GET HEALTHY PHILLY:

Farmers' Market & Philly Food Bucks 2013 Report

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GET HEALTHY PHILLY
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EXECUTIVE SUMMARY

Farmers' markets and the Philly Food Bucks program contribute to the health of Philadelphia residents by increasing the availability and affordability of nutritious food. In 2013, The Food Trust continued its work to provide low-income, high-need residents of Philadelphia with sources of fresh, local fruits and vegetables. During the 2013 season, The Food Trust's farmers' market program operated 24 markets with nearly 100 farmers and vendors, reaching over $51,000 worth of Philly Food Bucks redemptions and over $60,000 in SNAP sales.

The eight Get Healthy Philly (GHP) markets—opened between 2010 and 2011 in partnership with the Department of Public Health—and The Food Trust's other farmers' markets continue to grow along various measures of success: SNAP sales, Philly Food Bucks redemptions, customer and farmer survey data, WIC and Senior FMNP sales, customer counts, and number of operating market days. This report summarizes and evaluates the impact, reach and key lessons learned from the 2013 farmers' market season and the fourth season of the Philly Food Bucks program.

Key findings:

1) **Users of Philly Food Bucks are increasing their intake and variety of fresh, local produce.** Farmers' market customers who use Philly Food Bucks continue to report increased fruit and vegetable consumption, a major goal of the Philly Food Bucks program. Compared to non-Philly Food Bucks users at the eight low-income Get Healthy Philly markets, they were more likely to have increased their intake of fruits and vegetables (61% vs 40%) and to have tried new fruits and vegetables (52% vs 35%) since shopping at market. This suggests that farmers' markets, in hand with programs like Philly Food Bucks, have the potential to improve and transform the diets of high-need individuals.

2) **Farmers' markets in high-need neighborhoods continue to serve low-income customers.** During the 2013 season, sales from food assistance programs (SNAP, FMNP, and Philly Food Bucks) comprised a full 50% of sales at the eight low-income Get Healthy Philly markets. At GHP markets, overall SNAP and FMNP sales increased by 12% and 24%, respectively, from the previous year. Thus, shoppers continue to use these markets as a source of fresh fruits and vegetables.

3) **SNAP recipients are spending more on each visit.** Over the past three seasons, The Food Trust has observed increases in the amount of SNAP dollars customers are spending on each market visit. Last year, the amount spent per visit increased 5% to $12.75. In 2013, 36% of customers at Get Healthy Philly markets have used SNAP to shop and over 1 in 5 customers at all Food Trust markets have ever used SNAP at market, revealing the fact that markets are reaching an important population. The growth of these sales remains important to ensuring the sustainability of farmers' markets in low-income neighborhoods.

Key contributors to success in 2013:

1) **Expansion of community-based promotional efforts increases awareness of farmers' markets and Philly Food Bucks.** During the 2012 season, surveys revealed that only 3% of customers learned about the market through traditional advertising (e.g. print, newspapers, radio). As a result, The Food Trust geared efforts toward more direct outreach efforts in the past year, including expanded tabling at WIC and health centers near market sites during market hours and employing a cadre of volunteers to maintain consistent flyering efforts throughout the regular season. Indeed,

Philly Food Bucks users were more likely to be regular customers at Get Healthy Philly markets: 44% attended market at least every week (compared to 23% of non-Philly Food Bucks users).

2) **Formalized trainings for farmers new to selling in high-need, low-income neighborhoods increases market retention**. The Food Trust developed and implemented a new, comprehensive vendor training guide in order to create a more compelling shopping experience for market customers. 82% of farmers who participated in a training reported increased knowledge of food assistance programs, and 88% reported learning new marketing strategies for reaching low-income customers. Five of the eight operating Get Healthy Philly markets saw increases in customer counts compared to last year and GHP markets saw overall increases in SNAP and FMNP redemption, demonstrating that customers feel well-served by these markets.

3) **Increased programming at markets can increase customer retention**. During the 2013 season, The Food Trust created a suite of market tours to better nutrition education efforts and explain shopping with food assistance programs on a more personal, more participatory level. A new Art at Market program brought cultural happenings to market and worked to engage customers, especially those with children. Constructing farmers' markets as community spaces where education and activity can occur creates a compelling shopping experience which results in regular customers and increased sales. Indeed, 55% of market shoppers reported spending more time at market due to arts programming and 72% reported that they would attend market more often if they expected programming.

Key challenges in 2013:

1) **SNAP benefits are being reduced on both state and federal levels.** Low-income Pennsylvania families were affected by benefit cuts twice during the past year. An asset test was implemented on the state level in mid-2012, resulting in delayed applications and decreased SNAP enrollment. Federally, a reduction in monthly SNAP dollars occurred at the end of October 2013 as additional stimulus funding came to an end. The most recent Farm Bill passed in February 2014 includes further cuts to SNAP. Fewer food stamp dollars in the state undoubtedly puts limits on growth of SNAP sales at farmers' markets. These reductions in benefits increase the importance and role of programs like Philly Food Bucks in ensuring the affordability of and access to fresh, healthy food.

2) **Expansion of the Philly Food Bucks program depends on the efficacy of new sites outside of The Food Trust's farmers' markets.** The Food Trust requires that new Philly Food Bucks distribution and redemption sites meet a number of criteria before inclusion in our program. Nonetheless, these outside redemption sites often struggle to maintain the paperwork, signage, marketing materials, and at-market customer service necessary for the smooth and successful operation of Philly Food Bucks. These sites are a valuable addition to The Food Trust's network; non-Food Trust markets redeemed over $7,000 in Philly Food Bucks in 2013. During the 2014 season, The Food Trust seeks to find ways to expand the program to additional sites while ensuring the same quality of service and tracking at markets outside of its system.

3) **The role of farmers' markets, as part of a larger food landscape, may shift as other local options increase.** The Food Trust is committed to increasing access to healthy food and recognizes that farmers' markets are but one part of a larger solution. In recent years, there has been an influx of farmers' markets, expanded options at corner stores, new grocery stores, neighborhood co-ops, urban farms, and Community Supported Agriculture shares in Philadelphia, all of which work to

improve the overall food environment. For the 2013 season, there were nearly 70 sites where WIC and Senior FMNP could be used—just three years ago there were 40 sites. This is a wonderful change for city residents and The Food Trust vigorously champions increased food choice for all residents of the city. As options expand in some neighborhoods, however, new opportunities and targets to serve remaining underserved communities will be created for farmers' markets.

