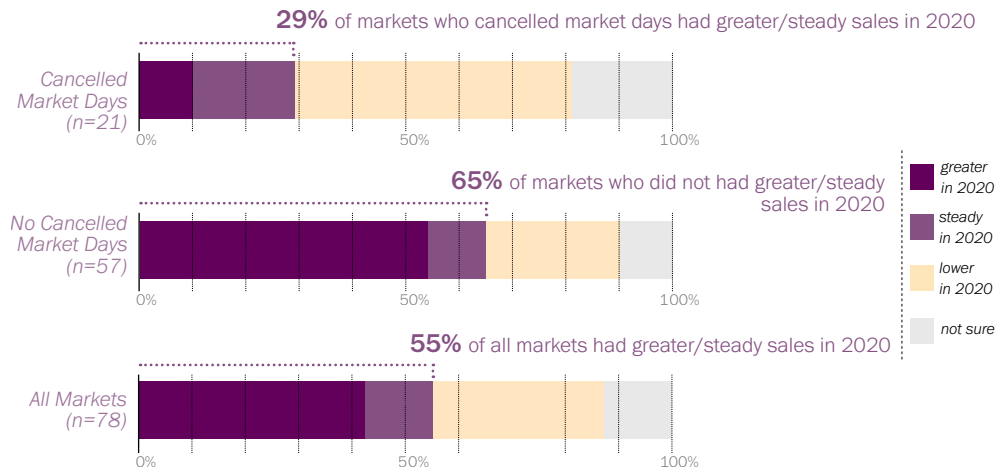


Fig 15. Sales in 2020 vs 2019: markets who cancelled market days (top), markets who did not cancel market days (middle), all markets (bottom)

Market Day Cancellation by Organizational Structure:

Markets with government sponsorship were less likely to have to cancel market days to develop a COVID response strategy.

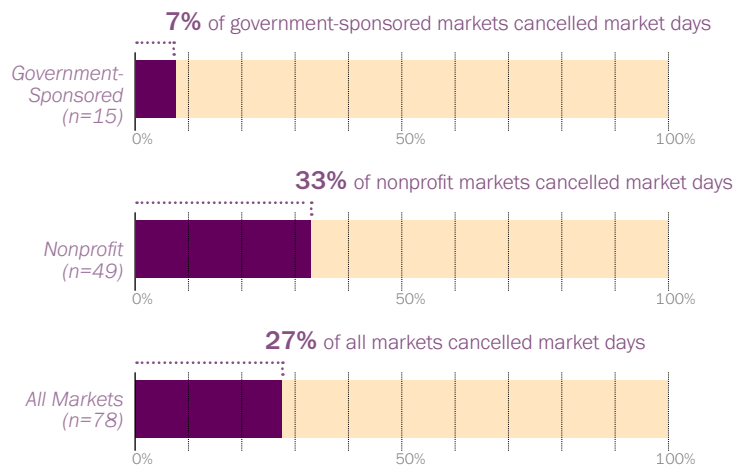


Fig 16. Market day cancellation to develop COVID-19 strategy: markets with government sponsorship (top), nonprofit (middle), all markets (bottom)

Key Findings: SNAP/WIC & Nutrition Incentive Programs

SNAP/WIC Acceptance & Nutrition Incentive Programs:

55% of markets accepted SNAP/EBT and/or WIC/FMNP. 33% of markets also offered nutrition incentive programs (such as Double Bucks). These are comparable, if slightly higher, than national rates.

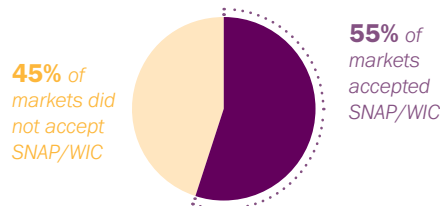


Fig 17. SNAP/EBT and/or WIC/FMNP acceptance by proportion: survey sample (n=78)

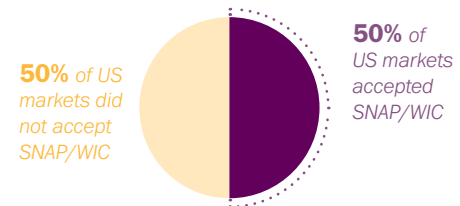


Fig 18. SNAP/EBT and/or WIC/FMNP acceptance by proportion: national sample¹¹

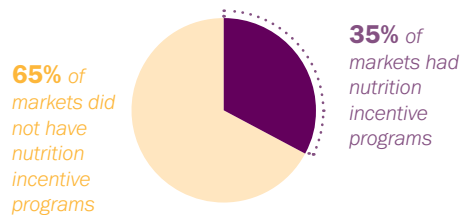


Fig 19. Nutrition incentive programs by proportion: survey sample (n=78)

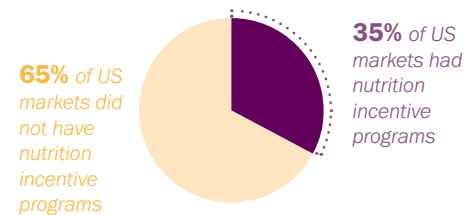


Fig 20. Nutrition incentive programs by proportion: national sample¹¹

Sales by SNAP/WIC & Nutrition Incentive Programs:

We did not find any clear relationship between SNAP/WIC or Double Bucks acceptance and 2020 sales or visitors, though we hope that reporting these numbers prompts further exploration of COVID-19's impact on these programs.

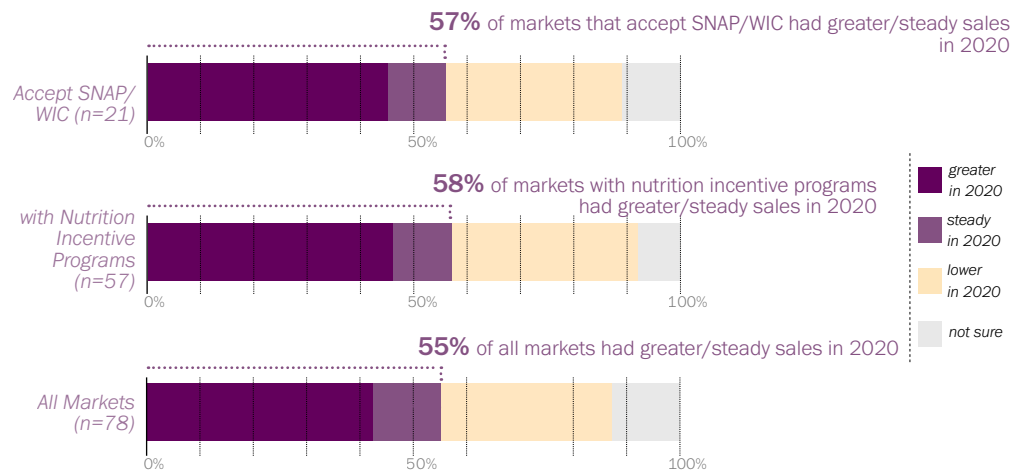


Fig 21. Sales in 2020 vs 2019: markets with SNAP/WIC (top), markets with nutrition incentive programs (middle), all markets (bottom)

¹¹ USDA Agricultural Marketing Service. 2020. *National Farmers Market Managers Survey*. <https://usda.library.cornell.edu/concern/publications/pz50hd694>.

