

***Farmers' Markets
and the
Benefits of Participation
for
Small Family Farms:***

***A Case Study of Two Markets on the
Mid-North Coast
of
New South Wales***

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Declaration

The candidate hereby declares that the work in this thesis is original work by the candidate and has not been previously submitted to any other university or institute for the award of a higher degree. Information derived from published or unpublished work of others has been acknowledged in the text and a list of references has been provided.

The candidate gives consent to this copy of the dissertation, when deposited in the University Library, being available for loan and photocopying.

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Abstract

In popular literature as well as some academic articles, farmers' markets are usually described as a very positive development in the world of food retailing. However, farmers' markets generally require some forms of government assistance for setting up, and a lot of nurturing from enthusiasts often on a voluntary basis. Many market managers report difficulty in attracting growers to participate and a high drop out rate of stallholders.

Relevant literature from the United States, the United Kingdom and Australia is examined and the results of discussions held with two groups of producer stallholders who participate in small markets on the Mid-North Coast of New South Wales are analysed. This paper thereby seeks to examine the benefits that farmers may derive from participation in farmers' markets and whether these benefits are sufficient to improve or maintain the viability of small family farms, as many enthusiastic supporters claim.

The literature establishes that there are different kinds of markets: frequently held 'experience' markets situated in metropolitan and large regional centres and small less frequent, usually monthly markets held in small rural centres. The two kinds of markets provide benefits on a very different scale and the producers who frequent them are also at very different stages in their enterprises. Full-time successful stallholders who make much of their income from farmers' markets are to be found taking part in the frequently held city markets, while the smaller, less frequently held 'indigenous' markets tend to attract hobby and part-time farmers who derive the bulk of their income from elsewhere. Many of them only sell a very small proportion of their produce at farmers' markets.

The conclusion reached by this study is that while they confer many intangible, hard-to-quantify benefits on growers, such as advertising, market research, pleasurable social experiences and a reinforcement of their feeling valued as producers of high-quality food, small farmers' markets do not provide the answer to the difficulties faced by small family farms. They are only one of several different marketing initiatives that entrepreneurially inclined farmers, who are by no means the majority, may be able to take advantage of, while still selling much of their produce to other outlets.

For as much as foods, markets are people, offering sustenance not only to individuals but to society¹

Preface

The topic for this dissertation had its beginnings in a workshop organised by the New South Wales Farmers Association which I attended at Warwick Farm Racecourse in Sydney in June 2003. It featured John Stanley, a retailing consultant who travels the world advising retailers on how to maximise their profits. He concentrates on customer service, displays and the physical ambience of retail spaces. The workshop was largely organised for the benefit of the vendors of the farmers' market held at Warwick Farm at the same time. Many of them attended, as did potential market participants like my little group.

There seemed to be a general air of despondency at the market that day and many of the stallholders were going home at the end of the day's trading with their trucks nearly as full as when they arrived in the morning. There was no consensus as to why sales were not going as well as they could. The market organizers, employees of the New South Wales Farmers Association, apparently felt that the growers just needed more retailing skills. The vendors clearly felt that what they needed were more customers.

That was the beginning of my interest in farmers' markets as a research topic, and the realisation that some of the assumptions underlying decisions made in respect of markets need to be examined. In 2004 I became involved with the setting up of the Kempsey Growers' Market and the uptake of the idea by potential vendors was frustratingly slow. A despairing Kempsey Shire Economic Development Manager exclaimed: "we are trying to help our farmers and they won't help themselves!" Apparently the benefits were not as obvious to the local farming community as they were to us, and to this day there are as many vendors from outside the shire as there are locals.

1. INTRODUCTION

1.1 Background

Farmers^{*} markets have become very popular in the United States and the United Kingdom over the last decade or two and more recently in New Zealand and Australia, with increasingly health conscious consumers, local government authorities, restaurateurs and food writers among others. They are perceived as a cure for many of modern society's ills: some writers for the popular press and some market managers claim that these markets are the saviours of family farms and the means of preservation of small scale food production in the 21st century.² In the United Kingdom farmers' markets "help maintain the employment base in rural areas, help in the regeneration of urban areas and generate income".³ More moderate but still enthusiastic supporters have assigned to farmers' markets the power to help revitalise Australia's rural economy. In general, claims made for these retail outlets are upbeat, everybody benefits from a farmers' market: "[f]armers, extension workers, and government officials look to direct marketing as a means of identifying alternative income sources, preserving small farms, strengthening economic and social ties between farms and urban residents, and as an outlet for organic and specialty farm products".⁴

The fact that so many farmers' markets are assisted by state or local governments indicates that this upbeat assessment is a widely held view. But on closer examination, not all markets prosper and thrive, and many market managers have indicated that they have difficulties attracting and keeping vendors, especially at newer and smaller markets.⁵ Both the need for champions and a general shortage of vendors may be a sign that perhaps markets in general are not as directly beneficial to growers as many organisations hope, or

^{*} The spelling of farmers' markets varies in the literature. I prefer to use the apostrophe, but quotations will vary in their usage.

more likely, that not all markets are directly beneficial to all growers and that not all segments of the community feel enriched by their presence.

This study examines how this enthusiasm for perceived benefits translates into real experiences for vendors who participate in small rural markets. As these markets share common characteristics across the English speaking part of the developed world: they are less frequent, often monthly, in areas modestly situated on the socio-economic scale, distant from major population centres and with a limited number of stallholders, these results may be extrapolated to similar farmers' markets elsewhere. The importance of the information collected and examined in the course of this work is that it may both offer an explanation and suggest strategies for the solution of some of the difficulties faced by market management in the maintenance of healthy markets and in a small way assist their continuing success.

The common assumption that farmers' markets are the answer to the difficulties faced by family farms in continuing to operate in the globalized, free-market environment of the 21st century is challenged. Some authors on the subject also question this assumption. Lyson, Gillespie and Hilchey while stating in the body of their paper that farmers' markets "may represent an economic lifeline"⁶ also admit in their conclusion that "from a neoclassical standpoint, farmers' markets may not make good economic sense".⁷ "The perception of profitability in direct marketing has led many farmers and entrepreneurs to become involved only to find it more challenging and less lucrative than anticipated".⁸ Opposition from mainstream retail outlets has also ensured that the path of newly established farmers' markets is not always a smooth or easy one. It seems that farmers' markets are not the complete, unalloyed success they are claimed to be, that not all small farmers who participate find their economic salvation therein.

An examination of farmers' markets in the 21st century involves the concepts of social embeddedness, localness and relations of regard. These are qualities attributed to farmers' markets in contrast to a global food system "under the growing control of a few seemingly unpeopled, yet powerful transnational corporations" and such qualities are seen as a comparative advantage of direct agricultural markets.⁹

Colin Sage scrutinises the theory that in the 21st century, when food security is of great concern to consumers especially in the United Kingdom, the local origins of the food being purchased is viewed as being of a greater *good* than being organic, or any other measure of wholesomeness. Perhaps as a consequence of the highly processed nature of foods purchased from mainstream retail outlets, and concern over the very long distribution chain that even unprocessed food items undergo, the *social embeddedness* of the producer in his or her local community, their being present at the point of purchase and thus capable of being personally known, is generally held as being a sufficient guarantee of the excellence of the food being sold. This food is perceived to be of high quality and "its ecologically embedded character defined by its locality of origin... [I]ts socially embedded features are established by ... its generally localized distribution through short food supply chains".¹⁰ Thus, this personal form of commercial interaction with the producer provides both parties to the transaction with a basis for a relationship of regard which will continue over repeated interactions, whether in fact it is justified or not.

Michael Winter calls this a "defensive localism", rather than a concern for environmentally sustainable means of production or any other objective measure of quality.¹¹ These local foods and drinks are often invested with concepts of "tradition, authenticity, quality, natural-ness and local-ness" and the advertising for some markets stresses the selling of local food to local people thus apparently guaranteeing quality, freshness and safety.¹² These concepts contribute to an understanding of one of the observations made in the course of this particular study, that for many vendors questioned overseas and at the Mid-North Coast markets, the enjoyment of selling at the farmers' markets may be even more important than the monetary returns.

1.2 Research objectives

The continuing existence of small family farms is under threat in the 21st century and whether the benefits conferred by farmers' markets assist families to stay on their farms is a question of interest to policy makers as well as those directly involved. As a significant amount of funds and a greater amount of energy are spent supporting farmers' markets, it is important to investigate the benefits that

growers in fact do derive from participating. To date, only a limited amount of information is available on the impact of farmers' markets on farmer income.¹³

The main sources of primary data were field observations at the Kempsey Growers' Market and two focus group discussions, using Krueger's focus group discussion research model. The hypothesis that the benefits to stallholders of farmers' markets is contested, rests on participants' perceptions of their situation, therefore a qualitative enquiry based on focus group discussions is the most efficient way to tease out this information.

An examination and analysis of relevant literature and discussions with stakeholders and focus group participants will:

- identify and describe different kinds of farmers' markets
- identify and describe vendor characteristics and lead to an understanding that farmers' markets are prime outlets for hobby or part-time farmers rather than traditional landholders.
- enable some conclusions to be drawn about the economic effect of small rural farmers' markets on family farms and rural communities
- identify and describe benefits other than financial

The purpose of this research is to demonstrate that participation even in small farmers' markets in rural Australia does confer some benefits on its participants, but that not all markets provide these benefits to the same extent, not all growers benefit in the same way and that certainly not all of these benefits are financial or even quantifiable. By focussing on two relatively recently established markets on the Mid-North Coast of New South Wales, namely the Hastings and Wingham farmers' markets, it is hoped that the findings may be extrapolated to other, similar, rural farmer's markets in Australia.

1.2.1 Assumptions and limitations

- The researcher has relied on the vendors self-describing any benefits they derive and only asking them for the percentage of their produce sold, rather than percentage of income earned from markets which is a limitation when examining financial benefits. However, initial attempts to discuss income derived from markets met with palpable resistance. As Ramu Govindasamy, a researcher who has conducted dozens of surveys and hundreds of interviews notes wryly: “as is well known, farmers are seldom able and / or willing to reveal their actual income”.¹⁴
- Findings are necessarily limited as growers are far from a homogenous group, their personal circumstances are very different and therefore their expectations and needs vary.
- It was outside the scope of this study to contact vendors who have dropped out of participating in farmers’ markets, and a fruitful follow-up to this project would be to get an overview of the reasons that caused them to do that.

1.2.2 This has been done before

At the second National Australian Farmers’ Markets Conference at Albury in August 2005, a study on Australian farmers’ markets was launched. It was funded by the Victorian Department of Primary Industries, completed by Max Coster and Nicole Kennon, titled New Generation Farmers’ Markets in Rural Communities and published by RIRDC. Largely undertaken during 2004, it is a study which involved a national survey of farmers’ market managers and in-depth interviews with the vendors of three Australian farmers’ markets: Collingwood Farmers’ Market in Melbourne, Hume-Murray Farmers’ Market in Albury and the Hastings Farmers’ Market in Wauchope, as well as surveys of shoppers at these three locations.

