

Hamilton

REPORT 13-003

HAMILTON FARMERS' MARKET SUB-COMMITTEE

Thursday, December 12, 2013

10:00 a.m.

Council Chambers
Hamilton City Hall

Present: Councillor J. Farr, Chair
Councillors C. Collins and R. Pasuta

THE HAMILTON FARMERS' MARKET SUB-COMMITTEE PRESENTS REPORT 13-003 TO THE GENERAL ISSUES COMMITTEE AND RESPECTFULLY RECOMMENDS:

1. **Hamilton Farmers Market CM12009(a) (City Wide)**
 - (a) That staff be directed to transition the current governance model of the Farmers' Market to a model that includes vendor/stallholder and citizen participation;
 - (b) That a transition plan be developed and presented to the Farmers' Market Sub-Committee that addresses finances, personnel matters, a draft terms of reference and other related matters;
 - (c) That the opportunities listed in Report CM12009(a) (hereto attached as Appendix "A") be incorporated into the Farmers' Market 2014 work plan, and that the work plan be added to the agenda of the next meeting of the Hamilton Farmers' Market Sub-Committee;
 - (d) That the recommendation in Report CM12009(a) (hereto attached as Appendix "A") be received and referred to the new governing body for their consideration and discussion.

FOR INFORMATION:

(a) CHANGES TO THE AGENDA

The Committee added the following Items to be discussed prior to the "Presentations" section:

- (i) Banner for the Market
- (ii) Free parking issue.

The Agenda for the December 12, 2013 Hamilton Farmers Market Sub-Committee meeting was approved as amended.

(b) DECLARATIONS OF INTEREST

There were none declared.

(c) APPROVAL OF MINUTES OF THE PREVIOUS MEETING

The Minutes of the November 11, 2013 meeting were approved as presented.

(d) DELEGATION REQUESTS

The following delegation requests were approved to address the Sub-Committee at today's meeting prior to the staff presentation:

- (i) Christopher Cutler wishing to address the Sub-Committee at today's meeting respecting Item 5.1, Report CM12009(a) entitled "Hamilton Farmers' Market" (Item 4.1)
- (ii) Jennifer Hompoth, Friends of the Hamilton Farmers' Market wishing to address the Sub-Committee at today's meeting respecting Item 5.1, Report CM12009(a) entitled "Hamilton Farmers' Market" (Item 4.2).

1. **Christopher Cutler wishing to address the Sub-Committee at today's meeting respecting Item 5.1, Report CM12009(a) entitled "Hamilton Farmers' Market" (Item 4.1).**

Christopher Cutler addressed the Sub-Committee. His comments included but were not limited to the following:

- The staff report is encouraging;
- It has provided the most honest evaluation of the Market;
- Problematic challenges exist;

- The problems were not created by the stallholders, they were created without their knowledge or their input – i.e. the validated parking issue;
- Every successful market in Ontario provides free parking;
- The customer survey of October 11 revealed that the concerns expressed by the patrons related to the stallholders themselves were in the single digits and the dissatisfaction with the changes made by the City were in the double digits;
- He respectfully suggests that the costs for the Market kitchen be removed from the Market budget and transferred to the Community and Emergency Services Department budget;
- He thinks that there has been incompetence on the part of the City (i.e.: the 6 to 9 million dollars in rent money that went missing)
- Another example is the gas stove that was installed without a gas outlet under the watch of the Public Works Department;
- Staff from the two different Departments involved in the renovation project did not communicate with each other;
- The Architect said no one talked to him regarding the double glass doors;
- He does not agree with the recent articles in the media which implied that the stallholders are whining;
- The stallholders are asking for relief from the problems caused by City staff;
- The City needs to stand aside and be a vigilant and competent landlord;
- The City was not even able to collect the rent effectively (i.e. the missing millions in rent money.)
- He wants to dispel the myth that the stallholders created the problems;
- All that the stallholders wanted with respect to the renovations was access to water and electricity;
- The waste was rampant in this (renovation) project and not because of the stallholders;
- City staff made no effort to celebrate the 175 year anniversary of the Market;
- The Market is an institute that is older than the City itself.

He responded to questions from the Sub-Committee regarding the following topics:

- What to do with the Market kitchen;
- The issues with the contracts;
- What to do with the street level space;
- Clarification regarding his statement that the City failed at effectively collect the rent;
- The need for free parking.

2 Jennifer Hompoth, Friends of the Hamilton Farmers' Market wishing to address the Sub-Committee at today's meeting respecting Item 5.1, Report CM12009(a) entitled "Hamilton Farmers' Market" (Item 4.2).

Jennifer Hompoth and Jeanette Eby, from the Friends of the Hamilton Farmers' Market addressed the Sub-Committee. They read from a prepared statement.

Jennifer Hompoth's comments included but were not limited to the following:

- They belong to the "Friends of the Market" an organization which they established;
- Any governance model for the Market needs to include input from stallholders;
- A 9 members board would be good;
- Privatization would reduce the Market to a business model which would diminish the cultural and social aspects;
- When calculating the subsidy paid by the City, the real costs should be separated from the costs which are a result of the decisions made by the City;
- Many decisions have been made by the City without input from the stallholders
- One vacant space can affect the total budget;
- Since 2010, 6 stallholders have left the Market which has affected the good Market mix;
- There is a difference between businesses that have longevity and the ones that offer innovations but don't last;
- It is impossible for the stallholders to plan for the future with the current uncertainty and their lack of input;
- The patrons of the Market also shop at other retailers;
- Food shopping requires easy transportation as buyers purchase large volumes and shop frequently therefore, offering the convenience of free parking makes sense;
- The cultural planning aspect needs to take stock of vendors already here;
- The Urban Marking Report labelled the market as "uncool" – perhaps this contributed to an aesthetics of glass.

Jeanette Eby's comments included but were not limited to the following:

- There is a new clientele (new people have moved downtown and are enjoying it);
- There is a diversity of background and income level;

- Community profiles are changing but some are still living below the poverty line, (i.e. new immigrants, accessibility limitations);
- Use an inclusion lens and get feedback from a variety of people;
- New demographics are moving in but there is still a large diversity;

They responded to questions from the Sub-Committee regarding the following issues:

- The loss of the perspective of the successful stallholder;
- The need for the City to work collaboratively with the stallholders;
- The bickering between the stallholders (when business is lost it creates conflict)
- Giving the stallholders a say will encourage them to move forward;
- The need for a survey to determine the impact of Nations;
- The Market kitchen – it is not licensed and cannot be used for the production of goods;
- The ability of the Market to be an educational tool;
- The right vendors are needed for the client base;
- Patrons are interested in buying food, not knick knacks
- The foyer;
- The true amount of the City's subsidy: don't download the cost of the programs onto the stallholders, any vacancies affect the budget.

On a motion, the Sub-Committee received the delegations.

For disposition of this matter refer to Item 1.

(d) DISCUSSION (Added Items)

(I) BANNER (SIGNAGE)

The issue of the lack of exterior signage on York Boulevard to identify the location of the Market was discussed. Staff provided information regarding the status of the public art proposal which is intended to be a sign locator for the Market. It was noted that the process will take some time as it is a two stage process and the public art may not be in place until 2015.

The glass wall of the building makes it difficult to affix traditional signs.

The Committee requested that staff investigate an interim solution to the signage problem and report back to the Sub-Committee in January 2014.

(ii) Parking

Marty Hazell, Senior Director of Parking and By-law Services provided a brief verbal overview of what would be the annual cost of providing validation for one hour free parking for Market patrons (from \$30,000 to \$40,000 annually).

He indicated that staff need information and direction on how to implement the validation, (i.e. based on purchase, etc.) The actual "free parking" can be implemented quickly. Once the details have been ironed out, it would involve simply instructing the cashiers to lift the gates. However, in the previous system, staff checked the purchase receipts and some Market vendors do not issue receipts.

Terry Quinn, Director of Strategic Services, indicated that once the approach is determined, the turn around time would be short. Finding an approach will be the challenge. Also, a hybrid solution with Market staff is possible.

It was noted that if the Hamilton Farmers' Market pays its fair share for the validated parking, then it would be more acceptable to other downtown merchants or other City merchants in general and would avoid a domino affect. Also, with respect to using City employees, a hybrid solution with Market staff is possible.

On a motion, staff were directed to report back to the Hamilton Farmers' Market Sub-Committee prior to the January 17 2013 General Issues Committee meeting with a sustainable validated parking program for patrons of the Hamilton Farmers' Market

(e) PRESENTATION

(i) Hamilton Farmers Market CM12009(a) (City Wide) (Item 5.1)

John Hertel provided an overview of the report with the aid of a PowerPoint Presentation and copies of the hand-out were distributed.

He covered the following topics:

- Introduction
- Methodology
- Stakeholder Vision
- Research Findings –
 - Current Operation

- Customer Satisfaction
- Marketplace
- Local Food Movement
- Competition
- Resellers
- Other indoor year round markets
- Economic Impact
- Challenges Facing the Market:
 - Focus Group Ranking
 - Validated Parking
 - Marketing and promotion
 - More effective use of space
 - Customer services
 - Leasehold improvements
- Next steps:
 - Options:
 - RFP to test the market
 - Establish an independent board now
 - Continue City governance model

John Hertel responded to questions from the Sub-Committee.

On a motion the Sub-Committee received the staff presentation.

For disposition of this matter refer to Item 1.

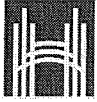
(f) ADJOURNMENT

The Hamilton Farmers' Market Sub-Committee meeting adjourned at 2:05 p.m.

Respectfully submitted,

Councillor J. Farr, Chair
Hamilton Farmers' Market Sub-committee

Ida Bedioui, Legislative Co-ordinator,
City Clerk's Office



Hamilton

CITY OF HAMILTON

CITY MANAGER'S OFFICE
City Manager

TO: Chair and Members Farmers Market Sub Committee	WARD(S) AFFECTED: CITY WIDE
COMMITTEE DATE: December 12, 2013	
SUBJECT/REPORT NO: Hamilton Farmers Market CM12009(a) (City Wide)	
SUBMITTED BY: Chris Murray City Manager	PREPARED BY: John Hertel (905) 546-2424, Ext. 2739
SIGNATURE:	

RECOMMENDATION

That staff be directed to submit a terms of reference to the Hamilton Farmers' Market Sub-Committee in January 2014 and then to GIC, for a Request for Proposal to the marketplace based on recently conducted primary and secondary research related to the Hamilton Farmers' Market including details of all financials and structured to encourage partnerships that leverage the best available local talent.