Key Findings: Racial Equity

BIPOC Representation in Leadership:

23% of markets had BIPOC in leadership.

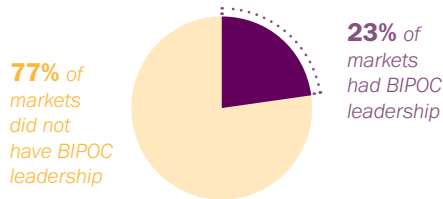


Fig 22. Markets with BIPOC leadership by proportion: survey sample (n=78)

Note: Our survey measured representation through simple yes/no measures. This is definitely not a full measure of representation in markets, and we hope these figures can be viewed as a starting point for further research.

BIPOC Representation as Vendors:

60% of markets had any vendors of color.

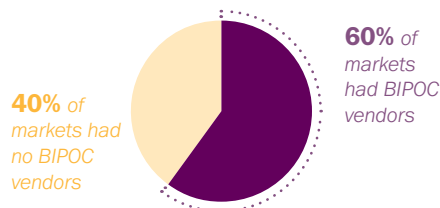


Fig 23. Markets with BIPOC vendors by proportion: survey sample (n=78)

Market Leadership Engaged in Racial Equity Training:

9% of markets had leadership engaged in racial equity training.

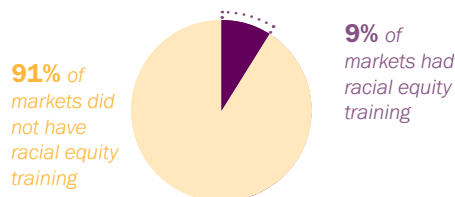


Fig 24. Markets with leadership engaged in racial equity training by proportion: survey sample (n=78)

Vendors of Color by Associated Administrative Factors:

The following were administrative factors most associated with representation of BIPOC as vendors.¹²

Markets with BIPOC leadership, markets with no vendor restrictions (such as no resale, no non-food products, or location restrictions), and markets with government sponsorship were more likely to have BIPOC vendors.

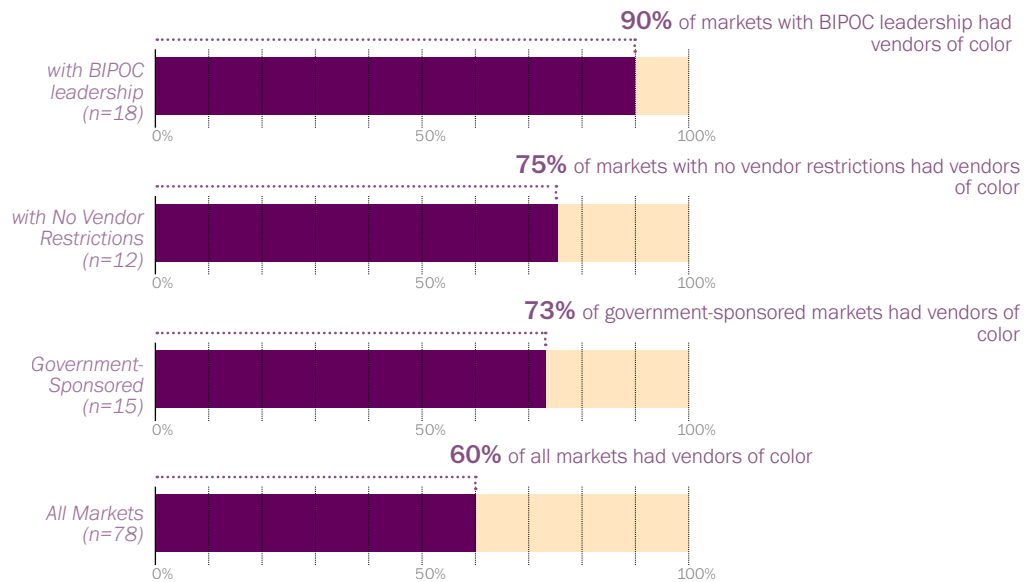


Fig 25. Markets with BIPOC vendors by proportion: markets with BIPOC leadership (top), with no vendor restrictions (second), with government sponsorship (third), all markets (bottom)

Sales by BIPOC Representation:

Representation of BIPOC in leadership or BIPOC vendors was associated with greater/steady sales in 2020 vs 2019.

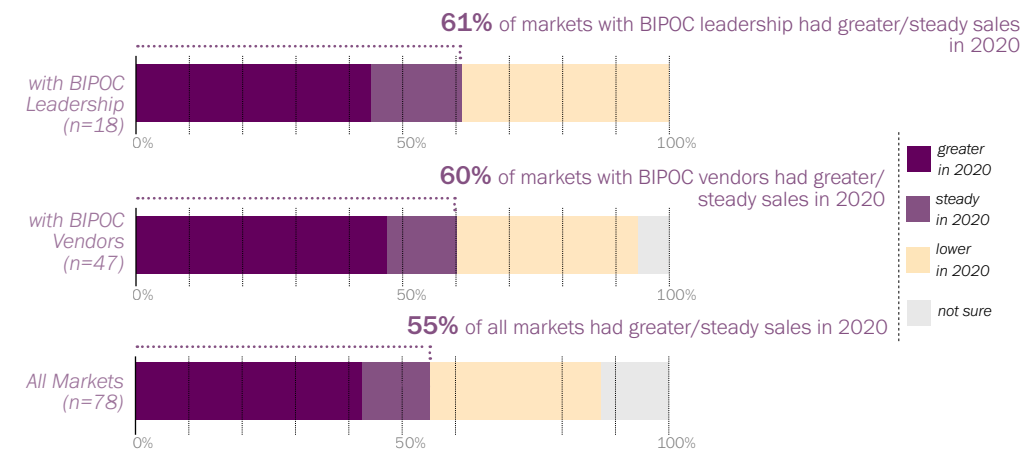


Fig 26. Sales in 2020 vs 2019: markets with BIPOC leadership (top), BIPOC vendors (middle), all markets (bottom)

¹² Contact us for further information on representation data.

04. Recommendations

The following recommendations resulted from a combined process of interpreting our survey findings, pulling forward key trends from national sources, and listening to our team of advisors on racial equity and food policy. The actions selected reflect an attitude toward practicality and impact: these are the clearest, most effective, and actionable steps found through our study.

Of course, we recognize that there is a wide range of context and capacity among NC farmers markets. These recommendations may not apply to all markets equally. We do believe, however, that this spectrum of actions will offer every market a place to start in planning for 2021 or in applications for relief funding, and will offer longer-term goals to drive strategic planning.