The authors provided free access to all the unpublished draft documents relating to their surveys as soon as they were requested to do so. These documents are

wider in scope and more detailed than the published work and have been consulted extensively for this study.

Coster and Kennon's research objectives were wider than those for this study; they were looking at four aspects of farmers' markets' effects:

- the social and economic benefits to rural and town communities provided by 'new generation' or producer-only farmers' markets
- the employment and local leadership created by farmers' markets
- the relative benefits perceived by farmers compared to other marketing options
- the factors that contribute to a successful farmers' market ¹⁵

Although initially there was concern over the possibly overlapping scope of the Victorian study and this study, this project is more focussed in its objectives and is aimed purely at vendors, their profits and the effect of farmers' markets on the financial viability of their farms. Finally, there was only one focus group participant who had also been interviewed by Nicole Kennon and it would seem that the two studies complement each other rather than go over the same ground.

1.3 Definition of key terms

Family farm: the definition used for this study is a very straightforward one used by Rick Welsh a policy analyst for the Henry Wallace Institute for Alternative Agriculture in Virginia: "an unincorporated farming unit owned by persons residing on the farm and actively engaged in farming".¹⁶

Farmers' markets: will be defined in greater detail in the body of this work, but a brief description is that of *farmers selling produce to individual customers at a temporary location*.¹⁷ They are also referred to in some of the literature under review as *direct agricultural markets* and also as *growers' markets*. In the United States where the term farmers' market can mean many things, *producer-only*

market is the nomenclature often used for the institution under consideration in this study.

Vendors, stallholders, growers, producers, farmers: are frequently used interchangeably. They are people who grow fruit and vegetables, produce meat or honey, or prepare value-added items such as jams, cheese, roasted nuts, pastes and olive products and who then attend stalls at farmers' markets to sell these products to individual shoppers. Occasionally a member of the family or a paid employee attends to these stalls instead of the principal producer and producers also at times sell items for each other.

This study draws on the disciplines of geography and sociology in its examination of a currently emerging retailing phenomenon. The use of focus group discussions to clarify the issues enlists the participants as co-researchers engaged in identifying meaningful ways of analysing this modern retail outlet and its role in the economic survival of an embattled way of life, namely small family farms.

Chapter two provides a context for the research, based on a review of current literature: a description and discussion of different kinds of farmers' markets in the United States, the United Kingdom as well as Australia using Thomas Tiemann's typology of markets to draw distinctions between large, urban and small, rural markets and infer that the benefits they confer on vendors can be deduced from the types of markets that they are. This is followed by an examination of studies conducted into the perceived benefits of these direct marketing outlets to farmer stallholders. The economic conditions of the Australian agriculture sector in general as well as the Mid-North Coast of New South Wales are briefly surveyed, inasmuch as these have a bearing on farmers' markets. Chapter three provides an outline of the research methodology which includes the focus group design, the study area and research sites, as well as the methods and analysis. Chapter four deals with the outcomes of the focus group discussions that were conducted with vendors at two small, rural markets and provides a summary of findings. This discussion leads to chapter five and to the conclusions drawn by the researcher, some suggestions for further research and some possible concrete initiatives.

2. LITERATURE REVIEW

2.1 Background

Food markets have been in existence since humanity lived in urban centres, their form changing over the millennia to suit different conditions and societies. Although farming communities were largely self-sufficient for much of the time, markets have been the centres for selling surplus produce and for feeding the increasing number of people in the community who did not grow their own food. Ancient Greece, Egypt of the pharaohs and classical China all had their markets which also acted as a focus for social life.¹⁸ Even today, in some less developed areas of the world markets are held daily, as they are the only source of food purchases for urban populations.

During the Middle Ages in Europe, markets were established in most towns and within reach of all but the most remote villages. These urban markets were the sites for both farmers trading surplus produce and traders reselling goods for profit.¹⁹ London and other large cities, attracted traders from all over Europe for their markets and fairs.²⁰ Gradually chains of intermediaries between producer and consumer formed and the distance between food production and consumption lengthened. As cities grew, markets became difficult to manage for urban authorities and many were relocated outside city walls in the suburbs, and covered halls surrounded by open-air markets were constructed.²¹

Food supplies to large population centres were often at risk: city administrators in Venice in the 15th century had to buy cattle from Hungary, Istanbul authorities one hundred years later were importing sheep from the Balkans and grain from Egypt for its 700,000 inhabitants.²²

By the 19th century urban markets in the Western world had become permanent buildings "monuments to the wonder of industrial technology, palaces of abundance" but they could not keep pace with the demands of growing populations and by the end of the century major centres hosted large food stores which eventually grew into the supermarkets we know today.²³ The development

of efficient transport and modern food technology has led to the rise of convenient, one-stop, all-year-round shopping, which in turn led to the gradual disappearance of farmers' markets from the cities of most Western countries. Taking advantage of industrial food preservation and distribution, supermarkets now provide the bulk of foodstuffs to city populations in the process not only taking control from consumers, but also abrogating to themselves the great proportion of financial returns away from growers. In a continuation of trends that began as early as the 15th century, farmers receive as little as 10 percent as their share of the retail price of some commodities.²⁴

Partly as a reaction to the industrialisation of food processing, the long supply chain sometimes leading to thousands of kilometres of travel before even an unprocessed item reaches the table and the continuing dissociation between people and the origins of their food has led to the desire of a growing number of consumers to return to fresh, unprocessed, local produce. Farmers' markets are one means of retailing food on a much shortened supply chain.

The modern version of farmers' markets have proliferated in the second half of the twentieth century and according to data posted by the United States Department of Agriculture (USDA) on its website, the number of farmers' markets there has risen from 1755 in 1994 to 3706 ten years later.²⁵ The United Kingdom National Association of Farmers Markets website states that the first 'new generation' farmers' market was held in Bath in 1997 and in 2002 there were 450 markets in the UK.²⁶ The Australian Farmers' Market Association which was formed in 2003 listed 76 markets on its website in March 2005.²⁷

2.2 Models and definitions of farmers' markets

The definitions under which market managers operate need to be understood, as it has implications for the way these enterprises are structured and therefore the benefits participants may derive from them.

In Kempsey, New South Wales, there is a retail outlet called Kempsey Farmers' Market, so the monthly direct marketing event is called the Kempsey Growers' Market. In some areas they are called *produce markets* and in New York City

they are called Greenmarkets. There are also *organic markets* that operate more narrowly and with many more restrictions. The definitions of farmers' markets although pretty consistent from country to country express some differences of emphasis. In the USA regulations are not always strictly enforced and reselling does take place and this has implications for producer participation. Some studies refer to *producer-only markets* in an effort to differentiate. However, there have only been a few studies conducted into producer-only markets.

The Australian Farmers' Markets Charter is chiefly concerned with the locality and ambience of markets in its definition: "A Farmers' Market is a predominantly fresh food market that operates regularly within a community, at a focal public location that provides a suitable environment for farmers and food producers to sell farm-origin and associated value-added processed food products directly to customers."²⁸ This definition clearly places markets at the centre of the community; they are community enterprises and community building is seen as an important function.

The growth in the numbers of farmers' markets in the United Kingdom has been given a strong impetus by recent food related health scares such as Bovine Spongiform Encephalitis and foot and mouth disease as well as popular concern over genetically engineered food products. Hence the UK definition is a bit tighter and is more closely concerned with the provenance of the goods sold: "Farmers, growers or producers from a defined local area are present in person to sell their own produce, direct to the public. All products sold should have been grown, reared, brewed, pickled, smoked or processed by the stallholder".²⁹ This definition is concerned with the responsibility of each vendor for the products they sell. Known provenance is associated with safety which is of very high priority.

There does not appear to be an overarching association of farmers' markets in the USA and the USDA does not define farmers' markets.

Allison Brown in her review of United States based research on farmers' markets makes a strong case for the inaccuracy of USDA statistics including the number of farmers who are thought to take part in direct marketing activities. She claims that the number of participating farmers and the income they derive are vastly

underestimated, because only a small proportion of markets are registered with the Department. She also comments on the looseness of the definition of farmers' markets as even in academic studies, data sets on wholesale and retail markets are amalgamated.³⁰

In an Agricultural Law Research Article released by the University of Arkansas in 2002, Neil Hamilton surveyed the rules and regulations that govern farmers' markets across the country. He found great disparities in the definition of farmers' markets from state to state and even within cities, depending on market administrators. His working definition, distilled from markets held in 26 cities can be summarised as follows: farmers selling produce they raise or create, to individual customers at a temporary location, on a periodic basis for a set period of time during the local growing season and usually operated on a non-profit basis. This definition has been adopted by several other US based researchers as already noted. As Hamilton explains however, there are important local variations to this definition and there are many enterprises that call themselves farmers' markets that are no such thing.³¹ Farmers' markets in the USA have developed exuberantly to fit local needs and conditions, and the sense distilled from the literature is that they are run for the benefit farmers and the community in general as much as consumers.

These formal definitions set the parameters for studies conducted into farmers' markets and they are close enough for comparisons to be valid. The main differences are in emphasis as determined by the markets' histories and social conditions. These differences can affect the impact the markets' have on vendors' ability to make a living from them.

Farmers' markets implicitly reconnect consumers with the production of their food, through interaction with the producer. Locally produced, minimally interfered with food is generally felt to be of a higher quality and safer than the homogenized, highly processed, global food that most urban residents are exposed to. It is clear that these retail outlets which are outside the conventional food distribution system and sell non-standardised foods, have grasped the imagination of consumers, food writers, policy makers and many producers and organisers. This is demonstrated by the apparently spontaneous growth in the

numbers of these markets in the Anglophone world over the last couple of decades.

2.2.1 Farmers' markets in the United Kingdom

The National Association of Farmers' Markets (NAFM) issues a set of fairly detailed criteria to groups wishing to run farmers' markets that are recognised as such by the Association. The Association is also available to mediate in disputes between vendors and market management and is able to keep close tabs on markets that call themselves farmers' markets, through their accreditation scheme.³² Markets, in their advertising make much of their accreditation with the national body.³³ It can therefore be assumed that statistics produced by the NAFM and studies based on information provided by them are reasonably accurate.

British consumer interest in unprocessed, organic, fresh foods has been stimulated by health concerns and a growing distrust of official bodies and scientific intervention in food production. A characteristic of farmers' markets is to "tend to emphasize the ethical and environmental qualities embedded in the food".³⁴ There is a stress on the localness of the produce sold, freshness and quality. Although most of the produce sold is not grown organically, vendors emphasize the natural way that most items are produced, with care for animal welfare and minimal use of chemicals.

