Addressing Rural Agricultural Producer Barriers to Direct Market Sales and Consumer Access

A Recommendation for the Formation of a Regional Farmers Market Association in Lewis County, Washington

In partial fulfillment of a Port of Chehalis sponsored USDA Rural Business Development Grant

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In partnership with

Northwest Agricultural Business Center

Washington State University Division of Government Studies and Services

Washington State Farmers Market Association

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Introduction

There are specific challenges facing Lewis County, Washington agricultural producers who are currently, or may be considering direct-to-consumer markets. This document addresses how previously unknown barriers to direct marketing agricultural products were identified by utilizing direct feedback from local producers and consumers. Research to uncover barriers was conducted in 2021 with assistance from USDA Rural Development. Included in this report is background context, a snap-shot profile of the Lewis County's agricultural community and its local policies, and a strategy recommendation for moving forward that is consistent with local policies and the regional vision for economic sustainability.

The recommended strategy would create a staffed Lewis County Regional Farmers Market Association to help producers with marketing and distribution through shared administrative and marketing staff and the development of an online sales platform. It is intended to increase consumer access to locally grown and value-added agricultural products and expand existing or create new direct-to-consumer markets for Lewis County area producers.

The duties of the Regional Farmers Market Association would include, but not be limited to the following:

- Share resources by combining marketing efforts;
- Develop a place-based regional agricultural marketing program;
- Curate ag-producer profiles (location/market attendance/product availability);
- Create an online storefront to help facilitate increased sales of Lewis County agricultural products;
- Provide assistance to market managers with the Washington State Farmers Market Association application process and compliance;
- Serve as liaison to local government agencies, business, non-profit and community stakeholders; and
- Fundraising and community support.

This recommendation is the product of collaborative input from the recently chartered Lewis County Agricultural Advisory Committee based on findings reported in *Identifying Rural Agricultural*

Producer Barriers to Direct Market Product Sales in Lewis County, Washington (See Appendix A). It represents a practical solution that can be implemented at a time when the availability of resources for rural-community agricultural producers are limited or non-existent.

Lewis County, Washington Profile

Originally formed in 1845 as Vancouver County, later renamed in honor of Meriwether Lewis in 1849. Lewis County is mostly rural, nestled between the Cascade mountains and the Pacific Ocean in southwestern Washington - halfway between the major metropolitan cities of Seattle and Portland. A major economic north-south transport corridor, Interstate-5, bisects the center of this 90-mile-wide county. State Highway 12 connects the county with eastern Washington through the Cascade Mountain range and is part of the National Scenic Byway.

Agricultural operations conducted by the Hudson's Bay Company in the native prairie lands associated with the Cowlitz River, a major tributary of the Columbia River, could be considered the original economic base of the first white settlers in the county. The earliest farms in Lewis County were also prevalent throughout the Chehalis River basin.

By 2010, roughly 51 percent of Lewis County's population lived in rural or resource areas. April, 2020 *US Census* data estimates Lewis County's population at 84,149, or just over 34 people per square mile, with a growth rate of 1.37% in 2020, and 11.42% growth since 2010. Lewis County's average annual individual wage in 2019 was $44,692, about a third less than the state's average. Twenty-six percent of adults living in the county are seniors, the median age is 43. Most residents identify themselves as white, with seven percent of the population being Spanish speaking. In the period 2015-2019, 87.5 percent of residents age 25 and older were high school graduates. Those with a bachelor's degree or higher made-up 17.7 percent in that same age range and time period.

The median household income in 2019 was $58,911, with the largest job holder age group in 2019 being in the 55 and older age category, and making up 26.5 percent of employment across all industries. Nearly 71 percent of Lewis County residents are home owners. In 2019, 11.6 percent of Lewis County's population was living below the poverty level.

According to regional labor economic data reported in the *Lewis County Profile*, updated February 2021, by the WA Employment Security Department, the average unemployment trend in Lewis County has declined annually since the 13.3 percent rate posted in 2009. The recent Great Recession was hard on the Lewis County economy, and as non-farm jobs declined, double digit unemployment rates became the norm up until around 2014. That trend reversed in 2019 when it fell to 6.2 percent. The 2020 COVID-19 pandemic brought the county's unemployment rate back up sharply, peaking at 16.6 percent in April 2020, then settling to 7.4 percent by December of that same year. The current unemployment rate in Lewis County is 4.3 percent.

Lewis County Farmers Markets

Farming employment in Lewis County accounted for approximately 1,875 jobs in 2016, or 5.4 percent of total full and part time employment in the county. Based on the most recent data available from the *Lewis County Comprehensive Plan* there were 1,647 farms in Lewis County, the bulk of which in 2012, ranged between one and 180 acres in size. Almost half of all farms are between ten and 49 acres in size. 18 percent are between one and nine acres and only eight percent are between 180 and 499 acres.

According to 2012 NASS data, Lewis County farm income includes nearly $30 million in nursery and greenhouse crops and an additional approximately $130 million in livestock, poultry and their products sales. Only 24 percent of Lewis County farms had sales greater than $10,000 in 2012.

Here is a summary of agricultural statistics for Lewis County, according to USDA National Agricultural Statistics, *2017 Census of Agriculture County Profile*:

- $9,643,000 annual sales of Vegetables, Fruits and nuts (typical of market farmers)
- $12,707,000 annual sales of Nursery, Greenhouse, Floriculture, and sod (which might also include market farmers)
- 1,723 total farms
- 122,870 total acres
- 71 acres average farm size
- Total market value of all farm products sold - $136,345,000
- Average market value of all products sold per farm - $79,132
- 83% farmers have internet access
- 3% farm organically
- 11% sell direct to consumers
- 23% hire farm labor
- 97% are family farms
- 3,038 total producers of which 2,940 identify as white, 90 identify as Hispanic, Latino, or Spanish origin; with an additional 98 farmers who also identify as people of color; 909 are new/beginning farmers; 233 are less than age 35; 1,715 are age 35-64; and 1,090 are age 65+
- Forage crops (Hay/Hay silage) is the number one crop with 35,364 acres
- Total acres in vegetable crops are 2,066

- Top 3 livestock produced in the county are broiler and other meat type chickens; cattle; and layer hens

In 2021 there were six farmers markets operating in Lewis County. They are all considered “small” to “very small” as determined by the average number of vendors during peak market season, as defined in *Oregon State University Special Report 1073-E, Revised 2018*. This report notes that small market size over time is a risk factor that could lead to market closure due to unsustainable vendor fees sufficient enough to support market operations.

Data from a report by the Washington State Farmers Market Association, commissioned by the Lewis County Agricultural Advisory Committee as part of this grant project, shows that total reported vendor sales at farmers markets in Lewis County increased from $184,048 in 2016 to $255,262 in 2020. During the same time period the total number of reported farm vendors selling at farmer markets in Lewis County increased from 30 in 2016 to a high of nearly 50 in 2019, although the average number of farm vendors per farmers markets has been declining since 2017. It is yet unclear what the primary causes for this decline are.

Reported shopper counts for a season, while not precise, may indicate overall trends. A shopper count is not a unique shopper, but rather an estimate of the number of times a shopper visits a market. Annual shopper visits per farmers market dropped between 2016 and 2018, and had an average decrease of 17 percent between 2019 and 2020, although sales increased in this period, suggesting higher spending per shopper visit, a very positive trend.

Lewis County Agricultural Strategic Planning

The *Lewis County Comprehensive Plan* (as amended February 2021) identifies a vision for the future of the community and establishes a set of long-term goals, policies, and land use patterns for growth over a 20-year period. This vision includes policies directly intended to strengthen the continued economic future for agriculture.

Lewis County agricultural planning policies include goals that aim to do the following:

- Strive to create jobs, targeting agricultural business sectors that provide family wage jobs and facilitate their continued operation, including the development of small businesses and cottage industries;
- Foster the establishment and success of agricultural operations and food processing industries;
- Ensure that sufficient agricultural land, support services, and skills are available to encourage a healthy, viable and diversified agricultural economy;
- Work with the Washington State University Extension, and other organizations and individuals to encourage agricultural diversity and sustainability within the county;

- Enhance the viability of farming through strategies such as marketing, promotion, business development, financing, agritourism, and specialty and niche agriculture;
- Nurture the ability of farms to generate on-farm and non-farming income to help support the economic viability of their agriculture operations;
- Encourage on-farm housing for farm families and workers;
- Promote the expansion of value-added food processing facilities and markets to showcase and support Lewis County's agricultural products;
- Seek to construct a regional distribution facility/food hub along I-5 to better link farms in Lewis County (particularly on the west and east sides of the county) to markets in Portland and Seattle;
- Support efforts to promote local and regional agricultural producers, events, exhibitions, and farmers' markets; and
- Advocate (at a federal and state level) for regulations that encourage local food production and processing.

In addition to the policy directions outlined above, Lewis County agriculture is an area included in *The Strategic Plan 2019 - 2021 Regional Agriculture Development Collaborative*, a group of agricultural organizations, cities, counties, ports, educational institutions, and others committed to the spirit and practice of cooperation with the aim of employing a strategic, systems approach to advance agriculture throughout the Southwest Washington region. The vision for this collaborative approach to strategic planning is to promote regional agricultural viability. This is understood to be a vibrant agricultural economy sustained by diverse and high-value markets, access to necessary infrastructure for production and marketing, a stable land base, a high level of consumer awareness and commitment, a compatible regulatory landscape, living wages, and access to support services.

USDA Rural Business Development Grant Project

The recommendation to create a regional agricultural marketing association in Lewis County is the outcome of research conducted with the assistance of a 2020 USDA Rural Business Development grant project sponsored by the Port of Chehalis with support from the Northwest Agricultural Business Center, Lewis County farmers market managers, and farm-direct market producers. Service area selection for the project was based on a supposition that farmers markets (FMs) could be considered the original flag bearer of the "buy-local" food movement. They represent one avenue in addressing customer demand for "locally grown" and provide a means for producers to capture 100 percent of the direct market consumer dollar. FMs may also increase customer loyalty and create intangible benefits such as ties between producers, consumers, and stronger communities.

Lewis County FM managers understand that two things must be considered when attempting to develop more accommodating local food systems that address current direct market barriers:

1) local food promotion will not be successful if the local context does not support it; and

2) local conditions matter – in other words - there is no one-size-fits-all design for local food systems.

Given this understanding, and if the goal of local food development is to create more equitable and sustainable food systems for all, then careful consideration had to be given to local contextual features. Failure to consider local contingencies would limit Lewis County rural FMs from realizing the potential benefits of local food systems, in effect diminishing the promise of more inclusive and equitable systems.

This project was therefore both important and timely, as funding could provide these collaborators with the resources necessary to identify and fully understand barriers. Providing assistance to agricultural producers to address these concerns could expand consumer awareness and access to current and new direct market opportunities and therefore increase consumption, resulting in strengthening the economy of the local agricultural base.

The project team reached out to 80 Lewis County farmers, including 16-25 that were identified as currently having the capacity to expand operations and/or were already engaged in direct market sales, and therefore could provide relevant feedback regarding existing barriers to increasing on-farm direct sales revenue.