EXECUTIVE SUMMARY

Following a motion at the General Issues Committee on February 2, 2012, staff was directed to:

- (a) Seek expressions of interest from the private sector to maintain and operate the Hamilton Farmers' Market;
- (b) Look at ways and means to internally reduce the annual subsidy for the market;
- (c) Look at dividing the responsibilities for marketing and programming vs. the property maintenance and daily operation.

On May 8, 2012 staff issued a Request for Information for the operation of the Hamilton Farmers' Market. The RFI was issued to over 240 companies. As well, the RFI was advertised on the Biddingo web site.

Upon closing of the RFI on May 30, 2012, only one response was received. This response was an expression of interest and did not include a detailed proposal.

The lack of response to the RFI is not entirely surprising as many companies will only respond to RFP's and RFQ's that have specific selection criteria, rather than share their ideas not knowing if they have a realistic chance of eventually winning the opportunity.

Approximately a month after the close of the Request for Information, staff received a proposal from Farmers' Market Inc. (formerly known as the Hamilton Farmers' Market Stallholders Association). As this was not in response to the RFI, staff has treated it as an unsolicited proposal for consideration.

The report back to the General Issues Committee has been delayed, in part, by an outstanding litigation matter with Yale Properties Limited which has since been resolved. The file was assigned to the Director of Enterprise Management and Revenue Generation, Corporate Services Department.

Over the past few months, extensive primary and secondary research has been conducted in order to understand the current picture of the Hamilton Farmers' Market and the impacts of increased competition, changing demographics in the area, and the significant revitalization taking place in downtown Hamilton. Staff also felt it was important to research and understand the trends in the broader context of (farmers') markets both in our region and beyond. This would provide staff the knowledge to more clearly describe the vision for our Market in the future, its role in the food distribution system, healthy neighbourhoods, and in our community as a whole.

There has been a great deal written about the Hamilton Farmers' Market and about the role of markets in general. Staff have reviewed these extensive materials, and have also conducted a significant amount of primary research through focus groups and individual discussions. The comprehensive report from the research is found in Appendix A.

Alternatives for Consideration – Not Applicable

FINANCIAL / STAFFING / LEGAL IMPLICATIONS (for Recommendation(s) only)

Financial: It is anticipated that the successful proposal will result in a reduction of the current operating subsidy. The full impact on this area would not be recognized until the RFP's are received for review.

Staffing: The impact, if any, on this area would not be recognized until the RFP's are received for review.

Legal: N/A

HISTORICAL BACKGROUND (Chronology of events)

On April 30, 2012, the Hamilton Farmers' Market Sub-Committee approved the following recommendations, which were later approved by Council:

- (a) That the terms of reference for a Request for Information as outlined in Appendix "A" of report CM12009 respecting the Privatization of the Hamilton Farmers' Market be approved and issued in a form satisfactory to the Procurement Manager;
- (b) That staff report back to the General Issues Committee by June 30, 2012 with the results of the Request for Information respecting the Privatization of the Hamilton Farmers' Market.

It should also be noted, however, that there was a previous direction which still remains outstanding. The following is further background that should be considered:

Report CS06008b contained the following recommendations, which were approved by the Emergency and Community Services Committee on June 20, 2007:

- (a) That the Hamilton Farmers' Market Analysis and Action Plan, attached as Appendix "A" to Report (SD06008(b)), be received.
- (b) That staff be directed to analyse the legal, financial and staffing implications of operating the Hamilton Farmers' Market by an independent corporation owned by the City of Hamilton, and report back to the Emergency and Community Services Committee.

Report ECS08062 contained the following recommendation, which was approved by the Emergency & Community Services Committee on December 3, 2008 and Council on December 10, 2008;

That staff be directed to proceed with the undertaking of a Business Case Study, which provides for public consultation, for the creation of a not-for-profit corporation to operate the Hamilton Farmers' Market, as described in Section 6 and 8 of Ontario Regulation 599/06 un the Municipal Act, 2001 and report back to the Emergency & Community Services Committee.

Motion passed by the General Issues Committee on February 2, 2012 and approved by Council on April 11, 2012:

- (a) That staff be directed to conduct a feasibility study on privatizing the management of the Hamilton Farmers' Market, and provide a report back to the General Issues Committee for consideration;
- (b) That the Farmers' market Sub Committee be requested to review the Terms of Reference, in consultation with staff, to look at ways and means to internally reduce the annual subsidy for the market and report back to the General Issues Committee for consideration;
- (c) The in concurrence with the feasibility study, that staff be requested to divide and measure the responsibilities of the Farmers' Market Manger between Programming and marketing vs. property maintenance and daily operation in adherence to the legislation.

POLICY IMPLICATIONS/LEGISLATED REQUIREMENTS

N/A

RELEVANT CONSULTATION

- 5 Focus Groups (Approx. 50 community members)
- Procurement Manager, Corporate Services, COH
- Director Culture and Tourism, Planning and Economic Development, COH
- Ontario Farm Products Marketing Commission
- Board Member – Mustard Seed Co-op
- Executive Director, Farmers' Markets Ontario
- General Manager, London Covent Garden Market
- Planning Staff, COH
- Friends of the Market
- Councillors, Farmers' Market Sub-committee
- Architect
- Market Manager, ECS, COH
- Associate Medical Officer of Health, Public Health, COH
- Legal Services, Corporate Services, COH
- Director Healthy Living, Public Health, COH
- Manager, Economic Development, COH
- Greening Marketing
- General Manager ECS, COH
- Director Health Protection, Public Health, COH
- Members of the Market Stallholders Association

- Professor U of T, Co-chair of the Community Food Security Stakeholder Committee
- Hamilton Municipal Parking System
- Director Strategic Services, ECS, COH

ANALYSIS / RATIONALE FOR RECOMMENDATION

(include Performance Measurement/Benchmarking Data, if applicable)

ALTERNATIVES FOR CONSIDERATION

(include Financial, Staffing, Legal and Policy Implications and pros and cons for each alternative)

ALIGNMENT TO THE 2012 – 2015 STRATEGIC PLAN:

Strategic Priority #1

A Prosperous & Healthy Community

WE enhance our image, economy and well-being by demonstrating that Hamilton is a great place to live, work, play and learn.

Strategic Objective

1.3 Promote economic opportunities with a focus on Hamilton's downtown core, all downtown areas and waterfronts.

1.5 Support the development and implementation of neighbourhood and City wide strategies that will improve the health and well-being of residents.

1.6 Enhance Overall Sustainability (financial, economic, social and environmental).

Strategic Priority #2

Valued & Sustainable Services

WE deliver high quality services that meet citizen needs and expectations, in a cost effective and responsible manner.

Strategic Objective

- 2.2 Improve the City's approach to engaging and informing citizens and stakeholders.
- 2.3 Enhance customer service satisfaction.

APPENDICES / SCHEDULES

Appendix A - Hamilton Farmers' Market Review, Prepared for – The Farmers' Market Subcommittee Meeting, December 12, 2013

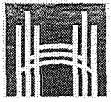


Hamilton Farmers' Market Review

Prepared for – The Farmers' Market Subcommittee December 12, 2013

By

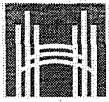
John Hertel – Director Finance, Administration, and Revenue Generation.



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Executive Summary

Most markets in the region are faced with similar challenges: trying to attract and retain farmers; trying to adapt to changing demographics, and financial challenges; looking for more revenue streams, and lowering operational costs; all the while looking for a sustainable model.

This is a pivotal opportunity for the Hamilton Farmers' Market to set a course for growth and to play a key role in downtown Hamilton's revitalization. The downtown transformation is creating a demographic shift as a result of an influx of new residents and employees. It is the ideal time to step back and reassess the vision, operation, and governance associated with the market.

New residents, employees and visitors moving into the downtown area have raised the bar of disposable incomes and shopping expectations. With higher incomes, higher average levels of education, and more discerning tastes, the Market and other businesses must adapt quickly or they will not be successful.

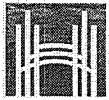
The movement towards fresh local foods has grown from a new trend to a business reality and is dictating the direction of many markets and communities; markets must further differentiate themselves from large grocery stores and individual specialty shops as shoppers look for both unique high quality local foods and direct relationships with the producers.

While many markets identify that they are losing farmers, the challenge they face is that the customers wants the opposite; they want more farmers in their markets. A financially viable 'farmer friendly' experience must be found for our Market.

Markets need to be community destinations, meeting places to connect with friends and neighbours to experience the sights, sounds and aromas of food being prepared, discussed, and enjoyed, in a vibrant active environment.

There are several viable governance models that are currently being used throughout the province. The specifics of the models vary considerably, establishing the premise that it is more about the breadth of expertise, experience and passion of the operators rather than the pure governance model itself.

Markets are part of our community food distribution system. Hamilton's Board of Health is playing a key role along with the Community Food Security Stakeholder Committee to help develop local food infrastructure and procurement. Their work must play a part in shaping the future of the Hamilton Farmers' Market.



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Management has made great strides in reducing costs and settling the day to day operations since the move back to the renovated facility, but there is wide spread agreement that the status quo operation of the Market is not meeting expectations.

Many challenges have been identified that need to be corrected to meet the vision for the Market as identified by the various stakeholder groups. These include but are not limited to: marketing, signage, parking, increase utilization and income from available space, stall locations and traffic flow, creating a more 'farmer friendly' model , and aligning the Market's product mix, services offerings, hours of business and days of business to meet customer expectations.

Proposals from different groups representing not-for-profit parties, private sector operators, and the City of Hamilton itself, will help identify the best way to go forward with the market.

The Objectives of this Report:

1. Clarify the vision for the Market from the perspective of the community.
2. Complete an environmental scan of the Market's current challenges in meeting this vision.
3. Recommend a process to achieve the vision.

Recommendations:

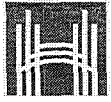
That staff be directed to submit a terms of reference to the Hamilton Farmers' Market Sub-Committee in January 2014 and then to GIC for a Request for Proposal to the marketplace based on recently conducted primary and secondary research related to the Hamilton Farmers' Market including details of all financials and structured to encourage partnerships that leverage the best available local talent.