Bentley, Hallsworth and Bryan in their study of a farmers' market in Birmingham concede that despite the fact that markets are growing in numbers and in importance, farm shops and farm gate trading have in fact generated much greater income for organic growers than farmers' markets.³⁵ This fact may partly explain their statement that despite the fact that farmers' markets are very popular with consumers and organisations interested in the retailing of fresh produce "the current numbers of farmers/producers prepared to attend markets does not seem likely to support much expansion".³⁶ There are other difficulties: not all farmers enjoy or are good at retailing, and participating in a market takes time away from farming. "[T]he farmers who really need help... are the struggling hill farmers who are less likely to come as they are not familiar with selling to the public".³⁷

While the provenance and traceability and therefore the assumed safety of food sold at farmers' markets is paramount, saving money for the consumer, enhancing the local community and especially increasing income for the grower are also of importance.

2.2.2 Farmers' markets in the United States

The United States has led the resurgence in the *new generation* farmers' markets and this direct marketing phenomenon is encouraged at the highest level of government; for instance, the week of August 7, 2005 was declared National Farmers' Market Week by the Secretary of Agriculture of the USA. The United States Congress through House Resolution 4858 provides grants, loans and loan guarantees to public agencies and non-profit organizations for the construction of new or the rehabilitation of old farmers' markets and seeks to continue this facility through to 2007.³⁸ According to Allison Brown it was the passing of a law by Congress which approved direct marketing as a legitimate activity of the USDA that was instrumental in the surge of farmers' markets in the 1970s.³⁹ Farmers' markets have become a sizeable industry with over 100,000 growers involved in thousands of markets making sales of around one billion dollars with most of these funds going to small family farms.⁴⁰

An important part of their perceived value to the community lies in farmers' markets' role in the fight to preserve farmland from development pressure by providing another means for small farmers to stay on the land.⁴¹

An attempt to assess the benefits or otherwise of farmers' markets in the US has its special limitations as "no longer all (or even most) of their vendors are farmers selling homegrown products" and this theme is repeated through much of the literature under review.⁴² Allison Brown in her comprehensive discussion of the many different kinds of markets that often call themselves 'farmers' markets' rues the situation that "[r]esearch into farmers markets is hindered by the lack of consistency in classification, by incomplete description of market characteristics, and by lost data".⁴³ Only in California and Maine have farmers' markets been legally codified.⁴⁴

Markets may be run by both public and private organisations and can be found in central business districts both thriving and rundown, as well as suburbs and small towns and villages. Their locations have great influence on their style, success and hence profitability. As the seasonal variations can be quite extreme, many farmers' markets where the growers only sell their own produce are not able to operate all year round.

Another important point of difference with markets in the UK or Australia is that American farmers' markets are very consciously a part of government welfare services. According to a 2000 USDA study, 58 percent of markets participate in programmes for low income people that include food coupons and stamps as well as government nutrition programmes, and 25 percent of markets participate in "gleaning programs aiding food recovery organizations in the distribution of food and food products to needy families".⁴⁵

Despite the USDA's enthusiastic talking up of the success of farmers' markets, Gail Feenstra and Christopher Lewis in their survey of farmers' markets across the spectrum of possibilities: that is rural, downtown and suburban markets, have found that over "20% of all managers surveyed said that finding new vendors was one of their greatest challenges".⁴⁶ Even the USDA itself in a study of 2863 farmers' markets in 2000 found that over four years 18 percent of the markets suffered a decrease in the number of farmer vendors.⁴⁷ As a 2002 article in The New York Times indicates: "farmers who once haggled with middlemen to sell their crops are now being fought over themselves".⁴⁸

2.2.3 Farmers' markets in Australia

Studies based on Australian farmers' markets are still relatively rare, as these institutions have only really been a revitalised part of the Australian retailing scene since Jane Adams returned from her study tour of the USA in 1998 and started talking about the potential benefits of farmers' markets to the community. The most comprehensive study available to date is that completed by Max Coster and his colleague Nicole Kennon in 2004 and published in 2005.

The Australian Farmers' Markets Association (AFMA) which was only formed in 2002 to "exchange information, coordinate policy, and promote grower-centric

farmers' markets across Australia" has been a very important player in the growth of these enterprises across the country. Its mission and values are a very clear encapsulation of what farmers' markets are about and a succinct list of the benefits the community can expect to derive from them. This can be summarised as follows: the preservation of farmland and sustainable agriculture, to assist with profitable trading for vendors as defined, to improve nutrition and education about nutrition, and to assist with the maintenance of community health, capital and community spirit.⁴⁹ The framers of the charter have learnt from overseas experiences and the list of benefits is characteristic of the enthusiastic claims that supporters make for farmers' markets; namely, that farmers' markets are the answer to many of society's ills.

Entities largely associated with local governments from Bathurst to Albany have used the expertise and enthusiasm of the Association's chair Jane Adams, to help them develop the framework for their own markets. This does mean among other things that future researchers working on farmers' markets in Australia should not have the difficulties experienced by researchers in the USA, in trying to count and compare markets that operate with different rules and are inconsistently named. Australia's farmers' markets commonly share the Association's aims and charter and most are registered.

Max Coster and Nicole Kennon from the Victorian Department of Primary Industries have conducted a groundbreaking study of farmers' markets: it comprises of surveys and interviews with market managers and vendors as well as consumers. There are around 80 farmers' markets in Australia and two thirds of the 50 markets they surveyed in 2004 reported they had been operating for two years or less.⁵⁰ As is the case with markets overseas, eighty-one percent of the market managers indicated that they had room for more vendors. They also report that competition among markets is beginning to emerge in Victoria and New South Wales.⁵¹

Importance is accorded to supporting local food systems, although the metropolitan and other larger markets tend to have a looser definition of *local*, extending perhaps as wide as growers who operate in the same state, whereas smaller rural markets have a tighter definition of *local*, usually from the same or neighbouring local government areas, or from within a geographic boundary.

New Zealand farmers' markets have also employed Jane Adams to help set up their early enterprises, and they have followed the Australian Association's guidelines fairly closely, with some local variations.⁵² At the second National Australian Farmers' Markets Conference held in Albury in August 2005 there were more delegates from New Zealand in attendance than from Queensland.

"Not driven by food scares as in the UK or environmental and sustainability concerns as in the US, New Zealand consumers are simply after superior produce and a happier shopping experience".⁵³ John Guthrie and his collaborators also note that only 12 percent of the market vendors they surveyed relied solely on farmers' markets as their distribution outlets. And yet, "[o]rganisers of the Whangarei Growers' Market strongly believe that their Saturday morning market has saved many smaller growers from going out of business".⁵⁴

2.2.4 Two kinds of farmers' markets

John E. Tunbridge of Carleton University, Ottawa has classified markets into different categories such as *traditional* and *vendor* markets which host resellers as well as producers, *festival markets* which chiefly cater for tourists and the *farmers' markets* being examined in this study.⁵⁵ Thomas K. Tiemann, Professor of Economics at Elon University in North Carolina further divides farmers' markets into two categories and his definitions go a long way toward explaining the differing vendor benefits conferred by city and rural markets.

Experience markets are generally located in large cities. They provide more sophisticated products and usually offer leisure activities and entertainment as well. The vendors are often more experienced retailers and are more likely to derive all of their income from raising produce for markets. As the geographic limitations are usually wider and the ban on resellers is not always policed, there is generally a greater variety of goods for sale. The rare, the exotic, the new product, the first of the season or the 'very best of' are going to be found at an experience market. Prices are quite high, but shoppers are willing to pay more for quality products. The number of stallholders can reach hundreds. The glossy photographs in magazines of young women carrying woven baskets full of flowers and leafy vegetables are usually taken at experience markets and these

are the markets where chefs are usually seen. The proportion of value-added product compared to fresh produce tends to be quite high.

Indigenous farmers' markets as Tiemann has named them are more common, tend to be in areas with a smaller population base, are much smaller and are more likely to be part of the informal economy. The author in his travels around rural USA surveying farmers' markets found that most of the indigenous markets he visited have six or fewer vendors and the sale of value-added product is much less likely. Entertainment and leisure activities are rare and produce tends to be more local, seasonal and therefore there is not as much variety provided as at the experience markets. Customers are older and more reluctant to pay higher prices for traditional produce. "The economic function of indigenous farmers' markets is to provide low-priced, seasonal produce to people who grew up in households with large gardens but who no longer garden themselves."⁵⁶ Market days are rarer - rural markets are as likely to be held once a month as once or twice a week, so not many of the vendors depend on these outlets as their only source of income.

Although the larger farmers' markets in the US are as likely to harbour resellers as producers, by using Tiemann's typology to define the enterprises being examined in this study, namely indigenous markets, the comparisons of vendors' benefits become meaningful.

2.3 The benefits of farmers' markets

The studies consulted for this section of the dissertation largely comprise of surveys of market managers and market vendors conducted in the USA, UK and Australia. The issue that much of the literature considers is why are farmers' markets so successful in developed countries when consumers have so much choice for purchasing their food and farmers appear to have well developed means of selling their produce? What are farmers' markets' advantages?

2.3.1 Economic background

Numerous local government entities, farmers' organisations and state departments of primary industries sponsor, oversee or otherwise assist farmers' markets. This is seen as one way of helping to alleviate hardship for a primary industry which is struggling to remain profitable, one way to help rural economies prosper and families to stay on farms.

The continued viability of rural communities and family farms is threatened by a number of factors. Large amounts of farmland are disappearing in the developed world, especially around large urban centres. "In the past decade, more than 40 million acres of farmland, including about 700,000 acres in New York, were lost to development and other uses" a 2002 article in the New York times quoted these USDA figures.⁵⁷ Australian farmland loss is also considerable, population pressure is especially fierce in coastal areas with the result that land on the coast near urban centres has become very expensive, making the practice of agriculture in those areas increasingly difficult. A recent article in the Sydney Morning Herald by their urban affairs reporter was titled "Concrete sprawl devours daily veg".⁵⁸ Australian Bureau of Statistics (ABS) figures concur: in 1998 there were 144,863 farms in Australia with \$5000 or more of agricultural operations, in 2004 there were 132,983.⁵⁹ The loss has been occurring at the rate of 1.5 percent a year for over two decades and during this period there has also been a decline in farm incomes and a rise of farm debt.⁶⁰ Australian Bureau of Agriculture and Resource Economics (ABARE) figures tell a similar story: the net value of farm production has declined 10.2 percent from 2004 to 2005, continuing a several years long trend which they forecast will continue.⁶¹ This trend is due to a variety of reasons, including climatic extremes, but the trend is a long term one nevertheless. Neil Barr of the Centre for Land Protection Research of the Department of Natural Resources and Environment suggests that: "by 2021 it is conceivable there will be a decline in Australian farmer numbers of between 40 and 60 percent" due to the fact among other things, that farmers are ageing and young people are moving to urban centres.⁶² A corollary to this is the decline in the political influence of the farming community.