It was estimated that an additional 40-50 agricultural producers in the Lewis County project area could, over time, develop their capacity to include direct market sales. For example, through the creation of new or expanded markets, or by diversification of farm operations to create value-added products. This expanded capacity will only be realized with a clear understanding of unknown, and possibly unique local direct marketing barriers. It was proposed that once these barriers are understood, community stakeholders could help remove barriers by implementing a practical strategy that includes opportunities to increase purchases of locally produced farm products that are both cost-effective and convenient for consumers.

Early in the project, the Lewis County Agricultural Advisory Committee, comprised of local farm producers, farmers market managers, and other local agricultural community stakeholders was formed to oversee project deliverables. The committee enlisted the services of the Washington State University Division of Governmental Studies and Services, (DGSS), to assist with the design and implementation of a survey tool for data collection to identify the unique barriers to direct market sales and local access to agricultural products in Lewis County's rural communities.

Research was conducted through assessment of base-line direct market sales data, and engagement with agricultural producers and potential consumers through the use of two separate surveys tailored to address the separate concerns of each distinct group.

Both the consumer and producer focus groups were exclusive to responses only from Lewis County residents, although the producer feedback also includes responses from farmers who live out of area if they indicated that they direct-to-consumer market their agricultural products in Lewis County.

Consumer Barriers to Local Access

Consumer responses point to a potentially strong demand for Lewis County agricultural products. For example, when asked if they were willing to purchase locally grown farm products, 88.5 percent of respondents either *agreed* or *strongly agreed* with that statement, and nearly all consumer survey participants (95.4 percent) said that purchasing their food from a local farmer was in some degree *important to extremely important*.

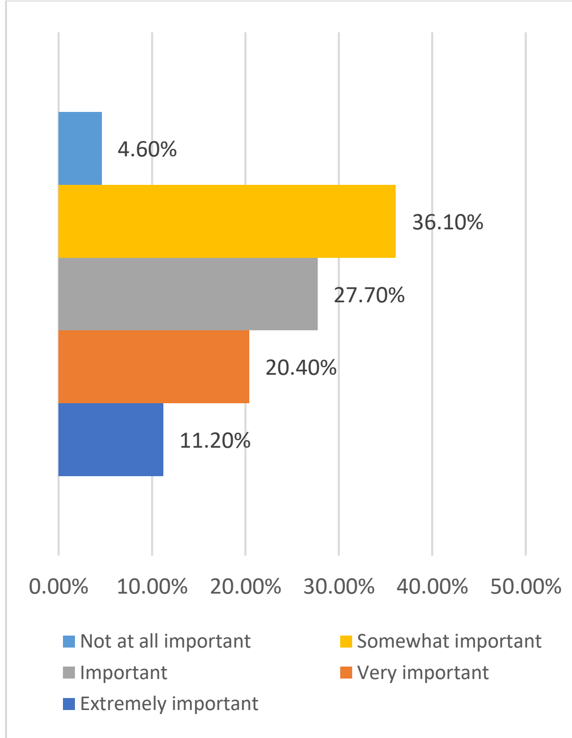

Figure A: Importance of Purchasing from Local Farmer

The willingness to purchase locally grown food products was predicated on the ease of access to farmers markets, competitive prices, and product variety and availability. We identify these decision concerns as primary barriers to purchase of direct market products for Lewis County consumers.

Consumer respondents indicated that knowing where farmers markets are located, providing a convenient location, and more flexible open market hours/days would encourage the likelihood of them increasing direct market purchases.

Consumers indicated that they were *somewhat to very likely* to order direct from the farm online with home delivery if the service wasn't too expensive. The same was true if ordering online was available with a delivery service to a central location for pick-up.

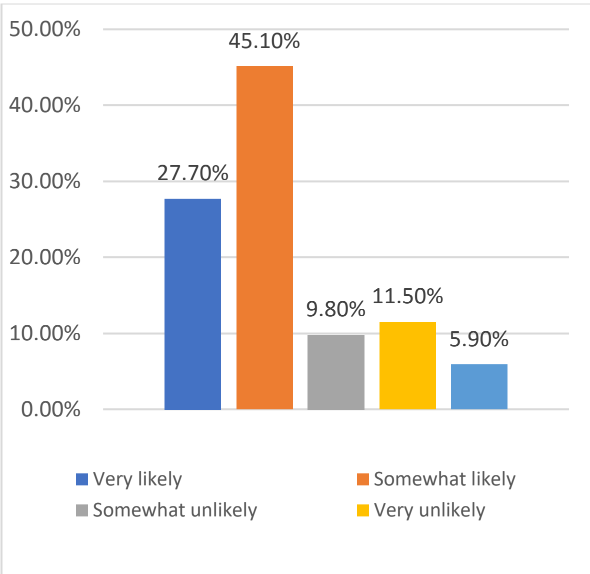

Figure B: Likelihood of Purchasing Local Farm Products Online that are Delivered to Central Location

Producer Direct Marketing Barriers

For the agricultural producer survey, a majority of participants indicated they were currently involved in direct sales, including farm stands, on-farm sales, and for a quarter of respondents - utilizing online sales.

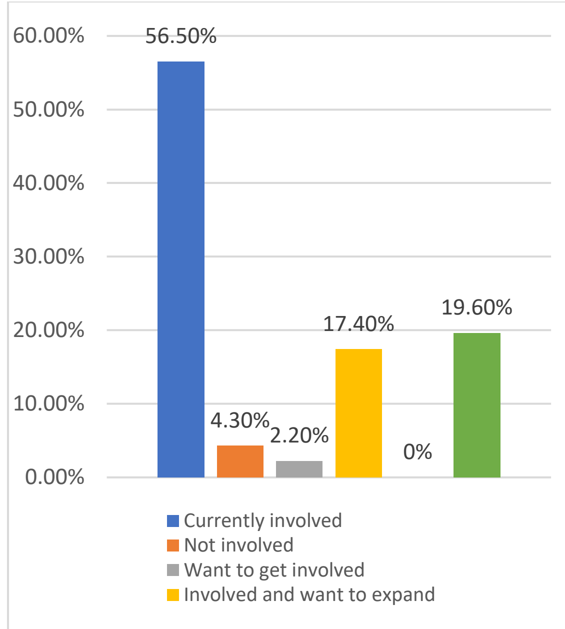

Figure C: Operation Involved in Direct Market Sales

Lewis County producer responses indicated that *time away from the farm* was the number one barrier to direct market participation. Producers also indicated that their top concern for including direct market sales is the unpredictability of sales. Producers also indicated that direct market barriers include the belief that it would require additional costs and/or employee hours to develop direct market sales outlets.

Experienced producers who direct sell at markets *outside* of Lewis County did so because they mitigate these factors by achieving more reliable sales and increased profits in the wealthier, and more densely populated Seattle, Portland, and Vancouver metropolitan areas.

Over 70 percent of producers indicated that increased direct market sales would lead to hiring additional part-time to full time employees to increase volume and product diversity.

While most of the producers surveyed indicated that they would expand if they had access to distribution services to help with direct marketing their products, nearly half (42.2 percent) would not, due to other limitations, including not having the capacity or enough capital resources to expand.

In other responses, more potential limitations and concerns become evident, such as lack of employees, concerns over licensing and permits, and equipment needs.

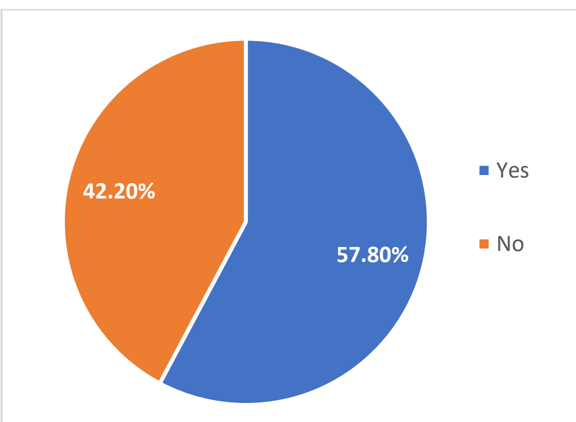

Figure D: Expand Operation if had Access to Distribution Services

In terms of expanding direct market sales, producers commented on the need to have a focused advertising campaign as a way to increase their customer base, provide improved outreach, and diversify direct sales options.

Conclusions/Summary

Lewis County is a rural and natural resource lands county with a median income level equal to one third of the state's overall average. Farming represents less than six percent of total full and part-time employment in the county, generating approximately $160 million in annual revenue. Nearly 70 percent of the farms in the county are under 50 acres. A quarter of total farms had annual sales greater than $10,000 according to 2016 data reported in the Lewis County Comprehensive Plan.

There are currently six "small" to "very small" farmers markets operating in the county. These markets generated over a quarter of a million dollars in annual direct market sales as reported in 2020 by the Washington State Farmers Market Report referenced in this document.

Relevant agriculture statistics for Lewis County as compiled from the *2017 Census of Agriculture County Profile* include:

- Total acres in vegetable crops are 2,066
- $22,350,000 annual sales of Vegetables, Fruits, Nuts, Nursery, Greenhouse, Floriculture, and sod
- 71 acres average farm size
- 83% farmers have internet access
- 3% farm organically
- 11% sell direct to consumers
- 23% hire farm labor

A USDA Rural Development grant project sponsored by the Port of Chehalis, in partnership with Northwest Agricultural

Business Center, uncovered unique direct marketing barriers experienced by Lewis County agricultural producers. Project research data also identified consumer access barriers to the purchase of local farm products while also recognizing a strong preference for buying local farm products.

Research was conducted through direct engagement with local agricultural producers and potential consumers through the use of two separate surveys designed to understand the specific concerns of each group. The surveys were developed by Washington State University Division of Government Studies and Services (DGSS). Survey data concluded that the most important factors confronting Lewis County agricultural producers when making personal direct market sales decisions are:

- time away from the farm,
- transport and set-up, and managing the vendor space,
- working with other management, and
- the overhead cost of retail sales including licensing, fees, and potential equipment needs

In Lewis County, the most familiar access point for locally produced farm products is through area farmers markets. Consumers indicated that knowing in advance where farmers markets are located, and providing a convenient location, with more flexible open market hours/days would encourage their likelihood of increasing personal direct market purchases.

Most consumers surveyed indicated they overwhelmingly agree on the importance of purchasing local farm products. There are caveats with consumer willingness to purchase locally grown food products, including access to farmers markets, price, and availability. These concerns represented the primary consumer access barriers to direct market purchase decisions for Lewis County residents.

Consumers may consider participating in a service where they can order direct from the farm from an online venue with home delivery if the service wasn't too expensive. The same cost concerns were true for them if ordering online was available that included a delivery service to a central pick-up location.

It is clearly noted in the DGSS report - across both surveys, that - *the need for marketing and advertising is apparent and developing coordinated marketing strategies that focus both within Lewis County and larger, regional initiatives would be beneficial to both consumers and producers*.

Effective marketing efforts of any practical services that may be adopted in the future to remove these barriers should include social media and word of mouth - since this is how most Lewis County consumers obtained information on purchasing local food products.

Vending at farmers markets or other type of in-person seasonal market venues can involve significant travel and set-up time, and may require vendor fees, development of point of purchase product signage, building customer relationships, and multi-media advertising, in addition to the pre-market logistics of preparing product for the specific venue.

In addition, direct-to-consumer sales demands a specific skill set to develop farm-specific marketing and delivery strategies and build the customer base essential to marketing success. Individual producers either have to acquire these skills over time through training and/or experience, or hire experienced staff able to perform these tasks.

