PDA 2012 Council Retreat
Wednesday December 12th, 2012
Elliott Bay Room - 9:30am to 4:30pm

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Date: December 7, 2012

To: PDA Council

From: Ben Franz-Knight, Executive Director

Re: 2012 Council Retreat

Our annual retreat will be held next Wednesday, December 12, 2012 from 9:30am – 4:30pm in the Elliott Bay Room. We will have coffee, fruit and pastries available during the retreat welcoming starting at 9am.

Included with this memo you will find the following:

- Retreat Agenda
- 2012 Year in Review
- Draft Resolution 12- 94: Strategic Goals for the Farm Program
- Recent Rapid Market Assessments (RMA’s) for the Pike Place Market and U District Farmers Market
- Food Web White Paper
- 1974 Pike Place Market Farmers Research Paper

I encourage you to spend some time reviewing the Rapid Market Assessments and the 1974 PPM Farmers Research Paper. We will reference these documents during the course of the retreat but will not have ample time allotted to cover each item in detail.

I look forward to seeing all of you next Wednesday. Come prepared to spend a bit of time in the kitchen for lunch arrangements. To compliment hours of discussion surrounding fresh food you will also have an opportunity to engage in a real-time farm to table experience.
9:30am Welcome - Approval of the Agenda – Council Chair

9:35am Review of 2011 – 2012
  ▪ PDA Key Accomplishments

10:00am 2013: The Year Ahead
  ▪ Presentation of Objectives, Goals and Opportunities

10:20am Strategic Planning: Strategic Issues for 2013
  ▪ Near Term (6-12 months)
  ▪ Mid Term (1-3 years)
  ▪ Long Term (4-5 years)

11:20am Catching Up with Cleveland
Presentation on 8th International Public Markets Conference

12:00pm Lunch – Farm to Plate demonstration

1:15pm Coordinating Regional Food and Farm Efforts
  ▪ Food Web – Phyllis Shulman

1:40 pm Pike Place Market Farm Program Review
2012 Farm Report - History and Overview, Farmer Profitability, Current Program Assessment and Status

2:05pm Farmer Panel
Presentation from Market Farmers regarding day-to-day operations and challenges – Q and A with PDA Council

2:45pm Break

3:00pm Moving Forward
  ▪ Food and Farm Program Goals
  ▪ Pike Place Market Roles in Food and Farm
  ▪ Areas of Focus – Actionable Programs/Policy for 2013 – Review of draft Resolution 12-94

4:20pm Closing
  ▪ Council Chair Final Words

4:30pm Adjournment
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Introduction

2012 was a year of major transition for the Pike Place Market. In May we marked the end of major renovation, concluding three years of intense construction that strengthened the Market for decades to follow. While the Market Community took a deep breath following three years of renovation, internally the PDA staff adjusted to the needs and demands of a new central plant, new elevators and new restrooms throughout the Market. The PDA also successfully recruited commercial tenants for vacant spaces and dramatically reduced residential vacancies due to renovation.

The economic performance of the Market continued to improve in 2012 outpacing recovery on the regional and national level. An increase in mercantile sales for the first time since 2009 provides the strongest signal that the economy is stabilizing.

With the emerging Waterfront design and the debate over the demolition of the Viaduct complete a substantial focus was placed on developing a viable concept for PC1N. The efforts of the PDA Council, Staff and consultants advanced the goals for PC1N further than at any point in the last 40 years.

Internally the PDA Council reconfigured committees which, along with the reorganization of staff provided a better alignment between department responsibilities and committee oversight. Additionally, the PDA Council tackled strategic issues ranging from Marketing Strategy to Social Service roles, adopted a set of Metrics for Success and advanced Strategic Capital Project planning efforts.

The following Year in Review highlights the key accomplishments and results of PDA Council and Staff efforts throughout 2012.
PDA activities are governed by an all-volunteer, 12-member PDA Council. Council members serve as volunteers and are not compensated. Of the 12 members, four are appointed by the Mayor, four are elected by the Constituency, and four are appointed by the PDA Council. All Council members must be confirmed by the Seattle City Council and typically serve a four year term.

2012 Council Members
James Savitt – Chair
John Finke - 1st Vice Chair
Gloria Skouge- Secretary/Treasurer
Bruce Burger
David Ghoddousi
Matt Hanna
Betty Halfon
Patrick Kerr
Bruce Lorig
Ann Magnano
Jackson Schmidt

Executive
James Savitt, Chair
Bruce Burger (Mkt Programs)
Matt Hanna (Finance)
Patrick Kerr (Asset Mgmt)
Jackson Schmidt (WRC)

Asset Management
Patrick Kerr, Chair
John Finke, Vice Chair
Betty Halfon
David Ghoddousi
Gerry Kumata
Bruce Lorig

Finance
Matt Hanna, Chair
Bruce Lorig, Vice Chair
David Ghoddousi
Gerry Kumata
Ann Magnano
Gloria Skouge

Market Programs
Bruce Burger, Chair
Ann Magnano, Vice Chair
Betty Halfon
John Finke
Jackson Schmidt
Gloria Skouge

Waterfront Redevelopment
Jackson Schmidt, Chair
Gloria Skouge, Vice Chair
John Finke
Matt Hanna
Patrick Kerr
Bruce Lorig
Organizations and Leadership

Market Organizations & Authorities
- Market Historical Commission
- Pike Place Market Constituency
- Friends of the Market
- Daystall Tenants Association
- Pike Place Merchants Association
- Buskers Guild (inactive)

PDA Management Team & Structure

Ben Franz-Knight  
*Executive Director*

John Turnbull  
*Director of Asset Management & Special Projects*

Steve Nelson  
*Director of Operations*

Sabina Proto  
*Director of Finance and Administration*

Kelly Lindsay  
*Director of Programs and Marketing*

Lillian Hochstein  
*Executive Director of Market Foundation*

[Diagram of organizational structure with roles and departments]
PDA History and Charter

The Pike Place Market Preservation and Development Authority (PDA) is a public corporation chartered by the City of Seattle in 1973. As a public trustee, the PDA serves as the caretaker and steward of the City’s historic Pike Place Public Market. The PDA’s mission and charter purposes are:

- Ensuring the traditional character of the Public Market is preserved
- Renewing, rehabilitating, preserving, restoring, and developing structures and open spaces in and around the Market Historical District
- Continuing the opportunity for Public Market farmers, merchants, residents, shoppers, and visitors to carry on traditional market activities
- Initiating programs to expand food retailing in the District, especially the sale of local farm produce.
- Preserving and expanding the residential community, especially for low-income people
- Promoting the survival and predominance of small shops, marginal businesses, thrift shops, arts and crafts, and other enterprises, activities and services which are essential to the function of the Market

The PDA provides a structure within which all public agencies, private groups, organizations and individuals whose concerns relate to the preservation of Seattle’s Market area may work together to accomplish the above purposes and goals.

The PDA owns and manages the majority of the buildings and open spaces in the Market Historic District. We provide retail space to over 200 businesses, 200 craftspeople, and almost 100 farmers on an annual basis. In addition, we provide housing to almost 350 people in the district, primarily low-income seniors. The PDA also provides the property management, security, janitorial, and maintenance services to tenants and visitors in the Market. Rounding out the Market neighborhood, the historic district is also home to four social service agencies which serve the downtown population including the Food Bank, Senior Center, Childcare and Pre-school, and Medical Clinic.
Completion of Major Renovation
After three years of nearly constant work, the major renovation work of Phase III is now complete. The Economy Atrium has been open since March with a new elevator serving all floors including Post Alley. Two new restrooms were completed and available for visitors during the peak summer season. All residents in the Stewart House have returned to their units and residential vacancies due to the renovation have largely been filled. In the Soames Dunn Building, seismic upgrades, plumbing and electrical work was completed in the spring and the reconfiguration of commercial spaces for Chocolate & Ice Cream, Seattle Cutlery and Bavarian Meats was finalized this fall. Restoration of the windows along Western Avenue is currently in progress.

Thank You Seattle
With significant completion of the renovation, the PDA wanted to demonstrate the success of the project and the responsible use of public funds. “Thank You Seattle” was a multifaceted communication campaign designed to recognize Seattle voters for funding the project, educate the public about the changes that were made and acknowledge the contributions of individual supporters of the Proposition 1 levy campaign. The PDA also hosted a special “Day of Thanks” for Market residents, tenants, employees and project partners to celebrate the end of the renovation and share our gratitude for the cooperation and perseverance of the tenants, residents and employees who lived through three years of construction and disruption.
**PC1N Concept Plan**

The PDA Council WRC Committee, PDA Staff and Market Community advanced PC1N design efforts and established the Market as a prominent partner in the Central Waterfront Plan. This effort resulted in securing commitments from the City of Seattle to include significant funding for the PC1N project in waterfront funding plans. The efforts of the market also established the PC1N project as one of the first Central Waterfront components with a target construction commencement date of mid-2014 and completion, including parking, targeted for December 2015.

Following extensive public input and PDA Council Review Miller Hull Architects presented a concept design for PC1N that was approved in September. The City Council approved a bi-annual budget that includes funding for the next phase of design work. MOU (Memorandum of Understanding) regarding next steps for PC1N is pending review by the Seattle City Council.

The PDA secured approval from the State to utilize the GCCM procurement process and is poised to move forward with schematic design, design development and general contractor procurement early in 2013.

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**Union Contract**

Over 60% of the PDA staff are members of Teamsters Local 117. In 2012 we successfully negotiated a new 5 year agreement for Residential, Maintenance, Facilities, Parking and Security staff.

The agreement will ensure a continued high-level of service in each of these areas as well as providing for stable and predictable benefits for employees.

The new agreement also provides greater clarity relating to progressive discipline, equipment, uniform needs, performance reviews and compensation.

Finally, there are improved definitions for qualifying dependents, domestic partners, bereavement leave and the ability for staff to convert a percentage of unused sick leave balances to vacation leave.
Farm Season Promotions

To promote the summer Farm Season, the PDA developed a series of five “pop up” lunches bringing the spirit of the Pike Place Market to downtown locations. Each lunch featured a different Market restaurant showcasing farm fresh produce in new and delicious ways. To emphasize that buying farm fresh produce does not need to be expensive, lunches were priced at just $5 each, giving customers a great value for their money. Each location provided not only wonderful food, but ambience as parks and plazas were transformed into charming open air restaurants with tables and chairs not to mention flowers and buskers straight from the Market. The series ran from July through September and was met with sell-out crowds at nearly all of the locations. The program received overwhelmingly positive feedback and national attention.

To encourage lunch patrons to visit the Market following the experience, each person attending received a reusable shopping tote with a Summer Guide including shopping tips, parking information and a series of five coupons each good for $5 off of a $10 farm table purchase. Coupons were good for two-week intervals to encourage return visits throughout the summer.

Farm Fresh Numbers

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
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<tbody>
<tr>
<td>Summer Guides Distributed</td>
<td>7,500</td>
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<tr>
<td>Coupons Redeemed</td>
<td>3,595</td>
</tr>
<tr>
<td>Estimated revenue to farmers from “$5 off $10 purchase” coupon</td>
<td>$43,140</td>
</tr>
<tr>
<td>Impressions generated by 7,500 shopping bags</td>
<td>90,000</td>
</tr>
<tr>
<td>Impressions generated from two tweets by celebrity chef Marcus Samuelson</td>
<td>132,600</td>
</tr>
<tr>
<td>Total Lunch Guests</td>
<td>923</td>
</tr>
<tr>
<td>Total Impressions</td>
<td>3.3 million</td>
</tr>
</tbody>
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Partner Restaurants

- Tom Douglas Restaurants (participated twice)
- Marché
- Matt’s in the Market
- Steelhead Diner
Strategic Issues

Metrics for Success

Develop and track a set of Market specific metrics to aid in the review of Market performance across the full range of key issues – values, uniqueness, heritage, social, cultural and economic health.

In February 2012 the PDA Council adopted a set of Metrics for Success to track over the course of 2012 to gauge accomplishments, track progress and identify potential issues. The metrics were tracked by individual departments on a monthly basis, reported to council committees and summarized in the monthly ED report. Included in this Year in Review are results of key metrics by discipline. Working with council committees the metrics and monthly reports will continue to be reviewed and adjusted accordingly moving forward to facilitate continued direct communication between staff and council, ensure adequate oversight and support informed decision making.

Waterfront Property Development and Connection

Continue to participate in the Waterfront design process and develop plans for connecting to the Waterfront and the Market.

Please refer to the PCIN summary on page 9.

Marketing Strategy

In 2012 the PDA will undertake a review of overall Marketing Strategy including current program, assessment of new opportunities, review of media platforms, resource allocation and priorities.

The Director of Programs and Marketing, in partnership with the Marketing and Communications staff and the Market Programs Committee spent several months conducting a detailed analysis of the current marketing programs and practices. Issues considered included: Brand Position, Target Audiences, Key Messages, Media Relations, Advertising, Social Media, Special Events and Partnerships.

The findings and recommendations from this process were presented to Council in the form of the Marketing and Communications Review and Assessment. This document was approved by Resolution on August 2012. The direction provided in this document served as the basis for the development of the 2013 Marketing and Communications Strategy to be approved by the Market Programs Committee in December 2012.
Social Services

*With the assistance of the Market Foundation and existing social service agencies in the Market, the PDA will review current and future social service needs.*

The Market Programs committee engaged in a series of detailed explorations of the PDA role in Social Service Programs and funding. With the arrival of a new Executive Director for the Market Foundation the PDA and MF reviewed emerging needs, current agency performance, re-affirmed roles and developed recommendations for more direct engagement in the process of identifying funding needs on an annual basis as well as multiple strategies to increase support for social services and foster greater alignment between PDA and MF.