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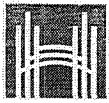
i. Introduction

- i. The market has played a historic role in Hamilton and has been an integral part of the cultural fabric of downtown since 1837. It has evolved in different forms and locations over time. Again it experienced significant change over that past few years, after going through a temporary move to Jackson Square and major facility renovations along with the adjoining Library. The market reopened in its current location on February 11, 2012, after 20 months.
- ii. The move back to the current location was difficult, complex, and contentious for the vendor community. Issues included the new footprint for the market following the renovations, limitations of the ventilation, new criteria for stall owner operations and new locations for long standing vendors. The process proposed to limit the number of returning stallholders and to accept the new stall holders was not supported by Council.
- iii. Today, 18 months later, many of the day-to-day operations are more settled. New management started in June 2012 and has continued to work with the remaining issues as directed by Council. However, many of the larger issues still remain unresolved, and the Market now also faces intense new competition from a recently opened unique grocery store, Nations Foods in Jackson Square, a growing number of seasonal farmers' markets in the region, as well as local specialty shops in revitalized neighbourhoods i.e. Locke Street.
- iv. In addition to the increasing competition, the Market also must respond to the changing demographics downtown. The revitalization has meant new condominiums that will house 2000 new residents over the next 3 years; more than half being young professionals and much of the balance being empty nesters. These residents generally have higher incomes, higher average education levels and higher expectations of products and services. We will also see the new McMaster Health Campus open that will bring 450 professionals to work downtown and service 54,000 patient visits annually as well as serve 4,000 students. Two new suites hotels with 305 rooms designed for medium and long term stays will be a catalyst for downtown shopping. All of this is driving new retail shops and restaurants to open all the time; they too have brought about 430 new jobs in the past year. The Market will have to understand the nature of these changes and the degree to which it is changing the buying needs of its base, and how they will respond in matching products and services.



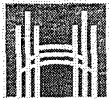
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- v. The Market is at a pivotal point in its history; a significant investment has been made in the facility. The perception by many, following this major capital investment, is that it is not fulfilling its potential. It has been felt by Council that it was worth exploring other governance models. In 2012, an RFI (Request for Information) was issued to test the interest of other companies or groups to operate the Market. Only one response was officially received; subsequently an unsolicited proposal was received from the Stall Owners' Association. The limited response is not entirely surprising as many companies will not share their ideas through an RFI because the criteria for winning the bid were not known at that time and proponents fear that their intellectual property could be used by others.
- vi. There have been previous studies and reports completed in the past, regarding the Market's strengths and challenges, governance, and role within the food distribution system of the Hamilton community. The primary recommendations of the 2005 Report were not incorporated into the renovation of the facility that houses the Market. These new competitive challenges and the need to adjust to the changing downtown demographics have magnified the problems that need to be addressed if the Market is to be successful and sustainable.
- vii. It is Staff's contention that the governance model itself is secondary to the depth of experience, resources, and expertise of the organization operating the Market. Realistically the City has limited expertise and resources in operating markets. A properly designed RFP (Request for Proposal) distributed to private sector, not-for-profit, and the City department itself, will uncover both the best ideas and the best operators to work with the Market going forward.
- viii. The objectives of this report are to:
 - (1) Clarify the vision for the Market from the perspective of the community.
 - (2) Complete an environmental scan of the Market's current challenges in meeting this vision.
 - (3) Recommend a process to achieve the vision.



ii. **Methodology**

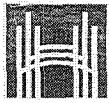
- i. Staff reviewed several previous studies and articles; some that are Hamilton specific, and others that were written about other indoor, year-round markets. Staff also reviewed food trends in markets, the work of the Board of Health and the Food Security Stakeholder Committee, and the broader roles within the community's food distribution system.
- ii. Six focus groups were conducted by staff with the assistance of a Hamilton based facilitator 2WA Consulting; five groups specific to the Hamilton Farmers' Market and an additional focus group was conducted by the City of Hamilton Planning department. The Planning department's findings were reviewed only as it pertains to potential synergies with the downtown Market; it does not specifically form part of this report but will be contained in a separate policy report to be presented by Planning in early 2014.
- iii. The attendees represented several segments of the community citizenry as well as the market vendors themselves. Approximately 60 participants attended in total: Hamilton Hive, Small Business, Market Vendors, Neighbourhood and Community Association members, Food Security Commission, and Seasonal Farmers' Markets. A small research project summarizing the key attributes of 10 indoor year-round markets in Ontario was conducted for us by a U of T professor and a graduate student. (see Appendix A1) The professor also serves as the Founding Chair of the Council appointed Community Food Security Stakeholder Committee.
- iv. A number of additional meetings were held with representatives of the Hamilton Farmers' Market stall holders association.
- v. Staff also conducted many additional targeted interviews with related experts and stakeholders i.e. Council members of the Farmers' Market Sub-committee, Executive Director of Farmers' Markets Ontario, General Manager of London's Covent Market, Public Health Services representatives, Director Health Protection, Friends of the Market, Planning representatives with the City of Hamilton, and many more (see the comprehensive list of all primary and secondary research sources in Appendix A2)



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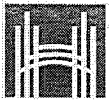
iii. **Findings**

- i. **Vision** – Clarifying the vision of the Market was a key objective of this report. Based on the focus groups, individual conversations, and all the literature reviewed, common themes emerged regarding the vision of the Market going forward:
 - a. The Hamilton Farmers’ Market needs to be an engaging experiential destination that draws residents and visitors downtown, to a vibrant, colourful, active space that offers a unique shopping experience and enables vendors to prosper.
 - b. The Market should be mostly about unique and high quality food; e.g. 70 – 75% food including lots of ready to eat foods prepared in the market and available for lunches and snacks; with the remaining 25% to 30% to be made up of complimentary and diverse, high quality, non-food products including those from local artisans.
 - c. Food security needs continuing focus as we move forward; offering both quality and diversity in the mix of offerings at the Market in consideration of the needs of the existing customers in nearby challenged neighbourhoods.
 - d. The Market needs to be more ‘farmer friendly’ both in design layout and cost structures to attract more farmers with locally grown foods, and that facilitates additional farmers in-season; the Market could consider adding a 1 day per week seasonal market at a nearby parking lot to draw more people downtown and broaden its’ role as a farmers market.
 - e. The Market needs to distinguish itself from large scale grocery stores by selling unique, high quality products that are generally not found in larger chain stores and building on their personal relationships with customers at a level that can’t be duplicated in large stores.
 - f. The Market must be convenient for shoppers in every way; easy to find, inviting to enter, customer friendly, and easy to do business with, consistent hours of operation with all vendor stalls open, payment options i.e. debit card and short term validated parking to encourage visits and easy pickups.



ii. Hamilton Farmers' Market Progress – Post Renovation

- a. There have been many challenges facing the Market and the vendors since its reopening. A new Management team was put in place in June of 2012. A considerable amount of time was spent by staff and vendors to better understand what's working and what opportunities exist for improvement. A number of positive actions have been taken to date, but all parties would agree that many challenges remain. It is imperative that many of the challenges be overcome in the near future or some of the vendors suggest they will not be able to renew their contracts at the Market.
- b. Achievements:
- i. Staff have successfully reduced the levy in each of the past 2 years and is budgeted to be reduced again in 2014:
 - \$250,000 2012
 - \$189,000 2013
 - \$160,000 2014
 - ii. Staff implemented a number of 175th Anniversary events that created significant media coverage.
 - iii. Staff developed and implemented a local musicians and choirs program to perform in the Market on Saturdays – a total of 100 performances are scheduled for the year. Musicians have recently appeared on CHCH on the morning show to promote this activity.
 - iv. An outdoor vendor program was launched for the first time in several years, not without some controversy; while there are inputs to review pro and con, an online poll on CBC Hamilton indicate 65% favourable vote of a total of 176 participants. 35% felt it was negatively impacting traffic and the indoor stalls.
 - v. The Community Kitchen focused its work with not-for-profit organizations in the City to deliver food courses to diverse and vulnerable citizens;
 - Community groups used it an average of 8 times per week – approximately 400 uses per year.



Hamilton

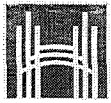
- 100 free cooking classes for the year are being conducted on Saturdays (two classes each Saturday: one for children and families, one for adults).

c. Customer Satisfaction:

- A customer survey (525 respondents) in September of 2011 demonstrates directionally that satisfaction ratings are quite high, but at the same time they fall below customer expectations; while it is a challenge, it is critical that customer satisfaction meets or exceeds expectations;

The table below presents the aspects of the Market in order of most important to the least important to shoppers: Aspect	Expectation	Experience	Gap	% of Respondents who rated this aspect "Dissatisfied"
Quality & freshness	4.75	4.42	-0.33	3.4%
Clean, neat, tidy	4.68	4.48	-0.20	3.4%
Good selection	4.61	4.44	-0.17	2.1%
Vendors are helpful & courteous	4.60	4.56	-0.04	1.1%
Convenient hours	4.53	4.17	-0.36	6.9%
Affordable prices	4.53	4.28	-0.25	3.3%
Able to find everything	4.48	4.29	-0.19	6.1%
Layout that makes it easy to shop	4.38	3.69	-0.69	21.3%
Cooking classes & demonstrations*	2.21	3.61	+1.4	20.5%

(Hamilton Farmers' Market Shopper Survey , 2011)

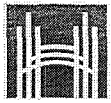


iii. **Governance Models** – See Appendix A6 “Governance and common factors in the success of Farmers’ Markets in Ontario”

A review of 10 indoor, year round markets was completed by Graduate Student Tammara Soma with the support of Prof. Sarah Wakefield, University of Toronto. Below is a brief summary of their findings:

- a. **1 Private operator** - “Only one Market (St. Jacob’s Farmers’ market) was run by a private corporation (Mercedes Corporation) and its Market is only one part of a larger mix of retail businesses operated by the corporation, which includes clothing, restaurants, arts and a mall.” (Wakefield, 2013)
- b. **4 Municipal operators** - “Our survey also found that city-owned and operated Markets are diverse in their structure and are managed by different departments. As can be seen in **Table 2.0**, city-operated Markets are managed under departments such as Emergency & Protection Services, Economic Development and Tourism and Operations Department. In some cases, larger Markets are allocated a significant number of staff (6 city staff in the case of the Ottawa Byward Market). Some of the services related to the operation may also be subcontracted. In this survey, it was found that subcontracting services were utilized minimally, and that most public markets maintained fairly exclusive control of their operations.” (Wakefield, 2013)
- c. **5 Not-for-profit operators**-“...half of the Markets surveyed were owned and managed by not-for-profit organizations. These not-for-profit organizations include two Markets operated by environmental NGOs (Evergreen and The Stop), one run by The Waldorf School (a private school), and two markets operated and managed by agricultural societies (Stratford District Agricultural Society and Woodstock Agricultural Society).” (Wakefield, 2013)
- d. While the financials for these markets were not easily available for the study team, each market considered itself successful. Each was governed with a different configuration, which suggests that the governance model in itself does not dictate success but it is more about the expertise and experience of the operators, and the passion for running their market

Additionally a site visit was made by staff to the London Covent Garden Market. It is municipally owned, and operated by an arm’s length organization that is a Council appointed Board which includes 2 Councillors and a citizen group with relevant skill sets. They have also been given responsible for the revenues and operation of the adjoining parking facility.