These recommendations are also designed for multiple audiences within the farmers market community. The first recommendations in each section are targeted for individual markets, around market planning or management. The final recommendations in each section are targeted toward regional networks, policy makers, and private sector organizations, with actions to support farmers markets throughout the state.

Our advice in using these recommendations? Use the list as a flexible set of options. Focus on where you are and what resources you have, and jump in on actions that are meaningful and achievable. Every market is different, and you are the experts in your own community. We hope these actions help you grow your vision, impact, and connections.

<i>Theme</i>	<i>Recommendation</i>
1 Learn from COVID-19 for Resilient Markets	1.1 Invest in curbside pickup, online ordering, and email mailing list initiatives
	1.2 Right size your market to your nearby population
	1.3 Support increases in dedicated farmers market staffing for vendor retention
2 Learn from COVID-19 for a Resilient System	2.1 Grow market partnerships with local governments, organizations, and networks to share resources
	2.2 Explore virtual food hub platforms where innovative marketing links vendors and customers
	2.3 Develop and fund a dedicated statewide farmers market database, network, and resource platform
3 Work with BIPOC Communities to Build Racial Equity	3.1 Begin a conversation about race in your market
	3.2 Increase representation of BIPOC among market leadership and vendors
	3.3 Critically examine your market's structure and policies , focusing on equity and inclusion
	3.4 Provide support to markets for racial equity trainings, education materials, and conversations

Theme 1:

Learn from COVID-19 for Resilient Markets

Overall, in our sample, farmers markets estimate greater sales but fewer visitors in 2020 vs 2019. This is not necessarily true of all markets, but even in the face of massive societal disruption we saw exciting trends toward greater support for direct-to-consumer local food sales. COVID-19 has created deep economic disruption and important new safety concerns, but these challenges also prompted innovation in response—innovations we believe could support longer-term resilience and impact of farmers markets.

The three recommendations here offer ideas for investing in innovations and structure associated with successful markets, prioritizing strategies to help weather this and future challenges.

1.1 Invest in curbside pickup, online ordering, and email mailing list initiatives

63% of markets with curbside pickup/online ordering programs had greater/steady sales in 2020 vs 2019, compared to 46% of markets without.

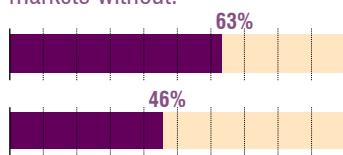


Fig 27. Sales in 2020 vs 2019: markets with curbside pickup/online ordering programs (top), markets without these programs (bottom)¹⁴

59% of markets with email mailing list communication had greater/steady sales in 2020 vs 2019, compared to 42% of markets without.

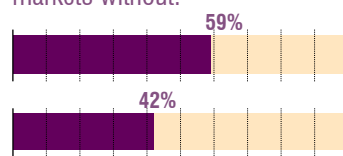


Fig 28. Sales in 2020 vs 2019: markets with email mailing lists (top), markets without email mailing lists (bottom).¹⁵

“ Our market has run a pre-order/prepay drive-thru for 18 weeks and filled more than 4200 orders. ”

Description:

Pre-order and curbside pickup programs allow customers to order food through an online platform, then pick up orders quickly upon arrival at the market location with limited contact. Exact forms of these programs vary: some markets connect to vendor-specific order platforms, while others have “food box” programs that combine multiple vendors.¹³ These programs tend to be higher effort, but provide a safe and flexible form of market experience that can maintain—or even boost—sales despite safety challenges.

While not explicitly linked to COVID-19, email mailing lists are one of many common forms of communication for markets, allowing customers to receive direct communication from markets.

Why It Matters:

Of all COVID-19 actions reported by markets in our study, “Implementation of curbside pickup and/or pre-order programs” was the only action to trend more toward higher sales in 2020 among participating markets. Support for these programs can help boost resilience as the pandemic continues, as well as maintain diversified initiatives that increase local food access in the long term.

Additionally, keeping customers up-to-date on markets has been crucial during 2020’s unpredictable season, and email mailing lists appear to be particularly effective in this area. In our findings, markets using email mailing lists among their communication methods trended toward higher sales for 2020. This action likely helps maintain sales through effective communication with customers that builds confidence and interest around farmers market shopping.

Who This is For:

Individual markets can prioritize these marketing programs in their planning.

Regional networks, private organizations, and state policy can prioritize funding or implementation assistance for these programs.

Getting Started:

This [Farmers Market Coalition Webinar on Curbside Pickup and Preorder Programs, September 2020](#) offers recent insight into a variety of curbside pickup and preorder programs, including implementing SNAP/EBT access.

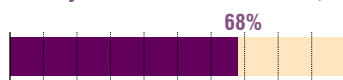
¹³ Farmers Market Coalition. 2020. Webinar: *Thinking Inside the Box – Making Healthy Food Accessible with Curbside/Drive-Thru (Contactless) Models at Farmers Markets During COVID-19*. Farmers Market Coalition: Resource Library. <https://farmersmarketcoalition.org/resource/thinking-inside-the-box-making-healthy-food-accessible-with-curbside-drive-thru-contactless-models-at-farmers-markets-during-covid-19>.

¹⁴ See Fig 13 for detail.

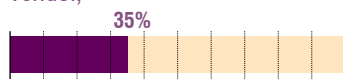
¹⁵ See Fig 14 for detail.

1.2 Right size your market to your nearby population

68% of markets with 3,000-20,000 people within 10 miles for every vendor had greater/ steady sales in 2020 vs 2019,



...compared to 35% of markets with fewer than 3,000 people per vendor,



...and only 27% of markets with over 20,000 people per vendor.



Fig 29. Sales in 2020 vs 2019: vendor:population ratio 3,000-20,000 (top), vendor:population ratio <3000 (middle), vendor:population ratio >20,000 (bottom).¹⁷

Description:

Based on our findings, farmers markets can optimize for sales and traffic by balancing their vendor numbers with the surrounding population (potential customer base). Too few vendors for the population might spark less interest from shoppers, and too many vendors might spread the shopping dollar too thin for each farmer to find profitability in a downturn. To calculate your markets' population to vendor ratio, divide the total population within a 10-mile radius by the number of market vendors. Our analysis found that markets with 3,000-20,000 potential customers per vendor appeared to be more resilient through the 2020 season.

While this is a broad range and may be intuitive, it is worth noting for market planning: is your market too large for a small population, or too small to attract notice in a larger population? Can you adjust your size up or down to hit this sweet spot? If you are opening a new market, can this ratio help you target your right size?

Why It Matters:

Most of a farmers markets' customers live within 10 miles of the market,¹⁶ making the population within 10 miles of a market a meaningful planning tool.

While we found little relationship between location (such as urban or rural) and estimated 2020 vs 2019 market sales in our study, this potential customer to vendor ratio was clearly associated with market sales. Markets with fewer than 3,000 or over 20,000 potential customers for every market vendor were more likely to experience lower sales than those in the "sweet spot" of 3,000-20,000 potential customers per vendor.