Strategic Capital Projects

*Following completion of major renovations, the PDA will conduct a Capital Needs Assessment to support strategic capital planning for the future.*

With the oversight of the Asset Management Committee PDA Staff and Consultants advanced the priority “Other Fund Projects” including reconfiguration of the Soammes Dunn Tenants, expansion of the Food Bank, support for construction of the new Pre-School, development of plans for the Atrium Kitchen and tenant improvements in post alley and on the new Hillclimb. Finally, to ensure accurate planning and budgeting for future Capital needs the PDA issued an RFQ for a 30 year Capital Needs Assessment. With the newly completed renovation as a baseline this study will allow the PDA to responsibly plan for the future capital needs of the Market.
Finance

Annual Performance

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<th>2011*</th>
<th>2012*</th>
<th>% Change</th>
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<tr>
<td>Revenue</td>
<td>$ 12,213,333</td>
<td>$ 13,255,997</td>
<td>9%</td>
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<tr>
<td>Expenses</td>
<td>$ 8,436,270</td>
<td>$ 9,462,209</td>
<td>12%</td>
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<tr>
<td>Net Operating Result</td>
<td>$ 3,777,063</td>
<td>$ 3,793,788</td>
<td>0%</td>
</tr>
<tr>
<td>Debt Service</td>
<td>$ 1,731,185</td>
<td>$ 2,383,927</td>
<td>38%</td>
</tr>
<tr>
<td>Reserves</td>
<td>$ 266,649</td>
<td>$ 283,571</td>
<td>6%</td>
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<tr>
<td>Net Operating Result After Debt Service &amp; Reserves</td>
<td>$ 1,779,229</td>
<td>$ 1,126,290</td>
<td>-37%</td>
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*Financial data through November 30, 2012

Audits & Results

Of the six audits conducted this year, the PDA received an “unqualified” opinion on all of them indicating a clean report.

- PDA Independent Audit
- Pike Place Market QALICB Independent Audit
- Pike Place Market QB2 Independent Audit
- PDA State Audit - Accountability
- PDA Federal Grants - HUD Audit
- LaSalle Senior Housing LLC Audit
Revenue - All Sources

- Commercial, $7,738,075
- Residential, $2,116,811
- Parking, $2,061,211
- Daystall, $1,041,155
- Other, $298,745

Expenses - All Sources

- Operations, $3,291,085
- Property Management, $1,391,318
- Debt Service and Designated Reserves, $2,667,498
- Parking, $788,679
- Administrative Expenses, $1,624,777
- Utilities, $1,501,484
- Capital Expenses, $1,126,290
- Marketing and Programs, $864,866

Finance | 2012 Annual Review
Operations

Maintenance

Significant projects include:

- Finalizing commissioning of the new Central Plant (ongoing)
- Incorporating the new Central Plant and associated equipment into the preventative maintenance program
- Incorporating new tenant equipment into the preventative maintenance program
- Identifying issues with water meters and installing additional equipment (38 check valves, three water meters) to resolve problems.
- Replacing the kitchen in nine Livingston-Baker apartment units.
- Remodeling the PDA office kitchen
- Converting the PDA conference room into offices for the Daystall department
- Updating the Economy Building conference rooms to serve as the PDA’s primary public meeting space
- Finalized renovation and reconfiguration of Maintenance Shop
Facilities

With the East Publics operational at the first of the year and the North East publics opening in May, integrating the maintenance for the new restrooms into the daily routines of all shifts was a significant project for Facilities in 2012.

- A total of 1,550 miles of toilet paper (4.55 miles per case) utilized in the total 38 stalls in the four sets of public restrooms. This ranged from 109 miles in February to a peak of 182 miles in July. The North Publics remain the busiest of the four each month of the year.

As of October the new fish ice melting tank was fully operational and as of November all fish markets are full participants.

- Each ice cart holds 800 lbs when full. Each Sunday night we are dumping close to 3 tons of ice in the tank and from 800 lbs. to 1.5 tons on a daily basis. October garbage tonnage was the lowest it has been in three years (2010: 170 tons; 2011: 185 tons; 2012: 166 tons). Recycling volumes have remained constant in the three years and business has been up in 2012.

Other significant measurements for 2012:

- Through October the reimbursements for recycling cooking oil and cardboard has offset the amount budgeted for recycling electronics, appliances and fluorescent lighting by 81%.
- Pest Control expenses have dropped by 11% due almost entirely to a reduction in requirements for service to combat bed bugs in residential buildings.
Capital Projects

- **The Stewart House** exterior upgrade was a major accomplishment completed in the Spring of 2012. The complex project included replacing the entire exterior envelope; windows, brick, flashing, and roofing. The project heavily impacted the tenants as we had to relocate them while work was being performed. This required an extensive amount of coordination between numerous PDA departments and the cooperation of the tenants.

- The **Pine Building Walk In Cooler** is another major accomplishment completed in the Fall of 2012. The Pine Cooler adds 430 square feet of space for the farm program. The cooler was installed in a space that was difficult to keep occupied by a commercial tenant. We also added 150 square feet of public seating during this project.

- The **restoration of the Corner Market windows**, along with the common area upgrades to the Stewart House interior are two small projects that make a big difference in the appearance of the Market and how the residents appreciate being a part of the Market.

- Advertised for and selected low qualified bidder, Schindler Elevator, for **Garage Skybridge Elevator Modernizations**. Project is underway, drawings have been approved, and completion date for both elevators is June 2013.

- We **replaced all windows** which were all failed, on the 7th floor of the Leland Residential Apartments, which included replacing or repairing rotted wood sills and window framing. The residents are now very appreciative of the wonderful view of the sound.

- Installed **electronic access systems** in both the Sanitary and Triangle residential doors and Sanitary Elevator to enhance security control on lost access fobs versus lost keys, and control door access times.

- We **renovated the Soames Dunn commercial spaces**, which included expanding and moving the Ice Cream Shop, greatly enhancing the entryway into the Dunn portion of the building, moving Seattle Cutlery, and expanding Bavarian Meats up to Pike Place, which now includes two lunch counters, and an expanded selection of product in new display cases.

- The wall and double doors separating the Soames and Dunn Buildings were also removed, creating a common area which includes the new public restrooms and seating area.
**Security**

The PDA Security staff works 24/7 to ensure that the market is a safe and secure environment.

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**Officer Activity**

- Commercial Detex: 58%
- Residential Detex: 6%
- Garage Detex: 15%
- Drug Activity: 0.6%
- Restroom Checks: 20%
- Medic/First Aid: 0.4%
- Liquor Violation: 0.0%

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**Restroom Checks**

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<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>Aug</th>
<th>Sept</th>
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<tr>
<td>Count</td>
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<td>94</td>
<td>78</td>
<td>79</td>
<td>129</td>
<td>182</td>
<td>171</td>
<td>208</td>
<td>157</td>
<td>213</td>
<td>85</td>
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**Removals**

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<th>Jan</th>
<th>Feb</th>
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<th>June</th>
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<td>157</td>
<td>213</td>
<td>85</td>
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Parking

As part of a SDOT Parking Mitigation Program, hourly rates in the parking garage were reduced with the revenue loss offset by a funding subsidy from the City of Seattle. Numbers were up in the summer months, due largely to the new waterfront Ferris wheel but came down again right after Labor Day.
Commercial Leasing

- Out of +/- 16,000 sf renovation-related vacancies
  +/‐ 14,600 sf leased
- Vacancies Leased (+/‐ 17,871 sf)
- 20 New Tenants (includes 2 sales of businesses)
- 3 Moves, 3 Expansions, 5 New Use
- 7 Current Vacancies (+/‐ 3,998 sf)
- 29 Lease Renewals (includes reconfigurations)
- 5 Lease Terminations
- Increased commercial portfolio revenue base by
  converting office use to two new restaurant uses and
  one storage area to a food/retail use
- Increased the artist community base on Market Level 3
  to include the Delve culinary school and three new
  artists with two studio spaces remaining.
- Conducted six (6) commercial staff site visitations and
  orientations on food retail management and
  comparative locations including Melrose Market and
  Granville Island and Urban Gardens in Vancouver BC.
- Rolled-out new billing system on upgraded Yardi
  program effective January 1, 2012
- Improved monitoring of water meters and direct billing
  by PDA on delinquent accounts.
- Increased Follow-up with new tenants during first year
  of occupancy
- Initiated Wayfinding Signage Program, solicited
  community feedback, secured design firm

New Tenants

- 6H Consulting Services
- Bella Umbrella
- Britt’s Pickles
- Coffee….and a Bakery
- Delve
- Eddie Tang
- El Borracho
- Favahar Café
- Flair
- Los Agaves
- Market Tours & Espresso
- Orange Dracula
- Paper Feather
- Pastakia & Associates
- Radiator Whiskey
- Roberto’s Ristorante
- Seattle Bagel Bakery
- Storyville Coffee
- Ugly Baby and La Ru
- Zaccagni’s
### Retail Sales

<table>
<thead>
<tr>
<th>Category</th>
<th>Sales 2011</th>
<th>Sales 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant</td>
<td>$39,155,523</td>
<td>$40,759,844</td>
</tr>
<tr>
<td>Mercantile</td>
<td>$15,833,671</td>
<td>$17,468,774</td>
</tr>
<tr>
<td>Food</td>
<td>$44,719,218</td>
<td>$48,223,622</td>
</tr>
</tbody>
</table>

### Percentage Rent 2012

Estimated Total $2,919,721

- **Food**: 41%
- **Restaurant**: 49%
- **Mercantile**: 10%
Leasing units vacant has been a significant focus for the Residential staff over the past few months. The vacancy rate reached 12% due to impacts from renovation, however these units began to be available by the beginning of third quarter. At year end, current vacancies have reached less than 3% - the lowest level in many years.

Beginning in 2012, Residential staff began a focused effort to bring rents to a more consistent standard within each building. Overall rents for market-rate units remain competitive with the goals of keeping rents affordable to medium income households.

Residential staff has increased the frequency of social gatherings in the buildings with a resulting increase in resident -initiated activities, including movie nights, coffee times, and building newsletters. Internet stations are now available to residents in each low-income building. There are significant improvements in common areas as well, with new paint in hallways and updated community rooms and lobbies.

Residential staff attended several training seminars including: Fair Housing Law seminar, Affordable Housing Conference, HUD Security Training, Managers Round Table Discussion, Tax Credit Seminar, and HUD updates.

The staff also collaborated with Contract Management Services (A HUD Project Based Contract Administration to conduct a file audit in their effort to improve the quality of their work.
Market Programs

Daystall

Active Permits

Craft, 182
Farm, 81
Offseason Craft, 30

Craft Program

Craft Attendance

<table>
<thead>
<tr>
<th>Year</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012 (YTD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>35000</td>
<td>35000</td>
<td>35000</td>
<td>40000</td>
<td>45000</td>
<td>45000</td>
<td>45000</td>
<td>45000</td>
</tr>
</tbody>
</table>
With 9,164 total Farmer attendance days YTD, the Farm Program is trending -.75% below YTD last year.
Marketing & Communications

Marketing Campaigns
- Thank You Seattle
- Farm Days
- Market Characters (online video series)
- Holiday

Special Events
- Daffodil Day
- Flower Festival
- Arcade Lights (April and October)
- American Craft Week
- Magic in the Market

Social Media
Growth of our primary social media platforms has remained consistently positive over the past year.

On Facebook we have generated 232 posts year to date, with post receiving approximately 276 “likes,” “comments,” or “shares.”

On Twitter we have generated 680 posts / reposts year to date.

Education
For the 2011-2012 school year, the Education Program led 69 tours for 73 classes from Seattle-area schools. Total attendance was 1,633 students. In addition to PDA staff, this program also receives support from 10 volunteers providing 358 hours of service annually.
Market Foundation

In 2012, the Market Foundation celebrated its 29th Cut the Pie event by distributing more than $755,000 in grants to the Market Community, including $55,000 to the Food Bank, $163,460 to the Preschool, $12,000 to the Heritage House, $284,544 to the Clinic, $218,816 to the Senior Center.

This year also marked a leadership transition as long-time Executive Director Marlys Erickson retired. The Foundation welcomed Lillian Hochstein into the role in April.

Pike Market Food Bank (PMFB) The Food Bank continues to experience huge increases in volume. They are supporting over 30,000 visits a year and this year will distribute over 500,000 pounds of groceries – that’s helping over 45,000 people.

Senior Center (PMSC) The economic decline continues to be hard on low-income seniors. The PMSC’s program called Focus on Fundamentals is their biggest priority and works to improve access to critical services, including: free meals, food stability and nutrition and access to social workers who can assist clients with housing, employment, transportation, counseling and other benefits. Through funding received in 2011, the PMSC was able to hire one more social worker and to expand their meal program.

Pike Market Medical Clinic (PMMC) Despite funding cuts, the PMMC has has maintained its core wrap-around services, providing primary medical care on a sliding fee scale, pharmacy, social work, behavioral health and outreach to nearly 5,000 unduplicated clients annually – many of who struggle with poverty, chronic disease and homelessness. The clinic’s most notable growth area has been in its Housing Health Outreach Team (HHOT), part of Seattle’s Plan to End Homelessness. The HHOT team nurses provide home visits to chronically homeless adults transitioning into housing, to help them stabilize and stay housed.

The Clinic just recently received recognition as a Patient Centered Medical Home (PCMH) at the highest possible standard, Level 3. PCMH recognition is provided by the National Committee for Quality Assurance to medical providers which meet a set of rigorous quality standards. The Clinic is one of the first 6 health centers in Washington awarded Level 3 recognition under the current standards.

2012 Metrics

Pike Market Senior Center
- 2012 operating budget = $601,044
- Unduplicated clients served = 1,300 (43,000 + visits)
- Cost per client visit = $13.98
- Total private fundraising needed = $493,129
- Support provided in 2012 from Market Foundation = $183,000

Pike Market Food Bank
- 2012 operating budget = $137,260
- Unduplicated clients served = 30,000 (serving over 45,000 individuals)
- Cost per client visit = $4.58
- Total private fundraising needed = $97,869
- Support provided in 2012 from Market Foundation = $55,000

Pike Market Medical Clinic
- 2012 operating budget = $4,412,873
- Unduplicated clients served = 5,000 + (27,000 visits)
- Cost per client visit = $162.60
- Total private fundraising needed = $518,095
- Support provided in 2012 from Market Foundation = $254,000
Pike Market Childcare and Preschool (PMCCP) In 2012, the Preschool moved into their new space and hired a new director, Ilene Stark. They served 90-100 families with children ages 18 months to 5 years.