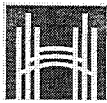
U of T Study Conclusion

“Despite the growing interest in local food and the growth in the number of Markets in Ontario, the study found that many Markets in Ontario face common barriers to success. Although most of the farmers’ markets surveyed in the report identified their operation as successful, half of the Markets identified challenges related to ensuring quality vendors and retaining farmers.....

In the literature, the role of the market manager is especially pertinent, as high manager turnover, volunteer managers, and managers that are paid low salary are factors that negatively affect the long-term sustainability of Markets. In the case of city-operated Markets, it was found that some Markets are allocated a significantly higher number of city-funded staff. Due to the complex nature of operating Markets, it is important to recognize the important contribution of a market manager and ensure that the market managers have adequate support and experience to manage the market.

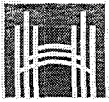
Finally, all of the Markets surveyed voiced strong opinions with respect to their central role in supporting local products and local farmers’ livelihoods. These Markets also strive to be a vibrant community hub and “destination place” for the local population. It is therefore important to embed such considerations clearly within the vision and mission of the Markets and develop workable strategies that can be evaluated to ensure that the Markets are reaching those goals.” (Wakefield, 2013)

The following chart summarizes the U of T findings:



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Name	Vendors	Owner	Managed by	Private/Non-profit/Public	Type of agreement or contract	Goals/Vision/Mission	Success	Barriers
Evergreen Brickworks Farmers Market (Toronto)	85	Evergreen	Evergreen	Non profit	Seasonal agreement with vendors	Support local economy, community health	Very successful	Less people during the winter market. Lack of awareness of the availability of winter produce.
Guelph Farmers' Market (Guelph)	59	City of Guelph	City of Guelph	Public	License agreement	Community destination and supporting local Guelph products	Successful. Especially in engaging collaboration with vendor and staff on vision and mission statement.	Enforcing by-laws while maintaining a friendly market can be challenging.
Kitchener Farmers market (Kitchener)	62	City of Kitchener	City of Kitchener	Public	Contract with municipality	Maintain employment and farmers' livelihood	Very successful	Maintaining the quality of the vendors as many re-salers are applying.
Ottawa ByWard Market (Ottawa)	200	City of Ottawa	City of Ottawa	Public	Farmers apply for a license, then enter into a permit with the city	Support local farmers' and local arts and crafts	Successful. Canada's largest outdoor farmers' market	Recruiting and retaining farmers.
St. Catharines Farmers market (St. Catharines)	41	City of St. Catharines	City of St. Catharines	Public	Lease with municipality	Support local farmers and local community	Very successful	Not enough indoor space for new vendors. High demand from new vendors
St. Jacobs Farmers' Market (Waterloo)	100	Mercedes Corporation	St. Jacob Country	Private	Application process	Good for the community, a local venue and meeting place.	Very successful	Ensuring steady base of vendors and shoppers. Stable supply and demand.
Stratford Farmers Market (Stratford)	63	Stratford and District Agricultural Society	Stratford and District Agricultural Society	Non profit	Contract with guidelines from Farmers' Market of Ontario	Promote local agriculture	Very successful	Strict rules that does not allow new vendors to apply. Vendors must either produce, bake, or made the items (no re-seller)
The Stop's Farmers' Market (Toronto)	56	The Stop	The Stop	Non profit	Application process and guidelines that vendors must sign	Supporting farmers and local community	Very successful	There is a 10 year waiting list, but the coordinator feels that the market is a good size as it brings a lot of vehicular traffic. So the current size is ideal.
The Village Market (Thornhill)	37	Toronto Waldorf School	Village Market Management Committee	Non profit	Contract and abiding by terms of operation	Provide a non-tuition-based stream for the school and to support biodynamic agriculture	Successful in popularizing the idea of organic agriculture in the school community	No obvious street presence and due to location in suburban area, there is not much traffic to the market from outsiders.
Woodstock Farmers market (Woodstock)	36	Woodstock Agricultural Society	Woodstock Agricultural Society	Non profit	Farmers' are picked/hired. No agreement/contract.	Support Woodstock community, promote fresh and local produce	Very successful	None. Enjoy support from the community, foodland Ontario and have been operating for 140 yrs.



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iv. Hamilton neighbourhoods are supporting fresh local food in their marketplace

- a. Fresh local food markets are growing quickly in neighbourhoods across the City of Hamilton. Facilities, services available, and product mix varies. The City of Hamilton Planning department is developing a Policy for farmers' markets to present to Council in early 2014 to establish standards to ensure food safety.
- b. Hamilton now has several seasonal markets operating across the City that generally operate 1 day per week offering a variety of farm fresh produce and prepared foods, artisans, and fresh foods prepared on site:
 - i. Ancaster
 - ii. Binbrook
 - iii. Dundas
 - iv. Hamilton West Mountain
 - v. Locke St.
 - vi. Mac Farmstand
 - vii. Ottawa Street
- c. There is a growing movement across the province to promote locally grown food. Many of the markets across Ontario, as well as the farmers themselves, are seeking to establish a consistent standard and brand image by gaining certification from Farmers' Markets Ontario. Markets can obtain "Mymarket[®]" certification, farmers can obtain certification as "MyPick[®]farmers", whose credentials are checked to ensure they are "Local Farmers[®]", these certifications provide a more transparent shopping experience for consumers. (www.farmersmarketsontario.ca)



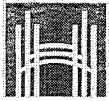
Hamilton

- v. **The Board of Health for the City of Hamilton has played a leading role in developing a food strategy**
 - a. This is important because the Market needs to serve the needs of its existing and changing customer base. As mentioned throughout this report the demographics and population of both residents and workers is changing significantly downtown, and while we have an eye to the future, the operator of the Market will have to find the balance needed to serve the customer base as it evolves.
 - b. Community Food Security Stakeholder Committee is an advisory committee to the Board of Health in Hamilton. They have established a goal to help develop local food infrastructure and procurement. They are also developing a Food Charter for Hamilton. The significance of this work as related to the Hamilton Farmers' Market is that it helps to establish one of the pillars to be considered in the vision of the Market going forward. The Charter states "Hamilton's Food Charter envisions a healthy, sustainable and just food system. It seeks to guide Municipal policies and community action." So this pertains then to both the product mix, but also the role that it plays within the food distribution and ecosystem of the greater Hamilton area.
 - c. The Community Food Security Stakeholder Committee completed a comprehensive study and presented it to the Board of Health in September of 2011 entitled the "Farmers' Market White Paper". The Study looked at the seasonal markets and the downtown Hamilton Farmers' Market.
 - i. The study identified that Farmers' markets have positive economic impact on the entire community:
 - "Every dollar spent in farmers' markets stays and circulates in the local economy for longer than a dollar spent in conventional retail stores.
 - Sixty percent of people who shop at farmers' markets will also shop at surrounding retail stores.
 - Farmers' markets provide revenue for local farmers and support rural economic development.
 - Other economic benefits of farmers' markets include increased tourism and travel into the community, and improved quality of life for community members." Source Farmers' Market White Paper – Community Food Security Stakeholder Commission



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- Although this notion is largely directed at the seasonal markets, it is applicable at a high level to the Downtown Farmers' Market "Currently, barriers exist which prevent residents and tourists from accessing farmers' markets in Hamilton. These barriers include limited parking availability and transit options, paid parking, hours of operation and lack of promotion." (Community Food Security Stakeholder Commission 2011)
 - ii. It is important to consider role the Hamilton Farmers' Market plays within the regional food distribution system.
- d. The White Paper made 6 recommendations:
- i. "A comprehensive farmers' market policy should be developed in consultation and collaboration with community partners;
 - ii. The policy should all farmers' markets to run like not-for-profits, with supportive infrastructure that is either low-cost or rent-free;
 - iii. Each farmers' market must have governing structure that includes farmers in the decision-making process;
 - iv. Farmers' market accessibility and affordability need to be improved through increased transit options and reduced parking fees,
 - v. there should be a single point of contact to help streamline information and support the ongoing operation of farmers' markets;
 - vi. And finally, a comprehensive policy will have a strong promotional aspect, including the creation of a local brand (i.e. Hamilton local) and online presence to increase public awareness and facilitate a collaborative network across markets." (Community Food Security Stakeholder Commission 2011)
- e. The role of food in our community is further emphasized by the **Municipal Food Policy Entrepreneurs** in a June 2013 report:
- "Food is central to a well-functioning municipality. Food is not only about health, nutrition, and food safety, but also food security, affordability, and access.



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Food and its production, supply and consumption affect water use, waste management, and carbon footprints. Food is a big part of the economy: the food sector (supply, distribution, processing, retailing, and food service) employs one person in eight in Canada, either full-time or seasonally. Food is related to culture and tourism. Public institutions, including educational institutions, procure, promote, and share knowledge about food as part of their core mandates. Food policy has implications for transportation, planning, economic development, and health promotion.

Food systems are the chains of commercial and non-commercial actors – from suppliers to consumers, regulators to advocates for system change – who collectively determine how we grow, process, distribute, acquire, and dispose of food. Food systems thinking reflects an awareness of how actions by one group in the system affects the other groups, as well as the environment, the economy, the fabric of society, and the health of the population, and ultimately, consumers. (see Figure 1)” (Municipal Food Policy Entrepreneurs report June 2013)

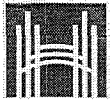


FIGURE 1
FOOD SYSTEMS THINKING

1. "Systems thinking" recognizes that:

- Complex issues are linked.
- There are multiple actors in the system and they are connected.
- Integrated solutions are required.

2. "Systems thinking" is a means to:

- Express and act on strategy.
- Engage and align diverse actors.
- Link health, environment and justice concerns with economic success.

3. A "food system approach" is about recognizing the connections between:

- Supply chain players and other sectors, and among players within other sectors;
- Connections between these diverse players and consumers; and
- Ensuring reliable food production and supply and the sustainable use of natural capital.

4. "Operationalizing a food system approach" requires:

- Supporting highly-collaborative supply chains.
- Collaborating with non-traditional actors beyond the supply chain.
- Understanding consumer food needs and health/well-being considerations.
- Understanding evolving societal expectations for how food is produced/supplied.
- Understanding how sustainability, equity, health and social expectations are managed at every stage in food production/supply.
- Deploying common objectives and metrics - this can include setting a bold target or destination.
- Aligning and creating supportive government policy and regulations.
- Working in multiple venues and on multiple topics

Understanding the connections can be used to create the necessary dialogue to apply systems thinking to specific issues.