Some of the challenges faced by farmers include globalisation as manifested in the deregulation of the rural sector and the lifting of tariffs on competitive

imports as well as anti-pollution regulations which are restrictive and costly.⁶³ Add to this list, difficult weather conditions and the domination of the retail sector by large supermarket and fast food chains which are very willing to use imports in their competitive drive to keep prices down. In the ten years from 1982, consumers paid 52 percent more for their food, while farmers received just 18 percent extra.⁶⁴ Not only do the large chains of food stores dictate prices, they also insist on uniformity of produce, a loss of control many producers intensely dislike. As this study is being written, rural newspapers are sporting headlines such as: "Imports crushing vegies"⁶⁵ and "Cheap vegie imports send ours packing" on the same page is a box with this snippet "Australia's \$3 billion vegie industry has warned it could be gone within three years".⁶⁶ The industry is certainly under some pressure.

Neil Barr of the Victorian Department of Natural Resources and Environment has documented some of these societal changes affecting farmers. His report on the social circumstances of farmers for instance, documents the importance of the happiness of the women in family partnerships for the success of farming enterprises, as well as the difficulties young farmers have in finding life-partners. These are important issues stimulating the movement of farmers to coastal areas, where partners are more likely to find work to suit them and where young men may stand a better chance of finding a wife.⁶⁷

Farming is changing its form. Coastal farms on relatively small acres lend themselves to the production of non-standardised foods that suit niche markets and it seems that direct marketing, which generally remains outside the mass production and distribution system, is of great benefit to farmers who are unable and may not wish to compete with large agribusinesses, as it does not require great capital outlay or large volume of production. Small farmers are increasingly participating in this part of the informal economy.

2.3.2 The benefits to vendors

Ramu Govindasamy and his colleagues have conducted a number of studies in the USA on the characteristics of producers who participate in farmers' markets. These characteristics include small scale operations and relatively new enterprises. The resurgence of farmers' markets across the USA has offered

unparalleled opportunities for small farmers to engage in direct marketing, to learn entrepreneurial skills and to grow their enterprises. As Govindasamy is based at Rutgers, the State University of New Jersey, his investigations mainly concentrate on farmers' markets in that state.

"Grower satisfaction with the farmers' market is a key factor that will determine their participation in these markets" is stating the obvious but grower satisfaction is not something that can be taken for granted as producers will not persevere with unsatisfactory markets.⁶⁸ Coster's survey of farmers' market managers lists as a major challenge for these respondents "maintaining grower commitment to the market".⁶⁹

One way for small farms to grow profitability without increasing farm size is "reducing the length of the supply chain, from farm gate to consumer".⁷⁰ Changing consumer preferences and concern with food safety and environmentally sustainable modes of production provide a growing number of opportunities for this. Small farmers with specialised or perishable crops, or just small quantities are particularly suited to direct marketing methods. However, in a survey of 455 New Jersey farmers, Govindasamy and his colleagues noted that "farmers utilizing market outlets in the urban areas and in commercial zones, are... more likely to attain high income levels compared to those utilizing markets in the rural areas."⁷¹

Benefits to vendors as listed in all the studies and surveys of market managers and stallholders are notably consistent. For example the findings and conclusions of studies and surveys undertaken by Simon Bullock in the UK, John Guthrie and his colleagues in New Zealand, Harry Cummings and his collaborators in Ontario, Max Coster and Nicole Kennon in Australia and finally Gail Feenstra and Ramu Govindasamy and their numerous colleagues in the USA have listed benefits which can be summarised as follows:

- **Profitability:** by cutting out the functions of the middleman and doing their own packaging and transport, gross returns to producers can be between 40 and 250 percent higher than sales to distributors according to US and UK studies.⁷² However, marketers at times set their prices too low: "wholesale and supermarket retailers often serve as the basis for price

setting".⁷³ Vendors at experience markets are more likely to set and receive higher prices than at small, indigenous markets and these are the farmers as Govindasamy and his colleagues have noted, who retail 70 percent or more of their produce through farmers' markets and who therefore are more likely to be satisfied with their profits.⁷⁴ It is important to note that nearly 40 percent of the vendors who responded to his questioning, earn less than 20 percent of their income from attendance at farmers' markets.⁷⁵ It takes some experience and confidence to charge a price which is a reasonable return for effort and therefore is more likely to be done by producers who rely on markets for the bulk of their income. It has also been noted that consumers at experience markets are usually more willing to pay higher prices than at the smaller, rural, indigenous markets.

Survey respondents who have directed their enterprises towards direct marketing right from the beginning, have tended to achieve much better financial returns than farmers who turned to direct marketing as an alternative or in addition to wholesaling their produce. "This appears to reflect an attitudinal effect on ultimate success".⁷⁶

Many of Max Coster's informants did not give a high priority to the financial benefits of participating in farmers' markets. They were asked to list perceived benefits: none of the Hastings stallholders mentioned profitability, only ten percent of the Hume-Murray vendors did so and 23 percent of the Collingwood producers mentioned it.⁷⁷ In fact 43 percent of Coster's Hastings respondents claimed that their other marketing options were better than the farmers' markets but the promotional rewards made their participation worth while.⁷⁸ In one UK study, for 12 out of 15 stallholders interviewed "sales at farmers' markets constituted less than 25% of their total sales and for three stallholders, even less than 5% of sales".⁷⁹

A significant number of farmers' market vendors in the US are either retired senior citizens supplementing a fixed income, or have additional sources of employment.⁸⁰ The story is the same wherever studies have been undertaken.

- **Education of consumers:** growers are able to inform consumers about production practices, especially sustainable or organic methods, introduce them to new produce, as well as different varieties of known produce. Simon Bullock, a researcher for Friends of the Earth claims that of the 550 varieties of eating and cooking pears grown in the UK, only three are sold at supermarkets, and farmers bulldoze trees that are not one of the three varieties.⁸¹ Farmers' markets thus help maintain biodiversity. At farmers' markets, consumers are very receptive to new products and are able to ascertain from the vendor how to prepare them.
- **Market research:** learning about customer preferences happens constantly through direct contact with consumers at farmers' markets. "The ability to speak directly with consumers provides a producer with a marketing tool unmatched in a conventional retail setting".⁸² This is helpful for total beginners in the field as well as for those trying new produce. Growers can test the market with small crops of a new food item and judge by customer feedback whether to invest more resources into a product. Customers also provide information on how a product can be used.
- **Skills learnt:** the gaining and improvement of entrepreneurial, marketing and retailing skills and increased business confidence have been frequently reported. It is their participation in farmers' markets which gives some growers the confidence to make the transition from part-time to full-time farming and retailing, although according to Coster, farmers' markets are still too recent on the retailing scene in Australia for many growers to make such a change confidently.⁸³ Gail Feenstra and her colleagues have undertaken several studies on the role of farmers' markets as business incubators and the gaining of marketing skills. "Farmers' markets ... are key institutions in promoting the concept and practice of 'entrepreneurship' in US agriculture, particularly for the smallest of the enterprises".⁸⁴ However, a study by Hinrichs, Gillespie and Feenstra published only twelve months after the previous paper cited and with several of the same authorial names occurring, expresses some misgivings regarding the modest levels of innovation reported by vendors in their study. "Planning and implementing more customer-responsive

marketing initiatives can be time-consuming and potentially challenging for farmers' market vendors, many of whom have substantial outside work and family commitments.⁸⁵ Not all farmers find chatting with customers easy, even if they are driven by economic necessity to become stallholders at a nearby market.

- **Ease and flexibility of making a sale:** customers approach the growers at farmers' markets, the vendor just has to be there with an attractive stand and the right attitude. Consumers are more tolerant of blemishes on the fresh local produce than they would be at a supermarket, especially if they know that chemical use has been kept to a minimum and produce can be sold at different stages of ripeness.⁸⁶ A greater diversity of produce can be sold at a farmers' market as opposed to wholesalers who usually will only take one or two products, always in the same condition, size and stage of ripeness.
- **New outlets:** word-of mouth advertising of a product and getting known by consumers, bring benefits to farm gate sales, as well as sales to retail outlets, restaurants and other markets. Getting known at farmers' markets also works well as advertising for larger producers at city markets, it helps them in their dealings with conventional wholesale markets.⁸⁷ Some market managers make it part of their duties to help promote their vendors to the local food industry.⁸⁸ Business contacts are also often made directly with chefs and restaurateurs who attend market days, as well as other producers which may lead to collaboration in other spheres.⁸⁹ Many vendors report greatly increased sales to diverse outlets as a result of market participations.⁹⁰
- **Psycho-social benefits:** camaraderie among stallholders is important as is socialising with other vendors as well as customers. People help each other at the markets, occasionally sell produce for one another, mind their belongings, help out with change and so on. Some vendors report that enjoying the market as a social event is the major reasons for attending.⁹¹ Direct contact with consumers creates a connection between town dwellers and farmers, helping to overcome divisions that exists. Farmers' markets "bring producers and consumers together to solidify bonds of

local identity and solidarity.⁹² Growers feel that this link helps create sensitivity to rural conditions and some of the challenges faced by farmers.⁹³ "Sometimes what producers are selling to consumers at farmers' markets is in part, the aura of personal relations and social connection" making the social contact and the economic benefit difficult to separate.⁹⁴ The face-to-face transactions give commerce at farmers' markets a personal edge, leading to the development of *relations of regard*, a form of personal and social relationship that enhances the consumers' opinion of the quality of the product they buy as well as the pride the vendors feel in their enterprise and their product.⁹⁵

- **Pride and control:** feeling good about the quality of the products they sell is assisted by customer feedback.⁹⁶ Markets offer a very direct insight into customer attitudes and the building of personal relationships with shoppers even if they are based on commerce, can be very motivational. Growers can exercise control over what they produce and at what stage of readiness they sell it, to suit their own perceptions of quality and customer demand, rather than that of an agent.⁹⁷

2.3.3 Limitations of management

The quality of market management, is usually dealt with in passing in surveys, as being very satisfactory.⁹⁸ In fact, the market manager can be a vital contributor to the success of a farmers' market. One or two surveys of farmers' market deal in some detail with the difference market managements can make to vendors' feeling of satisfaction with their market. Andreatta and Wickliffe researched several markets in North Carolina one of which operates for seven days a week, and not many small farmers can afford the time or have the product to participate to this extent. As a result, because they end up being the anchors of the market, large stallholders who are often resellers, are allocated the best sites. At another market stallholders complain of apparent favouritism by market management.⁹⁹ This can lead to feelings of dissatisfaction by small producers regarding their treatment by managers, and their subsequent withdrawal, as well as concern by the consumers whether everything they are purchasing is in fact local.¹⁰⁰

Most surveys gloss over this issue but a sense of differences does emerge, as market managers tend to worry about the retailing skills of their vendors, and vendors are concerned about the adequacy of advertising and the effort expended in attracting customers.¹⁰¹

The importance of market management and their role in the shaping of the market and the regulations that govern the running of the markets must not be neglected. As we have seen, experience markets which operate on many days per month attract more full-time marketers from a wide area and in effect often exclude small farmers who may have no employees and have to run a farm as well as manage a stall. Concentrating purely on the growth of a market without examining the rationale behind having a farmers' market in the first place, may defeat some important purposes.