Who This is For:

Individual markets and those planning new markets

Getting Started:

Estimate the population within a 10-mile radius of your farmers market, and calculate the ratio of vendors to population. Of course, if other farmers markets are within your radius, you should try to take this into account in your estimates.

This [mapping tool](#) can produce a rough population estimate to work from.

¹⁶ USDA Agricultural Marketing Service. 2011. *Mapping Competition Zones for Vendors and Customers in U.S. Farmers Markets*. USDA Agricultural Marketing Service. <https://www.ams.usda.gov/publications/content/mapping-competition-zones-vendors-and-customers-us-farmers-markets>.

¹⁷ See Fig 12 for detail.

1.3 Support increases in dedicated farmers market staffing for vendor retention

“ Our market has gone from three employees and one volunteer to a minimum of 10 employees just to keep us going.

I fear we're going to see markets falter financially and that we're also going to see a lot of burnout of staff. **Staff that is crucial to keeping local food flowing right now.** ”

“ Since March, our staff have worked twice as many hours with new roles, like supporting vendors and customers with technical assistance on pre-ordering, online store set-up.

We have increased the number of volunteers at market but **do not want to be reliant on unpaid labor.** ”

“ We have taken on a **considerable paid staff expansion** to run a drive thru and help with COVID guidelines.

We have more vendors right now than we have space for so **we've added vendors that we do not have space for to drive through preorder offerings.** ”

“ We had many vendors applying at once who had no other way of selling at the moment due to restaurants closing, or other markets closing. ”

Description:

Many markets have increased staffing¹⁸ to maintain new programs and resources for market vendors during the 2020 season. Some of these increases are temporary, based in COVID-19-specific safety and administration needs. Some may also be permanent, as successful new programs may continue indefinitely. Dedicated private and public funding to maintain these staff increases is crucial for the resilience of markets—and wider food producers—moving forward.

Why It Matters:

Farmers, particularly small farmers selling locally, are relying more heavily on farmers markets and other direct-to-consumer sales through the pandemic as restaurant and wholesale demand has evaporated.¹⁹ Farmers markets have largely met this need admirably, putting effort into new programs to maintain sales and visitors. However, these new programs have required staff and budget increases for many farmers markets, and some markets are struggling to retain vendors with space limitations.

In response to the prompt “As you consider the future, what will be your greatest challenge as we move through and hopefully beyond COVID-19?” 21 out of 69 responses cited funding concerns as their greatest challenge, particularly concerning increased staffing. 18 markets mentioned challenges maintaining vendors within new physical space limits and COVID-19 related budget concerns. Dedicated funding toward staff and vendor retention would help to meet this need and maintain these important resources.

Who This is For:

Funding sources within regional networks, private organizations, local government, and state policy

Getting Started:

Farmers market groups and networks should share experiences and identify common needs to supporting groups and advocacy networks.

State-level groups can help advocate for staffing and resources as part of future relief packages.

Local governments and non-profit funding agencies can recognize need for increased operational funds in order to maximize impact of farmers markets for local farmers and food access.

¹⁸ Farmers Market Coalition. 2020. August 2020 Impact Assessment. Local Food Systems Response to COVID. https://lfsocovid.localfoodeconomics.com/impact_assessments/farmers-market-coalition-fmc.

¹⁹ ASAP Connections. 2020. COVID-19: Impact on Southern Appalachian Farmers and Vendors Selling to Direct Markets. ASAP Connections. <https://asapconnections.org/report/covid-19-impact-on-local-farms>.

Theme 2:

Learn from COVID-19 for a Resilient System

A successful farmers market is a product of its place: its farm community, its customers, its funding, and its leadership. Every market supports and is supported by the local food system, where many resources and needs come together for local farm economies, community relationships, and healthy food access.

The quality and quantity of connections within this system reflect the degree of resilience the food system has to shocks such as a pandemic, a hurricane, or a major winter storm. A farmers market is not, in itself, the resilience that the system needs — it can, however, catalyze greater resiliency through engagement, networks, and smart infrastructure and programs.

These recommendations seek to support a connected farmers market community from the local to statewide level. Take these ideas into consideration for a more resilient and impactful system of farmers markets throughout North Carolina.

2.1 Grow market partnerships with local governments, organizations, and networks to share resources

“ We thank our partners for their leadership. They helped us to form a plan and adapt. Made all the difference. ”

“ We would not have survived without the help of [the town], including the police department. The town and the police chief have been in constant contact to see what they can do to assist us. ”

“ Offering free masks through [partner organizations] helped us enforce safety precautions. ”

73% of government-sponsored markets had greater/steady sales in 2020 vs 2019, compared to 55% of all markets.

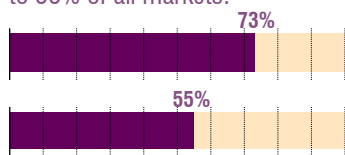


Fig 30. Sales in 2020 vs 2019: government-sponsored markets (top), all markets (bottom)²¹

Only 7% of government-sponsored markets had to cancel market days, compared to 27% of all markets.

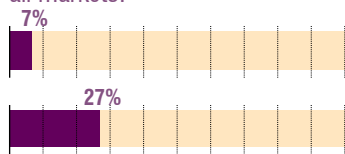


Fig 31. Market day cancellations: government-sponsored markets (top), all markets (bottom).²²

Description:

In response to COVID-19, community partnerships have helped markets supply PPE, share and develop strategies, and implement new programs. Even before the pandemic, partnerships supported food access and outreach initiatives, amplifying market success and community impact.²⁰

These partnerships can take many forms, from sponsoring governments or umbrella organizations, to community program partners, to regional networks. No matter the form, successful partnerships align visions, strengths, and needs, and help share ideas, strategies, resources, or programs.

Why It Matters:

Partnerships bring support networks that are crucial in uncertainty and crisis. In our study, we found that markets with government sponsorship (an important form of partnerships) trended toward greater/steady sales in 2020 vs 2019, and were less likely to have to cancel market days.

Additionally, in response to the prompt “Is there anything you would like to add?” 9 out of 36 responses mentioned the importance of partnerships in getting them through COVID-19. We are not suggesting that every market seek government sponsorship, but through the sum of our study, it is clear that support structures—whether with local governments, organizations, or other local networks—are deeply impactful and worth prioritizing.

Who This is For:

Markets can seek out sponsor organizations.

Local governments, faith networks, and organizations can also work to grow mutual partnerships and larger portfolios of supported farmers markets.

Getting Started:

Growing partnerships starts with simply prioritizing communication with local connections or joining regional networks.

This [RAFI Guide to Farmers Market and Faith Community Partnerships](#) offers useful tips, many applicable beyond faith community partnerships.

²⁰ Sandolo, Cristina. 2011. *Partnerships: The Key Ingredient in Successful Farmers Markets*. Farmers Market Coalition. <https://farmersmarketcoalition.org/partnerships-success-ww>.

²¹ See Fig 10 for detail.