Hamilton

vi. Resellers

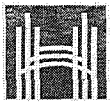
- a. Staff found that there were varying opinions during the research discussions regarding resellers in the market.
- b. All participants supported the notion that desirable food products, not produced locally but available through resale, were welcome and important to the shopping experience e.g. ethnic foods, fish, chocolate, bananas, mangos, as well as fruits and vegetables when they were out of season locally etc.
- c. There was a general misunderstanding of the **Ontario Food Terminal**, particularly regarding the source of foods and the quality of foods. The perception that has been created, to a large degree by the tone of media reports, is that all the food from the Ontario Food Terminal is imported and the quality is poor. The facts are that there are 400 Ontario farmers who have stalls at the terminal as their chosen go-to-market strategy; an efficient way to take their harvest to market in bulk and then let others take it to restaurants, markets etc.
- d. There is some optimism that local farmers who have currently chosen to sell through the Ontario Food Terminal who would also participate directly in the Hamilton Farmers' Market if the market were more "farmer friendly" from a cost and ease of doing business perspective. A unique space just for farmers within the Market with its own visual identity, prominent displays and some method of fractional pricing for space vs. full time year round individual stalls, were just some of the ideas coming from the focus groups and individual meetings.
- e. Focus group participants also said that a key issue for them is transparency regarding the source of the food e.g. if it is Ontario produce but not local, the Market operator and vendors should identify the farm source in any promotional materials that are used to ensure that consumers realize that these are high quality products from Ontario farms.



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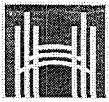


- i. There are quality products at the Ontario Food Terminal, the vast majority of them grown in Ontario. It is up to the buyer to determine the quality of the products that he/she will purchase for resale. Resellers have a responsibility to educate consumers regarding the products they are selling.



- ii. In addition there are also 21 'Warehouse Tenants' at the Ontario Food Terminal who provide local Ontario produce in addition to imported fruits and vegetables from all over the world to serve the demands of grocery and variety stores as well as food distributors who sell to restaurants etc.
- iii. It is noteworthy, that until the recent opening of Nations in Jackson Square, the Market served as one of the few locations downtown for residents to purchase groceries. Downtown was referred to as a food desert in the absence of a major grocery store. The Market served many local residents who require a lower priced product to meet their needs. Vendors will change their product mix as the demographics and demands shift downtown. Otherwise they will not succeed.





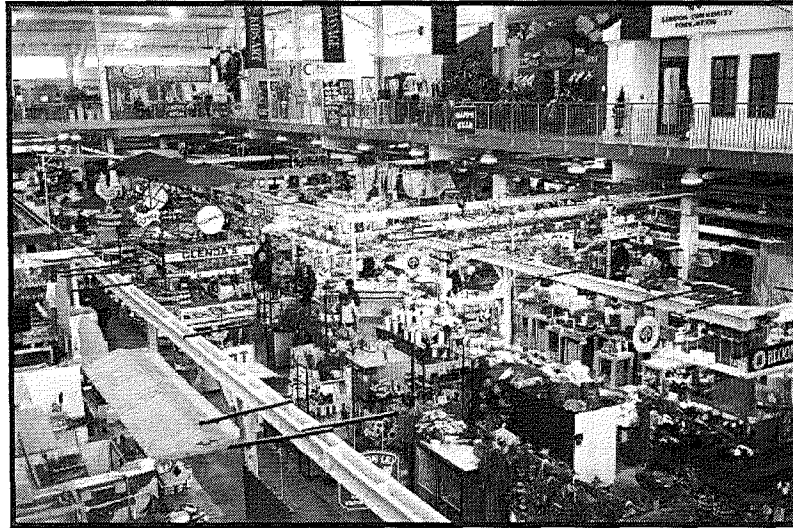
viii. **Consumer Demand is Converting Trends to Sustainable New Business Models**

- i. New product and service offerings in any market generally find a small customer base of 'early adopters' whether it's new technology i.e. hybrid cars or food i.e. organic, local, gluten free, no trans fats etc. Their longer term success is dependent on converting the relatively small group of 'early adopters' into a customer base of sufficient critical mass to be financially sustainable.
- ii. We are seeing food trends converting to sustainable market forces. Our focus groups and all the literature clearly outline the growing demand for healthy locally grown fresh foods are driving market business models. Not only is this seen in the rapid growth of seasonal neighbourhood markets, but also in the product mix of existing year round markets.
- iii. In London for example, the downtown Covent Garden Market does not have any farmers within the year round indoor market. They have however supplemented, with great success, by adding an outdoor seasonal market on their extensive adjoining property. They also use this space to host 11 festivals in the summer, and a skating rink in the winter, making it a year round destination (www.coventmarket.com 2013)

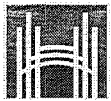




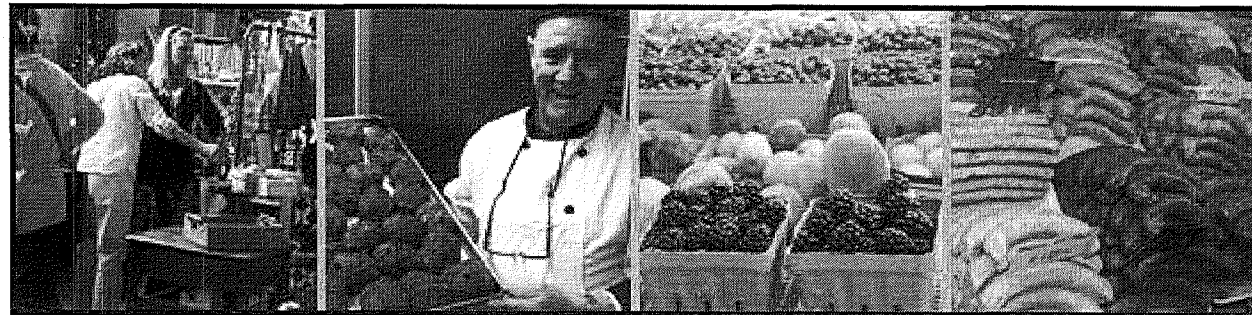
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- iv. Also in London, the absence of a year round farmers' market has more recently been the driving force behind a new market located at the Western Fair Grounds to meet the growing demand. The London Farmers' and Artisans' Markets is open Thursdays and Saturdays year round. "...The WFFAM is a popular destination for chefs, cooks and local gastronomes in search of a wide variety of artisanal products and seasonal ingredients. Market-goers love the WFFAM because they can buy high-quality; farm-fresh goods directly from the person who produced them and can find unique products they won't discover anywhere else in the city." (<http://www.londonsfarmersmarket.ca/Default.aspx> 2013)

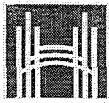


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There are more than 40 permanent plus a number of part time vendors.

(www.londonfarmersmarket.ca 2013)



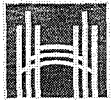
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- v. The City of Toronto is considering the redevelopment of the farmers' market within the St. Lawrence Market.



(http://www.toronto.ca/stlawrence_market/design/ 2013)

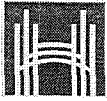
- vi. While the Evergreen Brick Works in Toronto is quite a different organization and operation than the Hamilton Farmers' Market, it is interesting to note their success, even turning a profit in 2012. From an idea in 1991 to a sustainable organization that has attracted 54 farmers, artisanal producers and Chefs during the winter months and 65 to 85 vendors in the spring through fall period. They have a clear vision, a strategic plan and the following guiding principles which may have some applicability to our Market:



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“In our efforts to foster a sustainable food system, Evergreen Brick Works is committed to the following:

1. **Regional and Seasonal** Support the connection between rural and urban communities, and promote the benefits of eating and growing local foods.
2. **Artisanal** Collaborate with local artisan producers to support small-scale food production and traditional preservation methods.
3. **Accessibility** A farmers' market and food programs that are accessible to diverse audiences.
4. **Economic and Environmental Impact** Educate and empower individuals to be part of a food system that is socially equitable, ecologically sustainable and economically viable.
5. **Health Promotion** Demonstrate the link between food and health, and promote healthy lifestyles through outdoor education, physical activity, nutrition and healthy eating.
6. **Food Culture** Celebrate food traditions and cultural diversity.
7. **Innovation** Foster and celebrate innovation at our farmers' market and in the design and delivery of our food programs.
8. **Education** Create an experiential, hands-on approach to the delivery of our food programs.
9. **Collaborative Infrastructure** Build relationships with other like-minded organizations and community groups, as well as the community at large.
10. **Replicable Models** Develop food programs that can be replicated locally and nationally.” (www.ebw.evergreen.ca 2013)



ix. Report for the City of Hamilton by the Urban Marketing Collaborative

i. Prior to the renovation of the facility, the City of Hamilton contracted Urban Marketing Collaborative to conduct a detailed analysis of the governance model and related issues that should form the basis for the re-launch of the market following the reconstruction. A report CS06008(b) was presented to the Emergency & Community Services Committee in April of 2007. The study looked at all aspects of the market including 3 Governance models:

1. Ownership and Direct Operation by the City of Hamilton – the Current Operational Structure;
2. Creation of an Independent Corporation Owned by the City; and,
3. Long-term Lease to a Private Sector Operator

ii. The report identified many of the same challenges that continue to impact the Market today. The governance recommendation was not implemented. As stated previously, staff does not believe that the governance model in itself is the solution, it is more about the experience, expertise and passion of the operator. However, the report does illustrate the kind of skills and decision making freedom that would benefit the Market; these remain true today.

iii. As a quick recap, the report recommended that an independent corporation owned by the City model as the best alternative for the following reasons:

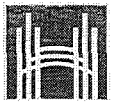
1. “Under the current model of City management, the Market has not been able to achieve a quality tenant mix and business-management structure that is competitive. In addition, the social programming has not developed to its full potential;
2. There is a need to increase the quality of the hands-on management at the Market. The Market needs to be guided by a strong Market Manager and a strong Board of Directors who can be creative, set long-term future direction, have an understanding of retail leasing, marketing, and operations, and can act quickly.
3. An independent corporation owned by the City will provide the required expertise and autonomy to manage this retail and cultural asset and will provide for appropriate control mechanisms for the City;
4. The Market will be in a better position to be competitive with other food shopping businesses by having the skills and autonomy to act quickly and efficiently to market forces (e.g., marketing programs, vendor compliance with lease regulations, etc.);



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5. The City would still maintain control over the Market so that it continues to operate as a community asset. The budget would be approved by the City. If the independent corporation owned by the City, defaulted, operation would revert back to the City;
6. The Board of an independent corporation owned by the City would be comprised of professionals who understand marketing, leasing, and operations of retail markets (e.g., business acumen) as well as social programming skills required to ensure this continues to be a valuable City asset (e.g., food education and training); and,
7. The Market is in a relatively positive economic position and recruiting qualified Board Directors should not be a problem. An independent corporation owned by the City will allow the Market to expand its operation, increase the budget, and remain economically sound.”