PMCCP typically provides tuition assistance to 70% of enrolled families with 50% of those families living at the poverty level. In their 2011-2012 fiscal year, PMCCP will provide approximately $220,000 in tuition assistance to families needing help. PMCCP is one of only three downtown preschools that accept low-income families with subsidies. PMCCP relies heavily upon the generosity of individuals, corporations and foundations in order to accomplish this.
Looking Ahead

First Avenue Street Car

In Arthur Goodwin’s 1929 book, “Markets: Public and Private,” he cites four key components for the location of a successful Market in order of priority: “proximity to department stores, proximity to the most important streetcar lines, auto parking facilities, then proximity to bus lines.” In 1906 one of Seattle’s most important streetcar lines ran down First Avenue. Ridership on the South Lake Union Streetcar has dramatically increased ridership every year since it opened in 2007. Earlier this year the City of Seattle broke ground on the First Hill Streetcar that runs from Pioneer Square up the Broadway and Capitol Hill. This fall the City of Seattle commenced an Alternatives Analysis to study three primary center-city streetcar connector routes – First and Fourth and Fifth Avenues. The Market would benefit tremendously from a streetcar on First Avenue connecting South Lake Union with Pioneer Square. The PDA will need to continue to monitor the progress of the study, timelines for decisions, funding options and potential implementation plans.

Waterfront LID

PC1N planning efforts will continue in 2013, however, a key component for the project to proceed from concept design to construction is the successful establishment of a Local Improvement District (LID) by the City Seattle. Current LID funding plans include up to $40 million for the PC1N project. The City of Seattle has retained consultants to study the LID, evaluate revenue potential, review potential size and make recommendations to the City Council and Executive. With the successful passage of the Seawall Bond in November the LID study efforts are moving forward earnestly. The PDA will need to closely monitor these efforts over the next eight months, assessing any objections and potential risks as this funding source is critical to viability of the PC1N project as currently conceived.

Alaskan Way Viaduct Demolition

The Alaskan Way Viaduct (AWV) nearest to the Market is scheduled for demolition in early 2016. However, extensive utility relocation work is already underway along with demolition of the southern portion of the Viaduct. In addition, Alaskan Way will be relocated underneath the viaduct in 2013 to allow for the Seawall work to commence. All of these advance activities have impacts on parking and traffic flow in and around the Market Historic District. The PDA is currently participating in AWV parking mitigation programs providing reduced rate short-term parking in the Market Parking Garage and is also eligible for additional parking mitigation funds through the development of parking on PC1N. The PDA will need to continue to closely monitor impacts to the Market due to AWV demolition prep work and demolition plans.
Food Hub, Food Web

The PDA will address farm and food related issues as key strategic issue in 2013. While there are actionable policy and program goals that the PDA can address in 2013 the role of the Pike Place Market in regional and national farm, farmers market, and food issues is potentially significant. Starting with a detailed assessment and development of a robust strategy for Farm and food in the market the PDA should also engage in the long-term outlook and challenges these issues face outside the Market. Serving as a centralized hub for these issues the Market can help convene diverse groups working toward common goals and raise awareness that will continue to preserve the roots of the Market in small independent farmers bringing quality food directly to the consumer.
Document Contributors


And all the PDA staff who, through their continued efforts, made these results possible.
Pike Place Market Preservation and Development Authority (PDA)

PROPOSED RESOLUTION: 12-94

Approval of Strategic Goals and Programs Intended to Increase Farmer Profitability and enhance support of Small Independent Farmers at the Pike Place Market.

December 2012

WHEREAS, on October 7th, 1907 the Seattle City Council adopted ordinance No. 17187 establishing Pike Place as a public market for the sale of “fresh fruits, vegetables, berries and other farm and garden products, and accept also butter, eggs, cheese, poultry, meats, lard and preserved fruit and vegetables raised, produced or manufactured by the person selling or offering the same for sale”; and,

WHEREAS, on July 31st, 1911 the City of Seattle adopted ordinance No. 27700 amending ordinance No. 17187 to include, among other changes, a definition of “manufactured” as “to apply to those products the principal ingredients of which have been actually grown or produced by the person selling or offering the same for sale”; and,

WHEREAS, on October 13th, 1922 the Seattle City Council adopted ordinance No. 44209 amending ordinance No. 17187 to include a definition of “person” to “when necessary be held and construed to mean and include natural persons of either sex, association, and co partnerships, whether acting by themselves or by a servant or employee; the singular number shall include the plural and the masculine the feminine” and adding “combinations of products” to the definition of “manufactured”; and,

WHEREAS, on February 14th, 1927 the Seattle City Council adopted ordinance No. 52515 amending Ordinance No. 44209 to, among other things, restrict to the sale of articles to those, “which have been raised, produced or manufactured in King and Kitsap County,”; and

WHEREAS, on August 6th, 1956, the Seattle City Council adopted ordinance No. 85384 an ordinance relating to the Pike Place Farmers Market; regulating the use and occupation thereof; fixing rentals for certain stalls; providing penalties for violations, and repealing Ordinance 52515; and,

WHEREAS, on July 8th, 1957 the Seattle City Council adopted ordinance No. 86312 an ordinance relating to and authorizing a lease from Pike Place Public Markets, Inc. and The Fairley Corporation to the city for farmers’ market stalls in the Pike Place Public Market; and,

WHEREAS, on May 22nd, 1967 the Seattle City Council adopted ordinance No. 95807 an ordinance amending Section 12 of Ordinance 85384 to permit the sale of flowers in certain “Wet Row Stalls” at the Pike Place Farmers Market; and,
WHEREAS, on December 28th, 1970 the Seattle City Council adopted ordinance No. 99549 an ordinance authorizing amendment of an agreement with Pike Place Public Markets, Inc. and The Fairley Corporation to permit use of certain portions of the Pike Place Public Market by farmers from Washington counties west of the Cascade Range; and,

WHEREAS, the PDA is a public corporation organized pursuant to RCW 35.21.660, 35.21.670 and 35.21.730-755 and Seattle Municipal Code Ch. 3.110 and operates under a perpetual Charter as issued on June 23rd, 1973, and amended on March 17th, 1976, September 21st, 1976, March 19th, 1985, October 1st, 1992, November 3rd, 1993 and August 26th, 2003; and,

WHEREAS, the PDA Charter states: “the PDA, as a public trustee with the mission to ensure that the traditional character of the Public Market is preserved, is authorized to perform renewal, rehabilitation, preservation, restoration, development, and non-profit management of structures and open spaces in the above-described areas in a manner that affords a continuing opportunity for Public Market farmers, merchants, residents, shoppers, and visitors to carry on their tradition of market activities. In addition to upgrading structures and public amenities in and around the Market Historical District, the PDA will initiate programs to expand food retailing in the Market Historical District, especially the sale of local farm produce...”; and,

WHEREAS, on June 23rd, 1975 the Seattle City Council adopted ordinance No. 104657 an ordinance relating to use and occupation of the Pike Place Farmers market and amending Sections 1, 2, 5, 7, 12, 13, 15 and 16 of and adding new sections designated Sections 3A and 3B to Ordinance 102826, to designate the Chief Executive Officer of the Pike Place Market Preservation and Development Authority as the “Market Master” and to transfer and grant to said Executive Officer certain rule-making and other functions in connection with the management and operation of said Market; and,

WHEREAS, on November 24th, 2008 the Seattle City Council adopted ordinance No. 122864 an ordinance relating to the Pike Place Market, authorizing a renewal of the agreement with the Pike Place Market Preservation and Development Authority commonly known as the “Hildt-Licata Agreement,” for a term of ten years. Amending an ordinance adopting the “Hildt Agreement” in 1983 and renewed in 1999 as the “Hildt Licata Agreement”; and,

NOW THEREFORE, BE IT RESOLVED,

that the Council has identified the Farm Program as a key strategic issue for 2013 with the goal of increasing Farmer Profitability and Farmer Participation in the Pike Place Market; and,

the PDA will pursue multiple strategies in 2013 in support of Farm and Food programs including;

a.
b.
c.
d.
e.

*to be completed reflecting outcome of retreat
additional opportunities may exist for strategic expansion of this program and,

Farm program staff shall update the PDA Council annually on the status of vendor sales, attendance counts, and operational issues related to all Pike Place Market Express-branded satellite market locations and,

these programs and strategies are being developed to ensure that the Pike Place Market will continue to be a local hub for farmers and food in Seattle’s urban environment and directly connect consumers with quality food in keeping with our “Meet the Producer” mission.

the PDA Council authorizes the Executive Director or his designee to pursue the above identified goals consistent with the annual budget and work plan.
Pike Place Market
2012 RAPID MARKET ASSESSMENT
Initial Results
Prepared by Colleen Donovan – September 19, 2012

RMA date: Saturday, September 15, 2012
Market organization: Pike Place Market PDA
        www.pikeplacemarket.org
Market managers: Teri Wheeler, Market Master; Zack Cook and David Dickinson
RMA location: Farm vendors that set up on cobblestones on Pike St, Seattle WA [Note: Pike Place manages 9 acres]
RMA time: 10:00am to 2:00pm [Note: the market is open from 9:00am to 6:00pm]
Market season: Year-round [Note: open 19½ hours a day, 362 days a year]

2012 Rapid Market Assessment Team

Clockwise: Kelly Lindsay, Pike Place; Joel Wachs, WSFMA/Mercer Island Farmers Market; Scott Davies, Pike Place; Teri Wheeler, Pike Place Market; Colleen Donovan, WSU Small Farms Program; Amanda Cross, Queen Anne Farmers Market; Emily Crawford, Pike Place; Bee Cha, WSU Small Farms Program; Karen Erickson, Everett and Snohomish Farmers Markets; Linda Morris, Auburn International Farmers Market; Sherry Palmiter, Chelan Evening Farmers Market; Judy Kirkhuff, Ballard Farmers Market/Seattle Farmers Market Association/WSFMA; and Dianna Goodsell, Pike Place.
Given the complexity and incredible scale of Pike Place Market, we had to approach this RMA differently. As outlined below, there is no other farmers market in the Pacific Northwest (and possibly the American West) that provides a realistic and useful point of comparison for Pike Place Market’s farmers market.

That said, we chose to do the best we can and contained the market in two ways to do the RMA. The first was in terms of time. We limited “the market” hours to from 10:00am to 2:00pm instead of a full market day (9:00am to 6:00pm). The second way was in terms of space. We created a “market within the market.” In this case, our “farmers market” for the RMA was confined to the row of farm vendors that were set up outside on Pike St (the cobblestones).

### Comparison with Typical RMA

<table>
<thead>
<tr>
<th>Feature</th>
<th>Typical Farmers Market*</th>
<th>Pike Place Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours per farmers market</td>
<td>4.5</td>
<td>8</td>
</tr>
<tr>
<td>Days per week</td>
<td>89% have 1 day a week</td>
<td>7 days a week</td>
</tr>
<tr>
<td>markets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Season</td>
<td>21 week season</td>
<td>Year round</td>
</tr>
<tr>
<td>Total market days/year</td>
<td>21</td>
<td>362</td>
</tr>
<tr>
<td>Total market hours/year</td>
<td>94.5</td>
<td>2,896</td>
</tr>
<tr>
<td>Average # of farm vendors</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Average # of craft vendors</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Average # of all vendors</td>
<td>49</td>
<td></td>
</tr>
<tr>
<td>Average daily shoppers</td>
<td>1,110</td>
<td></td>
</tr>
</tbody>
</table>

* Based on 2011 data from the WSFMA member markets

### I. SHOPPER COUNTS: Total estimated shoppers = 15,758

Shoppers were counted by “entrance” and by hour. Approximately 46% of shoppers entered from the Arcade side and approximately 54% of the counted shoppers entered from the Pike Street side. Also notes below.

#### Entrance Counts

<table>
<thead>
<tr>
<th>Time</th>
<th>Scott North end</th>
<th>Joel &amp; Dianna</th>
<th>Karen (and arcade)</th>
<th>Amanda South end</th>
<th>Kelly North end</th>
<th>Sherry &amp; Judy</th>
<th>Linda South end</th>
<th>Subtotal:</th>
<th>Estimate #</th>
<th>% by hour</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st hour</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:00 am-11:00 am</td>
<td>83</td>
<td>52</td>
<td>70</td>
<td>96</td>
<td>54</td>
<td>78</td>
<td>82</td>
<td>515</td>
<td>3,090</td>
<td>20%</td>
</tr>
<tr>
<td>2nd hour</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11:00 am-12:00 pm</td>
<td>150</td>
<td>97</td>
<td>60</td>
<td>89</td>
<td>79</td>
<td>96</td>
<td>84</td>
<td>665</td>
<td>3,930</td>
<td>25%</td>
</tr>
<tr>
<td>3rd hour</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:00 pm-1:00 pm</td>
<td>128</td>
<td>50</td>
<td>93</td>
<td>64</td>
<td>52</td>
<td>170</td>
<td>133</td>
<td>690</td>
<td>4,140</td>
<td>26%</td>
</tr>
<tr>
<td>4th hour</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1:00 pm-2:00 pm</td>
<td>117</td>
<td>92</td>
<td>96</td>
<td>85</td>
<td>77</td>
<td>168</td>
<td>123</td>
<td>758</td>
<td>4,548</td>
<td>29%</td>
</tr>
<tr>
<td>Subtotal:</td>
<td>478</td>
<td>291</td>
<td>319</td>
<td>334</td>
<td>262</td>
<td>512</td>
<td>422</td>
<td>2618</td>
<td>15,708</td>
<td>100%</td>
</tr>
<tr>
<td>Pre-opening:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>50</td>
<td>0.3%</td>
</tr>
<tr>
<td>Estimated # of Customers</td>
<td>2868</td>
<td>1746</td>
<td>1914</td>
<td>2004</td>
<td>1572</td>
<td>3072</td>
<td>2532</td>
<td>15,758</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td>% by Entrance</td>
<td>18%</td>
<td>11%</td>
<td>12%</td>
<td>13%</td>
<td>10%</td>
<td>19%</td>
<td>16%</td>
<td></td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>
**Team Notes:**

- **Hour 1** Judy and Sherry noted that the shoppers entering from Pike St seemed to pass straight through to Arcade. Therefore they were passing "through" market as opposed to into market.
- **In Hour 3,** Judy and Sherry noted that people were using their “entrance” to exit from the Arcade and apparently avoid the "bottle neck" in the fish throwing area.
- Multiple counters noted that people would "hang out" on the "cone line," making sight lines difficult.
- Multiple counters noted how difficult it was to tell where people were coming from.
- Scott noted in Hour 3 or 4 that people were coming in groups of 3 or 4.
- The first dot survey easel was set up very close to the cone line, creating some congestion in that area.

Due to the complexity of the situation, these counts are highly subject to interpretation and should only be considered very preliminary estimates.

**II. DOT SURVEY QUESTIONS**

An average of 730 people answered each dot survey question which represents an estimated intercept rate of 5% of shoppers on that day. Responses were tracked by hour.

