



**UF/IFAS MARKETING PLAN WORKSHOP**

# **MARKETING WORKBOOK**

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# KEEP IN TOUCH!

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# Why should I create a marketing plan?

When you think of what it means to be a Florida agriculture enterprise, you likely think of activities tied to production. You may imagine growing citrus, strawberries, tomatoes, avocados, or any of the 200-300 different agricultural commodities we grow in Florida (UF/IFAS, 2021). Activities such as selecting the best varieties and controlling pests and diseases may come to mind. Ranching and dairy operators may first consider their breed selection, vaccination regimes, and nutrition management activities. A few others may consider aquaculture, such as building ponds and underwater harvesting. Then, there is beekeeping with establishing colonies, growing queens, pollinating, and collecting honey. In Florida, we cannot forget the ornamental plant sector that requires having knowledge in shade houses, greenhouses, and irrigation systems. Some of us will think of craft food enterprises that add value, recycle the waste from our agricultural products, and create alternative revenue streams. Activities related to these value-added enterprises include making baked goods and preserves, which require obtaining the proper food safety certifications and choosing market stands. With the boom in agritourism, many will recognize the effort involved in establishing “u pick” operations, event spaces, farm stands, and farm-to-table restaurants.

In addition to these production and processing activities, many would consider some aspects of business management, such as maintaining accurate records and budgets to make investment decisions, essential to running an agricultural enterprise. What they may overlook is the importance of marketing to an agricultural enterprise. You can produce the best products or provide a phenomenal services. However, if no one knows about what you are offering or how to access it, all your effort go to waste. To expand your business, you need to let potential customers know what you offer. Over the last few years, marketing has become more important in the agriculture and food industries. The multiplication of advertising venues, especially social media, allows growers to reach a much larger audience outside of local and regional markets and make online sales. There are also new marketing channels from community supported agriculture, farmers’ markets, direct contracts with the hospitality and retail industries, and online sales platforms.

The United States Department of Agriculture (USDA) Economic Research Service estimated the number of farmers’ markets increased by 180% between 2007 and 2014 and the number of regional food hubs increased by more than 288% (Low et al., 2015). In addition to these structural changes, consumers’ demand for food products has evolved too, with a growing demand for locally, sustainably produced goods, organic or otherwise, that are of the highest quality (Roper & Rumble, 2018). In fact, the sale of local agricultural products in the US increased by 3% from 2015 to 2017 totaling \$11.8 billion, 3 percent of all agricultural sales (Martinez, 2021). This proliferation of niche and specialty markets are most accessible to small-scale growers who are focused on quality and diversity. Their small size makes them nimbler to meet a particular buyer’s requirements and obtain the premiums for meeting these requirements. The ability to participate in a variety of markets allows agribusinesses to have multiple revenue streams to diversify their risk so they can still earn an income when there is a disruption in one market.

Those of us involved in the agricultural sector in Florida could especially take advantage of these changes because of highly sought after agricultural and food products from the state and an expanding customer base with the rapidly growing population and large tourism sector. The Florida agricultural industry needs to continually inform these new customers of the great products and services that the Florida agricultural

industry has to offer (Visit Florida, 2020; Klas et al., 2021). Because of these factors, marketing strategies are even more critical in the Florida agricultural industry with its multitude of products destined for disparate and highly specialized markets (UF/IFAS, 2021).

We wrote this manual to help remove the mystery in navigating different marketing channels to select a combination that is appropriate for you and your business. Additionally, this resource provides a general guide on how to utilize marketing; it also provides a general overview of the different distribution channels, and resources that are helpful in this process. This manual will guide you in creating a marketing plan and implementing the strategies you choose. We will provide you with some advice on how to evaluate the effectiveness of your marketing program in reaching your targeted customer base and how to make adjustments as needed. This marketing plan is meant to be a supplement to your business plan, which includes the overall strategies for your agricultural or food enterprise. If you would like to learn more about creating a business plan, please refer to these resources offered by the University of Florida Institute of Food and Agricultural Sciences [UF/IFAS](#) and the [USDA Sustainable Agriculture Research and Education](#) program.

## How do I make a marketing plan?

While creating a marketing plan may seem daunting, it is a straightforward process when broken down into a few simple steps. We will walk you through nine steps to create your own marketing plan based on an Evans and Ballen publication (2015). At the end of this section, we have included a worksheet that you can complete to assist in the creation of your own personalized marketing plan.