(Hamilton Farmers’ Market Improvements CS06008(b) (Ward 2), 2007)



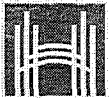
iv. **Observations – Challenges that must be overcome to achieve the vision**

- i. **Competition** - has intensified with the addition of Nations Foods, the growth of local specialty shops, and several regional seasonal markets. Competition to attract regional farmers is significant. The Market will have to find a new way to make it more 'farmer friendly' and cost effective to retain existing farmers and attract new ones. Vendors will have to differentiate themselves in products, relationships, and personal service. The Market will have to continuously assess the standards and product mix of vendors and artisans, the support activities i.e. entertainment, special events etc. to create a unique destination.
- ii. **Population growth and changing demographics** - have created increased demands from shoppers; higher quality, more unique products, more local foods, a more engaging shopping experience, and a destination to go to even without a specific purchase in mind. The influx of 2000 new residents over the next 3 years, mostly young professionals and empty nesters, along with the 450 professionals employed at the new McMaster Health Campus means on average higher education levels, higher income levels and higher expectations for spending their time and discretionary dollars.

The new Health Campus will also bring 54,000 patient visits annually as well as serve 4,000 students. Two new suites hotels with 305 rooms designed for medium and long term stays will be a catalyst for downtown shopping. All of this is driving new retail shops and restaurants to open all the time; they too have brought about 430 new jobs in the past year. The Market will have to understand the nature of these changes and the degree to which it is changing the buying needs of its base, and how they will respond in matching products and services.

The Market and Vendors will have to find the right timing to evolve the product mix. The demographic and population changes will happen over the next few years. Many existing customers and their buying needs must also be met within this changing equation.

- iii. **Parking** - is currently, and has historically been, a barrier to success. The issues are both convenience and cost. A lack of short term parking on York Street is inconvenient for patrons who want to go in to quickly pick up an item or to pick up a heavy load with multiple bags. Grocery stores, and the suburban market locations have various amounts of free in nearby short term



parking available; the lack of any validated break on parking e.g. ½ free during the week and more on weekends is a perceived barrier to attracting shoppers.

- i. Nations offers free parking for purchases greater than \$20.
- ii. Shoppers don't want to try and carry multiple and heavy packages very far, so they buy less or go to a large grocery store.
- iii. Many meetings and proposals have been discussed with the City and the Stall Holders Association without resolution to date.

iv. **A shortage of highly visible signage**

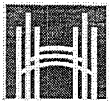
- i. A lack of signage on York Street makes it very difficult to build a top of mind brand presence downtown; prospective shoppers may not even know the market is there. The previous large sign was not compatible with the renovation and was demolished.
- ii. Creative proposals must be found to create a vibrant presence on York Street through a combination of street level and aerial signage, perhaps complimented with street furniture and other exterior décor to create an identity for the Market.
- iv. Signage and way finders in Jackson Square - also have very low visibility and do nothing to create awareness of the market or to create impulse purchase opportunities to potential shoppers.
- v. Signage inside the Market is lacking – there needs to be a large directory or site map for visitors to find out which vendors are in the Market and where they are located. The standardized signage used on the vendor stalls is non-descript and does not represent the individual brands of the vendors; a more creative signage opportunity within a reasonable template would allow the vendor stalls to be more visible and unique.
- vi. An exterior street scape review – is required to determine how an inviting engaging and highly visible atmosphere can be created on York Street.



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v. Overall marketing and promotion

- i. Budgets are currently very limited. They are a combination of City funds and Vendor funds. Vendors have complained that they have had a lack of input on the Marketing programs and spend. The small budget has made it challenging to create top-of-mind awareness of the Market, or to introduce promotional calls-to-action for shoppers to go to the Market.
- ii. There is some potential to further leverage the budget through synergies with the regional farmers' markets to create cost effective, in-season, marketing programs.
- iii. The vendors themselves can play a larger role in promoting the Market and their individual businesses. They should be coached on setting up web sites, social media accounts, and marketing techniques to be used on site. Some of them have marketing expertise today that can be of great value in creating an overall plan.
- iv. Social media offers a significant opportunity for low cost high audience reach. There exists a much larger opportunity to expand the use of social media and build Market networks as well as to further leverage the many networks in Hamilton today i.e. Hive group, the Spec., CH etc.
- v. There are great PR stories that can be generated in the local media about the Market, the Vendors, and special events at the Market. Events can range from cooking demonstrations with the Vendors products, to seasonal holiday special events for shoppers and their families. These are generally low or no cost opportunities that bring positive exposure to the Market.
- vi. Communications need to be engaging, inclusive, and frequent between all stakeholders. As a community of approximately 60 business owners, there is a tremendous amount of experience and knowledge that exists that can be leveraged to help the market flourish. These owners have "skin in the game" and are anxious to contribute to the growing market's success.
- vii. There may also be potential for increased marketing budgets through sponsorship revenues. E.g. Associations like the Ontario Farm Fresh Marketing Association, various meat producer associations, local restaurants etc.



viii. Currently the community kitchen operates quite independently from the vendor community; there is an opportunity to showcase the vendors and their products through demonstrations, tastings, pairings etc.

vi. Additional Customer Service Considerations

- i. Currently, cash is the only payment method offered by the Vendors. Increasingly people are carrying less cash and relying on debit and credit. This is currently costing vendors an unspecified amount of sales opportunities. At a minimum debit payments should be provided as an option.
- ii. The current parking challenges make it very difficult for customers to buy larger quantities of goods. Options should be considered to provide a pick up option or delivery service for certain quantities of dollar thresholds; whether as a carry out to a local parking garage or to their home or business within a designation area.
- iii. Hours/Days of Operation – should be reviewed for opportunities for more consistency and match shopper expectations in the changing marketplace. There was considerable feedback in the focus groups as well as in other reports, that the general public is confused by the current schedule Tuesday, Thursday, Friday, Saturday and that is further confused when vendors are not always open during hours that are posted.

vii. The Ratio of Staff Costs to Revenues – Total staffing costs are currently very high considering the total revenues of the operation. In 2012 they were 77% of the total revenues. A lot of work has been done over the last 18 months to reduce the costs through a more flexible scheduling of staff and the 2013 ratio is on target to be reduced to 59%. While this is a significant reduction, the current tracking does not include all of the overhead of the other City departments supporting the Market e.g. HR, Payroll, Accounts Payable etc. These costs have to be identified precisely going forward to understand the total costs of operations. Total staffing costs are limiting the monies available to the Market in areas of marketing and ongoing operational improvements like signage, and special events. Increased expense budgets in these areas could drive additional revenues.

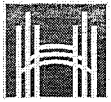


viii. A year round 4 day per week market is a big challenge for farmers

- i. They grow seasonally therefore can't justify annual fees, and are often family run therefore can't staff their stall during all the advertised hours. They are also being spread thin by attending more of the seasonal markets. The focus groups and individual discussions feedback have been unanimous in wanting to establish a more 'farmer friendly' Market, one which makes it affordable and flexible for them to bring their goods to the Market whenever they are in season.
- ii. It is anticipated that there are enough varieties of produce grown in the area that if coordinated properly, and it was profitable for the farmers to participate, there could be a greater year round representation of farmers at the Market. The focus groups and individual discussions have shown support to create a unique section of the Market dedicated to farmers.
- iii. Although details need to be determined, the concept would be to share a common space instead of having to rent individual stalls year round. The farmers who would share the space would share the cost. This would allow them to reduce their costs and potentially their staffing time by sharing the cost of staffing the space, while providing fresh local produce to the Market year round from strawberries and tomatoes to apples and potatoes. This might also attract some of the farmers who currently only attend the daily seasonal markets or choose to take their produce directly to the Ontario Food Terminal.

ix. The availability of ready to eat foods

- i. A major attraction that draws traffic into many markets on a frequent basis is food from vendors who are cooking and baking on the spot, filling the market with aromas. In downtown markets e.g. London's Covent Garden Market, it is the wide variety of food and daily specials that attract the nearby office workers and shop keepers to go the Market very regularly for lunch, and while there they often pick up other products. It is an expectation by many, as part of the Market experience.
- ii. Nations has executed this strategy very well, and many office workers stream in several times a week to get their lunch. The focus group and individual discussions had feedback from many people that they no longer go to the market for that very reason.



- iii. The community kitchen is currently the only area where cooking can be done because of a lack of ventilation elsewhere. This is a significant gap but would require capital investment to install additional ventilation. This is a very significant challenge to the Market and will only be overcome through a review of requirements as part of a master plan for the space, and an investment of capital dollars into leasehold improvements. Estimates for this work are required in order to determine the business case.

- x. **More effective use of the total space available**
 - i. There is a fair amount of space that is underutilized for example the Community Kitchen, and the York St. facing area. Both of these and any vacant stalls represent potential revenues. Also, these vacant spaces have a negative impact on the vibe and energy of the Market. The space potentially could provide for more exciting and unique vendors which would increase the drawing power of the Market and generate more revenue for the existing Vendors as well as the new ones. If filled with the right vendors e.g. organic foods, Hamilton/Niagara wineries, and local artisans, the underutilized spaces would help to create a better, more vibrant atmosphere for shoppers. Highly visible vendor expansion on the York Street entrance would also play a key role in drawing traffic into the Market.
 - ii. More flexibility is needed for individual vendors to qualify for additional (or less) space; and a vendor footprint that optimizes vendor locations, and traffic flow. Ideally a comprehensive master floor plan should be completed. Feedback has consistently indicated that the current layout of vendors is confusing and does not optimize traffic flows. A refreshed master plan with input from the stall owners and shoppers may create a more inviting shopping experience. Large colourful site maps would help guide shoppers to their areas of interest.

- xi. **Leasehold improvements** - are required to provide additional ventilation to allow for more food preparation stations to draw people in regularly for lunches and coffee breaks as a catalyst to increase shopping across the vendor community. Also some unique spaces require an ability to be isolated after hours or on non-market days i.e. the area immediately off of York St. and the Community Kitchen. These areas lend themselves to special event bookings e.g. cooking demonstrations, themed dinner parties, Hamilton/Niagara food and wine events etc.