²² See Fig 16 for detail.

2.2 Explore virtual food hub platforms where innovative marketing links vendors and customers

“ We have seen a huge increase in the interest to shop local and to support local businesses and to buy from local farmers. ”

“ Aggregation amongst vendors is increasing (especially with pre-orders, home deliveries) and is a new opportunity/ challenge for farmers markets where aggregation would be considered re-sale. ”

Description:

Farmers markets are natural organizers between farmers and consumers. Virtual food hubs would allow these groups to expand their opportunities to connect by sharing farmers' produce online for virtual sales. Many different platforms already exist to provide online farmers markets, and purchases can reach customers through pickup at a physical market, home delivery, on-farm pickup, or other arrangement.²³ The online platform acts as the aggregator, allowing customers to access multiple farmers through a single site.

Depending on volume, resources, and existing infrastructure, the farmers market could add shared cold storage, CSA-style boxes that source from multiple farms, or coordinated delivery services to the virtual platform, moving closer to the functions of a direct-to-consumer physical food hub.

Why It Matters:

Leveraging an existing group of farm vendors and customers can help quickly scale up a virtual market to a sustainable level. Once sales are established, farmers have the opportunity to expand sales and traffic beyond the typical hours of a physical market, with the added benefit of lower logistical overhead if distribution can be centralized. The formalizing of customer- and farmer-friendly virtual food hubs can help transform the growth in local food demand seen in COVID-19 from a crisis reaction into a lasting behavior change.

Who This is For:

Individual markets can explore virtual platforms.

Market networks and funders can add these as priority funding considerations.

Getting Started:

Before opening a virtual hub, markets should be up and running with customer databases and mailing lists. Farmers may need training and support on keeping up with online inventory and marketing. Market managers will need to determine an appropriate level of shared services and spaces, and whether a virtual hub requires new branding or rules structure alongside the farmers market.

²³ Farmers Market Coalition. 2020. Webinar: *Thinking Inside the Box – Making Healthy Food Accessible with Curbside/Drive-Thru (Contactless) Models at Farmers Markets During COVID-19*. Farmers Market Coalition: Resource Library. <https://farmersmarketcoalition.org/resource/thinking-inside-the-box-making-healthy-food-accessible-with-curbside-drive-thru-contactless-models-at-farmers-markets-during-covid-19/>.

2.3 Develop and fund a dedicated statewide farmers market database, network, and resource platform

“ Third party assistance with implementation (and likely in some cases, maintenance) of broader food justice programs would be welcome and appreciated. ”

“ It would be very helpful if the state could provide grants, offer discounts or otherwise help fund the setup of SNAP/ WIC programs at new markets, such as ours, that are struggling to get established. ”

“ If the market were to consider a third-party marketing platform for virtual market shopping, this would require significant staff-time and vendor buy-in. About 1/2 of our vendors have an online store and the other 1/2 take orders by e-mail and we would need to feel confident in the platform and be able to long term sustain the increased cost of using it. ”

Description:

A long-term project to know, connect, and support all North Carolina farmers markets. The project would gather and sustain accurate data on farmers markets across the state in order to develop tailored, effective policy directions, to share and maximize resources, and to best understand the impact and potential of farmers markets on North Carolina’s farm economies and food access systems.

Why it matters:

There are few statewide resources, information, or even consistent counts of markets in NC. The NC Farm Fresh Directory²⁴ begins to provide information and resources for markets, but needs more resources to stay updated. This lack of clear, consistent information was a concern raised around racial equity and food access among advisors—without information on markets and programs, it is harder for new customers to access markets. Building on existing directories, a dedicated database of markets would help advertise and increase information available to the public, while providing accurate data for research.

A corresponding statewide network and resource platform would help support local networks in sharing information among farmers markets, while expanding connections to markets with fewer local resources. Additionally, statewide resources would help in facilitating online options, including SNAP/EBT, by sharing costs and administration. While local networks play an important role, a statewide resource platform would fill existing gaps and expand the capacity of local resources.

Who This is For:

This could be housed in state government (see NY Department of Agriculture database and resource platform²⁵), in a state-level advocacy organization (see Virginia Farmers Market Association²⁶), or as a public-private partnership.

Getting Started:

A task force including such partners as NC Department of Agriculture, NC Cooperative Extension, Rural Advancement Foundation International, Appalachian Sustainable Agriculture Project, Carolina Farm Stewardship Association, The Rural Center, and Center for Environmental Farming Systems could assemble and discuss how to launch and sustain such a project.

²⁴ www.ncfarmfresh.com/

²⁵ <https://agriculture.ny.gov/farming/farmers-markets>

²⁶ <https://vafma.org/>

Theme 3:

Work with BIPOC communities to build racial equity

Farmers markets are a visible, important part of local food, but have historically had difficulty including and serving BIPOC communities. Many food justice efforts in markets have taken a “color-blind” approach, focusing on food access initiatives without explicitly addressing systemic racism—and finding that general perceptions of markets as “white” spaces remain unchanged.²⁷

There are two main reasons to recognize and change this: First, by increasing economic opportunity for BIPOC farmers, farmers markets can be part of building justice and equity into the future of our food system. Second, by intentionally and empathetically welcoming customers of color to the market, farmers markets will be growing their customer base and creating a shared space for new community connections.

Our survey results also show a general trend that markets with BIPOC among leadership and/or vendors had greater sales success in 2020 than those that did not. For farmers markets to create a more resilient, shock-proof, and equitable food system, they must find ways to welcome and provide value and community for BIPOC as both customers and vendors.

These recommendations are not quick fixes, and require dialogue and empowerment of Black, Indigenous, and people of color as a key part of the process. We hope they can be a starting point for conversations and structural work in your market.

²⁷ Alkon, and McCullen. 2011. “Whiteness and Farmers Markets.” *Antipode* 43 (4): 937-959. <https://farmersmarketcoalition.org/resource/whiteness-and-farmers-markets>.

3.1 Begin a conversation about race in your market

Description:

Conversations about race can take many forms, though all should share a foundation of patience, humility, compassion, and honesty—even through discomfort and uncertainty. Seek to learn and understand, asking how race impacts market leadership, vendors, and customers.

Intentional conversations among leadership are fundamental in building a shared language and understanding, and can be relatively informal or with facilitation or structure as study groups. With vendors, dialogue can happen informally, within vendor agreements, or through structured workshops. Community conversations about race can be a part of standard market communication with the public, become integrated into market education programs, or involve intentional community programming to discuss race with community partners.²⁸

Why It Matters:

It can be difficult to acknowledge and discuss race in farmers markets — or any setting — but open dialogue about race is fundamental to building racial equity. White people especially must begin taking the first, often difficult steps toward open dialogue. Racism is ingrained in food systems, with Black farmers in particular having faced a long history of marginalization.²⁹ By opening dialogue about race, markets can build a shared language and open the possibility of building racial equity.

Who This is For:

Market leadership can take initiative to begin these conversations internally and with the public.