<table>
<thead>
<tr>
<th>Dot Survey Question</th>
<th>Responses</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Where do you live?</strong></td>
<td>Downtown / Belltown</td>
<td>38</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Ballard / Queen Anne / Magnolia</td>
<td>24</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>Green Lake / Wedgwood / Ravenna / U-Dist /</td>
<td>21</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>Northgate</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Capitol Hill / Central District / Beacon Hill</td>
<td>30</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>Rainier Valley / Columbia City / Seward Park</td>
<td>6</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td>Sodo / Georgetown</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>West Seattle / White Center</td>
<td>17</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td>Other Seattle Neighborhood</td>
<td>14</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td>Bellevue, Kirkland, Redmond</td>
<td>30</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>Other King County</td>
<td>40</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Other Washington</td>
<td>70</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>Other US State or International</td>
<td>480</td>
<td>62%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td>770</td>
<td>100%</td>
</tr>
</tbody>
</table>

**Note:** A cruise ship was docked nearby.
2. How did you travel to the Pike Place today?

<table>
<thead>
<tr>
<th>Travel Method</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foot</td>
<td>285</td>
<td>37%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>5</td>
<td>1%</td>
</tr>
<tr>
<td>Small or Mid-sized Car</td>
<td>214</td>
<td>28%</td>
</tr>
<tr>
<td>Large Car, SUV, or Truck</td>
<td>109</td>
<td>14%</td>
</tr>
<tr>
<td>Bus or Light Rail</td>
<td>98</td>
<td>13%</td>
</tr>
<tr>
<td>Ferry</td>
<td>24</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>27</td>
<td>4%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>762</td>
<td>100%</td>
</tr>
</tbody>
</table>

Note: The results point to over a third of shoppers walking to the market. One question how the people on the cruise ship answered since they may have walked from the dock – which would be very different than walking from a downtown home or business.

3. How often do you shop for farm products at Pike Place Market?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly</td>
<td>68</td>
<td>9%</td>
</tr>
<tr>
<td>Twice a month</td>
<td>35</td>
<td>5%</td>
</tr>
<tr>
<td>Once a month</td>
<td>34</td>
<td>5%</td>
</tr>
<tr>
<td>Once or twice a season</td>
<td>126</td>
<td>17%</td>
</tr>
<tr>
<td>This is my first visit</td>
<td>279</td>
<td>38%</td>
</tr>
<tr>
<td>Other?</td>
<td>198</td>
<td>27%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>740</td>
<td>100%</td>
</tr>
</tbody>
</table>

Note: In the course of the RMA, shoppers pointed out that we did not have a “daily” option. This may account for some of the relatively high “Other” responses. But I suspect there is more to it. One possibility is that visitors have been to Pike Place Market before so it was not literally their first visit. Meanwhile, well over a third (38%) of respondents reported that it was their first visit. And 19% reported shopping at Pike Place Market at least once a month.

While we wrote “for farm products” to try and focus on the farm vendors, the results of the last question lead me to suspect that at least some people don’t read very carefully and may have answered more generally.
4. How much have you (or will you) spend on farm products at Pike Place Market today?

<table>
<thead>
<tr>
<th>Amount</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>126.5</td>
</tr>
<tr>
<td>$1 to 5</td>
<td>112.5</td>
</tr>
<tr>
<td>$6 to 10</td>
<td>114</td>
</tr>
<tr>
<td>$11 to 15</td>
<td>69</td>
</tr>
<tr>
<td>$16 to 20</td>
<td>77</td>
</tr>
<tr>
<td>$21 to 30</td>
<td>60</td>
</tr>
<tr>
<td>$31 to 40</td>
<td>49</td>
</tr>
<tr>
<td>$41 to 50</td>
<td>27</td>
</tr>
<tr>
<td>$51 to 75</td>
<td>20</td>
</tr>
<tr>
<td>$76 to 100</td>
<td>4</td>
</tr>
<tr>
<td>Over $100</td>
<td>18</td>
</tr>
</tbody>
</table>

**TOTAL** 677 100%

The average estimated spending “on farm products” was calculated to be $16.93.

5. How much will you spend at other Pike Place Market businesses or restaurants today?

<table>
<thead>
<tr>
<th>Amount</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>57</td>
</tr>
<tr>
<td>$1 to 5</td>
<td>45</td>
</tr>
<tr>
<td>$6 to 10</td>
<td>79</td>
</tr>
<tr>
<td>$11 to 15</td>
<td>62</td>
</tr>
<tr>
<td>$16 to 20</td>
<td>95</td>
</tr>
<tr>
<td>$21 to 30</td>
<td>96</td>
</tr>
<tr>
<td>$31 to 40</td>
<td>55</td>
</tr>
<tr>
<td>$41 to 50</td>
<td>59</td>
</tr>
<tr>
<td>$51 to 75</td>
<td>52</td>
</tr>
<tr>
<td>$76 to 100</td>
<td>23</td>
</tr>
<tr>
<td>Over $100</td>
<td>57</td>
</tr>
</tbody>
</table>

**TOTAL** 680 100%

The average estimated spending “on other Pike Place businesses and restaurants” was calculated to be $31.51.

6. What is your **primary** reason for shopping at the market today?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthy food</td>
<td>25.5</td>
</tr>
<tr>
<td>Environmentally friendly food</td>
<td>18.5</td>
</tr>
<tr>
<td>Tasty food</td>
<td>89</td>
</tr>
<tr>
<td>Affordable food</td>
<td>5</td>
</tr>
<tr>
<td>Support a local farmer</td>
<td>55</td>
</tr>
<tr>
<td>Atmosphere</td>
<td>325</td>
</tr>
<tr>
<td>Seeing friends</td>
<td>37</td>
</tr>
<tr>
<td>Crafts</td>
<td>35.5</td>
</tr>
<tr>
<td>Prepared foods</td>
<td>6</td>
</tr>
<tr>
<td>Other</td>
<td>156.5</td>
</tr>
</tbody>
</table>

**TOTAL** 753 100%

Most notable here is the unusually high Other (21%) and Atmosphere (43%).
In addition, a seventh question asked: **What is your favorite thing about the farmers at Pike Place Market?**

Nearly 170 responses written on the flip charts were transcribed and sorted based on initial themes and frequencies.

<table>
<thead>
<tr>
<th>Top Themes</th>
<th>Number of Comments</th>
<th>Most frequent responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL FEEL/PACKAGE</td>
<td>39</td>
<td>Friendly (11), atmosphere (7) [also an option on Q6], variety (7)</td>
</tr>
<tr>
<td>FARM PRODUCTS, specific</td>
<td>41</td>
<td>Flowers (28); Veggies (5); no other specific farm product had more than 2 comments.</td>
</tr>
<tr>
<td>FOOD attributes</td>
<td>19</td>
<td>Local (8), sustainably/responsibly grown (6), organic (4), fresh (4)</td>
</tr>
<tr>
<td>ENTERTAINMENT</td>
<td>13</td>
<td>People watching (7)</td>
</tr>
<tr>
<td>FOOD, general</td>
<td>12</td>
<td>Food; great food; delicious food (11)</td>
</tr>
<tr>
<td>PEOPLE</td>
<td>12</td>
<td>The people here are awesome; all the great people (3)</td>
</tr>
<tr>
<td>CRAFTS</td>
<td>11</td>
<td>Crafts (3); culture (3)</td>
</tr>
</tbody>
</table>

**III. CONSTRUCTIVE COMMENTS AND OBSERVATIONS**

In addition, each of the RMA Team members were asked to note their construtive comments and observations about the vendors and products; atmosphere; and physical site.

Please note: These “initial results” will be reviewed by the WSU team and finalized in the full RMA report.
U-District Farmers Market
2012 RAPID MARKET ASSESSMENT
Summary of Results
Prepared by Colleen Donovan – August 28, 2012

RMA date: Saturday, August 25, 2012
Market organization: Neighborhood Farmers Market Alliance
www.seattlefarmersmarkets.org
Market staff: Chris Curtis, Executive Director; Kira Doley, Market Manager; Julian O’Reilley, Operations Manager; and Ivy Fox (also below)
Market location: 50th and University Way NE, Seattle, WA
Market time: 9:00 am to 2:00 pm
Market season: Year-round (51 weeks a year)

Assessment Team: Colleen Donovan, WSU Small Farms Program; Florence Vincent, Yelm Co-op; Jennifer Brown, WSFMA; Kaho Makiba, iLeap intern; Teri Wheeler, Pike Place Market; Rieko Izumizarra, iLeap intern; Joe Gruber, U-District Food Bank & NFMA board Karen Kinney, WSFMA; Ivy Fox, Broadway (NFMA) Market Manager; Bee Cha, WSU Small Farms Program; Amanda Cross, Queen Anne Farmers Market; Geana Henkes, Yelm Farmers Market Manager.
I. **CUSTOMER COUNTS**: Total estimated customers = 4,960

<table>
<thead>
<tr>
<th>Time</th>
<th>NE: University Way</th>
<th>SE: University Way &amp; 50th</th>
<th>SW: 50th &amp; Brooklyn</th>
<th>NW: Brooklyn Ave</th>
<th>Subtotal</th>
<th>Estimated # of Customers</th>
<th>Percent by Hour</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st hour</td>
<td>66</td>
<td>40</td>
<td>51</td>
<td>19</td>
<td>176</td>
<td>1,056</td>
<td>21%</td>
</tr>
<tr>
<td>2nd hour</td>
<td>48</td>
<td>51</td>
<td>30</td>
<td>29</td>
<td>158</td>
<td>948</td>
<td>19%</td>
</tr>
<tr>
<td>3rd hour</td>
<td>42</td>
<td>52</td>
<td>54</td>
<td>23</td>
<td>171</td>
<td>1,026</td>
<td>21%</td>
</tr>
<tr>
<td>4th hour</td>
<td>32</td>
<td>53</td>
<td>47</td>
<td>33</td>
<td>165</td>
<td>990</td>
<td>20%</td>
</tr>
<tr>
<td>5th hour</td>
<td>40</td>
<td>26</td>
<td>33</td>
<td>34</td>
<td>133</td>
<td>798</td>
<td>16%</td>
</tr>
<tr>
<td>Subtotal:</td>
<td>228</td>
<td>222</td>
<td>215</td>
<td>138</td>
<td></td>
<td>4,818</td>
<td>97%</td>
</tr>
<tr>
<td>Pre-opening:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>142</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

**Estimated # of Customers**

| Percent by Entrance | 1,368 | 1,332 | 1,290 | 828  | 4,960 | 100% |

II. **DOT SURVEY QUESTIONS**

An average of 844 people answered each dot survey question which represents an estimated intercept rate of 17% of shoppers on that day. Responses were tracked by hour.

<table>
<thead>
<tr>
<th>Dot Survey Question</th>
<th>Responses</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Where do you live?</strong></td>
<td>University District</td>
<td>172</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>Ravenna/Bryant</td>
<td>98</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>Roosevelt/65th</td>
<td>29</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>Laurelhurst/Sand Point</td>
<td>37</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>Lake City/Wedgewood/Maple Leaf</td>
<td>93</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>Wallingford</td>
<td>59</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Greenwood/Phinney Ridge/Greenlake</td>
<td>51</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>Fremont/Ballard</td>
<td>42</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Capitol Hill</td>
<td>73</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>Other Seattle Neighborhood</td>
<td>97</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>Other King County</td>
<td>37</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>Other - Western WA</td>
<td>13</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td>Eastern WA</td>
<td>9</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td>55</td>
<td>6%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td>865</td>
<td>100%</td>
</tr>
</tbody>
</table>

| **2. Is the farmers market your primary reason for coming to the U-District neighborhood today?** | Yes                         | 649   | 77% |
|                                                                                     | No                          | 182   | 21% |
|                                                                                     | Not sure                    | 6     | 1%  |
|                                                                                     | Other                       | 11    | 1%  |
| **TOTAL**                                                                            |                                                                          | 848   | 100%|
3. How much have you (or will you) spend at the farmers market today?

<table>
<thead>
<tr>
<th>Amount</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>23</td>
<td>3%</td>
</tr>
<tr>
<td>$1 to 5</td>
<td>46</td>
<td>6%</td>
</tr>
<tr>
<td>$6 to 10</td>
<td>74</td>
<td>9%</td>
</tr>
<tr>
<td>$11 to 15</td>
<td>62</td>
<td>7%</td>
</tr>
<tr>
<td>$16 to 20</td>
<td>129</td>
<td>16%</td>
</tr>
<tr>
<td>$21 to 30</td>
<td>106</td>
<td>13%</td>
</tr>
<tr>
<td>$31 to 40</td>
<td>97</td>
<td>12%</td>
</tr>
<tr>
<td>$41 to 50</td>
<td>99.5</td>
<td>12%</td>
</tr>
<tr>
<td>$51 to 75</td>
<td>92.5</td>
<td>11%</td>
</tr>
<tr>
<td>$76 to 100</td>
<td>60.5</td>
<td>7%</td>
</tr>
<tr>
<td>Over $100</td>
<td>42.5</td>
<td>5%</td>
</tr>
</tbody>
</table>

Estimated average spending per respondent was $36.03

4. How much have you (or will you) spend at businesses on The Ave/University Way today?

<table>
<thead>
<tr>
<th>Amount</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>474</td>
<td>57%</td>
</tr>
<tr>
<td>$1 to 5</td>
<td>106</td>
<td>13%</td>
</tr>
<tr>
<td>$6 to 10</td>
<td>82</td>
<td>10%</td>
</tr>
<tr>
<td>$11 to 15</td>
<td>39</td>
<td>5%</td>
</tr>
<tr>
<td>$16 to 20</td>
<td>59</td>
<td>7%</td>
</tr>
<tr>
<td>$21 to 30</td>
<td>30</td>
<td>4%</td>
</tr>
<tr>
<td>$31 to 40</td>
<td>15</td>
<td>2%</td>
</tr>
<tr>
<td>$41 to 50</td>
<td>8</td>
<td>1%</td>
</tr>
<tr>
<td>$51 to 75</td>
<td>6</td>
<td>1%</td>
</tr>
<tr>
<td>$76 to 100</td>
<td>3</td>
<td>0%</td>
</tr>
<tr>
<td>Over $100</td>
<td>9</td>
<td>1%</td>
</tr>
</tbody>
</table>

Estimated average spending per respondent was $6.93

TOTAL 832 100%

In addition, a fifth question asked: **What is your favorite thing about the U-District farmers market?**

A total of 456 comments were recorded. Shoppers appeared to take the question seriously and respond thoughtfully. Comments illustrated shoppers’ passions either through the actual content, size of writing, or liberal use of exclamation points.