Over 70 percent of producers indicated that they understood that direct market sales would mean hiring additional part-time to full-time employees to keep up with the increase in volume and product diversity. Farm direct sales activities typically employ two to five permanent positions and many more seasonal hires.

Most of the producers surveyed (57.8 percent) indicated that they would expand their operations. Conditions for their ability to expand included the need for more venues for their products, the difficulties involved with distribution of product, including a lack of time to manage distribution, the need for a local co-op, a closer distribution center, and/or the need to find additional out-of-area markets.

Others noted expansion of operations would require more land or product, and better access to USDA inspected slaughter and butchering services.

Assumptions that producers can easily access these additional resources should be avoided, as well as the assumption that these producers would expand if they are not confidenct that they can recoup the additional overhead costs associated with direct marketing through increased sales.

A regional marketing association that consolidates marketing, collection, and distribution activities under a local brand would benefit all participating producers and may attract those operations that indicated that they would not expand due to lack of capacity or capital resources.

A targeted marketing campaign may also help increase producer confidence by allowing better seasonal production planning for producers, while at the same time addressing local access and product variety while remaining within Lewis County consumers' food budgets.

Based on a careful analysis of this data, the Lewis County Agricultural Advisory Committee recommends the formation of a Lewis County regional farmers market association. Development of a regional marketing association can reduce barriers by assuring consistency in product availability, variety, and quality while creating a distinct "grown in Lewis County" quality marketing brand that recognizes a standard of customer service and product excellence.

The agricultural marketing association model has been successful in similar rural communities throughout Washington. While it is understood that Lewis County direct marketing challenges are unique, there are common aspects of this model that are adaptable for this region. Additional research will have to be conducted to develop a structure that will appropriately address the goals of the regional agricultural marketing association as proposed.

In conclusion, the recommendation to create a fully staffed Lewis County Regional Farmers Market Association will help producers with marketing and distribution, and improve access for consumers through shared administrative and marketing staff, and the development of an online sales platform. Such a regional marketing association would increase consumer access to locally grown and value-added agricultural products and expand existing, or create new direct-to-consumer markets for Lewis County area producers.

The formation of a regional agricultural marketing association is consistent with Lewis County's Comprehensive Plan policies and vision. Its formation and collaborative approach would also contribute to the realization of the vision of *The Strategic Plan 2019 - 2021 Regional Agriculture Development Collaborative* to promote regional agricultural viability.

Implementation of a regional agricultural marketing association is contingent on the availability of a viable short-term funding source. Proposals to create regional marketing associations such as this have proven to be reliably fundable public projects. The ability for Lewis County stakeholders to realize its success depends on the active support of the local agricultural community, and must include experienced, as well as, entry-level producers. Concurrently, the development of working partnerships with government, business, and committed non-profit stakeholders is essential.

Working together, a regional marketing association will improve the capacity to make locally grown farm products more accessible and convenient for Lewis County consumers, while bolstering the sustainability of the small but important economic sector for Lewis County and all participating regional farmers.

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APPENDIX 1: ***Identifying Rural Agricultural Producer Barriers to Direct Market Product Sales in Lewis County, Washington***

APPENDIX I

Identifying Rural Agricultural Producer Barriers to Direct Market Product Sales in Lewis County, Washington

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Photo by NeONBRAND

INTRODUCTION

In Fall of 2020, the Port of Chehalis was awarded funding from the USDA's Rural Business Development Grant Program for their project: *Identifying Rural Agricultural Producer Barriers to Direct Market Product Sales in Lewis County, Washington.* This project seeks to aid local agricultural producers who are considering expanding operations to direct market sales and those who have already expanded to direct market sales. This research was conducted through assessment of base-line direct market sales data, and engagement with agricultural producers and potential consumers. As part of this assessment, representatives with the Port of Chehalis contacted the Washington State University's Division of Governmental Studies and Services (DGSS) to consult on development of two surveys: a survey for agricultural producers in Lewis County and a survey of potential consumers in the County.

DGSS is research and outreach unit sponsored by WSU Extension and the College of Arts and Sciences. For over fifty years the mission of DGSS has been to translate the resources of the University for public benefit through research, technical assistance, and training projects with communities, with state, local, federal, and tribal government agencies, and with select non-governmental entities. DGSS has significant experience with applied research and technical assistance for government and nongovernment organizations, including multiple local and state survey projects.

DGSS faculty worked with representatives of the Port of Chehalis to develop online surveys for agricultural producers and consumers. The consumer survey focused on where consumers buy their groceries, importance of purchasing from local farmers, what prohibits them from shopping at farmers markets and/or direct farm stands, their interest in ordering local farm products delivered to their door, as well as other concerns and preferences. The agricultural producer survey focused on whether survey participants are currently involved in direct sales, their direct sale strategies, interests in expanding direct sales, concerns regarding direct marketing operations, etc. In what follows, we present the results of each survey.

METHODS

Consumer Survey

The consumer survey was distributed at the Southwest Washington Fair in Lewis County in August of 2021. A total of 584 people completed the survey.

Agricultural Producer Survey

The agricultural producer survey was an online survey distributed via email during the summer of 2021to 86 agricultural producers. A total of 44 agricultural producers from the Lewis County project service area completed the survey for a response rate of just under 52%.

RESULTS

Consumer Survey: Demographics

The majority of survey respondents are female (63.7%, 364), white (87.2%, 486) and indicated that their place of residence is rural (53.2%, 303). Nearly half the survey sample have lived in Lewis County 21 or more years (45.9%, 268), and nearly a quarter indicated that their approximate annual income is $100,000 or more (22.1%, 121). A vast majority of respondents received no food assistance (90/2%, 518). Respondents were more varied in terms of the age and the number of people for whom they typically grocery shop, (33.2%, 191) of respondents were 60 or older and (39.3%, 226) shop for 2 people.

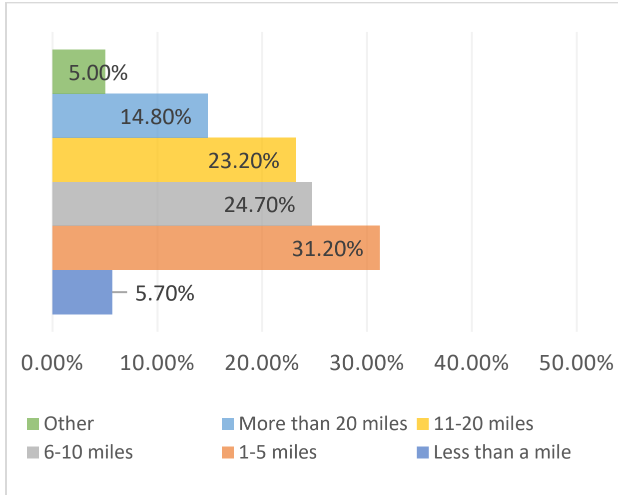
Table 1: Survey Demographics

Variable	Central Tendency
Lived in Lewis County	21+ years (46.6%, 268)
Gender	Female (62.3%, 364)
Race/Ethnicity	White, Non-Hispanic (87.2%, 486)
Place of Residence	Rural (53.2%, 303)
Age	60 or older (33.2%, 191)
Income	$100,000 or more (22.1%, 121)
Food Assistance	No (90.2%, 518)
# Of People shop for	2 (39.3%, 226)

Consumer Survey: Current Grocery Purchases

Respondents were asked how far they typically travel to purchase groceries and how they typically travel to those locations. Nearly all respondents (97.9%, 570) use a car to travel to purchase their groceries. A larger percentage of individuals travel from 1 to 5 miles to purchase groceries (31.2%, 182), while nearly a quarter travel 6 to 10 miles (24.7%, 144), or 11 to 20 miles (23.3%, 135). Those who selected "other" mentioned that the distance they travel ranges. For example, they purchase some items locally and drive over 40 miles for other items, or periodically drive to a Costco or WinCo every few months but mostly shop locally.

Figure 1: Travel to Purchase Groceries



Respondents were then asked where they usually obtain food for their household and were able to select answers from multiple response options. Figure 2 below indicates that the vast majority of respondents get their food from a grocery store or supermarket (93%, 541), followed by wholesale clubs (43%, 250), and farmers markets (35.1%, 204). For those who selected "other" and provided further explanation, responses ranged from gardens (personal, family, or friends), local farms, hunting and/or fishing, roadside markets, family, Walmart, and Meals on Wheels.

Figure 2: Where Obtain Household Food

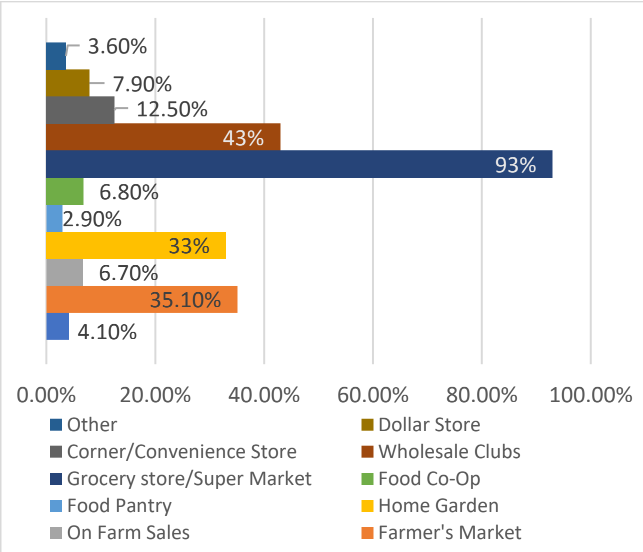
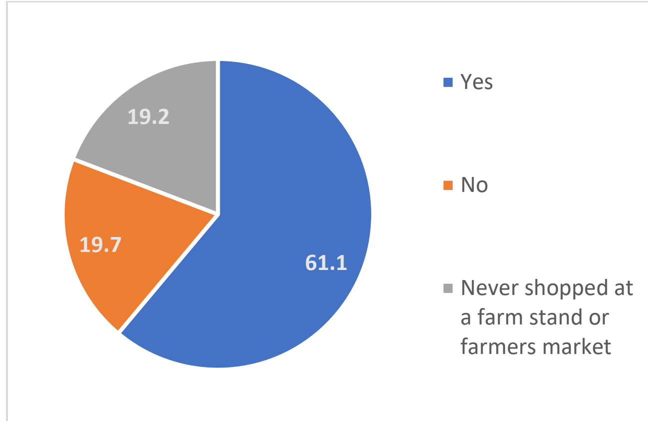


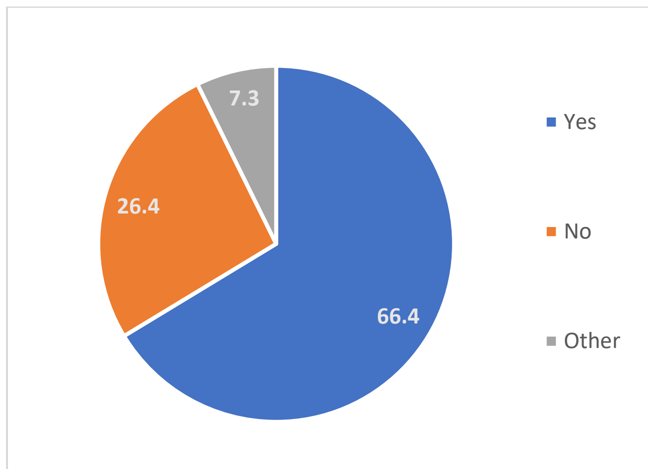
Figure 3: Satisfied with Varieties of Products