GET HEALTHY PHILLY

In partnership with the Philadelphia Department of Public Health's Get Healthy Philly initiative, The Food Trust opened ten new farmers' markets in low-income neighborhoods over the 2010 and 2011 seasons and launched the Philly Food Bucks program in 2010 (a profile of these markets can be seen in Appendix A). These markets—eight of which operated during the 2013 season—and the Philly Food Bucks program contribute to the Get Healthy Philly goals of establishing environments which promote healthy eating and active living.

PHILLY FOOD BUCKS

Philly Food Bucks is a coupon incentive program developed and launched in 2010 to increase the purchasing power for SNAP customers at farmers' markets. For every $5 that a SNAP customer spends using their benefits at a participating market site, they receive a $2 coupon for fresh fruits and vegetables. The program is available to all SNAP recipients and in 2013 Philly Food Bucks coupons could be redeemed at over 25 sites that sell local fruits and vegetables across Philadelphia. Through the program, The Food Trust seeks to increase SNAP sales at farmers' markets, increase the affordability of produce, and bolster the sales of local farmers.

DISTRIBUTION AND REDEMPTION

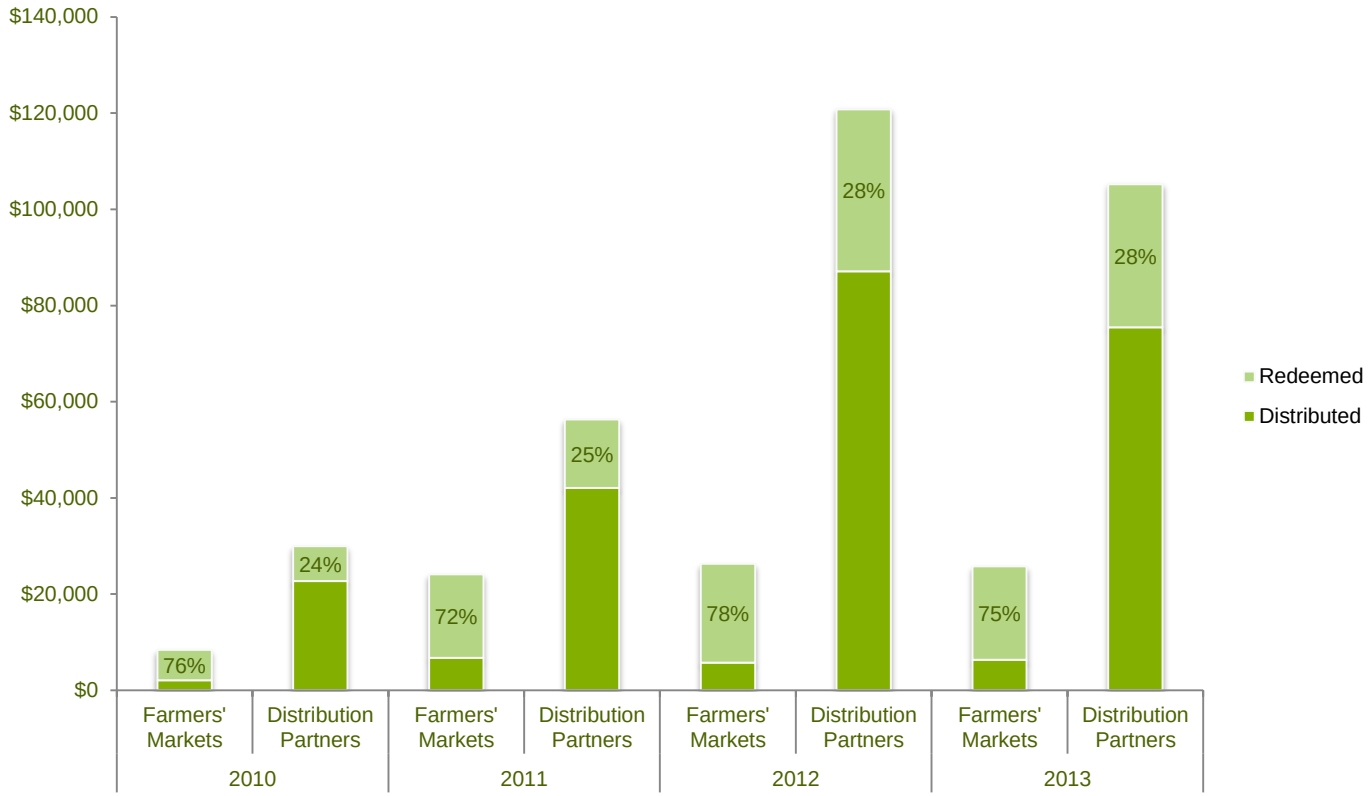
$401,568 in Philly Food Bucks were distributed from June 2010 through December 2013, $134,618 of which was distributed during the 2013 season. Philly Food Bucks coupons are distributed in one of two ways: either at farmers' market sites, where Food Bucks are distributed in connection with SNAP sales (78% in 2013), or through distribution partners (22% in 2013). These partners—which include recreation centers, health centers, WIC offices, food pantries, churches, and community groups—all serve SNAP or SNAP-eligible populations and distribute Philly Food Bucks as a promotional tool to encourage low-income residents to shop at farmers' markets for fresh produce.

Redemption sites—locations where Philly Food Bucks can be used to purchase fresh fruits and vegetables—are listed on a Philly Food Buck brochure, online, and via 311[i]. Sites for 2013 included farmers' markets managed by The Food Trust, farmstands at Greensgrow and Mill Creek Farms, and the Fair Food Farmstand. Appendix C provides a profile of farmers' market sites and shows if they distribute and/or redeem Food Bucks, accept SNAP, and which are operated by The Food Trust.

Over the course of the Philly Food Bucks program, total redemption of Philly Food Bucks was $158,062, with an overall redemption rate of 40%. $51,176 of these were redeemed during the 2013 season. Figure 1 shows Food Bucks redeemed over past market seasons by distributor type. Philly Food Bucks distributed at farmers' markets are the most likely to be redeemed; 78% of Food Bucks distributed at market in 2013 were redeemed, while Food Bucks distributed by partners were redeemed at a rate of 28%.