### 1 Set clear objectives

You need to have clear goals in your marketing plan. Initially, limiting the number of objectives to four or less keeps your plan focused and achievable. However, as your understanding of marketing and markets grows you can expand your objectives to coincide with business expansion. Utilizing SMART (specific, measurable, attainable, relevant, and time-bound) objectives helps you create definitive, achievable, and realistic goals within a schedule. The ability to measure and reflect on results enables you to learn, adapt, and grow. With proper record keeping and measurement tools you can keep track of effectiveness, such as meeting a certain sales value, sales volume, market share, distribution channel, and greater brand recognition. Finally, you will need to set up a plan of implementation and establish a time frame to measure how well you have met these goals. (Refer to [Farnsworth et al., 2020](#) for more detailed explanation on setting SMART objectives for your business).

Examples:

- In five years, we will double the sales volume at our own farm store.
- Within a year, we will make our first online sale.
- Within six months, our agritourism business will have an interactive website where clients can pre-purchase their tickets.

### 2 Identify your competition

Identifying competitors is crucial because it helps you understand the business environment, the strengths and weaknesses of your competitor and how they promote their product, as well as their

pricing strategy and if there is anything unique about the product they sell. This will help you understand what makes your product or service different from theirs. It will also help clarify the demand for your product and discern your competitive advantages. Undertaking this analysis might seem obvious, but many have little understanding of what sets them apart. Identifying and understanding your competition can be complex and time-consuming, but if you are planning to expand, it is crucial. Once you understand your competitive niche in relation to other businesses, you can leverage it to attract new consumers and strengthen the relationship with your existing customer base.

### **3 Determine how your product/service sets you apart**

A business needs customers to survive. This is why it is important to Give consumers a reason to buy what you are selling and eventually they will give you their loyalty in return. Based on your analysis of your competition in step 2, you can now discern what sets your product or service apart. To describe what you are selling to the consumer, consider the following questions:

- What benefits do customers receive from the product/service you offer?
- How do customers perceive the benefits of the product/service you are providing?
- What do customers perceive as the special/unique features of your product/service?
- Why do your customers purchase the product/service from you?
- How are you going to present your product/service to these customers?

These questions will help you to comprehend what the customers perceive about your product or service as well as what they value about it.

#### *How can you conduct simple market research?*

It may be helpful to get firsthand knowledge about what draws consumers to your products and services. Understanding new customers' interest in your product line-up would be particularly useful to learn what strategies were successful in gaining their business. You can informally ask customers as they make a purchase in your business to gauge their opinion. You can conduct written surveys with your customers while they shop, via phone interviews, or through online or email surveys. UF/IFAS Extension [EDIS publications](#) provide a wealth of information on how to conduct consumer interviews (Refer to [Israel & Gouldthorpe, 2020](#); [Khachatryan et al., 2020](#)) or focus groups (Refer to [Wysoki et al., 2019](#); [Galindo-Gonzalez, 2020](#)).

### **4 Identify your target market**

Identifying the demographics of your target market consists of identifying individuals or businesses that would be most likely to purchase your product or service. These characteristics could include age, sex, profession, income level, education level, residency, individual, or business. By identifying the demographics of your ideal customer, you can effectively target them, and your marketing campaign will be more likely to reach them. Businesses undertake targeting because segmenting the audience helps you focus your efforts and resources on those who are more likely to purchase and help you grow. An effective way to identify who you should target is to understand your current customer base. By understanding the characteristics of your current customers, you can see opportunities to target this segment of the population or see if there is a group of potential customers you are missing. Then, you can investigate what tactics you should undertake to meet the needs of all the distinct types of consumers who frequent your business or how to attract future customers.



## 5 Determine your distribution strategy

One element often underestimated in the food and agricultural business sector is distribution. Distribution is the means and steps used to move the product/service from one point to another. Though it is often overlooked, distribution is particularly important because before you can sell a product, you need to transport it to where your customers need it. To define your distribution strategy, you need to clarify several key factors. First, you need to determine if you are going to sell directly to your customers (i.e., farmers' markets; farm stands; online; or direct contracting with the hospitality industry, store, or schools), indirectly to packing houses or retailers, or a combination. You will need to consider the transportation implications for each of these distribution channels. Many businesses choose to sell in more than one market to spread risk. If they face a challenge in one market, they can move product in another. You must determine which of these distribution channels will meet your customer base.

Defining a geographical scope is also essential, whether you will supply local, regional, national, or international markets. For a startup, we encourage you to build up experience in the supply chain in local markets before expanding into larger markets with more stringent requirements and complicated distribution networks. Understanding which marketing channels you will use to distribute your products will allow you to determine the type of packaging required, if at all. For more information on how to access these different markets please refer to the *Florida Direct Marketing Handbook* available at [UF/IFAS Extension Bookstore](#) or from your [county extension agent](#). The [Florida Farmers' Market Association](#) and the UF/IFAS page on [direct marketing](#) for small farmers and alternative enterprises has detailed information on different marketing opportunities.