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xii. The current governance model

- i. Regardless of how hard people are working, the status quo is not achieving the outcomes that the general public, the vendors, or the City of Hamilton expected with the renovation of the facility.
- ii. Operating a Market is not a core strength of the City; as a one of a kind operation there is no critical mass of expertise. There has been continuous turnover of Managers over the years. Each one has done their best to resolve the issues but as previously stated, success is not so much about the model itself as it is about the depth of experience, resources, and expertise of the operators.
- iii. The current model is a slow decision making model compared to its competitors.
- iv. The current model has not fostered positive communication with vendors or the broader community, and is a slow decision making model compared to those of competitors.

Recommendations:

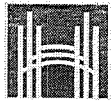
That staff be directed to submit a terms of reference to the Hamilton Farmers' Market Sub-Committee in January 2014 and then to GIC for a Request for Proposal to the marketplace based on recently conducted primary and secondary research related to the Hamilton Farmers' Market including details of all financials and structured to encourage partnerships that leverage the best available local talent.



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Appendices

- A1. Governance and Common Barriers to Success in Farmers' Markets in Ontario
- A2. Summary of Primary Sources
- A3. Summary of Secondary Sources Cited



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APPENDIX A1

GOVERNANCE AND COMMON FACTORS IN THE SUCCESS OF FARMERS' MARKETS IN ONTARIO: A REPORT
FOR THE CITY OF HAMILTON

BY:

TAMMARA SOMA

DEPARTMENT OF GEOGRAPHY AND PLANNING

UNIVERSITY OF TORONTO

OCTOBER 2013



EXECUTIVE SUMMARY

THE OBJECTIVE OF THIS REPORT IS TO PROVIDE INFORMATION ON THE STRUCTURE AND GOVERNANCE OF FARMERS' MARKETS ("MARKETS"), AS WELL AS INFORMATION ON THE CHALLENGES/BARRIERS THAT ARE FACED BY YEAR-ROUND MARKETS IN ONTARIO. THIS PRELIMINARY REPORT IS BASED ON A SURVEY OF 10 YEAR-ROUND, LARGE-SCALE MARKETS IN PRIVATE, PUBLIC AND NOT-FOR-PROFIT CONTEXTS. THE SURVEY WAS CONDUCTED THROUGH PHONE INTERVIEWS AND EMAILS TO MARKET MANAGERS OR SUPERVISORS, AS WELL AS A REVIEW OF EXISTING ONLINE DOCUMENTATION FOR EACH MARKET. IN ADDITION, THE LITTLE EXISTING ACADEMIC AND PUBLIC LITERATURE ON THIS TOPIC WAS REVIEWED.

The following questions were posed to all of the Markets that participated in the survey: 1) Who owns the market? 2) Who manages the market? 3) Is it private, non-profit or public? 4) What type of agreement/contract (if any) is made with vendors? 6) What are the goals and mission of the market? 7) Is the market successful? And finally, 8) What are the barriers/ challenges (if any) faced by the market? Follow-up questions were asked specifically to city-run (public) Markets to obtain information on the number of city-staff allocated to the market, the department responsible for market operation, and the role of sub-contractors in market operation. The result of the surveys is divided into two tables based on the category of public Markets and others (non-profit and private).

There were many challenges in obtaining the information for the survey component of the report. These challenges include difficulties in getting in touch with market managers (who are very busy and are often part-time employees), and the relatively short timeline of the research, which affected the market manager's ability to respond to the questions within the deadline. In addition, the researcher was not able to obtain all of the information for all the Markets, as additional questions were added at a later date and the market manager/supervisors were not available to answer follow-up questions.

The study found that most of the challenges from an operational standpoint are related to ensuring a steady base of quality vendors that meet customers' expectations. Furthermore, it was found that market managers are facing an increasing pressure in managing the high numbers of applications from new vendors despite limited facilities (site, space) to accommodate them. Markets who are members of the umbrella organization Farmers' Markets Ontario (FMO) are also committed to supporting and working directly with farmers, and so often turn away re-sellers – this was not considered a problem per se, as markets using this approach were able to find sufficient local producers, but it did shape their operations in a fundamental way. Challenges were also identified with respect to promoting Markets during the winter season and in areas where there is less walking traffic.



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The study found that all of the Markets surveyed are in agreement over the goals of supporting local farmers' livelihoods and the local economy through the promotion of local and fresh food, while creating a destination place and hub that is vibrant for the local community. The result of the study will hopefully assist market managers and the city council in addressing some of the challenges associated with maintaining publicly funded, large, indoor, and year-round Markets.

1.0 INTRODUCTION:

Amidst the growth of interest in supporting local food and the local economy, the popularity and the number of Markets are growing across Ontario. According to the Farmers' Market Ontario (FMO) - a provincial umbrella organization for farmers' markets established in 1991 through the support of the Ontario Ministry of Agriculture (OMAFRA) - 167 Markets are included within their membership roster as of 2013. Some of their members, such as the Woodstock Farmers' Market, have been in operation for 140 years.

To adapt to the growth in the number of competing Markets while meeting the community's demand for local foods, and ensuring the supply of quality vendors and products, Markets must continue to evolve and adjust to various factors to ensure long-term sustainability. These factors include changing demographics of the community, market fluctuation in prices, and financial considerations including but not limited to: revenue generation, operation, site maintenance, labour cost and logistics. In a study conducted on Markets in Oregon, United States, it was discovered that out of a total of 62 Markets that opened between the years 1998-2005, 32 Markets closed.¹ Furthermore, 15 out of the 32 Markets closed after their first season and 30 out of the 32 Markets that closed were less than four years old.²

This evidence suggests that the growth of Markets and growing recognition by the public on the importance of supporting local food does not necessarily lead to long-term financial sustainability. Both new and established Markets can struggle to keep afloat and face issues in matching supply with demand. As Markets play an important role in contributing to local economic development and in particular to local agriculture, it is important to understand what is working in Markets, in order to determine appropriate governance structure as well as best practice for success. When successful, Markets can contribute to the health and wellbeing of the local community through the provision of fresh whole foods.

¹ Stephenson, G., Lev, L., & Brewer, L. (2008). 'I'm getting desperate': what we know about farmers' markets that fail, *Renewable Agriculture and Food Systems*, 23(3): 188-199.

² Ibid.



2.0 METHODOLOGY

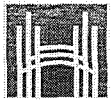
The directory of Markets provided online³ by FMO under the “Market Finder” tab was used to select the member Markets that were surveyed. On September 10th 2013, the researcher reviewed the list from the farmers’ market directory, which at that time consisted of 166 entries. Out of all of the entries (n=166), 14 Markets were selected based on the following categories: year-round, large, and indoor. After conducting surveys for a period of three weeks from September 11th, 2013- September 25th, 2013, which included phone calls and emails to the contact person listed on the FMO website, only 10 Markets responded.

In addition to the farmers’ market survey, a scan of the literature was conducted which included grey literature retrieved online as well as academic articles on Markets through the University of Toronto library database. The literature search resulted in a very small number of relevant papers both academic and grey literature that was useful for the objective of this study. Most of the grey literature on Markets available online were “how to” guides on establishing or creating a farmers’ market.

3.0 FINDINGS

According to an older survey conducted in 1998 dealing with the economic impact of Markets, the average farmers’ market (“Market”) has between 11 and 15 vendors. By contrast, in this study, the market with the least amount of vendors that participated in the survey is the The Village Market (36 vendors). The number of vendors in a Market is an important consideration when managing a year-round operation, as market managers strive to offer diverse products for their consumers, and the supply of produce is often limited in the winter. In addition, vendors may offer similar products, which may result in unnecessary competition. The largest markets surveyed in this study were the Ottawa Byward Market with 200 vendors (A combination of both food and local arts and crafts vendors) and St. Jacobs Farmers’ Market (with approximately 100 food vendors). It was found that all of the Markets had more than one vendor offering similar products. However, each vendor also offered at least one additional unique item, which provided more choice for the consumers.

³ <http://www.farmersmarketsontario.com/index.cfm>



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Most of the Markets surveyed had policies discouraging or prohibiting re-sellers. In fact, two of the Markets surveyed noted that as members of FMO, they are committed to selecting farmers and sellers that either produced the food or made the food (baked goods/sausages etc.). Although the FMO is not a regulatory body and is in fact a marketing organization, it strives to work with market managers to inform them of the benefits of supporting certified farmers or local growers directly. FMO also owns and operates the MyMarket® brand of Markets and the My Pick® verified farmers certification. MyMarket® is Canada's first certified farmers' market that features certified farmer-vendors verified under the My Pick® assurance. The My Pick® logo ensures that the grower is local and they he/she is selling food that are produced on his or her farm⁴.

3.1 MARKET ADMINISTRATION

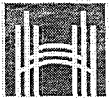
As identified in **Table 1.0. Market Profile**, half of the Markets surveyed were owned and managed by not-for-profit organizations. These not-for-profit organizations include two Markets operated by environmental NGOs (Evergreen and The Stop), one run by The Waldorf School (a private school), and two markets operated and managed by agricultural societies (Stratford District Agricultural Society and WoodStock Agricultural Society). Only one Market (St. Jacob's Farmers' market) was run by a private corporation (Mercedes Corporation) and its Market is only one part of a larger mix of retail businesses operated by the corporation, which includes clothing, restaurants, arts and a mall.

According to a survey conducted in 1998 of 122 Markets in Ontario, 40.4% (n=51) of Markets at the time were administered by Vendors Associations and 18.5 % (n=22) of Markets were administered by City Corporations.⁵ That report found that Markets operated in the city often have a more complex organizational structure than those administered by Vendor Associations, are usually based in large

Table 1.0 Market Governance Profile

⁴ <http://www.farmersmarketsontario.com/mypick/about.cfm>

⁵ Cummings, H., Kora, G., & Murray, D. *Farmers' Markets in Ontario and Their Economic Impact 1998*, Farmers; Market of Ontario. Retrieved online on September 10th 2013, from <<http://www.onfarm.ca/uploads/File/PDF/EconomicImpactStudies/FarmersMarket/FarmersMarketsOntario.pdf>>



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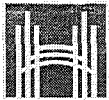
Categories	# of Farmers' Markets
Public Markets	4
Private Markets	1
Not-for-profit markets	5
# of vendors < 50	4
# of vendors > 50	6

urban centres, operate year round on permanent sites, have paid market managers, and operate with significantly larger budgets.⁶

Our survey also found that city-owned and operated Markets are diverse in their structure and are managed by different departments. As can be seen in **Table 2.0**, city-operated Markets are managed under departments such as Emergency & Protection Services, Economic Development and Tourism and Operations Department. In some cases, larger Markets are allocated a significant number of staff (6 city staff in the case of the Ottawa Byward Market). Some of the services related to the operation may also be subcontracted. In this survey, it was found that subcontracting services were utilized minimally, and that most public markets maintained fairly exclusive control of their operations.