For the first time, The Food Trust implemented a concrete redemption rate (15%) that partners had to maintain in order to continue with the program. The organization also transitioned to a group training model for distribution partners, all of whom participated in a formal PowerPoint presentation followed by a discussion on best practices, general farmers' market information, and community needs. The Food Trust also introduced contact management software to structure consistent, ongoing communication with partner organizations throughout the season.

FIGURE 1. PHILLY FOOD BUCKS DISTRIBUTED AND REDEEMED BY DISTRIBUTOR TYPE, 2010-2013



USE OF FOOD ASSISTANCE PROGRAMS AT GHP FARMERS' MARKETS

The Food Trust farmers' markets accept several food assistance programs, including SNAP, Farmers' Market Nutrition Program (WIC FMNP), and Senior Farmers' Market Nutrition Program (SFMNP) as part of their mission to provide access to healthy and nutritious food to underserved populations. These assistance programs are critical to the success of farmers' markets in low-income neighborhoods. Currently, 476,000 Philadelphians—more than 30% of residents—receive SNAP benefits.[ii] Among customers surveyed at the eight Get Healthy Philly markets in fall 2013, the following rates of participation in food assistance programs in the past year were reported:

- 62% of customers at GHP markets participated in at least one food assistance program (SNAP, Philly Food Bucks, WIC, or Senior/WIC FMNP) in the past year (essentially unchanged from 65% in 2012).

- 45% participated in SNAP, almost tripling the farmers' market SNAP customer base from 2010. (In 2010, SNAP participation in the past year was 16% at 4 GHP markets)

- 41% used Philly Food Bucks to shop at markets (compared to 32% at GHP markets in 2012).

- 13% participated in WIC (remaining essentially even with 12% in 2012).

Table 1 shows sales data from food assistance program sources at The Food Trust's ten (now eight) GHP markets over the past three seasons. Total SNAP sales at Get Healthy Philly markets in 2013 increased compared to the year before, despite decreases on the state and federal levels in SNAP funding. FMNP sales rose at these markets as well, reflecting the fact that high-need individuals continue to use the markets as a source of fresh fruits and vegetables. Overall, food assistance programs (FMNP, SNAP, and Philly Food Bucks) comprised a full 50% of total sales at Get Healthy Philly markets. Average total sales per market for the 2013 season was $15,247.53, a 20% increase compared to 2012 ($12,683).

TABLE 1. SALES FROM FOOD ASSISTANCE PROGRAMS AT GHP MARKETS, 2011-2013

	FMNP VOUCHERS (% OF TOTAL SALES)			SNAP SALES (% OF TOTAL SALES)		
	2011	2012	2013	2011	2012	2013
FAIRHILL	$300 (12%)	$0 (0%)	$2,105 (30%)	$193.16 (8%)	$211.30 (22%)	$1,036.05 (15%)
BROAD AND SNYDER	$4,685 (35%)	$3,465 (24%)	$5,815 (34%)	$859.35 (6%)	$1,132.10 (8%)	$1,691.95 (10%)
FRANKFORD TRANSPORTATION CENTER	$660 (6%)	$1,585 (14%)	$2,545 (18%)	$1,252.46 (11%)	$1,578.55 (14%)	$2,066.71 (15%)
GRAYS FERRY	$1,720 (11%)	$1,215 (10%)	$1,905 (16%)	$2,294.52 (15%)	$2,581.52 (20%)	$2,842.31 (24%)
HUNTING PARK	$4,270 (14%)	$4,865 (17%)	$2,735 (12%)	$2,992.76 (10%)	$2,360.86 (8%)	$2,297.84 (10%)
KINGSESSING	$2,330 (18%)	$6,140 (32%)	$8,375 (39%)	$1,655.18 (13%)	$2,604.16 (13%)	$2,467.19 (11%)
NORRIS SQUARE	$870 (18%)	$80 (2%)	CLOSED	$472.51 (10%)	$178.01 (5%)	CLOSED
OLNEY TRANSPORTATION CENTER	$1,930 (22%)	$320 (49%)	CLOSED	$1,547.10 (18%)	$159.50 (24%)	CLOSED
POINT BREEZE	$2,375 (27%)	$2,300 (19%)	$2,650 (23%)	$1,957.88 (17%)	$1,478.25 (12%)	$2,406.13 (21%)

STRAWBERRY MANSION	$1,495 (13%)	$1,990 (14%)	$1,075 (7%)	$1,537.65 (14%)	$2,010.25 (15%)	$1,264.21 (8%)
TOTALS:	**$20,635 (16%)**	**$21,960 (19%)**	**$27,205 (22%)**	**$14,762.57 (12%)**	**$14,294.50 (12%)**	**$16,072.39 (13%)**

PHILLY FOOD BUCKS AND SNAP SALES

SNAP usage continues to grow at many of The Food Trust's farmers' markets: eleven markets saw an increase in food stamp sales during the 2013 season. Total SNAP sales were $60,907.27—a slight decrease from 2012—and the eight GHP markets had combined SNAP sales ($16,072.39) that comprised 26% of total SNAP sales at all Food Trust markets. The proportion of SNAP customers using their benefits to shop at market—a key goal of the Philly Food Bucks program—remains significant: 22% of customers at all markets and 36% of customers at GHP markets have used SNAP benefits to shop. Additionally, SNAP customers continue to spend more on each visit: the average SNAP benefit used per purchase has risen 5% from 2012 to $12.75 in 2013. Table 2 shows total and average SNAP sales and Philly Food Bucks redeemed at Food Trust markets.

As noted, SNAP benefits were adversely affected twice over for Philadelphia residents in 2013. The reduction in total SNAP sales at Food Trust markets is in large part due to a large drop in food stamp sales at the Clark Park Thursday and Saturday farmers' markets, which have historically made up half of all SNAP sales at Food Trust markets. When these sales are excluded, combined overall SNAP sales at the remaining markets saw a 4% increase in sales compared to 2012. Clark Park remains a strong, vibrant market, but food stamp sales have spread to other food retailers in the neighborhood. An expanded food co-op is now operating daily within a few blocks of the market in addition to multiple CSA options and grocery stores. In 2014, an additional farmstand will open within a half mile of the market. The Food Trust plans to continue SNAP outreach to the community surrounding the market but anticipates the further spreading of these dollars to other outlets.