Initial results were grouped by subject matter. The most common responses are listed below in order of frequency. A more thorough discursive analysis will be included in the full report.

**MARKET FEATURES (123 comments)**

- friendly atmosphere/friendly people; it is a friendly place for local foods & farmers to come together! People with fantastic attitude
- music; happy musicians
- sense of community; neighborly contribution; nice neighborhood feeling
- atmosphere; fun; great vibes to start the day; good vibes; vibrancy/spirit; feel of it; "the vibrancy, the color, product of industry, the smells, the people, the enthusiasm. Farmers markets are my religion."
- It's open all year; year-round deliciousness
- close to home/walking here; I don't have to find parking (walking distance to home); location
- the sun; warm weather; sea breeze
ATTRIBUTES OF PRODUCTS (109 comments)
- food quality; quality of produce; quality produce; consistent quality
- fresh
- organic
- local

SPECIFIC PRODUCTS (79 comments)
- flowers (beautiful)
- salmon; Loki salmon; best salmon ever
- bread; baked goods; pastries
- peaches
- cheese; dairy; Pt Madison cheese
- happy meat; grass-fed beef; meat
- veggies; vegetables

EXPERIENTIAL ATTRIBUTES/VALUES (41 comments)
- knowing the farmers! (our friends); meeting farmers; interacting with the farmers; connection with farmers
- being able to buy direct from farmer/maker
- supporting local farms/supporting local goods; supporting local farmer(s); support Wash farms!
- food, farmers, community -- this is our primary "grocery store"
- supporting local, sustainable, organic food

VARIETY (33 comments)
- overall variety; amazing variety; great variety; variety of vendors; variety - a range of my fav farms; awesome selection; large selection; vast selection
- fresh produce selection; variety of produce; best veggie/farmer selection
- food, not crafts; it's food centric
- variety of foods; best food selection of all the Seattle farmers markets
- variety of organic vendors

VENDORS (30 comments)
- farmers; friendly farmers
- vendors; great vendors/people; especially Steve the cheese guy (1); local wonderful vendors (family vendors); awesome producers; great produce and wonderful vendors
- food vendors
- quality of vendors is very high
- organic vendors rock

SPECIFIC VENDORS (24 comments)
- Rama Farms; rama peaches. They rock!
- Loki
- Nash’s
- youth vendors! P-patch

III. SHOPPER QUESTIONNAIRE

In addition to the “dot survey,” we added a one-page, 10 question paper survey. Shoppers completed the survey on a clipboard and received $2 in Market Bucks as an incentive. The surveys were collected each hour to note any changes in responses throughout the market day. In all, 351 surveys were completed by shoppers.

IV. CONSTRUCTIVE COMMENTS AND OBSERVATIONS

In addition, each of the RMA Team members were asked to note their construtive comments and observations about the vendors and products; atmosphere; and physical site.

For more information, please contact:
Marcia Ostrom, Small Farms Leader, or Colleen Donovan, Research Associate
Washington State University, CSANR Small Farms Program
mrostrom@wsu.edu or (509) 663-8181 ext. 263
colleen.donovan@wsu.edu
CONCEPT PAPER

Food Web

A homegrown initiative to increase and sustain the capacity of the Puget Sound regional food system to support health, community regeneration, economic development, food security, and living democracy.
initiators
The organizers of the project are a consortium of regional community leaders and organizations with years of experience working to advance multiple aspects of the local food system who identify the need to move our collective work to the next level of impact. The initiating team is partnering with Regenesis and Developmental Economies Group (DEGi) who are experienced in collaborative, holistic and transformational approaches to community and economic development and Food Commons 2.0, a national network of business and community leaders.

Richard Conlin, Seattle City Councilmember
Tim Crosby, Slow Money Northwest
Mary Embleton, Director, Cascade Harvest Coalition
Erin MacDougall, Public Health – Seattle & King County
Branden Born, Assistant Professor, Urban Design and Planning, University of Washington
Karen Kinney, Washington State Farmers’ Market Association
Viki Sonntag, Ecopraxis
Tammy Morales, Urban Foodlink
Jon Ramer, Ideal Network
Karma Ruder, Center for Ethical Leadership
Phyllis Shulman, Office of Seattle City Councilmember Richard Conlin

Food Web Concept Endorsers (initial list):
Valerie Segrest, Northwest Indian College
Ellen Gray, Washington State Food and Farming Network
Howard Frumkin, M.D., Dr. P.H., Dean, School of Public Health, University of Washington
Diane Dempster, Tilth Producers
Linda Nageotte, CEO, Food Lifeline
John Gardner, Dean and Vice President of Academic Affairs, BGI Bainbridge Graduate Institute
Olivia Robinson, Regional Affairs Coordinator and staff lead Regional Food Policy Council, Puget Sound Regional Council
Brad Gaoloch, Ph.D., Director, Washington State University Pierce County Extension
Andrea Platt Dwyer, Executive Director, Seattle Tilth
Jonathan Scherch, Founder and Executive Director at Pacific Bamboo Resources, Core Faculty, Antioch University Seattle
Andrew Stout, CEO-Founder, Full Circle Farm
Linda Chauncey, Associate Dean, Seattle Culinary Academy, Seattle Central Community College, Chef’s Collaborative
Charlotte Garrido, Kitsap County Commissioner District #2
Jae Easterbrooks, Vice President, Commercial Relationship Manager, One Pacific Coast Bank
Siri Erickson-Brown, Owner, Local Roots Farm
Lawrence Yee, Food Commons
James Cochran, Food Commons, Owner, Swanton Berry Farm

(affiliations for identification purposes only)
Assets of The Puget Sound Region
The Puget Sound Region is abundant with assets and the potential to achieve a strong regional food system.

Many decades of efforts supporting local and regional food sustainability and security have created a rich collection of active participants in the local food community—small and mid-sized farmers, community and backyard gardeners, farmer’s markets, schools, major institutions, local independent grocers, distributors, artisans, restaurants, and food cooperatives, as well as an increasing number of conscious consumers.

Fueled by supportive city and county policies, a growing appreciation of the importance of healthy food, and local entrepreneurial spirit, new ventures are emerging regularly, and the need to coordinate on a larger scale is growing.

The Need for Food Web
After years of efforts however, there remain a number of significant challenges to the region’s ability to fully achieve its potential and sustain a viable food system into the future including:

- The increasing number and variety of food system actors has led to increasing complexity. This in turn has created dynamics that affect coordination and collaboration of efforts, inhibiting overall effectiveness and increasing conflicts.
- Decisions related to policies or budgets are made by a variety of agencies without knowledge and evaluation of system-wide impacts.
- Programs compete for similar funds and businesses work independently, lacking shared infrastructure investment, such as small scale processing facilities that could benefit multiple groups.
- At the same time that the region has made significant progress, it has lost essential programs and services.
- Farmland is disappearing or is underutilized.
- Local and county governments are challenged to integrate policies and programs related to climate action, transportation, economic development, environmental protection, health, and emergency preparedness, all of which impact the food system directly.

What impedes our ability to achieve our potential?
- There is no collective understanding or agreement about the systemic social, political, economic, and environmental conditions needed in this region to support a viable and regenerative food system over time.
• Given our current segmented efforts, we lack the overall ability to evaluate whether these conditions are in place, whether they remain in place, or whether there is progress on efforts as a whole.
• We lack the organizational capacity to integrate the many entrepreneurial efforts that abound, increase our shared learning, and maximize long-term impacts.
• Even after years of government and non-government efforts, there are still significant challenges to creating enduring and systemic changes.
• Issues and policies are often dealt with separately by sector, or by different governmental agencies.

How do we identify and fulfill the unique potential of the region?

We cannot address each issue separately as we have done in the past. Work needs to be integrated and intentional to be strategic and sustainable. Work needs to go beyond traditional strategic planning processes.

Generating new learning, engagement, and community development opportunities and creating a different nature of organization that encourages participants to “think like an ecosystem” (Hans Peter Duerr) requires a very different approach than traditional strategic planning.

Food Web Initiative

Food Web is seeking to pioneer new approaches that are based on “living systems methodology” and that grow out of the natural ecology and culture of our place to address these kinds of challenges.

Its comprehensive approach represents the input and ideas of numerous experts and leaders in sustainable food systems throughout the region that have been discussed over a year of dialog and convenings. It is the reflection of years of on the ground experience, observation, and synthesis to identify how to fulfill the unique potential of the region.

Purpose

Food Web is proposed to be established over a three-year effort to:

• integrate and align efforts through unprecedented cross-jurisdictional and public-private coordination, relationship building, partnering and capacity building in which food system actors blend skills, assets, and creativity toward a long-term vision, shared frameworks and strategies
• enhance opportunities for communication and cooperative decision-making
• maximize long-term impacts and enhance existing programs, bringing a whole systems perspective as a context for catalyzing and fostering more effective collaboration, sharing of resources and integration of efforts, initiatives, and policies, without compromising autonomy, innovation, or entrepreneurial spirit
• identify key leverage points for food system transformation and incubate and implement key projects, policies, and actions
• support the region’s long-term sustainability by increasing the capability of organizations, businesses, communities, government, and institutions (food system actors) to create a regional food system that is democratic, equitable, enduring, inherently regenerative, and therefore more resilient
• design and implement a new form of network that will weave together efforts and steward integration and collaboration over time
Scale
The regional food system is not bounded by political boundaries and there are multiple interactions and transactions within the food system that are not restricted by geographic or political boundaries. Also, there are a number of ways that one can describe the foodshed. The Food Web initiative can be adapted to a chosen scale.

Option one: is that the first year effort be focused in King County, but informed by the greater system that surrounds it and year two and three the effort will involve, influence and inform widening rings of stakeholders and actions.
Option two: is to start broader with four counties that are represented in the Puget Sound Regional Council Regional Food Policy Council (King, Snohomish, Pierce, and Kitsap) and include Skagit County.

Core Components of Food Web

**Outreach and engagement**

Establishing and Weaving the Network

Integral Assessment and Story of Place Change Process

Food Commons/Regional Economic Development Strategy

Assessment of Conditions for Healthy System

Implementation of Key Actions

System Mapping

Capacity and Capability Building

Outreach and engagement of food system actors:
This begins with broadening awareness of Food Web for food system actors and identifying initial opportunities for engagement. As the initiative continues this work deepens and involves a widening ring of stakeholders in a variety of ways.

Integral Assessment and deepening the understanding of Puget Sound’s unique potential through establishing a “Story of Place Change Process” (see attachment):
A whole systems (cultural, economic, geographic, climatic, and ecological) assessment of the place and its food resources/programs will be conducted. This process engages a wide range of people in the food system through interviews and charrettes as well as integrates information from field visits, existing data, reports, and maps. As a Story of Place is shaped, people from different areas of expertise and sectors
can begin to align around a shared systemic understanding of the region, its unique potential and food system intervention opportunities. Utilizing the findings of the Integral Assessment, existing and potential efforts will be analyzed and contrasted to identify meaningful possibilities for more effectively strengthening the regional food system.

**Assessment of conditions that support a regional food system:**
Conditions essential for a viable and vital regional food system will be identified. Comparison of these conditions to existing programs, enterprises, policies, and efforts will be evaluated. Gaps will be identified.

**System mapping:**
The Food Systems Policy Landscape Map currently being designed at the Regional Food Policy Council will be expanded over the duration of the initiative to reflect in one format the complexity of the regional food system.

**Capacity and Capability-building of food system actors:**
Capacity and Capability-building will be involved in every component that engages participants. In addition, two specifically designed educational and capability-building series will be implemented: a Collective Leadership Development series and a Business/Organization Development series. The Collective Leadership Development series is a yearlong series of 8 sessions spaced at 4-6 week intervals. A small cohort of individuals who live in the region and are involved in food system work will learn living systems thinking methodology and apply it to leadership, projects, community development, and institutions. They will implement field work related to the initiative. The Business/Organization Development series is focused on businesses and organizations who want to lead the way in shifting the way of working on food—away from a fragmented approach to working toward an integrated system approach. These participants be ones who are implementing specific projects or businesses that are aligned with or initiated through Food Web and Food Commons.

**Identification and Implementation of key actions:**
Through Food Web interactions existing efforts will consider how to align and reshape in order to better meet the conditions essential for a healthy food system. Leverage points where interventions/efforts will energize the system as a whole will be identified through systems dynamic mapping. Initiation and implementation of these interventions/efforts will emerge out of a greater understanding of the system. Food Web will support and launch demonstration projects and increase the effectiveness of existing projects and programs.

**Food Commons prototype/Regional Economic Development Strategy:**
The Food Commons seeks to connect local and regional food system enterprises in a cooperative national federation that enhances their profitability and sustainability while creating and supporting a robust system of local community financing, ownership, management and accountability. As a regional prototype site, Food Web will lead the effort and convene regional stakeholders to explore and establish the commercial viability and value of the Food Commons business model and to develop a regional economic development strategy. New food and agricultural business enterprises will be developed and existing enterprises will be integrated more fully. (see attached summary)

**Weaving and structuring the network:**
Through the many interactions over the course of the initiative we will build a more collective understanding of how best to support the integration and alignment of efforts and what structure/operational network is needed to steward this work over time. We will develop an appropriate structural or organizational form and identify and find what resources may be needed for support.
Funding Plan
We are currently seeking funders as partners in the initiative. Food Web could be funded in phases.

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Attachments
A. Summary of Food Commons
B. Description of Story of Place Change Process and Integral Assessment
Story of Place® — A Transformative Change Process

Communities seeking sustainability face an increasingly complex, rapidly shifting environment. Technical solutions can only succeed and endure in the context of community understanding, cooperation and support. This requires vigorous participation by multiple diverse stakeholders, adding even more complexity.

Story of Place® is a regenerative change process that builds the capability to see opportunity in complexity, and the will to take on the whole-system transformation required for enduring change. It sets the stage for joining diverse stakeholders around a larger shared purpose and effort by approaching change efforts in terms of the contribution people and a community can make to the health of their place (rather than a narrow focus on harm reduction), and the reciprocity and resilience they gain as a result. It develops the ability to think, act and collaborate from a whole-systems understanding. It reveals opportunities for initiatives that can simultaneously stimulate economies that nourish and are nourished by the distinctive ecological and cultural diversity of their place; grow community creativity and resilience; reweave the bond between nature and culture; and promote collective decision-making and collaborative action.