### How do I sell my product or service online?

The proliferation of the world wide web has changed our lives over the last 20 years. One of these profound changes is the ability to seek out any product or service that we want from the comfort of our own homes. This change has enabled many small and medium sized agricultural and food businesses to compete with larger businesses by directly selling to customers. There is a wealth of website platforms that allow for the integration of ecommerce like [WordPress](#), [Weebly](#), [Wix](#), [Square](#), [Shopify](#), and [Amazon](#). Some things to consider when determining which site would be best for your business include costs of hosting and payment processing, inventory management options, customer payment options, scalability, and security of customer data. If you are considering developing more complex websites and sales platforms, there are several businesses that provide services for agricultural entrepreneurs, especially in providing assistance to manage CSAs. The [National Young Farmers' Coalition](#) and [CSA Innovation Network](#) provide guidance in choosing one of the platforms and services that may best fit your needs.

### What are e-payments?

Closing the sale is the ultimate step in every transaction, and it does not have to be a complicated process for either you or your customers. Fortunately, there are several options that make the e-payment processing system easy. However, you need to do some research to decide which provider best suits your needs and consider the costs associated with each one of the different platforms available. In this manual, we provide you with an overview of your available options. If you would like more detailed information on touchless transactions, refer to the resources provided by the [Center for Rural Enterprise Engagement](#).

# Square

Square was founded in 2009 and launched its first payment platform in 2010. The most basic option to process debit and credit payments is the Square reader for Magstripe. It works with the free Square Point of Sale app which accepts payments on smartphones or tablets. You pay 2.6% + \$0.10 per swipe for Visa, Mastercard, Discover, and American Express. So, for a \$10.00 sale, your transaction fees would be \$0.36 in

total. You receive your money as fast as the next business day. For up-to-date pricing info please visit [square reader](#).



# PayPal

PayPal Zettle accepts payments on the go or at the counter. It can process both debit and credit card payments. The card reader costs \$29.00. The transaction fee is 2.29%+\$0.09 per transaction. For a \$10.00 sale your transactions fees would be \$0.32 in total. Money transfers into your PayPal account typically within one business day. For up-to-date pricing info please go to [PayPal Zettle](#).



## Supplemental Nutrition Assistance Program (SNAP)

[MarketLink](#) is a program of the National Association of Farmers' Market Nutrition Programs (NAFMNP). In partnership with the USDA and Novo Dia Group (NDG), it assists growers and local markets with the SNAP retailer application. It connects them with free app-based SNAP Electronic Benefit Transfer (SNAP/EBT) processing equipment. In Florida, SNAP participants who buy directly from growers at farmers' markets or other venues get their benefits doubled by the Fresh Access Bucks (FAB) program. You can reach out to your county's [UF/IFAS Family, Youth and Community Sciences agent or Family Nutrition Program PSE](#) for guidance in joining these programs.

### *Eligibility:*

Generally, any direct marketing arrangement or farmers' market that needs SNAP/EBT processing equipment is eligible to participate in the MarketLink program. In some cases, MarketLink may consider other business models if the grower/owner is selling their product directly to the consumer.

### *How the Program Works:*

The MarketLink program guides you through the steps below to get your equipment.



1. [Apply](#) for the grant program to cover a reader, processing, and application fees.
2. Apply to get an authorized USDA SNAP [FNS number](#).
3. Complete an EBT Processing Application to setup your EBT/SNAP payment account through Novo Dia Group (this link is provided after your application has been received).
4. Receive and set up your equipment (including credit/debit if you choose).
5. Start accepting SNAP and electronic sales!

You may qualify to get the equipment needed to process SNAP sales ([TotilPay Go](#)) for free as well as the associated fees waived for one year. You may also process debit and credit payments under this same platform by following additional steps. In case you don't qualify for the free equipment but still want to process SNAP benefits in addition to debit and credit payments, you may be able to purchase the equipment for TotilPay Go and follow some additional steps to process debit and credit sales, all under the same platform.

## TotilPay Go

The transaction fee is \$0 per transaction. [TotilPay Go](#) works only for SNAP payments. Growers and other small food and agricultural enterprises may qualify to get fees for the first year waived. Prepaid annual subscriptions cost \$19.95/month or \$191.40/year (20% savings vs. month-to-month).



A small agricultural or food enterprise that utilizes the TotilPay Go platform has two options for processing credit and debit card payments in addition to SNAP benefits, either through the Square reader or WorldPay (see below for information on WorldPay). Both e-payment options are fully compatible with TotilPay Go software. After selecting one of these options, just a few extra steps are needed to be able to process debit and credit payments.