2.4 Summary

The literature review has provided a comparative description and analysis of farmers' markets and their benefits to stallholders, on three continents. While the rationale underpinning these markets is very similar, the conditions which operate are not identical, nevertheless the effect of these markets in the three societies that have thus briefly been examined are very similar.

With the exception of the highly successful metropolitan, experience farmers' markets many of which maintain vendors' waiting lists, a large proportion of markets, regardless of the identity of the organisers or location, face similar difficulties with attracting and keeping producer vendors, despite their popularity with consumers. The notion that participating in farmers' markets may be of benefit to them and their farms is not universally realised or acted on by eligible farmers: the barriers might be lack of retailing skills, lack of knowledge of the potential benefits, distance from market centres or simply a lack of time or personnel to attend to stalls when there is farm work to be done. In any case, as Latacz-Lohmann and Laughton point out in the conclusion to their UK study, profits are by no means guaranteed and the volume of produce moved may be quite small, although some small farmers may be enabled to continue to operate their business.¹⁰²

The congruence of consumers looking for fresh, in-season produce less dependent on fossil fuel and chemicals, with the movement of people back to the land attempting organic, environmentally careful farming has been a very important driver for the resurgence of farmers' markets. Farmers not capable of or not interested in supplying the requirements of the international marketplace, have found a niche in supplying the needs of local and regional markets which are currently under-served by the large supermarket chains.

The demand is such, that there are simply not enough growers in a position to take advantage of the opportunities that farmers' markets offer. Bentley and her colleagues note that farmers' markets are "the prime outlet" for hobby farmers, so although hobby farmers do at times develop into full-time growers it seems as if participation in farmers' markets is not perceived as an immediate solution to the problems of small family farms.¹⁰³ However, in spite of this shortage of growers, a proportion of potential producers are encouraged to take up farming as a direct result of the perceived opportunities offered by the establishment of farmers' markets in their area.

Farmers' markets have become "dynamic spaces where there is a powerful sense of regard between producers and with customers."¹⁰⁴ Vendors report attending farmers' markets as much for the enjoyment and social aspects as for the financial rewards, although this relatively minor income stream can at times be of "critical importance for rural families and households."¹⁰⁵ However, although making extra income is one of the benefits of participating in farmers' markets, in many cases it is not even the main one, let alone the only one.

Despite the momentum around farmers' markets "the employment and income effects of nontraditional agricultural activities are too small and diffused to produce an economic boom for rural areas".¹⁰⁶ The issue mentioned by all surveys of market managers and one of the major barriers to the further development of farmers markets, certainly in the UK and in Australia, has been a shortage of farmers able and willing to attend as vendors.¹⁰⁷ Some US farmers' market managers expect a ten percent reduction per annum in vendor numbers due to time constraints and retirement.¹⁰⁸ Therefore the economic effect of farmers' markets on their rural communities is likely to remain slight.

The inference to be drawn from an examination of these studies is that while a proportion of farmers derive the bulk of their income from large experience markets, and farms and communities within a short drive of major population centres are the major beneficiaries, a considerably greater number of stallholders, those who attend the smaller, rural markets merely supplement income drawn from off-farm activities.¹⁰⁹

3. METHODOLOGY

The following primary qualitative data collection methods were utilised: focus groups which comprised the main method, and the supplementary research method was participant observation coupled with informal interviews. The two ways of collecting information allowed a certain amount of triangulation of data to take place. As Berg indicates, the meanings and answers derived in the course of these data gathering exercises are socially rather than individually constructed, with input from most categories of stakeholders.¹¹⁰

3.1 Focus Groups

This enquiry is largely directed towards the experiences and motivations of farmers' markets stallholders and therefore, conducting focus group discussions with vendors at selected markets is a good way of testing the hypothesis that emerged from the literature review: namely that the financial benefits derived from their attendance at farmers' markets is contingent on the types of markets being attended, the frequency of the markets and the stage the vendor's business enterprise has reached.

3.1.1 Research design

The focus group discussions for this research project were designed and organised in accordance with the guidelines developed by Richard Krueger and David Morgan in their six volume Focus Group Kit.

The researcher acted as facilitator. The colleague who helped in the field is a professional who has done a considerable amount of research herself and is an experienced note-taker. She did not participate in the discussions, sat unobtrusively a little bit to the side of the group and concentrated on taking notes.

3.1.2 Participant selection and profile

Stallholders from the two markets nearest to Kempsey were chosen for the focus groups. There is some overlap among Kempsey and Wauchope stallholders and Wauchope and Wingham stallholders. A map of the Mid-North Coast is reproduced at appendix 6.1.

- Hastings Farmers' Market at Wauchope in Port Macquarie-Hastings Municipality, situated 50 kilometres south of Kempsey, is held on the fourth Saturday of the month from 8.00 am to midday at the Wauchope Showground.
- Wingham Showground Farmers' Market, part of Greater Taree City local government area, is 150 kilometres south of Kempsey, held once a month on the first Saturday morning of the month from 8.00 am to 11.00 am, at the Wingham Showground.

The Coffs Coast Farmers' Markets, the nearest markets to the north of Kempsey are held fortnightly on Thursdays in the Coffs Harbour central business district. As it was felt that the research would be more valid using markets that are comparable with each other, Coffs Coast Farmers' Markets were eliminated from consideration as being too different in organisation.

In summary, the Wauchope and Wingham markets were selected for the study because:

- entry was made possible through the market managers
- the right sample of stallholders was available
- the researcher had easy continuing access for as long as necessary
- the markets are quite similar in organisation

Anita Gibbs of Oxford University in her recommendations on the use of focus groups suggests between six and ten participants as being the most commonly used.¹¹¹ Eight potential candidates were contacted for each market.

As this research project is primarily focussed on the effect of farmers' markets on the financial viability of farms, as much as possible *growers* were invited to participate in the focus groups, rather than people who sold value added products. Recruitment was designed to achieve homogeneity of circumstances amongst the discussion group members. Participants from both markets were selected through a process of elimination from lists provided by the managers. As the Wingham market is quite small, virtually all the growers who attended the market held on the day of the focus group meeting and were available, ended up participating in the discussion as well as one couple who are value-adders.

The requirements of reciprocity were met by the provision of lunch and the promise of the dissemination of the study results. Both meetings were held at the market site in a showground hall which doubles as a dining room, and is familiar for the vendors. Some of the participants were couples working together on a stall, or in one case friends, so the lunches were pleasant social affairs. By having the meal provided by the researcher at the market site, the meeting was made more convenient for people who had just completed a long, tiring morning and possibly had a lengthy drive home ahead of them. The lunches were catered by local café owners who helped to serve, so that was only a minor distraction.

The Hastings discussion group was the larger of the two, it comprised of four couples, one employee and one single stallholder. It was livelier, the participants were more relaxed and more secure after three and a half years of marketing experience.

	MEN	WOMEN	TOTAL
Wingham	3	4	7
Wauchope	6	4	10

fig. 1 participants' gender breakdown

The Wingham market is much smaller and had been operating for about 18 months at the time of the discussions. There was one couple, who are not

growers, they buy local nuts, mainly macadamias, roast, flavour and package them. One grower attended with his young son who helps with the selling, the market manager's husband participated, one stallholder with a friend who helps on the stand and three single stallholders. The vendors did not seem to know each other well and needed encouragement to express their opinions. The attendance of the manager's partner was helpful as he started the discussion by talking about their experiences and observations as managers.

AGE GROUP	41-50	51-60	61-70	TOTAL
Wauchope		8	2	10
Wingham	3	4		7

fig. 2 participants' age breakdown

Although the majority of the participants own and live on substantial acreage, 100 – 200 hectares, most were careful to point out that they may only use 10 hectares or less for growing their horticultural products for the markets. Other farming activities are beef cattle produced by several respondents, one has a citrus orchard, one a dairy farm and several have bush blocks which are largely left to nature and not used for farming.

3.1.3 Focus group organization

In both instances the market managers were very helpful with the provision of contact lists and showed great interest in the research. Their introduction helped to establish the legitimacy of the project and build trust in the researcher and the process.

Although information on economic and social benefits derived from participation in farmers' markets is not especially sensitive, it is still private and personal information, and the matter was handled with due care. Potential participants were first approached by telephone, the research project was described to them in very general terms and their assistance sought. The only people who refused

initially were those who were not going to have product to sell and therefore were not going to be attending on the nominated market day.

On two Saturdays in June 2005, several people at both markets indicated that they had either forgotten and made other arrangements, or that something more important had cropped up in the meantime. There was also one potential group participant stallholder at each market who was simply not there. Fortunately more than the required minimum number of people had been approached in the first instance, but the numbers still fell below what would have been preferable.

In both instances it was important not to keep the discussions too long, both markets start at 8.00 in the morning, which means a very early start for some of the people who have to travel some distance after loading their vehicles. Rice recommends that discussions be kept shorter than two hours and each session was completed in 90 minutes.¹¹²

3.1.4 Data analysis

Extensive field notes were taken by the researcher and her colleague during the discussions and as soon as the sessions were over, a comparison of notes and impressions took place, to ensure the validity of the data. As many verbatim quotes as possible were taken note of during the sessions, they help to give the flavour of the discussions. The notes were then collated and combined into a narrative for each discussion question, with important points highlighted. An information sheet for each participant was completed as they were identified by each market manager, and a summary of comments from each participant was also entered on to this sheet. At this stage, the participants who had asked for transcripts were mailed the narrative. Background details of each participant, as well as other vendors who had been consulted for this study were entered on a Microsoft Excel 2002 spreadsheet.

3.1.5 Discussion points

As suggested by Morgan, because this study deals with the generality of people's experiences rather than answers to specific questions, these are triggers for discussions rather than narrowly focussed questions.¹¹³ The issues raised by the

discussion points were developed from the literature review as well as conversations with Kempsey market vendors.

- What led you to participate in farmers' markets?