Consumer Survey: Purchasing Local Products from Farmers Markets and Farm Stands

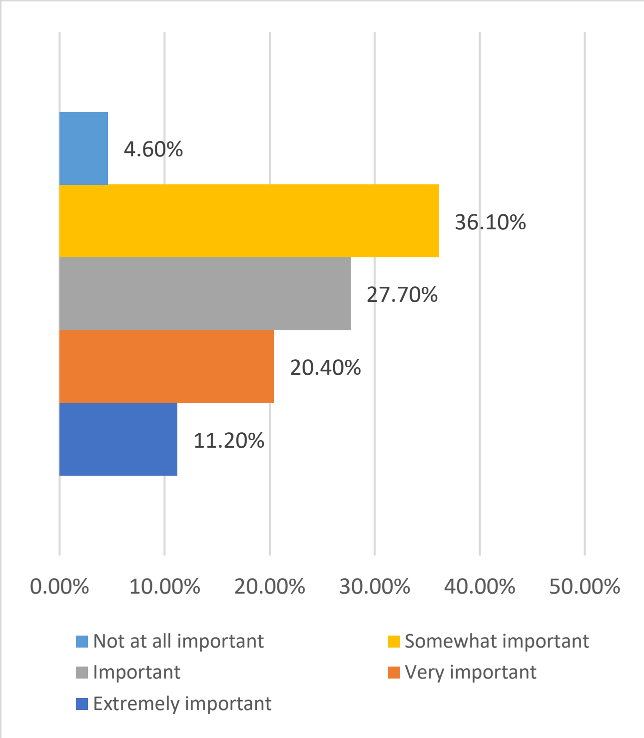
Respondents were asked if they are satisfied with the varieties of products available at their local farmers market or farm stand. A majority indicated that they are satisfied (60.4%, 353). Those respondents (114, 19.5%) who were not satisfied with the varieties of products, were asked if that limits their willingness to shop at these locations. Seventy-three (66.4%) said that yes, they are less willing to shop at locations with less variety. Of those who selected "other", 8 provided more information. These responses mostly focused on not enough variety or not enough products to purchase, while another mentioned that prices were too high.

Figure 4: Limit Willingness to Shop



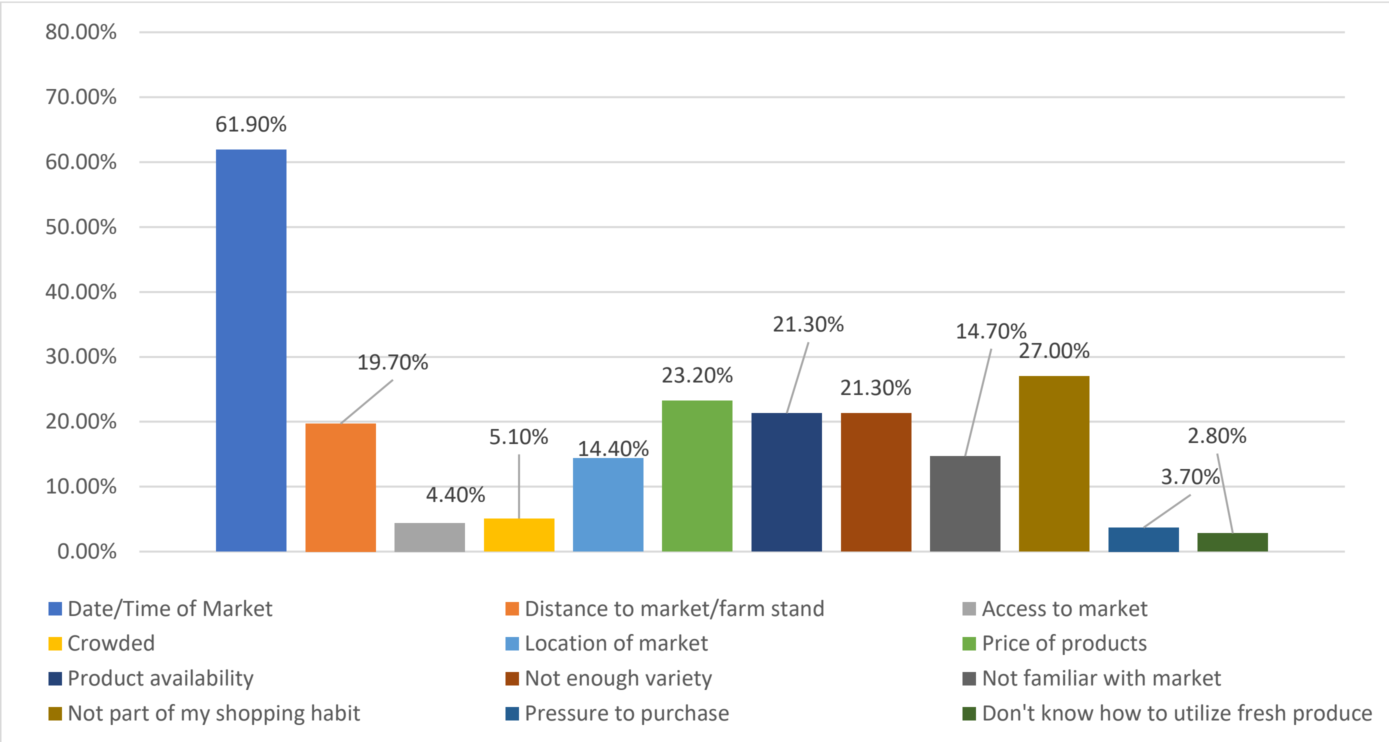
Respondents were asked the following question: *How important is it to you to purchase your food from a local farmer?* As indicated in Figure 6 below, the highest percentage responded that purchasing from a local farmer is *somewhat important* (36.1%, 210).

Figure 5: Importance of Purchasing from Local Farmer



In order to understand what discourages consumers from participating in direct sales, the following question was asked: *Which factors are most likely to prohibit you from shopping at farmers markets and/or direct from the farm stands in your area?* Figure 6 below presents those responses. The most identified factor that prohibits respondents from shopping at farmers markets or direct from the farm stands is *date/time of market* (61.90%, 349), followed by *not part of my shopping habit* (27%, 152), *price of products* (23.2%, 131), and *product availability* (21.3%, 120).

Figure 6: Factors that Prohibit Shopping at Farmers Markets and Farm Stands



Respondents were then asked the following open-ended question: *What would encourage you to include the purchase of local farm products as your regular shopping habits?* A total of 582 respondents answered this question. The most mentioned factor was the variety and availability of products, including more vendors and

farmers at the market and the need for more products (53). Fifty-three respondents also mentioned the open times of the market, with several mentioning that access outside of work hours and operating on weekends were important, while 28 participants emphasized the importance of the location of the market and a desire to shop local. Price was mentioned by 14 consumers and better advertising of dates, times, and/or locations was mentioned by 10 respondents.

Consumer Survey: Interest in Purchasing Local Products Online

Respondents were asked to rate how likely they would be to try a service that allows them to order local farm products online that are then delivered to their door. A majority of respondents indicated they were either *somewhat likely* (38.3%, 223) or *very likely* (34.2%, 199). When asked what factors might cause them not to participate in this service, 43% (216) indicated that they would not want to participate if the service was too expensive. Of the respondents who selected "other" factors that might cause them not to participate, 98 explained further (See Figures 7 and 8 below). Responses were greatly varied including many indicating that they prefer to shop in-person or have the ability to choose their own products (20). Many of these respondents mentioned that they want to be able to select their own products to ensure quality and that the product choice meets their preferences. Other respondents had concerns regarding additional deliver costs and fees or did not trust the reliability of delivery to their home (10). A few respondents mentioned that the size of their household was too small for this option.

Figure 7: Likelihood of Purchasing Local Farm Products Online that are Delivered to Door

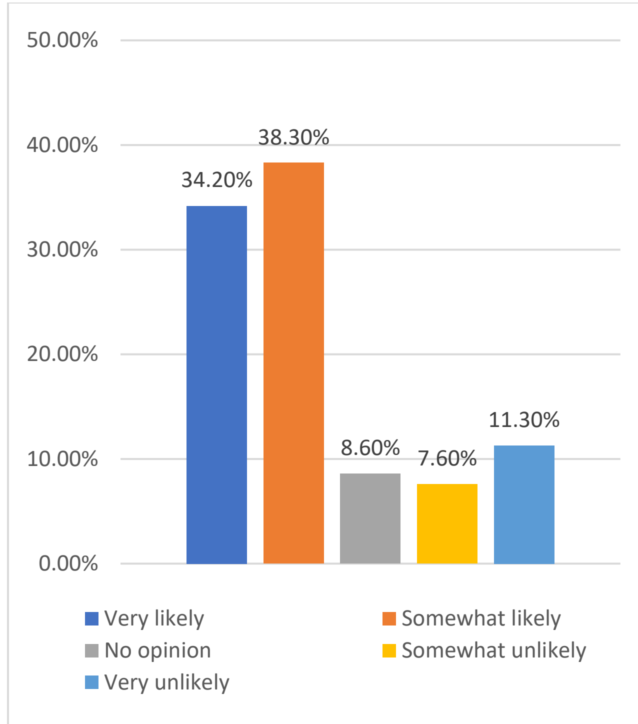
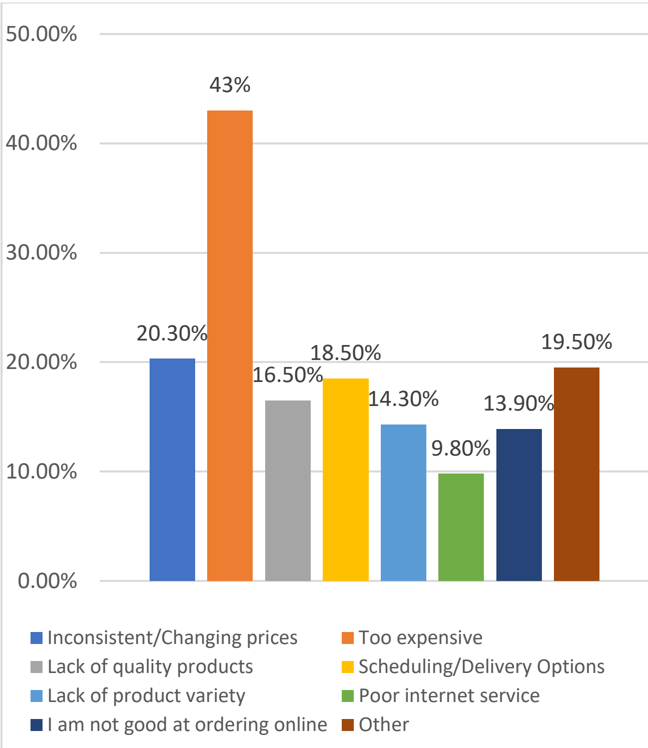


Figure 8: Factors Impacting Participating in Online to Door Sales



Respondents were also asked about the likelihood of trying a service that allows them to order local farm products online and have them delivered to a central location for pick up. Again, a vast majority of respondents indicated that they are *somewhat likely* (45.1%, 259) or *very likely* (27.7%, 159) to try this service (See Figure 9 below). Similarly, the most identified factor that would cause them not to participate in this service is high cost (39.1%, 199) (See Figure 10 below). Of those who selected "other" factors that would cause them not to participate, 42 provided more information. The responses to this question were similar to reasons why they might not participate in purchasing local farm products online and delivered to their home: preferring to purchase in person and choosing their own items were mentioned by several participants (15). Some respondents also mentioned inconvenience, they are too busy, have concerns over freshness and rotting, and believe that the size of their household is too small.