## Square Reader for contactless and chip

The Square reader for chip and contactless cards can be integrated easily under the TotilPay Go platform. It can only process debit and credit payments. It does not process SNAP payments. SNAP payments would have to be processed separately through TotilPay Go. Transaction fees for debit and credit sales apply. The Square Reader costs \$49.00. It can process chip cards, contactless cards, Apple Pay, and Google Pay. The



transaction fee is 2.6% of the sale + \$0.10 per transaction. For the latest fee information please visit [Square reader contactless](#).

# WorldPay

If you want to process debit and credit card payments using WorldPay, you do not need a separate card reader. You may use the same hardware included with TotilPay Go. However, both transaction and annual fees apply. There is no need to buy special hardware. The transaction fee is \$0.15 per transaction + 1.79% of the sale. A \$120 annual maintenance fee is charged. For up-to-date price info, please visit Totilpay Go.



	Square reader for magstripe	PayPal	Square reader for contacts & chips	WorldPay
<b>Equipment Costs</b>	<b>Free</b>	<b>\$29.00</b>	<b>\$49.00</b>	<b>-</b>
<b>Annual Fee</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>Free</b>
<b>Cost of Transaction Fee</b>	<b>\$0.10</b>	<b>\$0.09</b>	<b>\$0.10</b>	<b>\$0.15</b>
<b>Percent of Transaction Fee</b>	<b>2.6%</b>	<b>2.29%</b>	<b>2.6%</b>	<b>1.79%</b>
<b>Fees for a \$10 Sale</b>	<b>\$0.36</b>	<b>\$0.32</b>	<b>\$0.36</b>	<b>\$0.329</b>
<b>Fee for a \$100 Sale</b>	<b>\$3.60</b>	<b>\$3.20</b>	<b>\$3.60</b>	<b>\$3.29</b>
<b>Compatible with Tortipay Go/SNAP</b>	<b>No</b>	<b>No</b>	<b>Yes</b>	<b>Yes</b>

## 6 Choose your promotion strategy

Now that you have decided where you plan to sell your product or service, you need to promote it and define a promotion strategy. Promotion is communicating with your customers to let them know about the desirable products and services you offer and how they can purchase them. Promotion is the set of activities you undertake to reach your target customer, to create interest in your product or service with new customers, and to interact with your current customers. The end goal of promotion is to gain visibility and familiarity with your product or service so that potential customers buy or prefer your product or service over your competitors' products. One of the most important things to consider is to keep your communication simple and attractive; you need to be concise in what you say to attract and hold your customers' attention. Promotion can take many forms: placing flyers on bulletin boards or handing them out on the street; newspaper, radio, and television ads; road signs and billboards; and social media. Your promotional strategies will depend on where your target audience gets their information, with multiple strategies necessary to reach a wider audience. For information on promotion strategies please refer to [Khachatryan et al. \(2017\)](#), which is targeted at the nursery industry but provides advice relevant to the entire agricultural and food sector.

## How can I use social media and the internet to promote my product?

Social media platforms such as Facebook, Instagram, Twitter, YouTube, WhatsApp, Pinterest, and others have become integral parts of our lives. In 2020, 240 million people in the United States, 72.3% of the population, used a social media site at least once a month (Dean 2021). Social media is now the way many people interact with the world. In fact, the average person spends 145 minutes (about 2 and a half hours) each day on social media (Statistica 2021). Social media can be a fantastic way to interact with your customers, and there are several online platforms that can be utilized. UF/IFAS has a series of [publications](#) to help growers and food businesses select the social media platforms that are best for them and learn how to best leverage these platforms to reach current and new clients. Social media platforms, due to their reach and easy audience interaction, are amazingly effective when promoting your business. These are also one of the most cost-efficient product and service promotion channels (Ainin et al. 2015).

## 7 Develop a pricing strategy

Pricing means determining the value of your product or service and the amount you should charge your customers. There are several ways to determine how much you should charge; these are called pricing strategies. Remember that your business cannot survive if you do not generate enough revenue to cover your costs and earn a profit. The principal pricing strategies are cost-oriented pricing, flexible pricing, and relative pricing. The cost-oriented pricing strategy involves setting your price at a certain percentage level, say 25%, above your production cost. A flexible pricing strategy is where you vary the price depending on the buyer or season (e.g. harvest or holidays). A relative pricing strategy is simply using the prevailing market price to set your own price whether it is above, below, or the same as your competitors. You should keep the prevailing price in mind when setting your pricing strategy, even if you do not employ a relative pricing strategy, as you should avoid pricing yourself out of the market.