This introductory question was designed to get people to think along the lines of the study, to elicit a description of group members' enterprises, and an assessment of the stage they had reached on their life's path.

- In what ways has selling at farmers' markets been beneficial to you? and What do you enjoy about selling here?¹¹⁴

It was intended to treat this topic as two separate questions, to be sure of netting all the possible responses but the discussion merged into a single consideration and it became too difficult to separate *benefit* from *enjoyment*.

- What would you be doing if there were no markets?

The intent of this question was to ascertain the importance of the markets to participants' enterprises and economic survival.

- Has anyone experienced personal pressure not to participate in any market?

This question was designed as a wind-down topic for people to tell stories and to ascertain whether, as several market managers had indicated, retailers did eventually accept the fact that the markets were good for them too.

3.1.6 Ethics

The research was conducted in accordance with the University of Adelaide's guidelines on the ethical conduct of research, Studying People, prepared by Sandra Taylor. On the market day after the participants were first contacted, the

researcher attended the market towards the end of the morning when it was no longer quite so busy, introduced herself to each participant and handed them a copy of the *Participant Information Sheet* which outlines the purpose of the sessions, assures confidentiality and provides contact details (appendix 6.3). The *Participant Consent Forms* were handed out at the beginning of each session and at each session there were people who indicated that they did not wish to be taped (appendix 6.4).

3.2 Participant observation and informal interviews

To provide further information, to assist with the development and analysis of the points to be discussed by the focus groups, every opportunity was seized to question people involved with farmers' markets: stallholder delegates at the second National Australian Farmers' Markets Conference, stallholders who did not participate in the focus groups for various reasons, the managers of other Mid-North Coast and New South Wales markets, the managers of the two markets under consideration as well as the market manager and vendors at the Kempsey Growers' Market. Discussions with the Economic Development Officers of the three local government areas featuring in this study, and the Agribusiness Development Manager for the NSW Department of State and Regional Development in Port Macquarie were all enormously helpful.

Being a member of the Kempsey Growers' Market Management Committee from the planning stage onward made it easy to contact many of the stakeholders, especially market managers. It also made it possible for the researcher to act as a participant observer and speak with vendors regarding their expectations of the market, regularly, in a natural setting, while helping with the organisation of the enterprise.

Speaking with the Kempsey vendors acted as a first alert to the differences in the farming and financial backgrounds of participating growers and also to the difficulties of profiting from markets that are only held once a month. This enriched understanding greatly influenced the direction the research took and showed farmers' markets at least in rural areas like the Mid-North Coast of New South Wales in a different light from the markets studied in much of the

literature. Some background information on Kempsey has been included in the next section, as it has informed much of the direction that the study has taken and was largely instrumental in it being undertaken in the first place. Careful notes were kept at all stages of discussions and interviews with all stakeholders.

4. TWO FARMERS' MARKETS

4.1 Background

Their size, frequency and the small population centres in which they are situated, put these markets in the indigenous category.

4.1.1 Economic conditions on the Mid-North Coast

The region, also referred to as Australia's Holiday Coast is a narrow coastal strip and adjoining hinterland running approximately 350 kilometres north-south, between Hawks Nest in the south and Woolgoolga in the north, see map at appendix 6.1. The climate and the soils of the seven wide river valleys allow for a wide range of plant and animal enterprises. There has been an influx of new residents to the region, quite often with a higher level of education than the long-standing residents and with greater capital resources. They have brought with them new agricultural, social and cultural values.¹¹⁵

A survey of agribusiness conducted by Southern Cross University found that the average age of primary producers in the region is just over 54 years old¹¹⁶ and over 70 percent earn most of their income, agricultural and non-agricultural in the \$0-25,000 bracket.¹¹⁷ Perhaps not coincidentally, 25 percent of respondents reported having started work on alternative or diversification options.¹¹⁸ The vast majority of properties are family farms with many relying on off-farm income.¹¹⁹

As in the rest of Australia, the agricultural industry on the Mid-North Coast of New South Wales has also experienced a slump. For example, industry in general has shown a real growth of 1.5 percent in the ten years from 1991 to 2001 in the Kempsey local government area, but agriculture, forestry and fishing have shown a decline of 1.3 percent in the same period.¹²⁰

Wauchope is the centre of "a district that has been hard-hit by a double whammy of dairy industry deregulation and changes to forestry and logging prices."¹²¹ Employment in the agricultural sector has been showing a long slow

decline, although within this sector, the share of horticulture has been growing.¹²²

Economically underperforming areas tend to suffer from an outflow of money and farmers' markets are one way of reversing that trend, hence the interest of the Kempsey, Port Macquarie-Hastings and Greater Taree economic development managers in the establishment of farmers' markets in their localities.

4.1.2 The markets in brief

The New South Wales Department of State and Regional Development has been instrumental in setting up a regional network of six farmers' markets on the Holiday Coast, ensuring that market days of neighbouring areas do not clash.

The Hastings market:

- commenced in March 2002
- Wauchope's population 4,772, nearby large centre, Port Macquarie, population 38,289, 21 kilometres distant
- market is managed by the Economic Development Section of Port Macquarie–Hastings Council, with only irregular help from volunteers.
- organisers have about 60 stallholders on their books, and generally there are between 30 and 40 participating at any one time.
- approximately 3000 shoppers in attendance on operating days

The Wingham Showground Farmers' Markets:

- commenced in March 2004 partly to help the Showground Trust with its financial problems
- Wingham's population 4,659, many shoppers are from Taree, about ten kilometres distant, population 16,752

- Greater Taree Economic Development Manager, was largely responsible for setting up the market and continues to be closely involved in setting strategic directions
- volunteer market manager is a member of the Show Society Management Trust and she reports to the Trust
- manager has approximately 35 stallholders on her books, and between 20 and 25 seem to be in regular attendance
- about 1000 visitors on operating mornings

4.2 Focus group discussions

There were informal interviews with other vendors at the markets being studied, with Kempsey vendors and with vendor delegates at the second National Australian Farmers' Market conference. Composite responses have been incorporated into the following discussion with quotes selected to illuminate emerging themes.

- *What made you originally decide to participate in farmers' markets?*

It is possible to make some generalizations and roughly group the answers.

Several people indicated that they had set up to take advantage of markets as an activity that was going to generate some semi-retirement income for them. Some have already reached that planned for stage, and have been able to give up their other jobs "it didn't happen quickly or easily....but things are working out well at the moment". This category of response was offered the most often.

One or two set up specifically because the markets were there and they saw that as an opportunity to change their lifestyles. Another response, also made by several people, was that they were going to be growers of their products anyway because they loved the produce or growing things, and the markets offer just another outlet. Respondents also offered the fact that they feel pretty strongly

that the farmers' markets are of benefit to the community as well as themselves, and that part of the reason for their regular attendance is their desire to support the markets. This despite the fact that getting ready for the markets is very time-consuming for most vendors. Some are content to just sell at markets, others use the exposure the markets afford them to seek out other outlets.

A smaller number of people indicated that the sale of produce at the markets was an extension to other farming activities such as dairying, growing vealers or beef cattle, or managing a citrus orchard; markets generate cash-flows, but are rarely the main source of income.

One farming couple said that the markets saved them from walking off their farm when the deregulation of the dairy industry made that business unviable.

- *In what ways has selling at farmers' markets been beneficial to you? and What do you enjoy about selling here?**

Although everyone originally started attending the farmers' markets to generate income, the experience proved so enjoyable with so many unquantifiable benefits, that many of those people whose financial profits proved marginal keep returning for the sake of the other benefits. Those for whom the markets were not beneficial enough have stopped attending and the managers of both markets have lists of people who no longer participate.

As the farmers' markets under discussion are only held once a month, many vendors also have stalls at community markets where crafts, knick-knacks and second-hand goods predominate. Focus group participants were agreed in their assessment that farmers' markets are more profitable than the others. Members of the public go to farmers' markets with the express purpose of shopping whereas at the other markets they frequently "ppp – pick-up, put-down and piss-off".

* The two questions were originally intended to be dealt with separately, but the discussion merged the concepts of benefits and enjoyment.

The respondents were unanimous that the markets are enjoyable, they talk to each other, they talk to the shoppers, they get instant feedback on their product and feel that they and their beautiful fresh produce are valued and appreciated. "They ask you to grow things for them".

Pride in their product on offer was a consistent sentiment with members of both groups. "When you sell to a shop, they just say thank you and give you a cheque, and it's just not the same" as the feedback received through direct selling. They feel much more positive about their farms and their produce as a result of the feedback received from consumers and this positive regard has encouraged several people to grow their operations and be more proactive about direct marketing.

There is rivalry and competition among the vendors, but it is friendly and they often co-operate and sell produce for each other at different markets, an activity not always condoned by market managers. If some stallholders are left with unsold items at the end of a market session, they frequently barter with each other, although that seems to happen at Wingham more than at the bigger market. Any real hostility is reserved for the odd reseller who grows none of the products for sale, and who may slip under the market managers' guard.

Some people are using the markets to work towards diversification, for instance the dairy farmers who are embarking on aquaculture to help with the transition to a different way of farming. A beef farmer who sells citrus uses it for cash flow, a Victorian vendor at the Farmers' Markets conference who only sells a tiny percentage of his produce at his local market, has been inspired by his experiences at the market to expand his direct marketing outlets and rely less and less on wholesaling.

- *What would you be doing if there were no markets?*

At the Wauchope discussion, with the exception of the ex-dairy farmers who indicated that they would probably have to find off-farm work, people said that they would concentrate on other outlets. These stallholders have had time to establish networks of outlets for their produce, so their participation in the markets is not crucial to their continued existence as businesses.

Members of the Wingham group were a bit stumped and did not have ready answers. There was much shrugging of shoulders and “going back to a job” mutters. The flower grower said she would concentrate on flower shows and have to work much harder at the selling rather than the horticultural part of her enterprise. The nut sellers would “just have to rely on the pension”.

One unexpected issue that arose very early in the discussions in both groups was the strength of feeling against agents and middlemen in general, some of the responses were in fact quite bitter. There was a lot of resentment vented about agents who, they claim, manipulate demand. Anger was also expressed about the mark-up in prices on their products by retailers as well as wholesalers. These particular vendors felt powerless and their products undervalued when dealing with agents and will only consider dealing with middlemen again as a very last resort.

The groups agreed that they would have to reconsider selling to agents and wholesalers but would try and build up other segments of their enterprises first, such as boxes, roadside stalls and sales to shops. There was a little bit of discussion about the long-term prospects for farmers’ markets and whether they are just a flash in the pan, but no one seemed to be seriously concerned.