Table 2.0. Information specific to publicly-run and managed farmers' market

⁶ Ibid. p.18



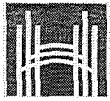
Name	# Vendors	Owned & Managed	What city dept is responsible for market operations?	Are any services subcontracted?	# Staff allocated to the market	Roles	Type of agreement/contract	Goals/Mission
Ottawa ByWard Market	200	City of Ottawa	Emergency & Protection Services -> Bylaw -> Market	Subcontract set up of market and subcontract property management of indoors space. Indoor space managed by Byward Market Revitalization Group	6 City Staff and 6 to 10 Summer Students	Market Manager (Lead)/ 2 Market Management Office/ Agri food specialist/ Arts and Crafts Specialist/ Market Clerk/ Summer Students	Farmers apply for a license, then enter into a permit with the city	Support local farmers and local arts and crafts.
St. Catharines Farmers market	41	City of St. Catharines	Economic Development & Tourism	None	1 city staff	Market & Event Coordinator	Lease with municipality	Support local farmers and the local community.
Guelph Farmers' Market	59	City of Guelph (market clerk & an elected vendor executive)	Operations Department	Building is maintained by corporate properties department. Temporary staffing agency is also used.	3 city staff	Two part-time market clerks and one supervisor	License agreements	To act as a community destination and support local Guelph products.

3.2. BARRIERS IDENTIFIED BY MARKETS

The literature on barriers and challenges faced by Markets is limited. However, it is generally recognized that there are common challenges related to operating and maintaining a Market. It is also important to note that due to the timeline of the research and the nature of the phone and email survey, it was not possible for the researcher to build a rapport with the market manager that might have provided more information regarding the financial status/profitability of the Market.

The literature identifies that Markets often experience difficulties in maintaining a stable supply of vendors from season to season, and this is especially pertinent with respect to year round Markets.⁷ Furthermore, due to the increasing number of Markets in Ontario,

⁷ Ibid p. 20



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vendors may leave one Market for another that seems more profitable. According to a study of failed Markets in Oregon⁸, there are five factors that are associated with failure:

1. Small Size (between 4 to 13 vendors);
2. A shortage of products or lack of diversity in market's offerings;
3. Administrative revenue was insufficient;
4. Market manager was a volunteer or paid a low salary;
5. High manager turnover.

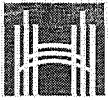
In the current survey, the most cited barriers (cited by 4 markets) had to do with maintaining the quality of vendors, farmer retention, and restrictive policies against re-sellers. It is important to note that market managers suggested that the best form of advertising is satisfied customers, and this was confirmed by a report commissioned by FMO, which also suggested that negative customer experience due to poor market quality may dissuade others from shopping at the Market.⁹ Other cited barriers include fewer customers during the winter market and not being able to accommodate the influx of interest from new vendors (see Table 3.0).

Table 3.0. Barriers Identified

Barriers Identified	# of Farmers' Markets
Less people during the winter market and lack of public awareness of the availability of winter produce. Issues with promotion and location (lack of street presence)	2
Enforcing by-laws while maintaining a friendly farmers' market atmosphere	1
Maintaining the quality of vendors (e.g., issues with the number of re-sellers applying and restricting re-sellers; farmer retention)	4

⁸ Supra note 1 p.194

⁹ Supra note 5 at p. 22



High demand from new vendors and not enough space to accommodate.	2
No challenges. Great support from the community, farmers, and the government.	1

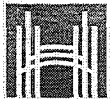
Almost all of the Markets surveyed, with the exception of The Village Market, mentioned that they were satisfied with their current operation and identified their market as successful (see Appendix). Although The Village Market also identified success, it also identified significant issues as a result of the market being located in an area that does not have significant foot traffic.

4.0 CONCLUSION

Despite the growing interest in local food and the growth in the number of Markets in Ontario, the study found that many Markets in Ontario face common barriers to success. Although most of the farmers' markets surveyed in the report identified their operation as successful, half of the Markets identified challenges related to ensuring quality vendors and retaining farmers. In the survey, the market managers were in general agreement over restricting or in some cases prohibiting re-sellers. These sentiments echo Farmers Market of Ontario guidelines that put a great emphasis on supporting certified local farmers and producers. Although FMO is not a regulatory body and cannot force Markets to exclude re-sellers, customers may be critical and have negative views of Markets that allow re-sellers. This issue deserves further attention and in-depth analysis on this issue was beyond the scope of this report.

In the literature, the role of the market manager is especially pertinent, as high manager turnover, volunteer managers, and managers that are paid low salary are factors that negatively affect the long-term sustainability of Markets. In the case of city-operated Markets, it was found that some Markets are allocated a significantly higher number of city-funded staff. Due to the complex nature of operating Markets, it is important to recognize the important contribution of a market manager and ensure that the market managers have adequate support and experience to manage the market.

Finally, all of the Markets surveyed voiced strong opinions with respect to their central role in supporting local products and local farmers' livelihoods. These Markets also strive to be a vibrant community hub and "destination place" for the local population. It is therefore important to embed such considerations clearly within the vision and mission of the Markets and develop workable strategies that can be evaluated to ensure that the Markets are reaching those goals.



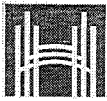
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Works Cited:

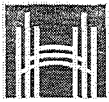
Cummings, H., Kora, G., & Murray, D. (1998) *Farmers' Markets in Ontario and Their Economic Impact 1998*, Farmers; Market of Ontario. Retrieved online on September 10th 2013, from
<<http://www.onfarm.ca/uploads/File/PDF/EconomicImpactStudies/FarmersMarket/FarmersMarketsOntario.pdf>>

Famers' Market Ontario (nd) About MyMarket® and MyPick® Retrieved from:
<http://www.farmersmarketsontario.com/mypick/about.cfm>

Stephenson, G., Lev, L., & Brewer, L. (2008). 'I'm getting desperate': what we know about farmers' markets that fail, *Renewable Agriculture and Food Systems*, 23(3): 188-199.



Name	Vendors	Owner	Managed by	Private/Non-profit/Public	Type of agreement or contract	Goals/Vision/Mission	Success	Barriers
Evergreen Brickworks Farmers Market (Toronto)	85	Evergreen	Evergreen	Non profit	Seasonal agreement with vendors	Support local economy, community health	Very successful	Less people during the winter market. Lack of awareness of the availability of winter produce.
Guelph Farmers' Market (Guelph)	59	City of Guelph	City of Guelph	Public	License agreement	Community destination and supporting local Guelph products	Successful. Especially in engaging collaboration with vendor and staff on vision and mission statement.	Enforcing by-laws while maintaining a friendly market can be challenging.
Kitchener Farmers market (Kitchener)	62	City of Kitchener	City of Kitchener	Public	Contract with municipality	Maintain employment and farmers' livelihood	Very successful	Maintaining the quality of the vendors as many re-salers are applying.
Ottawa By Ward Market (Ottawa)	200	City of Ottawa	City of Ottawa	Public	Farmers apply for a license, then enter into a permit with the city	Support local farmers' and local arts and crafts	Successful. Canada's largest outdoor farmers' market	Recruiting and retaining farmers.
St. Catharines Farmers market (St. Catharines)	41	City of St. Catharines	City of St. Catharines	Public	Lease with municipality	Support local farmers and local community	Very successful	Not enough indoor space for new vendors. High demand from new vendors
St. Jacobs Farmers' Market (Waterloo)	100	Mercedes Corporation	St. Jacob Country	Private	Application process	Good for the community, a local venue and meeting place.	Very successful	Ensuring steady base of vendors and shoppers. Stable supply and demand.
Stratford Farmers Market (Stratford)	63	Stratford and District Agricultural Society	Stratford and District Agricultural Society	Non profit	Contract with guidelines from Farmers' Market of Ontario	Promote local agriculture	Very successful	Strict rules that does not allow new vendors to apply. Vendors must either produce, bake, or made the items (no re-seller)
The Stop's Farmers' Market (Toronto)	56	The Stop	The Stop	Non profit	Application process and guidelines that vendors must sign	Supporting farmers and local community	Very successful	There is a 10 year waiting list, but the coordinator feels that the market is a good size as it brings a lot of vehicular traffic. So the current size is ideal.
The Village Market (Thornhill)	37	Toronto Waldorf School	Village Market Management Committee	Non profit	Contract and abiding by terms of operation	Provide a non-tuition-based stream for the school and to support biodynamic agriculture	Successful in popularizing the idea of organic agriculture in the school community	No obvious street presence and due to location in suburban area, there is not much traffic to the market from outsiders.
Woodstock Farmers market	26	Woodstock Agricultural Society	Woodstock Agricultural Society	Non profit	Farmers' are picked/hired. No application process	Support Woodstock community, promote local products	Very successful	None. Enjoy support from the community, foodland Ontario and have been operating for 10 years.



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Appendix A2

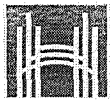
Primary Sources Consulted

- 5 Focus Groups (Approx. 50 community members)
- Procurement Manager, Corporate Services, City of Hamilton
- Director Culture and Tourism, Planning and Economic Development, City of Hamilton
- Ontario Farm Products Marketing Commission
- Board Member – Mustard Seed Co-op
- Executive Director, Farmers’ Markets Ontario
- General Manager, London Covent Garden Market
- Planning Staff, City of Hamilton
- Friends of the Market
- Councillors, Farmers’ Market Sub-committee
- Architect
- Market Manager, ECS, City of Hamilton
- Associate Medical Officer of Health, Public Health, City of Hamilton
- Legal Services, Corporate Services, City of Hamilton
- Director Healthy Living, Public Health, City of Hamilton



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- Manager, Economic Development, City of Hamilton
- Greening Marketing General Manager ECS, City of Hamilton
- Director Health Protection, Public Health, City of Hamilton
- Members of the Market Stallholders Association
- Professor U of T, Co-chair of the Community Food Security Stakeholder Committee
- Hamilton Municipal Parking System
- Director Strategic Services, ECS, City of Hamilton



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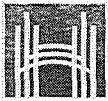
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