**Key elements of this approach:** There is no formula for carrying out a Story of Place® change process; each is designed to address the unique nature of a place, and the requirements of the change initiative. A framework of key elements guides its design and implementation, and includes 6 phases that iterate as it moves out and across scales.

**Defining** reveals the system (versus the element or problem) that the change effort needs to focus on to accomplish its overarching aim, and the nested socio-ecological wholes, or place, within which the system exists.

**Discovering** begins with an Integral Assessment that develops three elements critical to transformative change: 1) an authentic basis for a shared community identity and vocation; 2) identification of systemic leverage points and indicators, and 3) the regeneration of a “story field” that promotes collaboration through growing connection to and caring about place. Focused on patterns and patterning rather than data collection, this whole-systems assessment (cultural, economic, geographic, climatic, biological and ecological) develops understanding of how community and place work as an interdependent living whole.

**Signifying** engages community members in developing a “story of their place” as a vehicle for collectively grasping complexity and growing shared meaning across widening rings of engagement. It unleashes creative energy for individual and collective actions, while maintaining alignment with the authenticity of place and the overall aim of the change initiative. Starting with the planning teams and moving out, facilitated dialogues enable people and organizations to share and create their own stories within the story of place framework, seeing their place within the whole, and the distinctive contribution they can and do make.

**Integrating** draws on the systemic understanding to develop strategies and action plans that harmonize human actions with the underlying dynamics of place and grow a shared sense of community identity and vocation.

**Embedding** focuses on embedding into the community the regenerative capability to creatively adapt while maintaining coherence across all its dimensions—economic, cultural, social and environmental. In a living world, sustainability is a process not a steady state to be achieved and then maintained. Human sustainability requires maintaining the dynamic potential for further evolution, which in turn depends on the regenerative adaptive capacity of both human and natural living systems within a place.

1 Place is the unique interweaving of nature, geology and human culture that has shaped a community's present-day life and is co-creating its future.

[www.regenesisgroup.com](http://www.regenesisgroup.com)
The evidence is mounting that the current global industrial food system is deeply flawed and by most measures, not sustainable. Furthermore, the recession of 2008 was a huge wake-up call that the growth economy of the past 150 years is in need of fundamental change.

The creators of Food Commons believe that the antidote to this unsustainable path is a 21st-century re-envisioning and re-creation of local and regional food systems. Buckminster Fuller’s idea is that “you can’t fight existing reality, but to change you must create a new model that makes the old obsolete”.

The Food Commons is a new economic paradigm and whole systems approach to localized food. It is an agrarian-based, community centered food system that is locally owned and operated and is connected regionally and nationally. It is innovatively bold in scope and potential.

The Food Commons model has three integral components:

1) The Food Commons Trust - a non-profit, quasi-public entity to acquire and own land and other physical assets, which will be made available at affordable rates to small- and mid-scale farmers and food entrepreneurs.

2) The Food Commons “Bank” - a community institution that enables local investing and ownership of Food Commons enterprises and provides financing and other financial services to these same operations.

3) The Food Commons Hub - a for-profit, locally owned, cooperatively integrated, business enterprise that manages and facilitates the complex logistics of food aggregation and distribution, as well a number of other essential functions and services such as food processing, job training, business incubation, and marketing.

We believe that the Food Commons has the potential to be a major foundation for local economic vitality and a magnet for a new generation of innovators who need guidance, access to capital, and a physical place to put their energy and creativity to work. We also believe that this system can revitalize and ensure the continuity of small and mid- sized farms that steward the land, nourish our communities and our health, and comprise the fundamental building blocks of local and national food security.

Creating a national Food Commons system will entail three major stages:

- Proof of concept: building Food Commons regional demonstration prototypes
- Designing and building the national support infrastructure
- Outreach and education

Within the next year we will identify 2-3 communities to start regional prototypes, and secure the necessary funding to do feasibility studies, systems design, and business plans for each. Within three years these prototypes and the national support infrastructure will be implemented.

www.thefoodcommons.org

Contact us: lkyee@ucdavis.edu
INTRODUCTION

The farmer-seller has served as the root and trunk of the institution which has become today's Pike Place Market. Throughout almost 70 years, the farmer has brought his own produce to the Market to sell directly to the consumer. The farmer has been much more than a tradition, and the Pike Place Market is referred to, as often as not, as the farmer's market.

Our society has been changing, at an ever-increasing rate, and we have observed this change in the Market through a marked decline in the number of farmers who sell their produce from the traditional stalls along Pike Place. The mainstay of the Market's history and traditions is being threatened. In recognition of this phenomenon, this paper is a study of the farmer-seller at the Pike Place Market and the possible means of attracting additional farmers to the Market. Other vendors are discussed, but the primary focus is on the farmer.

For purposes of this discussion, three categories of Market vendors have been identified. The first category consists of the merchants, who offer their goods and services for sale from a permanent place of business. Merchants may produce their wares, but in general they are brought from another source for sale to the customer. The distinguishing characteristic of the merchant is that his place of business is permanent. The second category, the arts and crafts vendor, rents a stall on either a daily or weekly basis, and peddles goods he or she has made or bought for sale to the consumer. Generally, the goods are made by the arts and crafts vendor, but they are sold from an open stall. The third category is focused upon in this paper -- the farmer. The farmer sells produce and plants, which he himself grows, from a stall rented on a daily basis. The distinguishing aspects of the three categories are their place of business for sale of goods to the consumer, and the proportion of goods sold which either are self-produced or bought by the vendor.

This paper discusses the other Market vendors in terms of their relationships with the farmers. The history of the farmer at the Market is traced, identifying some of the trends, patterns, and relationships which have occurred over time. Then the existing relationships between the farmer and various vendors are discussed. From this point, the reasons for the farmer selling his produce at the Market are examined relative to his alternative marketing outlets, and methods of attracting more farmers are outlined.

These alternative methods of attracting more farmers are evaluated for their effectiveness in attracting more farmers and for their ramifications on other vendors and aspects of the Market. Finally, recommendations of methods for attracting more farmers to the Market are made.
This paper does not address the issues regarding the availability and viability of merchants, arts and crafts, and farmers in the region. These issues are more appropriately the responsibility of other groups and agencies responsible for land use, agriculture, and occupations in the region, and many of the issues regarding the farmer are being studied by other governmental agencies at present. This paper will treat the Market as an alternative place for the vendor to sell his products, and examine methods of attracting more vendors to the Market alternative.
HISTORY AND RELATIONSHIPS

The Pike Place Market grew up around the farmer. In 1907, the Seattle City Council passed an ordinance establishing a farmer's market at Pike Place where farmers could bring their produce to sell directly to the consumers. Prior to the establishment of the public market at Pike Place, the primary outlet for fresh farm produce was through commission houses. The farmer turned his produce over to the wholesaler on consignment and received his commission after it was sold. The commission houses sold the produce through door-to-door peddlers, and small retail stores. The consumer's price was exorbitant, and the farmer's return was small. The establishment of Pike Place farmer's market provided an alternative for both the farmer and the consumer.

On the first Market Day, August 17, 1907, only ten farmers drove their wagons to Pike Place. Each wagon load was sold out within minutes of its arrival. Within a week, more than 70 farmers were selling their homegrown produce along Pike Place. Approximately two months later, the City had delineated stalls on Pike Place to lend order to the confusion created by so many farmers and consumers. Farmers knew they could sell what they produced at the Pike Place Market, and they came to supply the consumer's demand.

Over the next ten years, between 1907 and 1917, most of the buildings comprising the Main Market complex were built, and stalls in these buildings were rented to farmers selling their own eggs, produce, poultry, and preserves. Most of the farmers living close to the city came by horse and wagon, and later by truck, daily to the Market. Farmers in outlying areas such as Kent Valley, across the Sound and east of Lake Washington made the trip to the Market weekly. In the early twenties, the farmers were moved off the street and stall space was provided for them in the arcades along Pike Place.

For more than thirty years after the Pike Place Market was established, farmers continued to choose to come to the Market in great numbers to sell their home-produced goods directly to the consumer. Between 1925 and 1939 there were never any fewer than 418 permits issued to farmers at the Market, and in 1932 some 628 permits were issued.

The rules and regulations which governed the assignment of stall space to farmers required that a farmer, in order to sell his produce at the Market, be issued a permit by the City. Based on his permit number, the farmer would be assigned a stall from a complex rotation system. With the large number of farmers utilizing the Market during the twenties and thirties, the rotation system would leave a few farmers without stall space to rent on the busiest Saturdays and relegate poor selling stall space to many of the farmers. Therefore, to ensure himself of a stall on the busy Saturdays and to increase his chances for a good stall, many farmers were said to have taken out more than one permit for his farm, perhaps under his name and under that of his spouse. But even at two permits per farm, the number of farmers selling at the Market during the 1920's and 1930's was substantial.
The heyday of the farmer at the Market did not last forever. In 1939, there were 515 permits issued to farmers at the Market. By 1943, only 196 permits were issued. The relocation of the Japanese, who made up 60 to 80 percent of the pre-war fresh vegetable produce farmers at the Market, the war-time employment opportunities and the military personnel needs did much to diminish the number of available farmers to sell at the Market during World War II.

Since the Second World War, pressures of rapid urban spread into farming areas, trends toward large-scale farming, attractive non-farm employment opportunities, mass-marketing techniques for agricultural products and a host of other factors further reduced the number of farmers coming to the Market to sell their produce. By 1966, there were only 57 permits issued at the Market, and the number of farmers selling at the Market was less than experienced one week after the Market was first established. In 1969, the number of farmer permits issued reached an all-time low of 42, but has since increased to 60 in 1973.

Table I shows graphically the number of farmers attending the Market over the years. Data is not available for many of the years, but the trends are nevertheless very evident.

The success of Pike Place as a farmers' market did not go unnoticed by other entrepreneurs. Shortly after the establishment of the Pike Place farmers' market, most of the buildings along Pike Place were constructed and filled with a wide range of food vendors. These vendors rented space from the Market building owners on a permanent basis. Pike Place was not only the location to buy farm-fresh produce, but it became the center of retail food distribution for Seattle and the region. The Market contained meat, fish and poultry shops, dairy product stores, full-line groceries and bakeries in large numbers. There were also a few non-food vendors contributing to the Pike Place Market's version of the predecessor to the shopping center and supermarket.

The central downtown location, the convergence of trolley cars at the foot of Pike Street and the availability of an assortment of food products not available competitively elsewhere contributed to the draw of shoppers to the Market, and the presence of shoppers attracted more vendors.

The first 30 years of the Market were dominated by farmers and food vendors, selling a variety of edible items from permanent places of business. These merchants found the crowds attracted by the farmers to be conducive to their business. Correspondingly, the number of merchants was such that the farmers could capitalize on customers attracted by the various merchants.
<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Farmers</th>
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<tr>
<td>1925</td>
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</tr>
<tr>
<td>1930</td>
<td>600</td>
</tr>
<tr>
<td>1935</td>
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<td>10</td>
</tr>
<tr>
<td>1975</td>
<td>5</td>
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The table shows the number of farmers using Pike Place Public Market from 1925 to 1973, by number of permits issued.
NUMBER OF FARMERS USING «PIKE PLACE PUBLIC MARKET»
selected years
(by permit sales or number of permits issued)

<table>
<thead>
<tr>
<th>year</th>
<th>permits</th>
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</thead>
<tbody>
<tr>
<td>1925</td>
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</tr>
<tr>
<td>1926</td>
<td>627</td>
</tr>
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<td>1929</td>
<td>488</td>
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<td>1939</td>
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<td>1943</td>
<td>196</td>
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<td>1944</td>
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<td>1948</td>
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<tr>
<td>1972</td>
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</tr>
<tr>
<td>1973</td>
<td>60</td>
</tr>
<tr>
<td>1974 April 30</td>
<td>37</td>
</tr>
</tbody>
</table>
In the mid-thirties, however, changes began to take place in the Market independent of the farmer. Stiff health regulations concerning meat products and licensing requirements for butchers caused the exit of a number of meat shops from the Market. The dairy industry became more rigidly regulated, and the butter and cheese shops also declined in number.

More significantly, the trends of suburbanization through the fifties and sixties reduced the importance of the Market as a food outlet for the Seattle area consumer. Supermarkets in the residential neighborhoods offered the same products with greater convenience for the shopper than did the congested Market. The Market became the supplier of specialty foods or foods sold in a traditional style, but no longer served as the major food outlet for the non-discriminating consumer. As shoppers began purchasing more and more of their food needs from their neighborhood supermarkets, the number of food vendors at the Market diminished. A gradual change of use in the many shops of the Market took place and non-food merchants began opening for business in the former quarters of butcher shops, dairy product stores, groceries and bakeries.

The pace of merchant changes increased in the sixties and seventies, and at least 57 new businesses have come into the Market since 1960. There is not much vacant space in the Market, but the intensity of space utilization has diminished as the types of merchants changed over time in response to a different and diminished consumer segment of the Seattle area shopping at the Market. The arts and crafts vendor is perhaps the most recent addition to the Market, renting stall space left vacant by an absence of farmers. The emergence of arts and crafts vendors is a function of a changing society, and the Market offers a place where the vendors can come on a regular or intermittent basis and be assured of shopping traffic. A late 1960's phenomenon to the Market, the arts and crafts growth in the Market is very closely related to the decline in demand for space by farmers.

With the very wide range of goods offered at the Market, particularly in the area of fresh foods, the Market serves the consumers' needs in a manner much like a supermarket. However, the Market "supermarket" is made up of many individual vendors, each a specialist in his product offering. Where there exists more than one vendor offering the same goods, there is competition and reinforcement for the vendors and choice for the consumer. The farmer, protected by local ordinances and management policies, occupies a unique position within the Market mix.

The farmer supplies self-produced local seasonal vegetables to the shoppers in the Market. His place of business is on one of the low stalls along the Market arcades, where most of the other food vendors sell from permanent stalls. The farmer serves the whole Market with his mere being, an attraction found nowhere else in Seattle. This
customer pull is important to all other activities which take place within the Market. However, the farmer also offers a range of food products which are complementary to all other food products in the Market. From the 8 to 10 feet of display space which he is allocated on the low tables, he offers produce which only he can grow and sell in the small quantities required for his own sale. The farmer engages in limited competition with the other permanent produce vendors in the Market, and does not compete at all with the fruit, meat, fish, spice, bread, delicatessen and grocery vendors. On the whole, there is very little direct competition between the farmer and the other permanent food vendors.