- *Has anyone experienced personal pressure not to participate in any market?*

Every one of the vendors who sell to retailers experienced pressure not to sell at the markets, some directly threatening, some indirectly so. In Kempsey several potential vendors were dissuaded from attempting the markets altogether by the threats, and others expressed concern that the Kempsey market is situated in the central business district, highly visible, while other markets are more out of the way and less readily observable. One person felt a certain degree of physical threat for a while, but most were in terms of “don’t expect to do business with us again”. The upshot is that some vendors have permanently lost custom with some retailers, and a couple simply decided that they did not want to deal with people who threatened them.

As Guthrie and colleagues note in their New Zealand study, when so few producers are able to rely on farmers' markets to sell all their produce, being boycotted by retail outlets can become a major problem.¹²³ It is an issue informants for this study had to consider carefully.

- *Expect the unexpected*

An issue which generated quite a lot of heat at Wauchope, was the pricing, and it was discussed at Wingham as well. A grower related the story of being at a market with 20 boxes of tomatoes. After realising that he had no hope of selling them, he virtually gave them away for only cents per kilogram. The group became very quickly divided between a couple of people who agreed with this action and a definite majority who said that they would rather give the stuff to the chooks or pigs than to undervalue it so much. The smaller group opposing, indicated that they could not afford to throw the perishables away although of course sometimes they have to do just that. The issue centred around having pride in your product and not being paid less than its perceived value.

There was one topic of deep interest and concern to some Hastings vendors, not raised in the discussion points, but of relevance to this study. It was mentioned in discussions that Hastings vendors were not entirely comfortable with the strict enforcement of the geographic limits for vendors at their market. This limit is a maximum of six vendors who are not resident in the local government area, provided their presence assists with product diversity. Stallholders felt that the more vendors are admitted, the more competition there is, and more choice offered to the consumers, the greater the chances of success for everyone. Twenty-nine percent of the Hastings vendors interviewed by Nicole Kennon had started participating in other farmers' markets as a result of their attendance at Hastings, others had been approached, but declined the offer.¹²⁴ This co-operation is however, not extended by Hastings market management to vendors from neighbouring local government areas, an issue keenly felt by Kempsey growers for instance, who have been excluded from Hastings markets on what they feel were very flimsy grounds. It also makes Hastings stallholders at other peoples' farmers' markets very aware of their status as 'carpetbaggers'.

4.2.1 Summary of discussions

In spite of the fact that discussion group members were varied in their financial situation and their position on their life's path, there was remarkable consensus among them over most of the issues raised in the conversations. Everyone spoke, voiced their opinions and described their experiences, although some had to be coaxed.

The effect of the focus group discussions was to anchor the conclusions generated by the literature review into a practical perspective, relating to real people and set in real circumstances. Many Mid-North Coast grower vendors are unable to attend more than a handful of markets a month because there are not any within a reasonable driving distance "and you need to have a life". The boundary limitations of the Hastings market add an extra restriction on other marketers. The bulk of direct sales occur where the populations are, and for most grower vendors farmers' markets are a sideline. Many have been able to cultivate other direct marketing outlets, others have resigned themselves to always remaining part-time or hobby farmers. Very few traditional farmers have been able to make the attitudinal change to switch to direct marketing and most of the people interviewed for this study have set up in response to the opportunities offered by the new enterprises in their area.

The satisfaction of business operators with their participation in an outlet is always a multidimensional issue, farmers' market stallholders tend to be happy with their participation and their profit margin. Ranging from the beekeepers whose sales are so small they could not measure what percentage of their total output they sell at the markets, to the semi-retirees whose entire income is generated at the markets, the cash-flow is a welcome extra that is no doubt occasionally invisible to the tax collector. Only one couple agreed that the markets gave them the means to stay working on their farm that is, *saved the family farm*. However, virtually everyone was enabled, in part by farmers' markets themselves and the connections they help forge, to lead the sort of life they wanted to and feel valued for doing so.

The pattern identified by the USA and UK studies that profits and business success are to be found at experience markets in large metropolitan areas rather

than at small rural markets, is repeated in country New South Wales. 31 Mid-North Coast vendors provided enough information for this study, to make the judgement that only four of them derive the bulk of the family income from direct marketing. The dominant trend is that farmers' markets are a supplement to incomes, welcome cash-flow is generated, but markets are not the main source.

no. of respondents	no. of markets attended	% of produce sold at markets
1*	4	100%
2	2	90%
2	6	80% - 89%
2	3	70% - 79%
1	1	50%
2	2	30% - 49%
1	8	25%
1	5	25%
1	4	15%
2	1	7% - 10%
1	4	5%
1	2	less than 5%
1	1	less than 5%

fig. 3 summary of information provided by 18 stallholders about the proportion of their produce that they sell at markets, not necessarily farmers' markets.

* a value-adder, not a grower.

4.3 Key findings

4.3.1 Profitability

Most farmers' markets need more vendors; it is a comment made in all cases where managers have been questioned, and shortage of farmers is "one of the key limitations to their development" according to Latacz-Lohmann.¹²⁵ The diminishing number of farmers at these direct retail outlets may be due to time constraints, availability of staff and retirement. However, only 60 percent of informants in the Latacz-Lohmann study considered their stalls to be

profitable.¹²⁶ Focus group participants also stressed enjoyment far more than profitability. Organisers have mentioned that some vendors have become discouraged because of unrealistic expectations of profits.¹²⁷ Govindasamy's studies of producer characteristics as well as the focus group participants' profiles suggest that those who set up specifically for direct marketing are the people most likely to be successful at the markets. Most vendors in fact derive a greater part of their income from off-farm activities.

A Victorian stallholder interviewed for this study, and he is only one of many such experience marketers, attends 20 markets per month. In summer he and his wife "endure" 16 hour days, a lifestyle not everyone may wish to follow. This is not even an option for most indigenous market vendors. As was reiterated at the Farmers' Markets conference, monthly markets are not sufficient for consumers to keep their refrigerators stocked and to become habituated to shopping at markets, and "once a month is not nearly often enough to make a living and the produce spoils in the meantime" according to a focus group speaker. Although the price per unit is satisfactory, the volume of produce sold is not sufficient to earn more than an income supplement.

By their nature, indigenous markets are ideal for hobby farmers, backyard gardeners and those at the start-up of their enterprises, for whom farmers' market offer an easy, low-cost entry into retailing, ready access to consumers and an easy avenue for product diversification. Informants were all very satisfied with receiving "a fair price" and "value for effort" for their produce. By shortening the distribution chain, vendors are able to keep a much greater part of the food dollar. However, growers who began their working lives as traditional farmers are not always able or willing to make the change to switch to direct agricultural retailing.

Although they do help to keep food dollars in their localities, indigenous farmers' markets operating for four hours per month are unlikely to affect the economic and social well-being of their communities to any significant extent. Also, hostility from retailers is one of the reasons farmers' markets need champions and why local government officers continue to be involved in the running of their farmers' markets, at least in New South Wales. Despite claims to the contrary, fruit and vegetable retailers do miss out on sales, and while supermarkets are not

seriously affected, greengrocers are.¹²⁸ Small businesses in small towns are frequently in a precarious financial position and their owners feel threatened easily. The economic development managers consulted for this study, spent many months during the period leading up to their first markets pacifying chambers of commerce and angry retailers who felt victimized by their councils.

Profitability engendered by farmers' markets for farmer vendors and communities is a complex issue and the conclusion derived from the focus group discussions and the literature survey suggests that profitability alone may not be worth the effort required to establish and run them.

4.3.2 Other benefits

Benefits listed were many and various, but they make participation in markets worthwhile even when profits are limited. A commercial beekeeper said that she set up at her market because she is sick of imported honey being sold at supermarkets under Australian labels and she wants to give people a taste of what "real Australian honey is like".

The psycho-social benefits of farmers' markets feature prominently in every study that has considered the matter and as Gale indicates "[t]he social aspects of direct selling appear to be as important as the economic benefits, if not more so".¹²⁹ These vendors are beneficiaries of the reaction against standardised and mass-produced food products by discerning consumers and they have seized the opportunities to build on this new-found enthusiasm for "food with a clear regional provenance" rather than producing food for transport endurance and the convenience of supermarkets.¹³⁰ This trend provides opportunities for better returns and the building of relations of regard with the shoppers who appreciate their apparently high quality product. The local food these stallholders sell offers an alternative to the mass produced items of the chain stores and they reap the benefits of consumers' appreciation at being offered the choice.

They all enjoy their markets and this enjoyment is a very important reason for continuing with that form of retailing. "Fabulous, love it" commented a very successful grower. As several studies note, smaller vendors are quite likely to attend farmers' markets just for the enjoyment of it, despite the low monetary

return.¹³¹ The women especially, indicated that the social factor was very important in keeping them returning, "I go with my daughter and we have a ball". The women's pleasure in the sociability of the markets is a very important factor in vendors' continuing commitment to them. Neil Barr's study showing that women's satisfaction with their lives is a better indicator of the potential success or otherwise of a farm enterprise than farm size or profitability is of relevance.¹³²

Social embeddedness is such a vital consideration because farmers' markets "repersonalise food purchase...as they enable interaction between producers and consumers".¹³³ These social relations of regard make the markets enjoyable experiences for both vendor and shopper and keeps them returning. "If stallholders are happy, making money is less of a priority, we're more willing to wait for a good day" was a comment from a female vendor.

4.3.3 A political act

As shopping has become for some people, a political act, discerning consumers have been the most direct beneficiaries of the resurgence of farmers' markets. The availability of fresh, local produce with a known provenance has been a boon for shoppers wary of the homogenous supermarket product which may have been excessively processed for long shelf life, and the creation of ever greater distances between the production and the consumption of food.¹³⁴ Such has been the concern about the distance that food has to travel, that "locally-produced food, or food with a clear regional provenance" has become a signifier of quality and stylish restaurants emphasize their use of local ingredients.¹³⁵ Personal interaction between the grower and consumer establishes trust and thus adds to the perception of the safety of the food for sale.¹³⁶ By being able to question producers about production methods, shoppers can satisfy themselves of "the ethical and environmental qualities embedded in the food".¹³⁷ Farmers are also being educated by their customers to value quality over quantity of production.

Biodiversity through the offering of a greater variety of foodstuffs than is available at large retail outlets, is nurtured by small farmers catering to niche markets. Farmers' market shoppers enjoy new produce, learning how to prepare it is part of the experience, and the feedback to the grower is another way in

which food is used for enjoyable communication, extending the conviviality of the table.

4.3.4 Threats

Focus group participants showed keen awareness of the community's changing food habits. "Kitchens are disappearing", "everyone is eating out or buying prepared foods". They believe that the movement back to more natural, environmentally friendly food production and preparation is opposed by the large retailers and vendors feel that markets need to create a learning environment associated with healthy eating, in order to try and change the community's eating habits and educate young people.