Figure 9: Likelihood of Purchasing Local Farm Products Online that are Delivered to Central Location

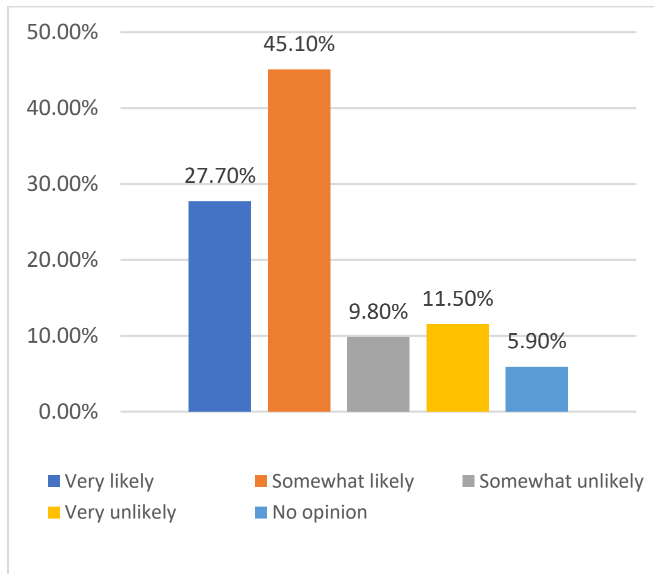
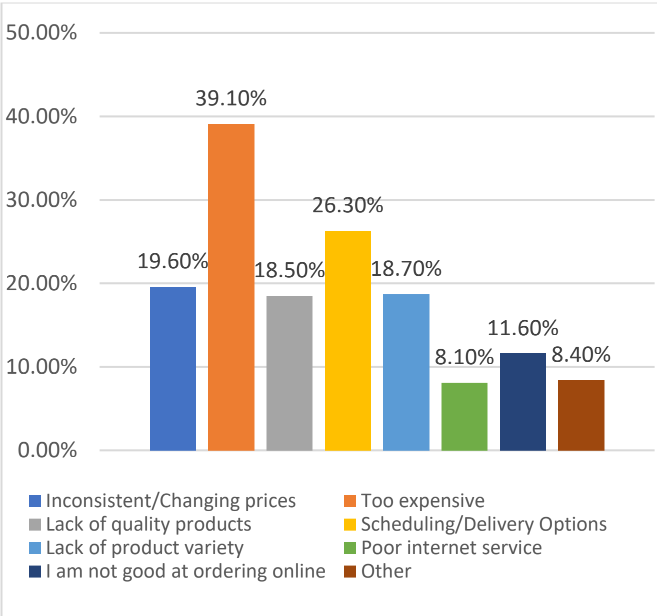
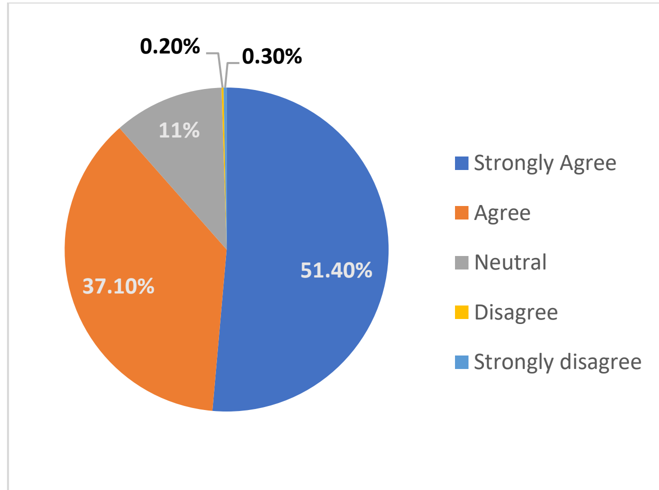


Figure 10: Factors Impacting Online to Central Location Sales



Respondents were also asked to indicate their level of agreement with the following statement: *I am willing to purchase locally grown farm products.* As Figure 11 below indicates, an overwhelming majority of respondents either agreed (37.1%, 213) or strongly agreed with this statement (51.4%, 295).

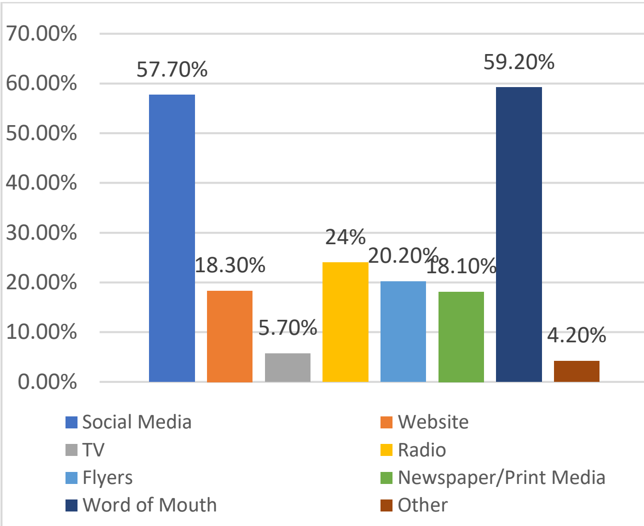
Figure 11: Willingness to Purchase Locally Grown Farm Products



Consumer Survey: Purchasing Local Farm Products

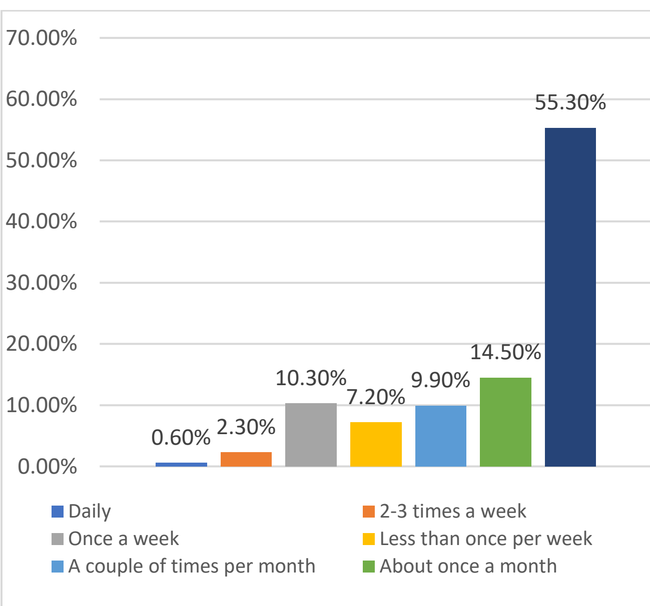
Respondents were asked where they are most likely to get information about opportunities to purchase local products. As shown in Figure 12 below, the most common sources of information are *social media* (57.7%, 331) and *word of mouth* (59.2%, 340). Of those who selected "other", 23 explained further, indicating that they get information from road signs or billboards, seeing a location while driving by, email, local ads, YouTube ads, fairs, and flyers at local businesses and other locations.

Figure 12: Purchasing Local Food Products Information



Respondents were asked how often they purchase products from a local farm stand, community supported agriculture (CSA), or online directly from a farm website. The majority stated that they make purchases from these locations a couple of times a year (55.3%, 286) (See Figure 13 below).

Figure 13: Purchasing Products from Local Farm Stand, Community Supported Agriculture or Online Directly



Lastly, respondents were asked the following open-ended question: *What would encourage you to shop at local farmer's markets, farm stands, or otherwise purchase locally produced farm products?* A total of 324 respondents answered this question. The largest number of the respondents indicating *variety and availability of products* (80). Other responses included *prices* (34), *days and times open* (29), *convenience* (22), *knowing their location and products for sale* (19), *quality of products* (14), and close *proximity to their home* (9). In terms of days and times open, it is noteworthy that many of the survey participants mentioned the importance of locations being open after hours and on weekends.

Producer Survey: Organization Demographics

The majority of producers surveyed described the area in which they live as rural (52.2%, 24). A larger percentage of producer's farms have been in operation in Lewis County for 21 or more years (28.9%, 13) followed by the 1 to 5 years category (23.9%, 11). In terms of farm owners, 35.6% (16) indicated that their farm owner was 60 or older, and gender of owners was evenly split between males and females (47.7%, 21 each). Nearly half of the responding producers indicated that more than 80% of their income was derived from direct market sales (47.7%, 21), and 45.7% (21) indicated their annual sales income is less than $30,000 (47.7%, 21). Lastly, most of the survey respondents indicated they are white and non-Hispanic (84.6%, 33).

Table 2: Agricultural Producer Survey Demographics

Variable	Central Tendency
Respondent Race/Ethnicity	White, Non-Hispanic (84.6% 33)
Farm Owner Age	60 or older (35.6%, 16)
Farm Owner Gender	Female (47.7%, 21) Male (47.7%, 21)
Farm Income from Direct Sales	50% or more (47.7%, 21)
Annual Sales Income	Less than $30,000 (47.7%, 21)

Producer Survey: Direct Market Sales Involvement

Of the producers who responded to the survey, 56.5% (26) are currently involved in direct market sales (See Figure 14 Below). When asked what direct market strategies they currently use, the majority said that they use *farm stand/on site* sales (59.10%) (See Figure 15 Below). Of the 9 respondents who selected "other", responses varied with two mentioning selling to wholesale vendors, four mentioning temporary suspension of direct sales due to COVID (2) and relocation (2), while one mentioned the risk of prescheduling with butchers.