Because the farmer has traditionally sold his own produce, his attendance at the Market has very closely approximated the normal growing season. Depending upon the crop harvested at any given time during the growing season, which is normally from May through November, different numbers of farmers will attend the Market offering different crops. The daily rental of the low tables and the rotation of stall assignments have worked very well in distributing the farmers among the various selling locations along the Market arcades. The seasonal and crop fluctuations naturally produce times when there are empty tables, when the supply of selling spaces exceeds the number of farmers attending the Market. In the last decade, the low table space not occupied by farmers has found another tenant—the arts and crafts vendor.

As the number of farmers attending the Market declined over time, the number of unassigned stalls increased. Farmers were informally permitted to spread their merchandise beyond the boundaries of their assigned spaces. This allowed the farmer to display more produce; and concurrently helped the low tables appear full despite the diminishing number of farmers. Needless to say, this arrangement was pleasing to the farmers, who could vividly remember the days when demand for table space was so severe that there were some Saturdays when one had to return to the farm with a truckload of produce for lack of an available stall. There was a time, during the 1930's and early 1940's, when the Market building owners rented unoccupied low stall space to non-farmers. This occurred primarily in the off-season, and vendors would rent the stalls to demonstrate such handy implements as glass cutters and razor blades. However, this practice was discontinued when the crowds these demonstrations would attract began to congest the arcade and prevent the free flow of shopping customers.

The arts and crafts vendors have been a more compatible co-occupant of the low stalls with the farmer. But this relationship has not been without conflict. While the individuals appear to work side-by-side agreeably, spelling each other from time to time, there are inherent conflicts created by the nature of products sold and by the stall assignment system. The use of water by farmers to keep their produce fresh can be damaging to the dry goods sold by arts and crafts. In addition, the empty stalls between farmers, once the expansion area produced by strategic stall assignment by the farmers, are frequently
filled by arts and crafts vendors, and spreading is no longer possible. These concerns are covered in a later section of this report.

The space problems between the arts and crafts vendors and the farmers occur only in the growing season. During the off season, when farmers are not attending the Market in large numbers, the arts and crafts vendors and the permanent food merchants contribute greatly to the Market. They maintain their businesses over the late fall, winter and early spring months, continuing the function of the Market in the farmer's absence. The permanent food merchants provide the basic produce and other food items demanded by the Market shopper, and the arts and crafts vendors sell their hand-crafted products, keeping the low stalls, otherwise vacant from the lack of farmers, full. This activity prevents the Market from becoming merely a seasonal shopping place.
THE MARKET AND THE FARMER

Alternative Outlets for Local Fresh Produce

Hitherto, the Pike Place Market and the roles the various vendors play within it have been discussed. But in order to identify methods of attracting additional farmers to the Market, it is necessary to examine the alternative markets available to the farmer and the particulars and peculiarities of the Pike Place Market as a marketing outlet for the farmer. Additionally, the characteristics of the farmer who is currently utilizing the Market, must be identified and contrasted with all other farmers. Finally, the future farmer who might utilize the Market as his produce outlet should be identified. After these items have been identified and examined, conclusions can be drawn which will aid in identifying methods of attracting more farmers to the Pike Place Market.

The farmer's methods of marketing his produce have changed over the years. At least two alternatives, popular several decades ago, have significantly diminished in recent years. These are the roadside stand and door-to-door and store-to-store selling. Roadside stands are difficult to maintain on a year-round basis for selling the farmer's own produce. In most cases, these stands emerge when a certain crop is in season, and customers look for the familiar stand where the farm-fresh product is being sold alongside the farm. As a result, there is a high degree of crop specialization in roadside selling, as stands are filled with pumpkins, corn, apples or whatever crop is being harvested on the farm at the time. Rarely does a farmer sell a wide variety of products from his own farm. Some of the more successful roadside stands have expanded their offering by buying and selling crops produced by neighboring farmers as well as purchasing from wholesaling establishments. A farmer rarely will farm exclusively for his roadside stand, but rather will use the stand to capture a retail price on a portion of his crop.

Roadside stands opportunities are dependent upon the proximity of the farm to a well trafficked high-access highway. These roads are diminishing as more people travel the limited-access expressways which allow people to pass through or by our farming communities at high speed. In a few cases, some farmers have built a reputation for quality produce of one kind or another, and have been able to set up their stands off the major roads. Nevertheless, the stands which sell their own produce are open for a duration no longer than the harvesting period for the particular crop of specialization.

Door-to-door and store-to-store selling by the farmer have declined over the years. Today, there are a few independent grocery stores to buy fresh produce directly from the farmer, and there are correspondingly few routes available. Many of the very small independent grocery stores handle no fresh produce. The few routes which do exist are highly dependent on the particular crop sold. Door-to-door
selling has all but disappeared from the Seattle area. Economic forces have made peddling, or buying from the farmer to sell to the retailer or consumer, more attractive than growing to sell on a route. In fact, most of the door-to-door selling of fresh produce which took place in the city was done by peddlers hired by the Commission houses.

Farmers in the Puget Sound area once had a viable market for their produce in the large food processors established in the area. Due to the decline in agriculture and the uncertainty about the long-term future of agriculture in the area, most of the processors have foregone capital investment in plants in the area and have moved to more stable agricultural areas. Today, only four processors remain in King County. It is not important whether the processors or the farmers were the first to move out of the area. It is important that for the few farmers remaining, a major market for their crops has been lost.

Today, the single most important market for produce farmers in the area lies in the large wholesale grocers and retail grocery chains and buying cooperatives. Some produce is still sold to commission houses which continue to sell the farmer’s produce on consignment. But the bulk is bought by large grocery store chains or buying cooperatives and by wholesale distributors. These outlets are very reliable for the farmer, and a few crops are even grown on contract and therefore sold before they are planted. Through these large buyers, the farmer has a ready market for a wide variety of fresh fruits and vegetables, and in one transaction an entire crop can be sold by the farmer to reach thousands of consumers through dozens of retail grocery stores and restaurants.

Depending on the existing supply and demand situation, which is greatly affected by the availability and price of California and Oregon produce, a price is established for a given quantity of goods. The farmer delivers his produce to the large buyer and is paid promptly. As mentioned above, the farmer may have his crop sold before he plants it. In either case, the time and risk involved in selling the crop are minimized. Since fresh produce is perishable, this time and risk minimization is important.

The local farmer has little control over price. California produce is generally machine harvested, and is subsequently sold at whatever price maximizes gains and minimizes losses. Local produce is harvested by hand, and when the prevailing price does not cover the cost of harvesting, the farmer is forced to plow his crop under.

Increasingly popular are U-pick fields, where the farmer sets aside several fields of crops for harvest by the consumer. For a reasonable cost and some exercise, the consumer can select and harvest the fresh fruits and vegetables he wants. The farmer thereby sells his crop without incurring the costs of harvesting and marketing.
The large buyers have encouraged the farmer to specialize and grow large quantities of a given crop. This has led to large-scale farming of crops. Accordingly, the traditional truck gardener who grew a great variety of crops simultaneously is all but absent from the modern farming scene.

Despite the presence of large scale buyers, there are many farmers who have opted for the Pike Place Market as their primary market for their fresh produce. In doing so, they subject themselves to a set of rules and regulations contained in a City Ordinance administered through a Market Master. The Farmers Ordinance defines a farmer who is eligible to buy an annual permit to sell at the Market as one who sells products he has grown and produced on land owned or leased by the farmer. The Ordinance further provides for the assignment and rental of an eight to ten foot long stall for $1.50 per day. Recently, a list of products which can be purchased wholesale for retail sale at the Market has been defined by Ordinance for farmers attending the Market in the off-season from December through April.

Farmers selling at the Market bring their produce in by truck every morning, Monday through Saturday. Between 8:30 and 9:00 a.m., the farmer backs his truck up to his assigned stall, unloads his produce and sets up his displays. Some farmers with smaller trucks or higher volume of sales will repeat this procedure of unloading and setting up two and three times daily, returning to their farms each time to bring more produce to the Market.

There are problems and hardships in the daily experience of the farmer at the Market. The congestion of service, Market employee and shoppers' vehicles create competition for space along the stalls where the farmer must back his truck. In addition, the alignment of the parking stalls along Pike Place does not facilitate the angle at which the farmer must park in order to load and unload easily. The open nature of the stalls forces the farmers to endure the cold and wind of wet winters.

And on top of it all, the farmer must take home with him all that he cannot sell in a day at the Market.

Even with all of these rules, regulations and hardships, the Market farmer continues to come to the Pike Place Market. Rather than draw conclusions regarding the farmer and his use of the Market at this point, this report will identify the Market farmer, examine the reasons why he uses the Market, and then draw these conclusions.

The Market Farmer

In 1973, the Market Master issued 60 permits to farmers who were eligible to sell their products at the Market. As of April 30, 37 permits have been issued for 1974, but many farmers will purchase their permits when
the harvesting period is upon them. There are four regular Market farmers who sell potted plants, and the rest grow and sell a variety of fresh vegetables. Many of the farmers do, however, sell seedlings of herbs and vegetable plants in early spring.

To get a more accurate picture of the Market farmer and his motivations or propensities for using the Pike Place Market as his outlet, a telephone survey was conducted with sixteen of the most frequent attenders of the Market. These interviews were supplemented by a questionnaire distributed to the farmers by the Farmers Committee of the Pike Place Merchants Association. Fourteen responses were obtained as a result of the questionnaire. Due to the frequency with which the interviewed and sampled farmers came to the Market, these two efforts can be regarded as quite reliable in presenting an accurate cross section of the regular Market farmer.

Of the sixteen farmers interviewed, eight have their farms within Seattle, four are from Kent, and one each from Auburn, Puyallup and Pacific to the south, and Brier to the north. Only two of them lease their land, 12 owning their farms outright, and two farmers both own and lease farmland. The farms tend to be small with only four exceeding five acres in size. Of these four larger farms, three of them are seven acres or less in size.

The farmers were asked how many different crops they grow for sale at the Market. All but two grow ten or more crops, with 15 being the most frequent response and 40 the high. The farmers were asked to list their three most important crops, and a total of 21 different crops were listed. Five farmers listed beans as one of the three and no other crop was listed by more than four farmers. It is apparent that the farmers not only offer a very wide variety of products but that they independently rely on different crops as their leaders. This variety in crops affects the farmer's decisions regarding selection of stalls. A farmer will select a certain stall based on the products which he has brought for sale to the Market. Additionally, they prefer to be separated from other farmers selling the same items. These decisions, made independently, add to the variety of products and consumer choice within any given location along the Market arcade.

Only five of the 16 farmers sell all of their crops at the Market. The eleven farmers who sell elsewhere dispose of between 10 and 80% of their crops to wholesalers, commission houses, grocery chains, restaurants and individuals. Even on these small farms, production exceeds the demand created by the Pike Place Market shoppers alone. For most of the Market farmers, the decision to sell at the Pike Place Market has not been at the exclusion of any of the other possible outlets for their products. In fact, nearly half of them sell 50% or more of their crops to other buyers outside the Market.
Twelve of the sixteen farmers queried indicated that they had a source of income in addition to the farm income. Of the four who rely totally on farm income, between 60 and 80% of their crops are sold to buyers outside the Pike Place Market. Other sources of income were, in descending order of response, social security and pensions, other jobs, sale or lease of farmland for other uses, and investments. While the average age of these 16 farmers is just over 60 years, only five are younger than sixty years old, with the youngest being thirty-six and all others having lived at least fifty-two years. Three of them are past seventy.

Nine of the farmers interviewed had parents who were farmers, and seven of these farming parents sold their produce at the Market. But only six of the Market farmers have their children help them today, and all sixteen unanimously indicated that their children will not farm in the future.

From the above, it is possible to draw some generalities regarding the Market farmer. His farm is small, generally five acres or less, and it is located fairly close to the Market, more than likely within the Seattle City limits. His farm is normally owned, which indicates, because of proximity to the Seattle metropolitan urbanized area, relatively high property taxes and assessments. The farmer grows approximately fifteen different crops for sale at the Market, but normally sells a significant portion of his total crop to other buyers, including the large wholesalers.

The Market farmer is over sixty years old and typically has another source of income besides his farm income. There is a 60% probability that his parents farmed, and if they did farm they more than likely used the Market as their retail outlet. The farmers' children probably don't help them, and none of the children will be farmers of the next generation. The lack of help of children is probably not due to lack of interest, but to age, as the farmers' ages indicate that their children have already left the home.

Finally, the farmers were asked to address the questions regarding why they use the Market, what the problems are with selling their products at the Market, and why they feel other farmers don't utilize the Market as a retail outlet. It is from these questions that conclusions can be drawn which would lead to recommendations for methods of attracting more farmers to the Pike Place Market.

Six farmers mentioned retail price as a factor in their decision to use the Market as an outlet. Four farmers mentioned that their farms are small, and since the wholesalers require large quantities for their buying purposes, the Market is appropriate for their crops. This is particularly important with the large variety of crops grown by any one farmer in lesser quantities than a more specialized farmer.
One response was that the selling of produce at the Market allowed the farmer to continue to pay the property taxes on his farm. But the overwhelming answer to this question was that farmers continued to use the Market because of habit, the Market being the place where that farmer sells his products. It is further the place where the farmers' friends are, where there is regular contact with the public, particularly regular customers. There was, in the responses of the farmers interviewed, an obvious sense of bewilderment in being asked why they did something some of them have been doing for 20 to 40 years. The high dependency on other non-farm or non-Market income indicates more than mere monetary incentive which attracts these farmers to the Pike Place Market. The familiarity of the Market and its people has much to do with the farmer's presence in the Market.

The farmers were queried about the problems faced in selling their products at the Market. To this question they had better prepared answers. Surprisingly, six farmers expressed no problems. Two mentioned the parking problems, both for their loading and unloading and for their customers. Problems with arts and crafts vendors intermingled with farmers were mentioned by four of the interviewed farmers. Three stated that a problem was the lack of farmers in the area. But the overwhelming response was that there was not enough space in which to display their home-grown products.

This question of problems was supplemented by a questionnaire distributed by the Farmers Committee of the Pike Place Merchants Association. Of the fourteen questionnaires filled out and submitted, two mentions of parking, four of pseudo-farmers, two of nursery farmers and one of the stall assignment system were recorded. There were eight farmers who felt the arts and crafts vendors were a problem to the farmers' operation in the Market, and another nine replies concerned the lack of sufficient display or table space. The comments regarding the conflict between arts and crafts vendors and farmers indicate a basic incompatibility of water-soaked produce and dry arts and crafts being displayed in such close proximity, as well as the lack of table space during the peak season for the farmers.