Getting Started:

The first step, always, is to acknowledge that race matters. Then reflect on your organization and work from where you are: there is no universal model for these conversations or “right” way to start, so tailor your work to the context of your market and the people you are with, and seek out resources that work for you.

This [Young Farmers Racial Equity Toolkit](#) is a fantastic guide to beginning conversations about race, with accessible term definitions, conversation guidelines, and readings on racial justice in food systems.

²⁸ Alkon, and McCullen. 2011. “Whiteness and Farmers Markets.” *Antipode* 43 (4): 937-959. <https://farmersmarketcoalition.org/resource/whiteness-and-farmers-markets>.

²⁹ Rosenberg, Nathan, and Bryce Stucki. 2019. *How USDA distorted data to conceal decades of discrimination against black farmers*. The Counter. <https://thecounter.org/usda-black-farmers-discrimination-tom-vilsack-reparations-civil-rights>.

3.2 Increase representation of BIPOC among farmers market leadership and vendors

Only 23% of surveyed markets had BIPOC leadership.

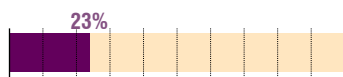


Fig 32. Proportion of markets with any BIPOC leadership: all markets³¹

Only 60% of surveyed markets had any vendors of color.

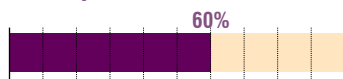


Fig 33. Proportion of markets with BIPOC vendors: all markets³²

“ *In the short term, representation and inclusion bring people coming out to shop, learning to cook new things, and building networks.*

In the long term, it builds a sense of self-efficacy, and confidence among BIPOC communities. ”

61% of markets with BIPOC leadership, and 59% of markets with BIPOC vendors had greater/ steady sales in 2020 vs 2019, compared to 55% of all markets.

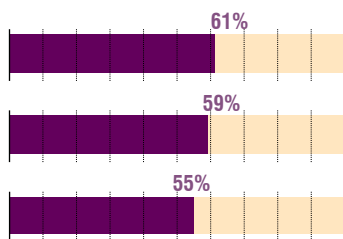


Fig 34. Sales in 2020 vs 2019: markets with BIPOC leadership (top), with BIPOC vendors (middle), all markets (bottom)³³

Description:

Markets should dedicate time and energy to recruiting BIPOC vendors and adding people of color to boards, steering groups, and management. Building relationships with communities and organizations of color can help support outreach and recruitment of BIPOC. Listening to concerns from BIPOC vendors, community leaders, or potential customers that may be reluctant to join the market can help identify unintended barriers or racial bias standing in the way of greater inclusion.

Why It Matters:

Meaningful representation is a key part of creating an equitable and welcoming market. Less than a quarter of our surveyed markets had BIPOC in leadership, and over a third of our surveyed markets had no vendors of color—reflecting historic marginalization of BIPOC farmers, as well as exclusion more specific to farmers markets.³⁰

Among advisors, empowerment of BIPOC leaders and seeing vendors of color in markets were crucial aspects of inclusive markets they had participated in. When BIPOC are included as an integral part of market functions, markets can show a more complete view of local food in NC, blind spots can be challenged, and a truly welcome and inclusive community can form.

While equity and inclusion are goals in their own right, it's likely that representation also factors into market resilience: our survey findings show a general trend that markets with BIPOC representation among leadership and/or vendors were more likely to estimate increased or steady sales in 2020.

Who This is For:

Individual markets and market networks

Getting Started:

Define your goals in increasing representation: know the difference between tokenism and inclusion, and focus on empowerment of BIPOC rather than checking boxes. Reach out to community leaders and farmers of color, and embrace new people, ideas, and actions in your market.

This [toolkit from a case study of the Bloomington, Indiana Farmers Market](#) offers helpful guidance on creating an inclusive culture in farmers markets, with tools and strategies to increase racial and economic inclusion in market culture.

³⁰ Splitter, Jenny. 2020. *Largest D.C. Farmers Market Repeatedly Denied Spots To Black Vendors, Farmers Allege*. Forbes. <https://www.forbes.com/sites/jennysplitter/2020/06/14/racism-dc-largest-farmers-market/#7235b6d4575b>.

³¹ See Fig. 22 for details.

³² See Fig. 23 for details.

³³ See Fig. 26 for details.

3.3 Critically examine your market's structure and policies, focusing on equity and inclusion

“ There must be a power shift—white farmers and markets must reckon with the past and increase accountability in the present. ”

“ How could black leadership change the face of farmers markets if allowed to? ”

“ We're tired of policing, of scrutinization through many levels. ”

90% of markets with BIPOC leadership had BIPOC vendors, compared to 60% of all markets.

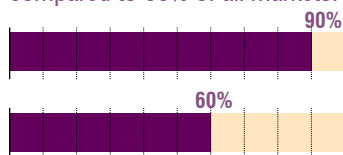


Fig 35. Proportion of markets with BIPOC vendors: markets with BIPOC leadership (top), all markets (bottom)³¹

75% of markets with no vendor restrictions had BIPOC vendors, compared to 60% of all markets.

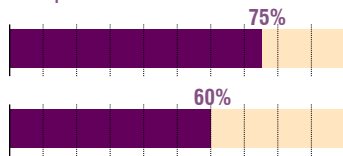


Fig 36. Proportion of markets with BIPOC vendors: markets with no vendor restrictions (top), all markets (bottom)³⁴

Description:

Market policies determine the personality of a market, defining it to vendors and community partners. Racial equity must be integrated into the creation or reassessment of these policies to combat unintended bias and structural racism. Assessment of policies with input from leaders, farmers, and vendors of color is an essential first step. Seek ways to challenge and improve existing structures: Where is implicit bias appearing in market policies? Are blind spots limiting participation of some vendors? How could policies be enforced more equitably?

Equitable policies will be different for every market and community, but some common themes and strategies include: transparent and clear vendor rules; onboarding calls or trainings for new vendors; flexibility in requirements that may restrict marginalized farmers; and recognition and reconciliation of past harm.

Why It Matters:

Market rules and policies can be restrictive to farmers of color, even if restrictions are not explicit. In advisor conversations, we learned that detailed rulebooks can lack transparency, imply scrutinization, or be enforced in unequal ways, making BIPOC less likely to apply or be admitted as vendors.

In our survey responses, markets with few vendor restrictions (such as no reselling, location requirements, or no non-food products) were more likely to have vendors of color. We are not suggesting that markets remove vendor policies, but to analyze and adapt policies to maximize transparency, equity, and inclusion.

Who This is For:

Market leadership should take initiative to examine market structure and policies with vendor and community voices.

Getting Started:

It is imperative to listen to and empower BIPOC leaders, vendors, and community members from the beginning of this process. Additionally, as serious as this work is, find the excitement and creativity in envisioning and enacting your market's work toward justice.

This [Race Matters Organizational Self Assessment](#) is a great general resource to assess and act toward equity in your organization, along with language and frameworks to understand organizational change.