FIGURE 2.TOTAL SNAP SALES AT FOOD TRUST FARMERS' MARKETS IN PHILADELPHIA 2005-2013

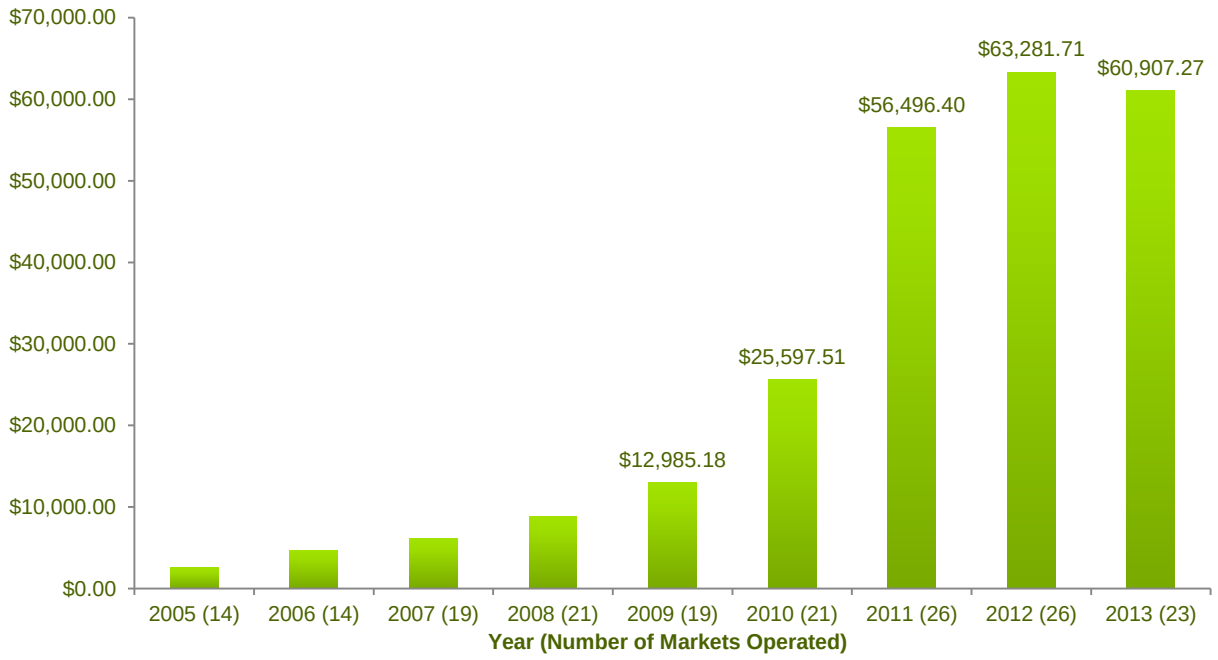


TABLE 2. SNAP SALES AND FOOD BUCKS REDEMPTIONS AT FOOD TRUST MARKETS, 2010-2013

	SNAP				FOOD BUCKS			
	2010	2011	2012	2013	2010	2011	2012	2013
PARTICIPATING MARKETS	21	26	26	23	20	26	26	23
TOTAL SALES	$25,597.51	$56,496.40	$63,281.71	$60,907.27	$11,488	$28,396	$43,854	$48,326
AVERAGE PER MARKET	$1,218.93	$2,172.94	$2,433.91	$2,648.14	$574	$1,092	$1,687	$2,101
AVERAGE SNAP PURCHASE	$8.56	$10.77	$12.17	$12.75	n/a	n/a	n/a	n/a

Note: SNAP and Food Bucks totals above encompass Food Trust markets only.

REACH AND IMPACT OF GHP MARKETS

Determining the composition and needs of the customer base of farmers' markets is integral to ensuring that the markets are meeting the goal of providing affordable fruits and vegetables to high-need communities. A 23-question survey was conducted with shoppers at 8 GHP farmers' market locations from September through November 2013. Questions asked about shopping frequency, consumption of fruits and vegetables, travel to market, use of SNAP/ACCESS cards, use and awareness of Philly Food Bucks, and how the shopper learned about the market. A convenience sample of shoppers was selected at the 8 markets and staff from The Food Trust administered surveys to customers. The response rate to the survey was 80%. A total of 403 surveys were completed at GHP markets as indicated in Table 3 below. (See Appendix B for the survey instrument.)

Data were self-reported by farmers' market shoppers and were not subject to outside verification. Data were collected from a convenience sample of farmers' market shoppers, and therefore may not accurately reflect actual behaviors and perceptions of all shoppers.

RESULTS FROM CUSTOMER SURVEYS AT GHP FARMERS' MARKETS

A customer survey was conducted at 8 GHP market locations (Table 5). Data from 403 customer surveys administered at Get Healthy Philly farmers' markets in 2013 indicate the following:

- Consistent with The Food Trust surveys in the past, women constitute the majority of market patrons surveyed (76%).
- Over half (56%) of patrons identified themselves as African American, followed by White (28%), Hispanic/Latino (11%), Other (3%), and Asian (2%). There were statistically significant differences in customer race and ethnic background by market (Table 8).
- 36% of shoppers were between the ages of 41-65, 33% were between the ages of 26-40, 19% were over 65, and 12% were between the ages of 18-25.
- In the past year, 45% of customers at GHP markets participated in SNAP, 20% participated in Philly Food Bucks and 13% participated in WIC.

TABLE 3: SURVEYS COLLECTED AT GET HEALTHY PHILLY MARKET LOCATIONS, 2013

MARKET LOCATION	# SURVEYS COLLECTED	PERCENT OF TOTAL
22ND AND TASKER	43	10.7
29TH AND WHARTON	44	10.9

MARKET LOCATION	# SURVEYS COLLECTED	PERCENT OF TOTAL
33RD AND DIAMOND	57	14.1
58TH AND CHESTER	45	11.2
BROAD AND SNYDER	61	15.1
FAIRHILL	55	13.6
FRANKFORD	49	12.2
HUNTING PARK	49	12.2
TOTAL	**403**	**100.0**

Table 4 shows the breakdown of gender and race/ethnicity by GHP market in 2013. Differences in gender by market were not significant ($p = 0.813$). Differences in race/ethnicity by market were statistically significant ($p = 0.000$).