Figure 14: Operation Involved in Direct Market Sales

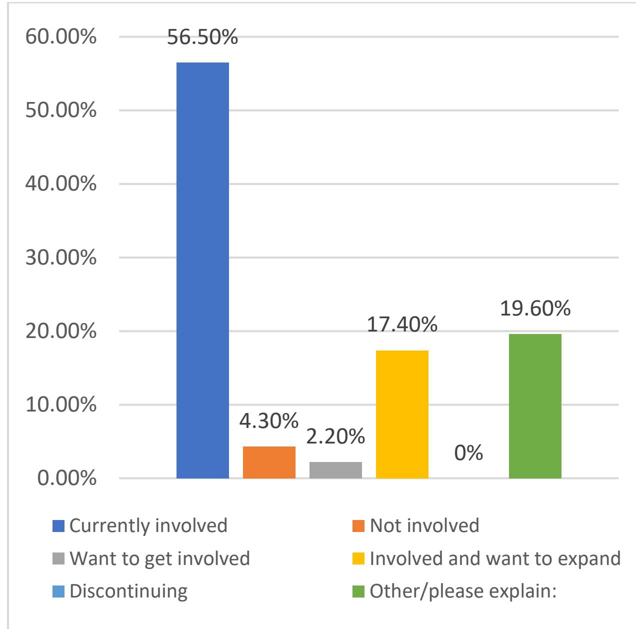
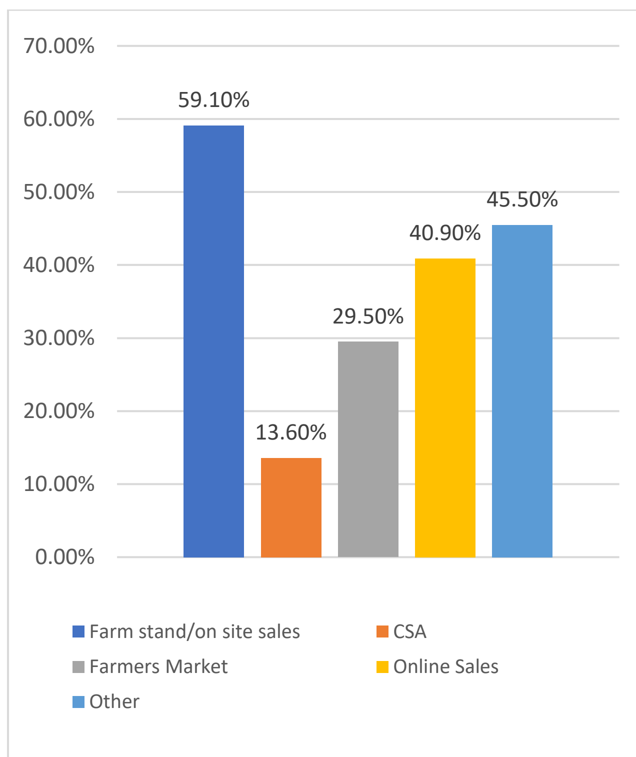


Figure 15: Direct Marketing Strategies Currently Utilized



Producer Survey: Direct Market Sales Improvement and Expansion

Respondents were then asked the following open-ended question: *What are the top three things you would like to do if you could improve or expand your direct marketing operation?* A total of 38 agricultural producers provided a response to the first option (#1 thing they would do to improve their direct sales operation).

Responses to this option were varied with some focused on better advertising and marketing (11), including using technology to increase online visibility, better farm signs on public/private lines, and getting a "wider reach to potential customers". Others focused on increasing sales through a variety of means, such as increasing online sales, including on-farm sales, adding U-Pick options (9). Others listed equipment, facilities or land needs, including more access to butcher/slaughter facilities, expand with "long term land lease or purchase to scale up operation", purchasing a refrigerated van, investment in equipment and infrastructure to expand operations, "afford to install power and well for field irrigation". A few respondents mentioned increasing their number of employees (4).

Twenty-seven producers provided responses to the second *thing* they would do to improve their direct sales operation. Top responses here were similar to the number one option, with many responders referencing increasing or improving marketing and sales (7), more direct sales options (8) that are cost effective, and better equipment or facility, and employee needs, such as a new cooler, more employees, a commercial kitchen, etc. (10).

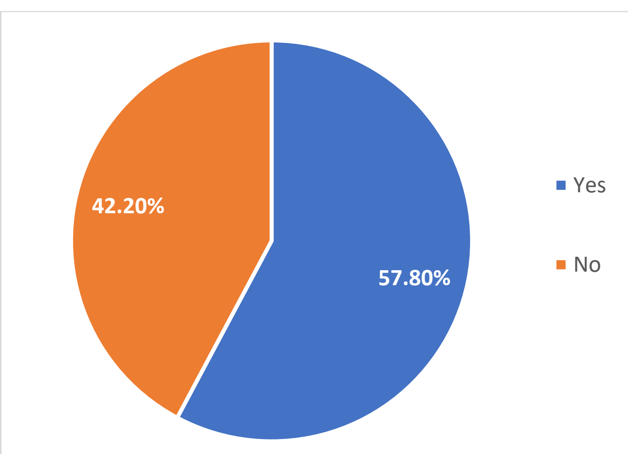
Twenty-seven producers also provided responses to the third *thing* they would do to improve their direct sales operations. Again, responses were similar to the top first and second things they would do to improve direct sales. There was much focus on advertising, marketing, and increasing sales with u-pick options, increasing online sales, having an on-site farm stand, and being able to expand farm tourism, as examples (14).

Overall, many ideas for improving operations were provided across all three options, including more regional and local direct marketing venues, including farmers markets, garlic festivals, lavender festivals, etc. Some (4) mentioned the issues of licensing and insurance with one stating, "currently the path to value added products is cumbersome and difficult to figure out…some kind of easy road to cottage food license, herb drying, or processing would be significantly helpful". A few respondents mentioned that being able to accept food stamps would be helpful. Overwhelmingly, the responses across all three options suggest the need for marketing and advertising support, as well as facility and infrastructure improvements, and more employee help to improve direct sales.

Respondents were asked whether they would expand their operation if they had access to distribution services, a co-op, distribution center, etc. The majority (57.8%, 26) indicated that yes, they would expand, while 42.2% (19) said that they would not. Of those who indicated *yes*, 18 respondents provided additional explanation with 7 of those mentioning the need for more venues for their products, distribution needs, and/or the need for local co-ops. Some of these respondents mentioned difficulties and needs associated with distribution (difficult to find time for distribution and the need for closer distribution centers), while another mentioned that belonging to a co-op and distribution center "has helped us grow". One producer stated, "a local co-op would be great for our area, and I would participate. My operation is home delivery, and I am limited in the amount of packaging and driving I can do". Others mentioned additional facilities that could be beneficial, such as a community kitchen, or a community space for processing products such as poultry (3). Lastly, some pointed to difficulties in being able to expand and mentioned needing more land or products, USDA inspected slaughter, butchering and difficulties getting stamps, while others mentioned the need to expand beyond local markets.

Of those participants who selected *no* as a response, 13 provided further explanation with several indicating that they were either happy with the scale they were at currently (5) or could not expand their scale without additional resources, such as employees (4). A few others mentioned that they have no interest in expanding (2), their products are seasonal (1), they are too small (2), or they already have too much supply to sell (1).

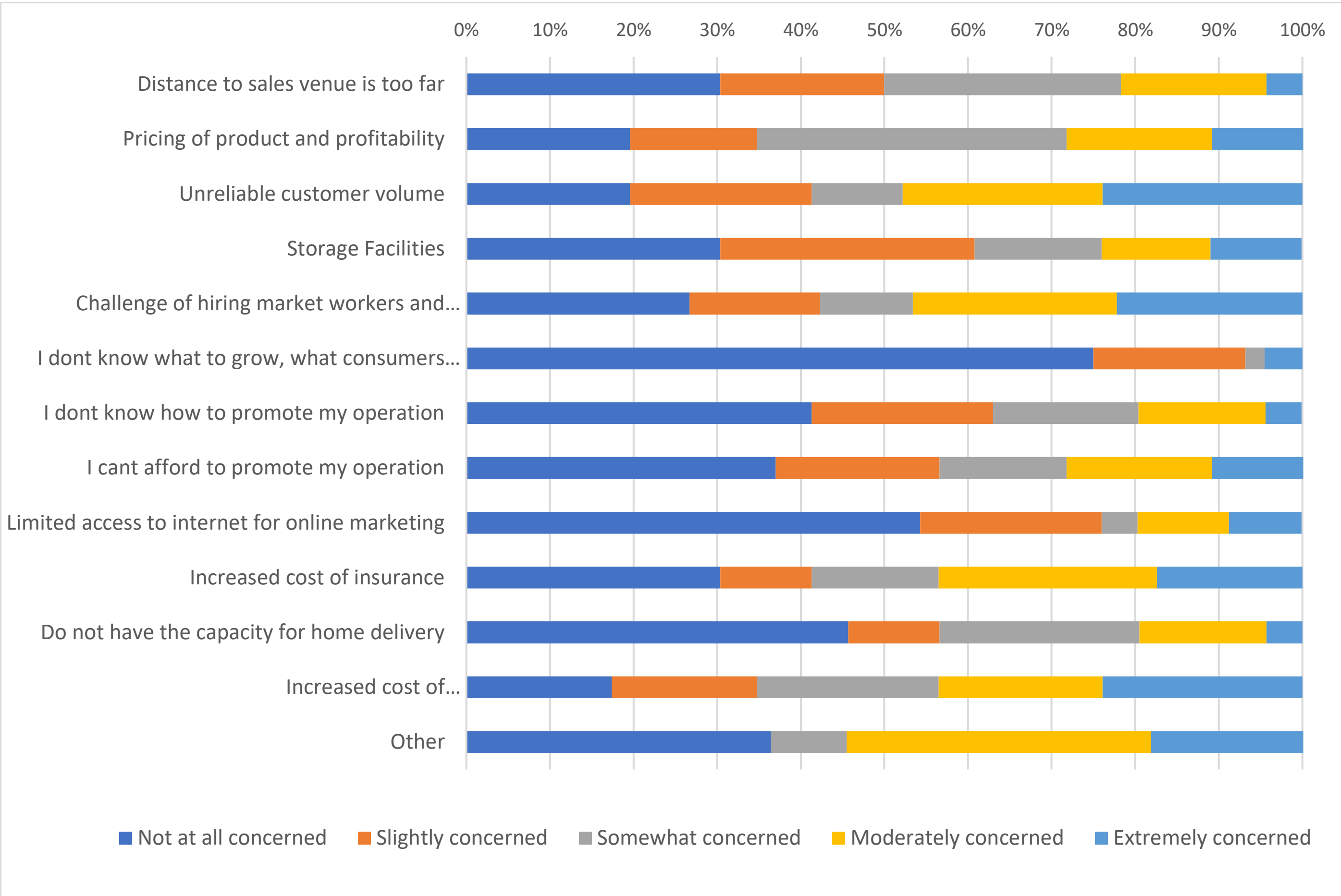
Figure 16: Expand Operation if had Access to Distribution Services



Producer Survey: Direct Market Sales Concerns and Preferences

Agricultural producers were also asked their level of concern about several aspects of direct marketing operations, including: *distance to sales venue too far*, *pricing of product and profitability*, *unreliable customer volume*, *storage facilities costly or inadequate*, *challenge of hiring market workers and profitability*, *I don't know what consumers want, I don't know how to promote my operation, I can't afford to promote my operation, limited access to online marketing, increased costs of insurance, don't have the capacity for home delivery, increased costs of licenses/permits/certifications, and other*. As presented in Figure 17 below, producers were least concerned about not knowing what consumers want (75%, 33 were not at all concerned), limited access to online marketing (54.3%, 25 not at all concerned and 21.7%, 10 slightly concerned), not knowing how to promote their operation (41.3%, 19 not at all concerned and 21.7%, 10 slightly concerned), storage facilities costs/inadequacy (30.4%, 14 slightly concerned and 30.4%, 14 not at all concerned). Producers were most concerned about increased costs of licenses/permits/certifications (23.9%, 11 extremely concerned and 19.6% moderately concerned), increased cost of insurance (17.4%, 8 extremely concerned and 26.1%, 12 moderately concerned), and unreliable customer volume (23.9%, 11 extremely concerned and 23.9%, 11 moderately concerned).

Figure 17: Concerns about Direct Market Sales Operations



Respondents were then asked the following open-ended question: *What are the top three things you like about direct market sales?* A total of 36 producers provided a response for the #1 thing they like about direct market sales. The most referenced by producers was customers and consumers (12), with mentions of *connecting with customers, relationships with customers* and *human interaction*. Nine participants mentioned higher profits, sales, especially reliable sales and in-person interactions leading to more web sales, and money. Some respondents mentioned educating the public and exchanging information (2), better pricing or retail pricing (2), and that it is rewarding.