³⁴ See Fig. 25 for details.

3.4 Provide support to markets for racial equity trainings, education materials, and conversations

“ Operating in a predominately white Appalachian community with white farmers/producers, we struggle on how to center racial equity.”

We would like input from others about how they center racial equity and discuss racism in the food system. ”

“ I personally would love more information/training on ways to work towards racial equity and broader food justice. ”

“ I would like to know more about being more racially equitable. ”

9% of surveyed markets had leadership engaged in racial equity training.

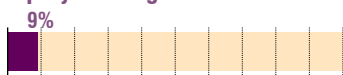


Fig 37. Proportion of markets with leadership engaged in racial equity training

Description:

Sustained racial equity training, education, and conversations are important tools to understand structural racism and learn skills to build equity. Racial equity training provides a common language and skillset, while intentional conversations can build community around racial equity.³⁵ By investing in funding, gathering, and creating shared resources for markets, supporting groups can provide the capacity for markets to do this work.

Why It Matters:

Only a small proportion of farmers markets reported engaging in racial equity training, while several expressed a desire for more resources, education, and broader conversation around racial equity in farmers markets.

With the limited resources of farmers markets themselves, supporting targeted racial equity trainings, education materials, and conversations is imperative for long-term, impactful racial equity work in markets.

Who This is For:

Regional networks, private organizations, and state policy can fund and/or facilitate these resources.

Getting Started:

Farmers market groups and networks should share resources and identify common needs to supporting groups and advocacy networks.

Local governments and nonprofit funding agencies should recognize needs for increased support for racial equity work is in order to maximize market impact.

For a hands-on approach, the [Racial Equity Toolkit's Community of Practice resource list](#) offers great information on forming and facilitating sustained racial equity work in communities, such as farmers market networks.

³⁵ Racial Equity Tools. n.d. *Training and Popular Education*. Racial Equity Tools. <https://www.racialequitytools.org/act/strategies/training-and-popular-education>.

05. Next Steps: Questions Raised

Through our analysis we reached two kinds of conclusions: those that led to specific, tangible action recommendations, and those that remain open-ended.

While in some cases we found data and insights to support clear action recommendations, in other cases our research and engagement methods as designed did not allow enough depth to reach clear conclusions. We are, however, as part of our process, able to point the spotlight at areas needing further investigation.

The following questions describe these open areas that, in our view, deserve further exploration as we grow toward a resilient, energetic system of farmers markets in North Carolina. Building knowledge around these key questions will provide the data and insights needed to develop the next, more detailed set of strategies and actions for farmers markets.

How effective have SNAP/WIC and nutrition incentive programs in farmers markets been through the COVID crisis?

What:

55% of our surveyed markets accept SNAP/EBT and/or WIC, and 33% offer additional incentive programs. In our analysis, we found little relationship between SNAP/WIC or nutrition incentive programs and sales, and our study did not specifically measure program efficacy. Targeted research toward food access through farmers markets during crises can go a long way toward increasing capacity of markets. How has COVID-19 impacted SNAP/EBT, WIC/FMNP, and nutrition incentive program sales? What support do markets need to most effectively provide food security to communities? How can these programs increase market sales or visitors?

Why it Matters:

In open-ended questions, several markets noted increases in SNAP business this season and concerns about incentive program funding. Food insecurity is an increasing threat through the COVID-19 pandemic, and farmers markets are a powerful potential source in relieving this issue.

“Our SNAP business is four times what it was for this same quarter last year because of our long-standing [double-bucks] program. I’m really worried that when the P-EBT funds and federal unemployment support run out we will have a lot more folks struggling in our community. And if we continue to see the volume of SNAP doubling we are seeing now we will run out of matching funds before the year’s end.”

“We hope to continue to spread the word about our SNAP/EBT/Fresh Bucks program to help those with food stamps since losing their jobs from COVID-19 or the ones who have children home from school who aren’t getting daily meals provided, have access to better food.”

How can Black, Indigenous, and People of Color be more invited and welcomed into the NC farmers market community?

What:

This study was broad, and focused more on racial equity in market vendors and management than on customers or communities. There is room and need for further research into actual representation of farmers and customers of color in NC farmers markets, as well as into best practices for creating inclusive markets: What is the demographic makeup of farmers market customers in NC? Of Vendors? What is impacting inclusion among BIPOC as customers, and what do individual markets need to combat this?

Why it Matters:

Several markets expressed needs for more resources on racial equity in farmers markets, and a first step to curating resources is to know what is actually happening in markets. We hope that our study can be built upon by individual and regional data collection around race in markets to provide context and focus areas for building racial equity in markets.

How might we gather more stories, experiences, and insights from BIPOC as vendors, leaders, and customers in North Carolina's farmers markets?

What:

Sharing stories can be a powerful tool toward empathy and understanding, and toward addressing the 'blind spots' we all carry in regards to others' experiences. Hearing directly from those most impacted by injustice can often provide new perspectives on why and where change is needed.

Why it Matters:

If, for instance, structural racism in a farmers market setting were something that a market decided to explore and try to dismantle, a group of mostly white people will have a difficult time clearly seeing where the barriers to equity and justice may be. By actively seeking and listening to BIPOC who have experienced the kinds of barriers the market is trying to break down, this group of white people will take an important step of seeing the problem through another's experience. This is not the same as creating racial equity, but gathering and sharing stories like this from across the state could allow many white people to open their eyes to new facets of the issues.

What are the 2020 experiences of the farmers markets not included in our survey responses?

What:

We did not reach all of the markets in NC, and we do not know why any particular market was not able to respond. There may have been any number of reasons for this, including severe challenges in staying open through the pandemic.

Why it Matters:

While we estimate a response rate of roughly 45%, the unprecedented circumstance of the pandemic makes statistical extrapolation inadvisable. To understand the full landscape of farmers markets in NC, greater effort and diligence must be directed toward on-the-ground research and investigation to fill these gaps in understanding.

What are the current and potential roles for farmers markets in city-region food economies, as part of innovative direct-to-consumer systems?

What:

Important opportunities for urban-rural economic development and environmental sustainability can be found through development of city-region food systems. As a traditional anchor of local food systems, farmers markets hold a key space where farmers and consumers intersect. As city-region food systems are studied and developed in NC, the evolving role(s) of farmers markets should be included as both a historical understanding as well as a future-oriented scenario modeling.

Why it Matters:

Development of effective city-region food systems, where a significant portion of the region's food is produced regionally, will lead to a more food secure, economically equitable, and climate-adaptive region. To the extent that farmers markets can fill certain links in these city-region models, these roles should be explored and developed.

06. Appendix

Appendix A: Resource List

This is definitely not an exhaustive list—there are many organizations and groups working to provide information and resources beyond what we have pulled together. We hope this can be a helpful starting point to resources that can assist in actions, and share some of the sources from our process!