TABLE 4: CUSTOMER DEMOGRAPHICS BY GET HEALTHY PHILLY MARKET, 2013

MARKET LOCATION	% WOMEN	% AFRICAN AMERICAN	% HISPANIC	% WHITE	% ASIAN
22ND AND TASKER	81.0%	85.0%	5.0%	7.5%	0%
29TH AND WHARTON	69.0%	53.7%	0%	41.5%	2.4%
33RD AND DIAMOND	73.8%	85.7%	2.4%	11.9%	0%
58TH AND CHESTER	77.3%	93.2%	0%	4.5%	0%
BROAD AND SNYDER	75.4%	11.7%	5.0%	71.7%	5.0%
FAIRHILL	72.9%	42.0%	50.0%	6.0%	0%
FRANKFORD	75.0%	32.7%	10.2%	44.9%	6.1%
HUNTING PARK	83.7%	68.1%	10.6%	19.1%	2.1%
TOTAL	**76.1%**	**56.0%**	**11.0%**	**27.9%**	**2.1%**

Table 5 shows the breakdown of SNAP, Philly Food Bucks, and WIC participation in the past year, and customers that have ever used SNAP and Philly Food Bucks at market by each GHP market location. Levels of statistical significance (p-values) are noted for each. The percent of customers that have ever used SNAP differed significantly by GHP market, ranging from 22.4% at Hunting Park to 58.1% at 29th and Wharton (p = 0.024). The percent of customers that have ever used PFB also differed significantly by GHP market, ranging from 29.5% at 58th and Chester to 67.9% at Fairhill (p = 0.000).

TABLE 5: PARTICIPATION IN FOOD ASSISTANCE PROGRAMS BY GHP MARKET, 2013

MARKET LOCATION	% PARTICIPATING IN SNAP IN PAST YEAR	% USED PFB IN PAST YEAR	% PARTICIPATING IN WIC IN PAST YEAR	% EVER USED SNAP AT THIS MARKET	% EVER USED PFB
22ND & TASKER	39.5%	18.6%	18.6%	39.5%	37.2%
29TH & WHARTON	50.0%	18.2%	11.4%	58.1%	42.9%
33RD & DIAMOND	45.6%	21.1%	10.5%	40.4%	49.1%
58TH & CHESTER	53.3%	17.8%	22.2%	42.2%	29.5%
BROAD & SNYDER	49.2%	16.4%	6.6%	31.1%	31.1%
FAIRHILL	52.7%	20.0%	18.2%	31.5%	67.9%
FRANKFORD TRANSPORTATION CENTER	34.7%	16.3%	12.2%	30.6%	26.5%
HUNTING PARK	32.7%	34.7%	4.1%	22.4%	40.8%
TOTAL	**44.9%**	**20.3%**	**12.7%**	**36.4%**	**41.0%**
P-VALUE (PEARSON CHI-SQUARE)	p = 0.244	p = 0.359	p = 0.093	p = 0.024	p = 0.000

Farmers' markets benefit from a consistent customer base. During the course of the 2013 season, shoppers surveyed at GHP markets were likely to be return customers.

- 64% of respondents had been to the farmers' market more than once, and 36% were first time shoppers to that market on the day they were surveyed (compared to 31% in 2012).

- Among those who were not first time shoppers, about half (48%) reported coming to the market "about once a week" or "more than once a week", 30% reported going to market "a few times a month," and 14% visit the market "monthly."

- Half of shoppers at GHP markets indicated that prices for fruits and vegetables at the farmers' market were "less expensive" (49%) than food stores in their neighborhood. Another 28% reported that fruit and vegetables prices were "about the same" as food stores in their neighborhood.

EVALUATION SPECIFIC TO GET HEALTHY PHILLY OBJECTIVES

Customer survey findings indicate that GHP farmers' markets support the goals of the Get Healthy Philly Initiative.

- Almost half (48%) of shoppers at GHP markets reported eating more fruits and vegetables since becoming a customer at market. Those who have used Philly Food Bucks at GHP markets were more likely to report increasing fruit and vegetable intake (61% among PFB users vs. 40% among non-PFB users) ($p = 0.000$).

- 55% of GHP market shoppers reported that they or their family has received information about healthy eating or nutrition at the market.

- 36% of respondents at GHP markets reported they have ever used SNAP at market, and 41% reported they have ever used Philly Food Bucks[iii]. Among those who have never used SNAP at market, the large majority (77%) did not currently receive SNAP, 13% said they prefer to use SNAP elsewhere, and just 10% were not aware they could use SNAP benefits at market.

- 50% of respondents at GHP markets reported finding out about the market by walking by, 16% through friends and word of mouth, 12% through a community group, and 6% through flyers and brochures. Among those who have ever used PFB at market, 56% found out about the program at the market and 28% found out about the program through community groups.

- Almost half (45%) of customers walk or bike to get to a market, highlighting a synergy between the nutrition and physical activity goals of the Get Healthy Philly initiative.

- Over half of customers at GHP markets come from the surrounding neighborhood, with 31% traveling "3 blocks or less" and 25% traveling "3-6 blocks." Another 44% of customers traveled "more than 6 blocks" to get to the market, indicating that GHP markets also draw people from outside the community.

PHILLY FOOD BUCKS USE AT GHP MARKETS

Among customers at GHP markets, 41% reported using Philly Food Bucks (n=163). Philly Food Bucks users at GHP markets are significantly more likely to report the following, compared to customers at GHP markets that have never used Philly Food Bucks:

- Trying new fruits and vegetables since becoming a customer at market (52% vs. 35%, $p = 0.001$)
- Eating more fruits and vegetables since becoming a customer at market (61% vs. 40%, $p = 0.000$)
- Receiving information about healthy eating or nutrition at market (69% vs. 44%, $p = 0.000$)
- Having used SNAP at market (65% vs. 16%, $p = 0.000$).

Compared to non-Philly Food Bucks users, those who have used Philly Food Bucks at GHP markets were less likely to be first time visitors to market, more likely to visit market weekly, and more likely to travel more than 6 blocks to get to market. These findings indicate that Philly Food Bucks are having the intended impact of drawing local residents to become regular customers at market:

- 26% of customers who have used Philly Food Bucks at GHP markets were first time visitors in 2013 (compared to 20% in 2012), vs. 43% of those who have never used Philly Food Bucks at GHP markets ($p = 0.006$).