For the second most liked *thing* about direct market sales, responses were similar, with producers mentioning connections to customers and getting to know their customers (7), increased profits and sales (7), and education about products and agriculture (2). Producers also mentioned sharing their philosophy and worldview (1), “being in charge” (1), less costs (1), getting retail prices and setting their own prices (2). A total of 34 producers provided a response to this option.

Twenty-eight producers provided a #3 top thing they like about direct market sales. While connection with consumers (5) and sales and profits (6) were again mentioned, respondents also mentioned eliminating the middle man (4) gaining farm supporters (1), expanding farm offerings (1), people visiting the farm, and “getting off the farm” (1). One producer stated, “it is always an added bonus to gain returning customers who become fans of the farm. These people who could purchase CSA in the future, or invest time into volunteering, or purchase a ticket to an on-farm dinner”.

Next, producers were asked the top three things they liked least about direct sales. Thirty-seven producers provided a response to the #1 top thing they liked least about direct sales. Interestingly, several mentioned customers (7) with mentions of “unreliable customers”, “finding customers”, and worry about “lack of customers”. This coincides with worries regarding unpredictability of sales, whether there is a demand for their products, deciding what to sell (4). Many producers focused on the resources required such as time and labor, with mentions of time constraints (8), including travel time and set-up, time involved for events, and that it is “time consuming to deal with customers”.

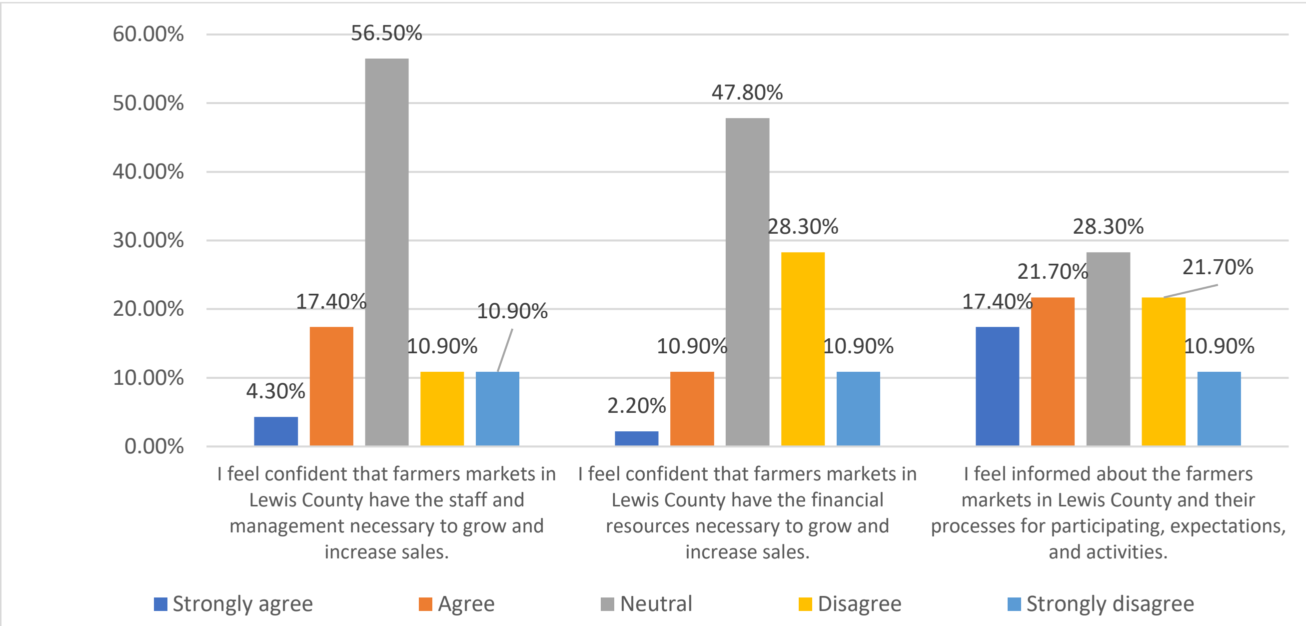
Thirty-one respondents provided a second option for things least liked about direct sales. Responses were greatly varied with some mentioning the increased labor especially for multiple farmers markets (3), the time and effort required for direct market sales (6), difficult customers (3), and logistics of processing (3).

For the third thing they least like about direct market sales, 26 producers provided a response. Again, producers referred to customers (3) and time commitment (3). One producer mentioned “having to educate customers about real costs…defend pricing”, while another discussed competing with stores and what they charge. Three respondents also mentioned regulations and licensing, while 2 mentioned the costs of advertising.

Producer Survey: Farmers Markets in Lewis County

Agricultural producers were then to indicate their level of agreement with three statements regarding Lewis County farmers markets: *I feel confident that the farmers markets in Lewis County have the staff and management necessary to grown and increase sales; I feel confident that famers markets in Lewis County have the financial resources necessary to grow and increase sales;* and *I feel informed about the farmers markets in Lewis County and their processes for participating, expectations, and activities.* Most participants were neutral in their confidence that the markets have the staff and management necessary to increase sales (56.5%, 26), while nearly half (47.8%, 22) were neutral that farmers markets in Lewis County have the financial resources necessary to increase sales. Responses to feeling informed about farmers markets and their processes are more mixed with the highest percentage of respondents selecting neutral (28.3%, 13), followed by 21.7% (10) of respondents selecting agree and disagree.

Figure 18: Opinions of Farmers Markets in Lewis County

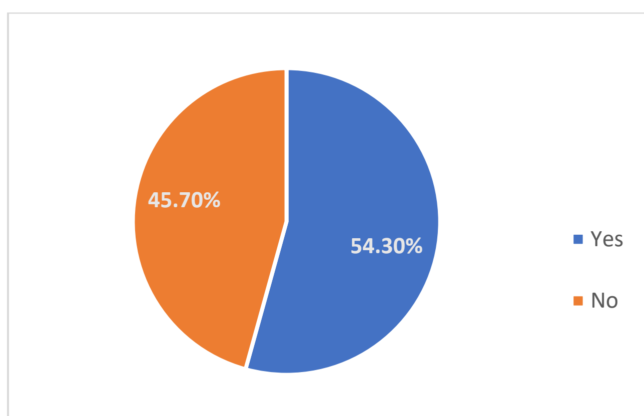


Producer Survey: Value Added Products

Over half of the respondents (54.3%, 25) indicated they would include value-added products in their inventory if they had access to a shared process facility in Lewis County (See Figure 19 below). Twenty-three respondents who indicated yes provided further information. Many replied with products they would be interested in producing if a shared facility was available, including frozen cuts of meat, teas and herbal medicines, honey, jams and jellies, frozen and canned produce, dried herbs, rubs, seasonings, dried flower wreaths, sausages and more. Some mentioned simply "yes", or that value-added products were a top priority, while others still mentioned resource concerns, such as time constraints and fiscal constraints. Another mentioned that the location of the facility would be important.

Seventeen producers provided further explanation of their *no* response. A few mentioned not needing a facility or not being interested in value-added products, while some mentioned they are meeting their current demand and do not want to expand beyond what they are doing. Some mentioned that their value-added products are processed on the farm, or they already have their own facilities.

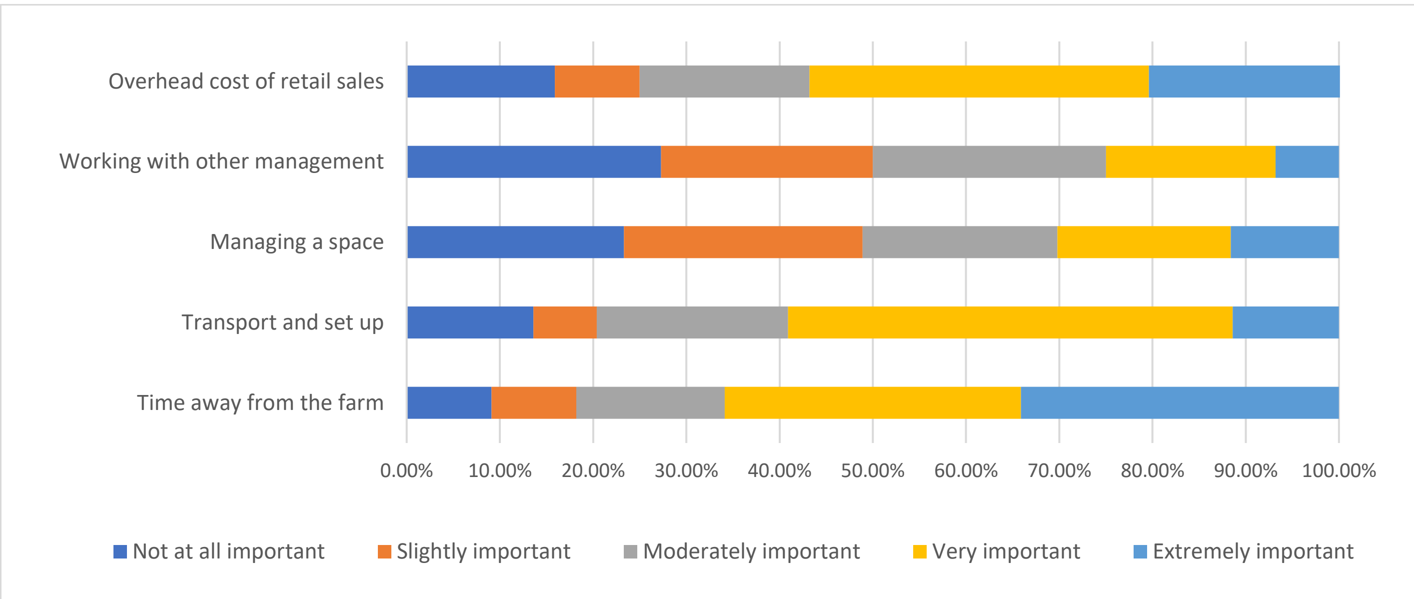
Figure 19: Processing facility and Value-Added Products



Producer Survey: Operation Sales and Products

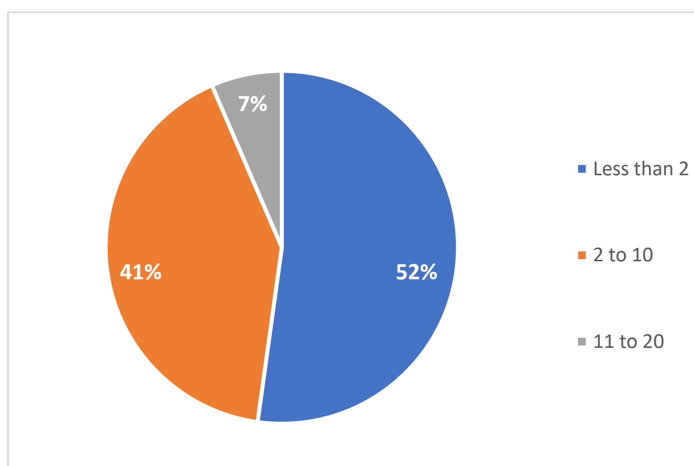
Agricultural producers were then asked how important the following factors are when making sales decisions: time away from the farm, transport and set up, managing a space, working with other management, and overhead cost of retail sales. The most important factors to them are time away from the farm (34.1%, 15 extremely important and 31.8%, 14 very important), transport and set up (47.7%, 21 very important and 11.4%, 5 extremely important), and overhead cost of retail sales (36.4%, 16 very important and 20.5%, 9 extremely important).