COVID-19 Response

General Resource Lists:

- [Local Food Systems Response to COVID Resource Hub](#): Fantastic collection of resources, reports, and connections focused on local food system responses to COVID
- [National Farmers Market Coalition Resource Library](#): Continuously updated database of resources, many concerning COVID-19, targeted to farmers markets

Toolkits, Guides, and More:

- [Farmers Market Coalition Webinar on Curbside Pickup and Preorder Programs, September 2020](#): updated insight into various curbside pickup and preorder programs, including SNAP/EBT implementation
- [Population Mapping Tool](#): Tool to estimate population near your market for market planning
- [RAFI Guide to Farmers Market and Faith Community Partnerships, 2018](#): A guide to building faith community partnerships with strategies applicable to building any partnerships
- [Farmers Market and Local Food Promotion Program Grants](#), Sept 2020
- [National Farmers Market Coalition, October 2020 Farmers Market Survey](#) on COVID-19 response

Racial Equity

General Resource Lists:

- [National Farmers Market Coalition Anti-Racism Resources](#): Continuously updated list with both educational and strategic resources, targeted to farmers markets
- [Food Tech Connect Food & Agriculture Anti-Racism Resources](#): Great list of education resources, specific to food & agriculture
- [Racial Equity Tools](#): Collection of thousands of tools, strategies, and tips on working toward racial equity in organizations

Toolkits, Guides, and More:

- [Young Farmers Racial Equity Toolkit, 2020, Young Farmers Coalition](#): Fantastic starting guide to racial equity conversations and work in food
- [Bloomington Farmers Market case study toolkit](#): Guide to building racial and economic inclusion in farmers markets, based on a case study on a market in Bloomington, Indiana
- [Race and Equity at Farmers Markets, 2019, Massachusetts Food System Collaborative](#): Project report and toolkit on creating a culture of inclusion in farmers markets, focusing on racial and economic equity
- [Race Matters Organizational Self Assessment, Annie E Casey Foundation](#): Framework for assessing and working to build racial equity into organizational structure
- [Farmers Markets and Whiteness \(podcast\), 2019, Earth Eats](#): Insightful podcast on race in farmers markets, including conversations with farmers, customers, organizers, and authors
- [Whiteness and Farmers Markets \(article\), 2010, Alkon and McCullen](#): Academic article on race in farmers markets, with some suggestions to shift toward equitable markets

Appendix B: Survey Text

1. Name of Market

2. Market Street Address

3. Town or City of Market

4. Market's Facility Type

- a. Pop-Up Tents
- b. Permanent Outdoor Pavilion
- c. Permanent Indoor Market
- d. Other:

5. Market Organizational Structure

- a. For-profit
- b. Independent non-profit
- c. Sponsored by government
- d. Sponsored by another organization
- e. Unincorporated
- f. Other:

6. Average number of market days per year (pre-COVID)

7. Average number of vendors (pre-COVID)

8. Does your market apply any of the following vendor restrictions? Check all that apply.

- a. Vendors/Producers must be located within a certain mile distance from the market
- b. Vendors can only sell what they produce or make: no reselling allowed
- c. Vendors may only sell produce, value-added food items, and meat: no non-food vendors allowed
- d. Other:

9. Is your market within a 5-minute walk of five or more retail businesses or community institutions (eg library, school)?

- a. Yes
- b. No

10. What communication methods does your market use to connect with customers and the public? Check all that apply.

- a. Website
- b. Social Media
- c. Email Mailing List
- d. Newspaper/Print Advertising
- e. Paper Flyers
- f. Word of Mouth
- g. Other:

11. How does your market work toward racial equity and broader food justice? Check all that apply.

CFL note: We grouped all of these responses into one question, unintentionally equating race, food injustice, and food insecurity. We know that BIPOC are statistically more likely to be excluded from food system opportunities and to be food insecure, but we do not believe or want to give the impression that all people of color are food insecure. We have worked to separate these issues in our analysis, and hope that readers will also appreciate this distinction.

- a. People of color in leadership roles in market
- b. Representation of farmers/vendors of color in market
- c. Market leadership engaging in Racial Equity Training or Coaching
- d. Acceptance of SNAP/EBT and/or WIC/FMNP
- e. Double Up Food Program
- f. Provision of SNAP eligibility screenings and enrollment on-site
- g. Online distribution of market vouchers or incentives
- h. Educational programs: nutrition and food knowledge, vendor mentorship, farmers' market navigators for new customers, etc
- i. Childcare and/or youth activities (pre-COVID)
- j. Multiple languages in marketing, signage, and programs
- k. Promotion and sales of culturally appropriate foods
- l. Outreach and marketing toward underrepresented groups
- m. Location: within a food desert/food apartheid area - lacking access to affordable, healthy foods
- n. Location: within a predominantly black or brown neighborhood
- o. Location: accessible for walking, biking, affordable public transit, and cars
- p. Other:

12. How has your market responded to COVID-19? Check all that apply.

- a. Requirement of PPE/face coverings among staff, vendors, and/or customers
- b. Adjustment of market layout to increase social distancing
- c. Signage encouraging or requiring social distancing
- d. Implementation of curbside pickup or pre-order programs
- e. Partnering with third-party online marketing platform for virtual market shopping
- f. Implementation of "senior hour" or "at risk" shopping times
- g. Limitation of number of customers allowed at once
- h. Addition of hand-washing stations
- i. Limitation of on-site prepared foods
- j. Cancellation of non-essential activities (eg live music, educational activities, children's activities)
- k. Cancellation of market days to allow time to develop a COVID-19 strategy
- l. Cancellation of 2020 season
- m. Other:

13. In your estimation of total number of visitors, how will your 2020 season compare to 2019?

- a. Far more visitors in 2020
- b. Slightly more visitors in 2020
- c. About the same number of visitors in 2020
- d. Slightly fewer visitors in 2020
- e. Far fewer visitors in 2020
- f. Not sure

14. In your estimation of market sales, how will your 2020 season compare to 2019?

- a. Far greater sales in 2020
- b. Slightly greater sales in 2020
- c. About the same amount of sales in 2020
- d. Slightly lower sales in 2020
- e. Far lower sales in 2020
- f. Not sure

15. As you consider the future, what will be your greatest challenge as we move through and hopefully beyond COVID-19?

16. Is there anything you would like to add? Your own insights and response, in your own words, can be incredibly helpful in addition to the multiple choices, above!

17. Can we follow up with further questions? (if yes, leave email address below!)

- a. Yes
- b. No

18. Your Email Address



Turnips
\$1.25/lb

Cabbage
\$1.25/lb

Cucumbers
\$2.50/lb

Next Weekend TOMATOES

Next Weekend TOMATOES

BEHIND THE SCENES
DO NOT DISTURB

Collards
\$1.99/lb
Temp

PLEASE KEEP
6FT
A SAFE DISTANCE

PLEASE ONLY ONE
CUSTOMER
AT A TIME

Butternut
Squash
Wise \$1.49/lb
Fruit

Thank
You for
Shopping
With Us