- 44% of Philly Food Bucks users at GHP markets attend market every week or more, vs. 23% of non-Philly Food Bucks users ($p = 0.000$).

- 55% of PFB users at GHP markets walked or biked to market, vs. 38% of non-PFB users ($p = 0.01$)

- 33% of Philly Food Bucks users at GHP markets travel 3 blocks or less to get to market, vs. 29% of non-Philly Food Bucks users ($p = 0.03$). Non-PFB users were more likely to travel over 6 blocks to market (50% vs. 38% of PFB users).

CUSTOMER SURVEY RESULTS FROM GHP VS. NON-GHP FARMERS' MARKETS

In addition to 403 surveys collected from 8 GHP market locations, 816 customer surveys were collected at 14 non-GHP farmers' market locations (16 different market days) from September to November 2013. Response rate was 80% for both sets of markets. Table 6 shows the number of surveys collected at non-GHP markets. Table 7 compares results for GHP markets vs. non-GHP markets, and presents overall results for all markets.

TABLE 6: SURVEYS COLLECTED AT NON-GHP MARKET LOCATIONS, 2013

MARKET LOCATION AND DAY	# SURVEYS COLLECTED	PERCENT OF TOTAL
52ND & HAVERFORD (FRIDAY)	45	5.5
52ND & HAVERFORD (WED)	43	5.3
BROAD & SOUTH	36	4.4
CECIL B. MOORE	47	5.8
CLARK PARK (SAT)	60	7.4
CLARK PARK (THURS)	53	6.5
CLIVEDEN	45	5.5
FAIRMOUNT	60	7.4
FITLER SQUARE	62	7.6
GERMANTOWN	46	5.6
HEADHOUSE	72	8.8
LIBERTY LANDS	50	6.1
OVERBROOK	44	5.4
OXFORD CIRCLE	48	5.9
SCHUYLKILL RIVER PARK	54	6.6
WEST OAK LANE	51	6.3
TOTAL	**816**	**100.0**

TABLE 7: SUMMARY RESULTS FROM CUSTOMER SURVEYS FOR ALL MARKETS AND BY MARKET TYPE, 2013

CHARACTERISTICS	GHP MARKETS (N= 403)	NON-GHP MARKETS (N = 816)	TOTAL, ALL MARKETS (N = 1,219)
GENDER			
FEMALE	76%	73%	74%
RACE/ETHNICITY			
AFRICAN-AMERICAN	56%	33%	40%
WHITE	28%	56%	47%
HISPANIC	11%	4%	6%
ASIAN	2%	4%	3%
OTHER	3%	4%	3%
AGE			
18 – 25	9%	14%	12%
26 – 40	32%	33%	33%
41 – 65	39%	34%	36%
OVER 65	19%	19%	19%
ANNUAL HOUSEHOLD INCOME			
≤ $30,000	59%	39%	45%
SHOPPING CHARACTERISTICS			
FIRST VISIT TO MARKET	36%	19%	25%
VISIT MARKET EVERY WEEK OR MORE	32%	42%	39%

CHARACTERISTICS	GHP MARKETS (N= 403)	NON-GHP MARKETS (N = 816)	TOTAL, ALL MARKETS (N = 1,219)
WALK / BIKE TO MARKET	45%	57%	53%
TRAVEL 3 BLOCKS OR LESS TO MARKET	31%	33%	32%
TRIED NEW FRUITS OR VEGETABLES SINCE VISITING MARKET	42%	54%	50%
INCREASED FRUIT AND VEGETABLE CONSUMPTION SINCE VISITING MARKET	48%	46%	47%
RECEIVED INFORMATION ABOUT HEALTHY EATING OR NUTRITION WHILE AT MARKET	55%	41%	46%
REPORT THAT PRICES AT MARKET ARE LESS EXPENSIVE THAN FOOD STORES IN NEIGHBORHOOD	49%	29%	36%
VISITED OTHER STORES/BUSINESSES IN THE NEIGHBORHOOD ON DAY OF SURVEY	35%	39%	38%
USE OF FOOD ASSISTANCE PROGRAMS			
RECEIVED SNAP IN PAST YEAR	45%	18%	27%
RECEIVED PFB IN PAST YEAR	20%	9%	13%
RECEIVED WIC IN PAST YEAR	13%	4%	7%
RECEIVED WIC FMNP IN PAST YEAR	9%	3%	5%
RECEIVED SENIOR FMNP IN PAST YEAR	11%	11%	11%
PARTICIPATED IN AT LEAST ONE FOOD ASSISTANCE PROGRAM (SNAP, PFB, WIC OR WIC/SENIOR FMNP) IN PAST YEAR	62%	32%	42%
EVER USED SNAP AT MARKET	36%	15%	22%
EVER USED PFB AT MARKET	41%	16%	24%

CONCLUSION

The Food Trust continues to boost the accessibility of fresh, local fruits and vegetables to communities in need of affordable, healthy foods through its farmers' markets and Philly Food Bucks program. As of December 2013, the program has provided nearly an additional $160,000 worth of fresh, local produce to low-income residents of Philadelphia and helped spur growth in usage of SNAP benefits at market. The Philly Food Bucks program is an integral part of outreach efforts and instrumental to the successful operation of farmers' markets in low-income Philadelphia neighborhoods.

Positive trends have endured: both market shoppers and farmers continue to find the program easy to participate in and support the continuation of the program. Customer survey data shows that Philly Food Bucks users are shopping at market more often, finding the markets accessible and affordable, and increasing their intake and variety of fruits and vegetables. The program is attracting new shoppers to market, and the SNAP base of customers continues to grow at The Food Trust's low-income markets.

The program continues to complement goals of the Get Healthy Philly initiative: customers are often walking or biking to market, showing that market patrons are increasing their intake of healthy foods while incorporating physical activity into their lives. The GHP markets are attracting customers from the immediate neighborhood and creating a stronger sense of community.