Both the Project interviews and the Farmers Committee questionnaire tested the attitude of Market farmers toward the presence of hobby farmers, weekend gardeners or pea-patchers. A total of twenty farmers participated in either of the surveys, and only three had non-negative reactions to this issue. The other fifteen farmers felt hobby farmers would tend to reduce the quality of products and displays, be in a position to undercut price and present unfair competition to the bona fide farmers, and that they will only add to the existing space problem. It is important to note that the existing Ordinance permits the hobby farmer or gardener to participate as a farmer in the Pike Place Market.

Finally, the Market farmers were asked why they thought other farmers did not utilize the Market. Relatively equal distribution was found in the impressions that arts and crafts vendors keep them away, other farmers are too large, there is no farm land available, there is not
sufficient selling space at the Market, and that all of the farmers
who can use the Market are doing so.

Other Farmers in the Puget Sound Region

As we are well aware, agricultural activities in the highly-urbanized
Puget Sound region are being increasingly threatened by the direct and
indirect effects of industrialization and urban growth. As a result,
all farmers, whether they utilize the Pike Place Market or not, are
faced with some significant pressures which have no direct relevance
to the actual selling of produce at the Market. While many of these
factors will be touched upon, the emphasis will be on those factors
which directly relate to the attraction of more farmers to the Market.

Most of the green vegetable growers in the region are located south of
the City of Seattle, predominantly in the Kent Valley area. These
farms range in size from 10 to 40 acres, averaging between 20 and 30
acres each. With land speculators and large industrial corporations
acquiring land for potential profit and expansion, most of the farmers
have taken the profit in their land and sold their farms. For the
last 6 or 7 years, these green vegetable farmers have leased their
land back from the new owners and continued their agricultural occupa-
tions. The farms are of sufficient size to necessitate hiring of
labor year-round, in addition to the seasonal harvesting hiring. The
major crops grown in the area by vegetable growers are celery, lettuce,
cabbage, onions, radishes, corn and carrots. They are sold to the
major wholesaling houses and grocery chains.

Over the years, the number of farms has declined substantially while
the average size of farms has increased significantly. The result is
that we have fewer, but larger farms producing most of our local pro-
duce. They plow, propagate, harvest and sell on a large scale. There
is crop specialization coupled with maximum intensity and efficiency
in their farming.

As discussed previously, these farmers are under significant price
competition. They must operate efficiently enough to withstand the
pressures created by the massive agricultural operations conducted
in California. In addition to the price squeeze from above, costs of
operation have been increasing greatly in recent years. Property
taxes, equipment and materials costs and labor expenses have all risen
dramatically in the last 10 years. With the current inflationary trend,
there appears to be no relief in the short term. There is a heavy
dependence on chemical fertilizers and pesticides, largely petroleum
derivatives, and the shortage of petroleum has created excessive costs
and troublesome shortages in these products. Conversion to natural
fertilizers such as manures involves significantly more soil prepara-
tion, and there exist shortages and high costs in these products also.
With an ever-diminishing margin on their products, squeezed on one side
by increasing operating costs and on the other side by severe price
competition, increasing volume is the only means of preserving the
farmer's income.
The most significant problem the Puget Sound region farmer has, however, is the uncertainty of the future of agriculture in the area. We have already discussed the food processors moving out because of this uncertainty. This has also caused most of the farmers to prematurely sell their land prior to their retiring. Farmers historically have had their land as their estate, to sell for their retirement or to pass on to their heirs. Today, the land which is being sold for retirement cushions is being turned into non-farm uses, and the land which is already sold will not be passed on to heirs who might continue farming. This uncertainty about the future also prevents the farmer from making any capital investment in his operation which would require a long period of amortization. If the farmer has placed his land under the open space program, he can look forward to farming for ten years. Otherwise, his outlook is considerably shorter.

These factors also affect the ability of anyone to gain entry into the agricultural sector of our economy. Land prices have soared to $5,000 and $10,000 per acre, and the financial resources required for acquiring an adequately large farm for start-up enterprise are far beyond most individuals’ means. In fact, most of the farmland acquired for farming in the area has been for purposes of expansion of existing farms, where this excessive price of land can be spread over a large number of acres, most of which were acquired at significantly lower prices.

The efficiency and volume demands of agricultural operations make it exceedingly difficult for one of these larger farmers to use the Market as a selling mechanism. The Market would require a person to attend the stall all day, and that person can be better utilized on the farm in production. The amount of produce sold per hour by one man in selling to a large wholesale or retail buyer is many times greater than the amount of produce sold per hour at the Market. Furthermore, the margin between retail and wholesale price does not warrant the expense of a farm hand spending a whole day at the Market.

For most of these farmers, struggling for their livelihood in the face of a host of large socio-economic pressure, the Pike Place Market must become economically attractive and advantageous to their operation before they will utilize it.
CONCLUSIONS AND RECOMMENDATIONS

The Pike Place Market has been treated on a microcosmic level in which the farmer functions as a vendor, with certain priorities, in a complex of food and arts and crafts retailers. The Market has also been examined for its role in the macrocosmic world of regional agriculture, serving as a small link in the huge food chain of our society. If we are to attract more farmers to the Pike Place Market, we must determine how the Market as a microcosm fits within the agricultural macrocosm, and ensure its continued position there.

The Pike Place Market farmer is unique in comparison to all other vegetable farmers. His farm is smaller, his age is greater, his crop variety is greater, and the whole scale of his operation is considerably smaller. However, the most significant aspect of the Market farmer which sets him apart from all other farmers is the fact that he sells his produce at the Market. His farm size supports the scale of his selling activities, and he has maintained a wide assortment of crops for display on the tables. More important, his motivations for selling at the Market are not purely pecuniary, but rely heavily on traditions, habit and social relationships. These traditions and habits cannot be readily transferred to farmers who have never used the Market.

The Market farmer, however, is not insulated from the socio-economic forces of our time. His operating costs are high. Further, he is forced to conduct his selling activities in close proximity to the incompatible dry products of the arts and crafts vendors. And selling space is lacking. Even at the Market, volume is important and the farmers desire more space to display, and subsequently sell, more produce.

For the Market farmer, changes are needed which provide him greater display space, increase his sales volume, and reduce the product conflict between him and the arts and crafts vendors.

The other farmers in the region have significant problems associated with production, not with selling. The only element which affects their marketing of their produce is the price competition from vegetables grown in other states. Their operations require large-scale selling practices which are not accommodable in the Pike Place Market. These operations are designed for food production, and not for retail food sales.

For the future of farmers at the Pike Place Market, it is reasonable to assume that we are enjoying the last of the traditional Market farmers around whom this Market was created. There can be no programs designed to attract more of these unique members of our society, as there are none. Nevertheless, there can be solutions to mitigate some of the existing problems of selling at the Market which have been outlined in sections above.
For the rest of the agricultural entrepreneurs, it appears that the existing trends will continue. The demand for food on a local, regional, and national scale demands that production be measured in tons rather than bunches, thus pressuring farms into efficient, intensive and large operations. In addition, this urban area will always have severe land requirements which will further drive farm land into more urbanized uses.

Given the above conclusions regarding farmers and the Pike Place Market, the following means for attracting farmers to the Pike Place Market are suggested for consideration:

- Encourage large scale farmers being forced out of agriculture to reduce the scale and nature of their farms and continue farming specifically for sale of products at the Pike Place Market.

- Actively solicit all farmers, large and small, in the area and encourage them to sell their excess and off-grade produce at the Market.

- Encourage home-gardening and pea patches and attract these hobbyists to sell their products at the Market.

- Provide agricultural land, equipment and technical resources to persons who would commit to selling their products at the Market.

- Move away from the farmer-seller tradition, and allow cooperatives or other efforts which would permit a farmer or group of farmers to sell local produce from the daily rental stalls of the Market through selected agents.

**Conversion from Large-Scale Farming**

Most of the large commercial farmers in the region are younger than the familiar Market farmers. As they succumb to the relentless urban pressures, they are forced to abandon a chosen agrarian way of life. A program could be planned and implemented which would both preserve their way of life and maintain the role of the farmer at the Market. The thrust of such a program would be educational. When a farmer is in a position of liquidating his land, he could be encouraged to maintain 5 to 10 acres of it, or to take the proceeds and purchase a small plot of several acres closer to Seattle. A farm of this size could be operated by his family without the labor costs and heavy equipment which are requisites of large operations. He could change his crop allocation, growing a greater variety of produce, including some specialty items not commonly found in the produce sections of the grocery chains. And finally, he could sell a portion of the harvest to his previous customers, the large wholesale and retail buyers, and bring the remainder to the Pike Place Market.
This effort would involve creating Market farmers, but it would not entail creating new farmers. The program would require showing the farmer how he could change his operation to produce vegetables for his own retail selling, rather than for wide distribution by another entity. The farmers would have to be solicited, and be convinced that farming for sale at the Market is a viable means of continuing his agrarian way of life. A comprehensive study would have to be made of the kinds of products which sell well at the Market and in what quantities, and also of which products can be raised efficiently on a small farm. And finally, the fine art of selling would have to be transmitted to farmers who have never conducted retail transactions before. The Market would become the place where the farmer could meet the consumer.

Recruit Existing Non-Market Farmers:

A second recommendation can be considered for a shorter term solution. The City and County of Honolulu, Hawaii began operating several street farmers markets in February, 1974. The area was canvassed for existing farmers who could come to their open markets to sell their surplus, off-grade or mixed grade produce. Within two months, they were successful in attracting some 85 farmers to three open market sites. The prices are maintained at less-than-retail levels, justified by eliminating the middle man (the wholesaler) and selling is so brisk that the markets close within two hours of their opening. The markets are carefully situated in lower income neighborhoods, not in the downtown area. Hawaii has virtually no large vegetable farmers.

Such a program could be successful in attracting some farmers to the Pike Place Market. It would be particularly effective with those farmers who do not know about the Market or are misinformed. However, its appeal would be primarily for the smaller farmer, of whom there are few in the region. Unless the few farmers of the Seattle area who may be attracted can be enticed into growing for the Market, their presence on Pike Place will be infrequent and of short duration, subject to the availability of produce not saleable to the large buyers and the ability of an individual to spend time at the Market.

Allow Sales by Part-Time Growers:

A third potential for retaining the producer-consumer transaction at the Market is to attract pea-patchers and other gardeners to bring their surplus items to the Market. In response to some of the Market farmers' reservations, careful control will have to be exercised over price and quality aspects of these gardeners. Furthermore, additional space would have to be provided as long as there exists a space conflict on the low tables. To be consistent with the existing Ordinance governing the Pike Place Market farmers, these gardeners would be required to either own or lease their land upon which they grow their crops. While the producer-consumer transaction would remain the same, there would be a considerable change in the socio-economic makeup of the producer.
Develop Special-Purpose Farming Resources:

Another proposal considers new farmers created for the Pike Place Market. A public body, such as the City of Seattle, could acquire farm land and equipment, and either sell at reduced costs or lease the property and equipment to persons who pledge to sell what is produced on the land at the Market. A program of this nature would remove the obstacle of the high start-up costs presented to one interested in farming, and would provide a permanent linkage and support between farms and the Market. An example of publicly held land for public tilling is found in Boston's Liberty Gardens, where the City of Boston for years has made available plots in public park land for local citizens to grow their own produce. In scale it approximates the pea patch concept of Seattle. However, agricultural plots linked to Market sales would have to be several acres in size to provide sufficient income to the individual seeking to become a bona fide Market farmer. This concept of course presents significant questions regarding the equitable treatment of the existing Market farmers who receive no preferential treatment in the costs of their production. In addition, such a subsidy program may be beyond the scope of local government. It is impossible to prognosticate the character of a farmer created by such incentive.

Agent Sellers for Farmer or Groups

Finally, the traditional concept of the farmer-seller could be abandoned and farmers could be allowed to pool their resources in order to sell their home-grown produce at the Market. Currently, the farmer who is selling at the Market is a member of the family or the same person who grew the produce. By eliminating the requirement for a farmer to sell only that which he has grown on the land he either owns or leases, a group of farmers could cooperatively pool their produce and designate or hire a representative to sell their produce at the Market. What is actually created through this concept is a selling mechanism, or an extra link in the chain between the producer and consumer. Nevertheless, the selling agent would likely maintain a farmer appearance and the produce sold would be local and fresh.

All of the proposals outlined above require some commitment of time and dollars to carefully design and implement a workable program. Further, they all require some attention to the availability of suitable space at the Market if there is success in attracting more farmers to the Market.

An ideal farmer-vendor program might contain the following features: It provides a number of new farmers which off-set the loss by attrition of existing Market farmers; requires a minimum level public activity and financial commitment; does not unduly tax space availability; maintains an acceptable balance of competition with the existing farmers and merchants; preserves the traditional dual role of the farmer-seller in the Market. In consideration of these points, the first and second recommendations above which relate to an existing sector of non-Market farmers appear to be the most equitable and practical approaches.
The proposal to attract as many existing non-Market farmers as possible to sell their excess or off-grade produce at the Market would help to restore a reasonable number of farmers to the low tables of the Market arcades. Success in this effort would bring about substantial space and locational problems during the height of the harvesting season, when most of these farmers would have excess produce. However, such problems could be approached through development of additional daily rental space in the redevelopment of the Market Core. The proposal to convert existing large scale farmers to Market farmers in lieu of losing them from farming altogether, would likely be a long term process, and serve to provide a stable source of farmers for the Pike Place Market for the foreseeable future. Both of these approaches would utilize the skills of existing farmers and the resources of existing farm land. Additionally, they retain the producer-consumer relationship and preserve the role of the farmer-seller in the Market.

For any of the programs to work, or even for the existing farmers to be able to continue their activities at the Market, there must be consumers. Any addition of farmers will require an addition of shoppers, eager to purchase the home-grown products displayed on the farmer stalls. We have discussed the ability of the farmer to produce his products, and the process of his selling at the Market. However we have not emphasized, until now, the importance of his ability to sell whatever he brings to the Market for sale. Therefore, any effort taken to reinforce the role of the farmer at the Pike Place Market must be complemented with an equally strong effort to attract more buying customers. The Market must be an economically viable place for disposing of one's products and that is the key to survival and future attraction of any and all of the vendors at the Pike Place Market.

May 10, 1974