Before you set the sale price, it is critical to first know how much it costs to produce the product or service to cover your costs. Remember that costs go beyond the farm gate and include marketing, packing, storage, distribution, and shipping costs. Conducting market research to learn how much your customers are willing to pay for your product or service and understand your competitors' prices is important in developing a long-term pricing strategy and setting a price that will ensure you make a profit while still being attractive to your customers.

## Where do I find pricing information and marketing research?

The [USDA's Marketing Service's Market News](#) section is very helpful in providing price information. Of particular interest to Florida growers is the Specialty Crop Section, which provides wholesale pricing data of sales of much of the fresh produce grown in Florida at terminal markets around the country, including Miami. There is also data on prices received at select farmers' markets across the country, for organic products, and for some products in retail markets. You may also look at research conducted by [UF/IFAS](#) on various Florida agricultural products. Recent research includes analysis of consumer preferences for various fruits particularly for [citrus](#), [ornamental plants](#), [vegetables](#), [seafood](#), and [organic](#) or [locally](#) produced agricultural products. Your [local county extension agent](#) can assist you in finding research that would be pertinent to your business.

## 8 Marketing budget

Marketing is not a production activity, but it does consume significant time, effort, and money to be effective. Since you do not have unlimited resources, it is important to determine how much you can/want to assign to advertising and marketing your product or service. You must estimate the cost of the marketing strategy you have proposed and make sure you stick to your budget. Consider your own labor costs to make and distribute the advertisement, how much a graphic designer or a public relations firm would charge to create the advertisements, and any costs to print the material or produce the radio or television spot. Even if your promotional strategy fits within your budget, you need to ask yourself if the current strategy is the best way to do marketing and consider alternatives to best reach the target market you identified in step 4.

### *What does it cost to market my products in different mediums?*

The cost of marketing your product can be difficult to estimate. In order to create an accurate budget, make estimates realistic as possible so you can see the true cost of marketing and decide how much you are willing and able to spend. You can find information on the cost of advertising your product or service in Florida by looking at the following sources: [radio advertising](#), [newspaper advertising](#), and [television advertising](#). A significant advantage of digital advertising is that it's much less expensive than traditional media.

## 9 Measuring success

You may think that once you have your marketing plan you are done. However, your new marketing plan is a living document. It needs to be updated and evolve as you implement your marketing strategies and new marketing avenues become available. Who would have imagined 20 years ago that we would be so dependent on marketing and selling our products and services online? You want to be ahead of the curve and take advantage of new marketing opportunities rather than running behind your competition. Many businesses review their marketing plan on an annual or more frequent basis. You may wish to conduct additional market research to see how effective your marketing plan has been, if your customers see your advertising, and if it has been effective in bringing in new customers. You can use the results from your analysis to update your marketing plan to invest more in the most effective marketing channels for your business.

Please do not forget that this marketing plan is meant to be a complement to your overall business plan and strategy. It does not replace a business plan, which is essential in sustaining your enterprise. If you are interested in creating a business plan, do not hesitate to contact your [county extension agent](#). You can also refer to these guides offered by [UF/IFAS](#) and the [USDA Sustainable Agriculture Research and Education program](#).

# Marketing Plan Worksheet

(Adapted Evans and Ballen, 2015)

## STEP ONE

What are your marketing objectives?

1.

2.

3.

4.

## STEP TWO

Identify your competition.

Who are your competitors?

1.

2.

3.

What is their specialty?

## STEP THREE

Identify your product/service.

What sets your product or service apart from your competitors?



## STEP FOUR

Identify your target market.

What customers do you plan to target?

1.
2.
3.

Why do you plan to target these customers?


## STEP FIVE

Determine your distribution strategy.

Distribution channel (i.e.,  
directly to customers or  
through a third party)

1.
2.
3.

Payment method  
(i.e., electronic, online,  
cash)


Shipping/Packing needs


## STEP SIX

Choose your promotion strategy.

How do you plan to promote (make people aware of) your business, product/service?

1.
2.
3.

## STEP SEVEN

Develop a pricing strategy.

What methods do you use to price your product (i.e., cost-oriented, flexible, and/or relative pricing)?

1.

2.

3.

## STEP EIGHT

Marketing Budget.

How much time and money can you dedicate to marketing?

1.

2.

3.

What are the costs of advertising in the marketing channels you wish to target?

## STEP NINE

Measuring success.

What methods will you use to measure the effectiveness of your marketing strategies?

1.

2.

3.

When will you conduct this evaluation?

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## Notes







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