The Food Trust has refined the Philly Food Bucks program over the past four seasons, but challenges remain. SNAP benefits continue to be reduced on state and federal levels. Data entry and tracking continues to be time-intensive. There are limits to the organization's capacity to take on additional distribution and redemption sites. Nonetheless, the organization foresees continued success. In 2014, The Food Trust will be opening five new farmers' markets, extending its network of markets into additional underserved communities. The Food Trust will continue to enhance and refine its farmer and market manager training, continuing an emphasis on serving customers shopping with food assistance programs. Just as The Food Trust refined trainings for distribution partners to great effect in 2013, the coming season will focus on improving the experience at outside redemption sites.

Philly Food Bucks continues to bolster the nutritional health of families and communities. In hand with The Food Trust's network of farmers' markets in low-income neighborhoods, the program remains instrumental in increasing the intake of fresh, healthy food for high-need Philadephians.

APPENDIX A. FARMERS' MARKET TABLES

TABLE A1. PROFILE OF 2013 GET HEALTHY PHILLY FARMERS' MARKETS

MARKET	OPENED
Fairhill Square Park **4th Street and Lehigh Ave, 19133**	June 2011
Broad and Snyder **Broad & Snyder Streets, 19148**	June 2010
Frankford Transportation Center **Bustleton & Frankford Aves, 19124**	July 2011
29th and Wharton **29th & Wharton Streets, 19146**	May 2010
Hunting Park **West Hunting Park Ave & Old York Rd, 19140**	June 2011
58th and Chester **58th and Chester Ave, 19143**	July 2011
22nd and Tasker **22nd & Tasker Streets, 19146**	June 2010
33rd and Diamond **33rd & Diamond Streets, 19121**	June 2011

NB: Eight of the original ten Get Healthy Philly markets operated in 2013; the Norris Square and Olney Transportation Center farmers' markets were not in operation. Norris Square is permanently closed; after three seasons, The Food Trust determined that the location was unsustainable for a farmers' market. Olney Transportation Center closed early in the season once the farmer determined that they did not have the capacity to continue the market. The Olney Transporation Center market will reopen for the 2014 season.

TABLE A2. FARMERS' MARKET PROFILES

FARMERS' MARKET	DISTRIBUTES PHILLY FOOD BUCKS	REDEEMS PHILLY FOOD BUCKS	ACCEPTS SNAP	OPERATED BY THE FOOD TRUST
22nd and Tasker Farmers' Market	X	X	X	X
29th and Wharton Farmers' Market	X	X	X	X
33rd and Diamond Farmers' Market	X	X	X	X
52nd and Haverford Friday Farmers' Market	X	X	X	X
52nd and Haverford Wednesday Farmers' Market	X	X	X	X
58th and Chester Farmers' Market	X	X	X	X
Broad & Snyder Farmers' Market	X	X	X	X
Broad & South Farmers' Market	X	X	X	X
Cecil B Moore Farmers' Market	X	X	X	X
Clark Park Saturday Farmers' Market	X	X	X	X
Clark Park Thursday Farmers' Market	X	X	X	X
Cliveden Park Farmers' Market	X	X	X	X
Dickinson Square Farmers' Market	X	X	X	
Fair Food Farmstand		X	X	
Fairhill Square Park	X	X	X	X
Fairmount Farmers' Market	X	X	X	X

FARMERS' MARKET	DISTRIBUTES PHILLY FOOD BUCKS	REDEEMS PHILLY FOOD BUCKS	ACCEPTS SNAP	OPERATED BY THE FOOD TRUST
Fitler Square Farmers' Market		X		X
Francisville Farmers' Market	X	X	X	
Frankford Transportation Center Farmers' Market	X	X	X	X
Germantown Farmers' Market	X	X	X	X
Greensgrow Farm	X	X	X	
Headhouse Farmers' Market	X	X	X	X
Hunting Park Farmers' Market	X	X	X	X
Liberty Lands Farmers' Market	X	X	X	X
Mill Creek Farm	X	X	X	
Overbrook Farms Farmers' Market	X	X	X	X
Oxford Circle Farmers' Market	X	X	X	X
Parkwood Farmers' Market	X	X	X	
Schuylkill River Park Farmers' Market		X		X
SHARE Nice Roots Farm	X	X	X	
West Oak Lane Farmers' Market	X	X	X	X

TABLE A3. PHILLY FOOD BUCKS DISTRIBUTION AND REDEMPTION, 2011-2013

MARKET	2011		2012		2013	
	DISTRIBUTED	REDEEMED	DISTRIBUTED	REDEEMED	DISTRIBUTED	REDEEMED
10th at Germantown/Fairhill Sq.	$70	$506	$80	$344	$372	$1,684
Broad & Snyder	$408	$354	$410	$1,194	$748	$2,126
Broad & South	$676	$1,000	$630	$830	$592	$728
Cecil B. Moore	$132	$260	$578	$822	$392	$742
Clark Park - Saturday	$9,734	$8,112	$10,844	$11,254	$10,046	$9,618
Clark Park - Thursday	$1,372	$1,832	$1,522	$3,862	$1,020	$2,550
Cliveden Park	$152	$522	$204	$274	$204	$278
Dickenson Square Park	n/a	n/a	$406	$514	$276	$496
Fair Food Farmstand	n/a	$3,080	n/a	$12,280		$2,952
Fairmount	$464	$414	$968	$1,392	$576	$1,970
Fitler Square	$2	$136	n/a	$26	$32	$62
Francisville	n/a	n/a	$292	$394	$50	$160
Frankford Transportation Center	$434	$512	$450	$1,162	$608	$1,988
Germantown	$172	$270	$306	$444	$518	$788
Grays Ferry	$824	$524	$898	$912	$952	$874
Greensgrow Farm	$786	$346	$960	$1,602	$1,472	$1,630
Haddington - Friday	$752	$428	$334	$1,462	$230	$450