Figure 20: Sales Decisions



Most producers who responded to the survey were part of small farm operations with the majority indicating that their farm operation employs less than 2 full-time, part-time, and seasonal employees including themselves (52.2%, 24), and 41.3% (19) employed from two to four employees (See Figure 21 below). No operations with 21 or more employees were represented in the sample.

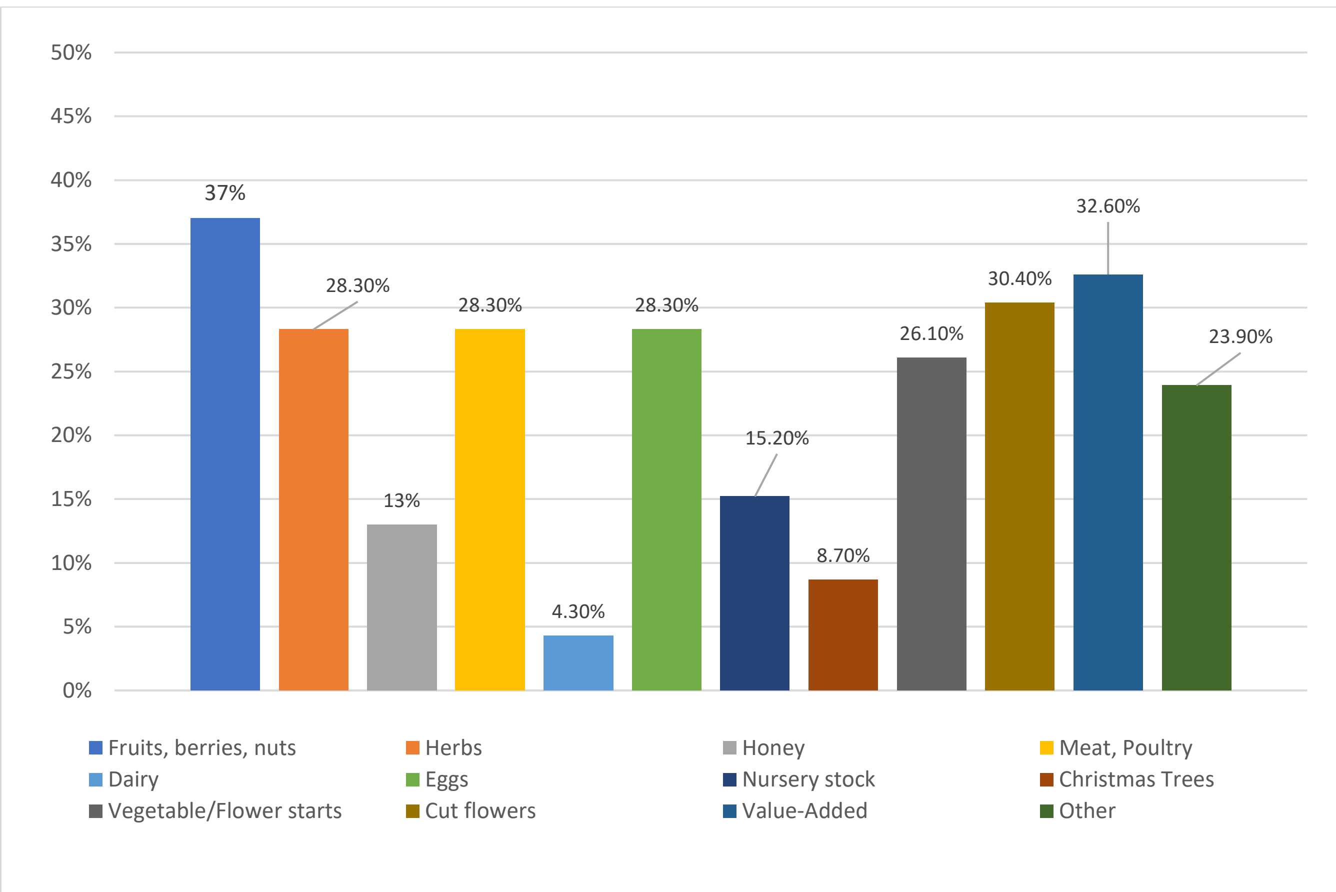
Figure 21: Number of Employees



The vast majority of respondents indicated that their sales area is within Lewis County (93.5%, 43), while 63% (29) indicated that they also have a sales area outside of Lewis County. Those who indicated that they sell outside of Lewis County were asked their reasons for doing so. Several mentioned that outside markets, particularly in more populated areas like Portland and Seattle, provide more sales and more reliability. Some mentioned that Lewis County cannot support their current activities (3). One respondent mentioned that they have been more successful in farmers markets outside of Lewis County. This respondent noted that farmers markets in Lewis County tend to be "very small, not well-managed, and poorly attended…combine that with the common attitude of the 'the cheaper the better', it is far less soul-crushing to go out of county".

Producers were also asked which crops they produce (See Figure 23 below). The most produced product is fruits, berries and nuts, followed by value-added products made with farm goods, and cut flowers. Those that indicated "other" mentioned haylage, wool fiber, and gift wreaths.

Figure 22: Crops Produced



Producers were asked if they direct market any of these crops. Nearly all participating producers indicated that they direct market their products (93.5%, 43). Those producers that indicated direct marketing some of these crops were then asked how and where they advertise their direct market sales. Most said that they do advertise their direct market sales (83.7%, 36) and 33 provided further explanation.

The most used platforms for advertising include Facebook (14), websites (7), Instagram (7), and local adds and media.

Producers were asked the following question: *If experienced producers such as yourself could increase Direct Market sales do you think it would create full or part time jobs in Lewis County?* Thirty-two respondents (72.7%) indicated *yes*. Twenty-two of these respondents provided further information, of which 12 indicated that increased sales would lead to hiring more employees (some indicated this would be part-time while others indicated full-time). One producer stated, "if we could grow our direct marketing sales, we would hire to do more events and hire to help produce more products", while another mentioned that "marketing staff are always worth their cost…and sales volumes just need to support it". Of the respondents who indicated *no*, 6 provided further explanation; these responses generally stated they did not know or were unsure.

CONCLUSIONS

Overall responses from the consumer surveys indicate that just over 35% of the respondents shop at farmers markets, that most are satisfied with the variety and agree that having a variety of products to choose from is important to them. Most would be willing to try a delivery service but several also indicated that they prefer to be able to choose their own products. This survey reveals that variety, availability of products, and date/time of markets are important for increasing local foods purchases among these consumers. Indeed, the importance of increasing the availability of products and product variety received much attention among consumers. Consumer respondents also indicated that knowing where farmers markets are located, and the convenience of hours make them more likely to shop at farmers markets. This suggests the need for effective marketing of any services adopted in the future to increase consumer awareness and considering options that provide flexibility in dates and times for direct food purchasing. Most consumers obtained information on purchasing local food products from social media and word of mouth, suggesting any marketing efforts should target these opportunities.

However, a large percentage of consumers were concerned that purchasing local food products online would be too expensive no matter if they were delivered to their home or a central location. While these options may be attractive to accommodate date/time of market considerations, any focus on these options will need to consider pricing and cost feasibility before moving forward. Consistency in product availability, variety, and quality will also have to be considered to ensure a service that is reputable, reliable and benefits both consumers and agricultural producers. The survey revealed that most consumer respondents only purchased local foods products online a couple times a year which may indicate a lack of a market to make these options feasible.

For the agricultural producer survey, most respondents were currently involved in direct sales, with most using farm stands and on-site sales, and over a quarter engaging in online sales. In terms of expanding direct market sales, many of the agricultural producers focused on better marketing and advertising. There was much emphasis on increasing the customer base, improving outreach, and increasing direct sales options. By focusing on marketing and expanding opportunities, it may be possible to address limitations identified by both consumers and agricultural producers. Some agricultural producers mentioned regional marketing campaigns as a way to expand the customer base beyond Lewis County, but it is clear better advertisement of opportunities is needed based on the results of both surveys.

It is important to note that while most agricultural producers would expand if they had access to distribution services, nearly half (42.2%) would not, due to other limitations, including not enough resources to expand. In other responses, more potential limitations and concerns become evident as lack of employees, concerns over licensing and permits, equipment needs and others are mentioned. Assumptions that producers can easily access the resources, such as employees, they need to expand should be avoided, as well as the assumption that these producers want to expand. However, services to help producers expand if they desire may be beneficial. As over half of the responding producers indicated they would include value-added products if they had access to a shared process facility, this may be a resource that can be pursued to increase direct market sales. Discussions with more producers should be considered before pursuing any options.

In terms of what producers like about direct market sales, relationships with customers received much focus. Interestingly, customers were also on the list of top things disliked about direct sales, but this was mostly focused on finding customers, unsteady customers, or lack of customers. To be sure, increasing sales and more reliable sales also received much attention, but the relationship with consumers was clearly a priority for producers. Direct marketing opportunities that reduce engagement with customers may be less popular, both for producers and consumers. Some producers mentioned the advantages of local co-ops in increasing their sales and that their area would greatly benefit from such a service. If a local co-op is feasible this may allow for product availability and variety expansion (a consumer concern) and the direct interaction and purchase that producers seem to favor.

Perhaps the best opportunity to expand direct market sales would be improvement to farmers markets already occurring within Lewis County. As a whole, producers were less confident that farmers markets in Lewis County have the resources and staff necessary to grow and increase their sales. This is an interesting observation since the number of market days, number of farmers markets, and total reported sales have increased at Lewis County Farmers Markets from 2016 to 2020. In 2016, total reported farmers market sales for all vendors was $184,048 in 2016 and $255,262 in 2020 (Donovan and Balding, 2021). However, the average of all vendor sales per farmers market was highest in 2016 ($92,024) but increased from $44,117 in 2018 to $63,815 in 2020. Total number of shopper visits for a season have also grown from 2018 to 2020, although they were highest in 2016 (Donovan and Balding, 2021).

Despite these successes, there are some concerning trends in Lewis County farmers markets. Average farm sales per market day in 2020 were $954 and while this is higher than it was in 2019 ($614), it is far below the $5,937 average of 2016. While some of this change is no doubt due to the COVID19 pandemic, average farm sales per market day had already been decreasing from 2016 to 2018. In fact, it dropped nearly 50% in 2018 from 2017 (Donovan and Balding, 2021). It is worthwhile to investigate the causes of these trends and why 2016 was such a successful year. Granted, it will take much effort to fully recover from the pandemic, but identifying successful strategies used in 2016 and implementing them going forward may be the best way to expand opportunities for producers while allowing them to still engage with customers and address the needs and desires of consumers.

It may also help to increase producers' confidence in Lewis County farmers markets by better advertising these successes. A targeted marketing campaign for current and potential producers may help to not only increase confidence of producers but increase product variety and availability which matters to consumers. Across both surveys, the need for marketing and advertising is apparent and developing coordinated marketing strategies that focus both within Lewis County and larger, regional initiatives would be beneficial to both consumers and producers.

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Donovan, Collen & Balding, Melissa. "Farmers Markets Data Report Lewis County, WA: 2016-2020". *Washington State Famers Market Association.*