As we have seen, the average farmer on the Mid-North Coast is more than 54 years old and 14 out of the 17 focus group participants are aged 50 and over; they were a typical group in that respect. According to Coster's report, consumers are typically aged between 30 and 50 years.¹³⁸ As one vendor noted "you don't see many young families at the markets". These facts certainly have implications for the long term viability of these enterprises.

4.3.5 Opportunities

Neil Barr in his study of movement on and off the land notes that interest continues to be very strong in entering farming in the amenity regions of the coast and hinterlands.¹³⁹ As the focus group participants' profiles and the discussions show, markets rather facilitate the turnover of small farmers, through the opening up of opportunities for many different kinds of direct marketing, rather than enabling existing farms to continue to thrive.

Several authors note that farmers' markets are situated between the formal and illegal economies and that they are much more flexible than the formal economy.¹⁴⁰ They give stallholders at very different stages of their lives the opportunity to manage transition from full-time employment in the city to farming in a rural area, to move from traditional farming to direct marketing, from employment to productive retirement.

5. CONCLUSION

The purpose of this study was to examine the assumption that all farmers' markets provide the solution to the difficulties faced by family farms in the economic conditions of the 21st century. Enthusiasts believe that farmers' markets are the means of keeping small family farms viable; this dissertation has set out to show that the picture is much less clear and that the variables both in markets and vendors' circumstances should temper market organisers' optimism. The qualitative research approach was to ask a representative sample of stallholders from two small rural markets what their experiences have been and to ascertain the benefits they have derived from their participation in these direct agricultural marketing enterprises.

The findings as expressed in the focus group discussions as well as analysis of the literature review, bear out the hypothesis that farmers' markets are just one form of direct marketing among several. Experience markets based in large population centres maintain waiting lists of vendors who often derive the bulk of their income from them. Indigenous markets based in small rural centres, the subjects of this study, have fewer days of operation, and are generally short of vendors, a significant proportion of whom are part-time, hobby or semi-retired farmers whose main income source is off-farm. However, we also need to be mindful of the fact that as a former farmers' market organiser for the NSW Farmers Association said: "farmers would not persist as much as they do if they didn't make money out of it."¹⁴¹

By undertaking more detailed research into the benefits to be derived from participation in small indigenous farmers' markets in rural Australia, this study will fill a gap in information on small producer-only markets which have been scarcely touched on in the existing literature.

5.1 The benefits

5.1.1 Economic

While the reasons focus group participants gave for initially attending farmers' markets were dominated by economic and business motives, their continuing attendance is greatly influenced by quality of life and enjoyment conferred by the activity. Markets that are held once a month for four hours, as five out of the six markets on the Holiday Coast are, can have only negligible economic outcomes for the vendors and the community. Although most stallholders are happy with their profit margins, there are only a handful of other markets within a reasonable driving distance for most of them. More than half of the informants in this study dispose of less than 50 percent of their produce at markets and 25 percent sell less than 10 percent of their produce at markets. These findings confirm the conclusions drawn from the literature review.

5.1.2 Psycho-social

Australian consumers attend farmers' markets for an enjoyable shopping experience more than out of a concern with food safety. The social embeddedness of vendors retailing highly regarded local food leads to both shoppers and producers enjoying the personal relations of face-to-face interaction. These positive relations of regard assist stallholders to feel pride in their enterprise and in their product, making attendance at the farmer's market a more satisfying experience than it may be otherwise, often leading them to continue attending despite at times marginal profits and the need to invest much time. It also provides encouragement for the diversifying of produce. The key importance of the relations of regard that growers build up with their customers at farmers' markets cannot be overestimated.

5.1.3 Community

Local government enthusiasm for farmers' markets and their perceived benefits to the community and especially to mainstream farmers, may be out of proportion to the actual effects. Certainly some of the food dollars spent in the community stay in the region as a result of much effort and energy expended by

numerous volunteers as well as council staff, but their limited time of operation means that they can serve as an outlet for only a small volume of produce for stallholders and act only as a supplementary outlet for most shoppers.

Many rural regions and the agricultural sector, suffer from a population loss over the years as young people leave the land and move to the cities for further education and work. However, the opportunities offered by farmers' markets in a small way counteract that trend by providing openings for new forms of later age entry into agricultural life and changing the way inter-generational transfers are effected. These newcomers who may have little agricultural background are often well educated, flexible, highly motivated and frequently with entrepreneurial skills. They tend to give a higher priority to conservation and environmental values. The shift toward less traditional means of farming is thus accelerated. The strengthening of the local food movement and giving it nearly an equal status with the organic food movement is one such shift.

The results of this study suggest that farmers' markets are symbols of the community's capacity to change in a positive direction, turning towards health, good nutrition and sustainable farming and shopping. They help rural towns become more attractive for metropolitan life-changers both as producers and consumers. "Direct marketing may also contribute to rural development by supporting diversity in the farm sector, offering an alternative source of income for small farms, and other alternative farms that in turn support rural businesses."¹⁴²

5.2 Limitations of this study and suggestions for further research

1. It would have been helpful to the purposes of this study to question informants about the actual proportion of their income that they earn from farmers' markets and whether they anticipate that proportion to grow. Respondents made it very clear early in the study that questions about income were off-limits. Possibly an anonymous survey would elicit some of that information, although Ramu Govindasamy posted a questionnaire to

144 New Jersey farmers' market vendors on this topic and only received 36 usable responses.¹⁴³

2. There were no vendors who had dropped out of farmers' markets questioned for this study, and no such surveys were located in the course of the literature review. It would be beneficial for a complete picture of farmers' markets and their benefits to small farmers to ascertain the reasons for discontinuing attendance.

5.3 Practical action

1. Trevor Sargeant, the Port Macquarie-Hastings Economic Development Manager recognises farmers' markets' limitations for community development, and has plans for building on the opportunities opened up by the farmers' market in his local government area. These include: plans to create a website for online ordering from market producers, to establish relationships with local restaurateurs and to encourage value-adding. Other local government areas also need to consider the expansion of opportunities for farmers in their areas through their farmers' markets, in order to assist the viability of the agriculture sector.
2. Grant Burrows, the Agribusiness Development Manager of the Department of State and Regional Development has established a loose network of farmers' markets on the Mid-North Coast, so the operating days of markets close to each other don't clash. The network could continue to co-operate by combining for different forms of joint advertising and marketing and more importantly, to act to ease entry for farmers within the region to all of the member markets. There may be funding available for region-wide activities from the department.
3. Recruitment information for vendors needs to make growers more aware of the very satisfactory prices per unit earned at the markets as well as place greater emphasis on the non-financial rewards.

6. APPENDICES

6.1 Map



Map courtesy of Mid North Coast Regional Cuisine

<http://www.produceshop.com.au/showregioninfo.php?regionID=1>

6.2 Focus group discussion guide

1. What made you originally decide to participate in farmers' markets?
2. In what ways has selling at farmers' markets been beneficial to you? *and*
What do you enjoy about selling here?
3. What would you be doing if there were no markets?
4. Has anyone experienced any personal pressure not to participate in any market?

6.3 Participant Information Sheet

Participant Information Sheet

What are the benefits of growers' markets to growers?

My name is Gabi Brie. I am undertaking research as part of my Master of Arts programme in Gastronomy at the University of Adelaide. My study is looking at the benefits that growers may or may not derive from participation in farmers' markets. I am hoping to speak with about eight stallholders at this market for approximately 45 minutes after the market meeting on **Saturday 4 June** in the lunchroom at the Showgrounds.

The discussions will provide an opportunity for you to reflect upon both the positive and negative aspects of growers' markets from your point of view. I'll be interested to learn why you may have embarked on this venture and whether the outcome has been as beneficial as you had hoped. The conclusions of my study may help to improve the management of markets, and I will do my best to disseminate the results, but I can not guarantee that you will benefit directly.

The study is completely confidential, so nothing that you will say will be reported in a way that will identify you or your remarks about any person or organization, unless you agree to be identified. If you do not wish to be identified, no personal or identifying information about you will be included in my dissertation, and I will use an invented name in my notes and any quotes.

The way that I will carry out the study will be to organise a meeting with about 8 of you after a market morning. The meeting should only take about 45 minutes and will be like a conversation among a group of people, rather than an interview. I and my colleague (Ginny Kelk) will be taking notes and it is the thoughts of the group that I'm interested in recording. **Lunch will be provided.**

If you agree to participate in the study you are free to change your mind and withdraw at any time and you don't have to give me a reason if you decide to do so.

Please don't hesitate to contact me if you want more information about the study. If you have concerns that you do not wish to discuss with me directly, contact Dr. Barbara Santich who is the co-ordinator of the Masters programme for which I am conducting this study.

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6.4 Participant Consent Form

Participant Consent Form

What are the benefits of growers' or farmers' markets to growers?

I consent to take part in the study of Farmers' Markets.

I acknowledge that I have read the *Information Sheet* that describes the aims and purpose of this study. I confirm that I have had the study, so far as it affects me, fully explained to my satisfaction by the researcher, Gabi Brie. My consent to be interviewed for this study by Gabi Brie is freely given.

Although I understand that the purpose of this study is to assist the management of farmers' markets in general, it has been explained to me that my involvement in the study may not be of any benefit to me.

I understand that I can request that my name not be connected with any information that I provide and that, if I do not wish to be identified, Gabi Brie will create a pseudonym to identify me.

I do / do not (*circle one*) wish to be identified.

I also understand that, if I do not wish the meeting to be tape-recorded, Gabi Brie and her associate will only take notes.

I do / do not (*circle one*) wish to be tape-recorded.

I understand that my participation is completely voluntary and that:

- I am free to withdraw the information that I provide at any time during the information gathering stage of the study
- I do not have to give reasons for withdrawing the information that I provide
- I am under no obligation during the meeting to divulge information or to discuss issues if I do not wish to do so.

I understand that I can request the transcript of the meeting before it is used in the study.

I do / do not (*circle one*) wish to check the transcript of the interview.

I understand that I will be provided with information about the results of the study if I wish.

I do / do not (*circle one*) wish to be provided with information about the results.

If you answered yes to either of the above questions, please provide your postal address overleaf.

I am aware that I should retain a copy of this *Consent Form* and the *Information Sheet*.

Signature (Participant).....

Date

Signature (Interviewer)

Date.....

6.5 Participant profile form

Participants information

Market: **W** **H**

Name:

Interview yes

Contact details:

copy of results required yes no

copy of notes/transcripts req'd y n

Products:

Full-time producer, part-time, working off farm, semi-retired, other

How many markets attended per month:

Approximately what % of produce sold at markets:

Where else: shops, roadside stall, wholesale, friends & neighbours, boxes, other

Age bracket: 20 – 30 31 – 40 41 – 50 51 – 60 61 – 70 71 - 80

No. of people working the farm; family members, employees, partners

Approximate size of farm.

The story:

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