MARKET	2011		2012		2013	
	DISTRIBUTED	REDEEMED	DISTRIBUTED	REDEEMED	DISTRIBUTED	REDEEMED
Haddington - Wednesday	$730	$1,276	$568	$1,258	$466	$1,064
Headhouse - Sunday	$878	$1,240	$1,774	$2,746	$2,016	$3,252
Hunting Park	$1,376	$3,248	$952	$5,454	$332	$2,718
Kingsessing	$634	$930	$898	$1,576	$846	$2,438
Mill Creek	$8	$20	$12	$6	$28	$2
Norris Square	$148	$1,538	$82	$958		
Olney Transportation Center	$542	$478	$44	$38	$60	$22
Overbrook Farms	$718	$1,110	$932	$972	$314	$396
Oxford Circle	$440	$1,402	$356	$1,708	$958	$2,528
Palmer Park	$116	$128	$20	$396		
Point Breeze	$660	$918	$602	$2,146	$974	$1,938
Sacks Playground	n/a	n/a	n/a	n/a		
Schuylkill River Park	n/a	$0	n/a	$36		$18
Strawberry Mansion	$594	$744	$744	$1,848	$510	$4,080
Weaver's Way Co-Op Ogontz	$1,052	$564	n/a	n/a		
West Oak Lane	$272	$514	$422	$798	$514	$1,280
Parkwood Farmers' Market					$336	$458
Liberty Lands Park					$170	$282
Nice Roots Farm					$112	$156

APPENDIX B. FARMERS' MARKET CUSTOMER SURVEY METHODOLOGY

The Food Trust developed a 23-question survey designed to be implemented with farmers' market customers and to measure impact of visiting and shopping at markets operated by the organization.

The customer survey was conducted with shoppers at 22 farmers' market locations (24 different farmers' market days) from September to November2013. A convenience sample of shoppers was selected and staff from The Food Trust administered in-person surveys to shoppers. Questions centered on shopping frequency, consumption of fruits and vegetables, travel to market, use of SNAP/ACCESS, use and awareness of Philly Food Bucks, and how the shopper heard about the market.

2013 Farmers' Market Customer Survey **Market:** _____

Please complete this survey only once. Thank you for your feedback.

○ Mark here if customer refused.

1. **How long have you shopped at this market?**
   - ○ This is my first visit
   - ○ This year only
   - ○ For the past 2 years
   - ○ For 3 years or more
2. **How did you find out about this market? (check all that apply)**
   - ○ Local newspaper: _____
   - ○ Flyer / brochure
   - ○ Word of mouth / friend
   - ○ Walking by
   - ○ Internet / E-mail / Facebook / Twitter
   - ○ Philly Food Bucks
   - ○ Community group
   - ○ Other: _____
3. **On average, how frequently do you come to this market?**
   - ○ More than once a week
   - ○ About once a week
   - ○ A few times a month (2-3 times a month)
   - ○ About once a month
   - ○ Less than once a month
   - ○ First visit
4. **How did you get to this market?**
   - ○ Septa ○ Walk / Bike ○ Car ○ Other
5. **How far do you travel to get to this market?**
   - ○ 3 blocks or less ○ 3 – 6 blocks ○ More than 6 blocks
6. **Since becoming a customer at this market, have you tried any new or unfamiliar fruits or vegetables?**
   - ○ Yes ○ No
7. **Since becoming a customer at this market, do you eat more, less, or the same amount of fruits and vegetables?**
   - ○ More / Increase ○ Less / Decrease ○ Same / No Change
8. **While at the farmers' market, have you or your family ever received information about healthy eating or nutrition?**
   - ○ Yes ○ No
9. **Did you make a purchase at the market today?**
   - ○ Yes; If Yes, How much did you spend today? ○ No (Go to Q.11)

   $_____

PLEASE CONTINUE ⇨

10. Which of the following items did you buy at the farmers' market today (mark all that apply)?

- ○ Fruits
- ○ Vegetables
- ○ Jams/Canned Goods
- ○ Breads/Baked Goods
- ○ Meats/Fish
- ○ Dairy/Cheese
- ○ Prepared Foods
- ○ Other: _____

11. Where do you most frequently shop for fruits and vegetables?

- ○ Supermarket or Grocery Store
- ○ Convenience/Corner Store
- ○ Farmers' Market
- ○ Other _____

12. How do prices for fruits and vegetables at this market compare to food stores in your neighborhood?

- ○ More expensive here
- ○ Less expensive here
- ○ About the same

13. At this market have you ever used an EBT (SNAP / ACCESS / Food Stamps) card?

- ○ Yes (Go to Q.14)
- ○ No (Go to Q.13b)

→ **13b. Why have you NOT used an EBT (SNAP / ACCESS / Food Stamps) card at market?**

- ○ Prefer to use SNAP benefits elsewhere
- ○ Didn't know I could use SNAP benefits at market
- ○ Don't currently receive SNAP benefits

14. Have you ever used Philly Food Bucks?

- ○ Yes (Go to Q.15)
- ○ No (If "no", go to Q. 16)

15. How did you find out about Philly Food Bucks? (check all that apply)

- ○ At market
- ○ Flyers / posters
- ○ Local newspaper
- ○ Community organization
- ○ Health center
- ○ Other: _____

16. Did you visit, or do you plan to visit, other stores or businesses in this neighborhood today (i.e. bank, corner store, coffee shop, restaurant, etc.)?

- ○ Yes
- ○ No
- ○ Unsure

PLEASE CONTINUE ⇨

Please tell us about yourself.

17. Gender: ○ Male ○ Female ○ Other:_____

18. Age: ○ Under 18 ○ 18-25 ○ 26-40 ○ 41-65 ○ Over 65

19. How would you describe yourself? (Check all that apply)

○ Asian ○ Hispanic / Latino ○ Other (please describe):
○ Black / African American ○ White _____

20. What is your current zip code? _____

21. What is your household income?

○ Up to $12,500 ○ $12,501-20,000 ○ $20,001-27,500
○ $27,501-35,000 ○ $35,001-42,500 ○ $42,501-50,000
○ $50,001-62,500 ○ $62,501-75,000 ○ More than $75,001

22. In which of the following programs have you participated in the past year? (Mark all that apply)

○ WIC ○ WIC Farmers' Market Checks ○ Philly Food Bucks
○ Food Stamps / Access / SNAP / EBT ○ Senior Farmers' Market Checks

23. What other comments would you like to share about this market?

THIS IS THE END OF THE SURVEY. THANK YOU!

Survey developed by The Food Trust. www.thefoodtrust.org

[i] 311 is the hotline for city information operated by the City of Philadelphia

[ii] Greater Philadelphia Coalition Against Hunger http://www.hungercoalition.org/food-stamp-statistics

[iii] This item asked respondents at CPPW markets if they "ever used Philly Food Bucks", compared to 32% that reported participating in Philly Food Bucks "during the past year".