

Trading Places: The local economic impact of street produce and farmers' markets



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Introduction

This study examines the contribution that street markets and farmers' markets in London make to their local economies, their local communities and to London as a whole. The focus is on markets' role in providing access to nutritious food and the wider impacts of London's markets in terms of the jobs they create, their impact on the business community and the wealth they generate.

There is little published literature on the impacts of street markets or farmers' markets. Most of the studies to date on farmers' markets have been performed in the United States or Canada where farmers' markets have a longer history than in the UK. There is also limited information available on the impacts of street markets on their local economies.

This study addresses several key questions.

- What impacts do the markets have on their local economies?
- What impacts do markets have in improving food access, in particular for those on low incomes?
- What are the barriers faced by street markets and farmers' markets and how can these be addressed?
- How can markets in London be promoted to maximise the benefits for the local economy, local people and London as a whole?

This study examines four markets in depth: two farmers' markets, in Ealing and Marylebone, and two street markets, in Walthamstow and Lewisham. Within each, **nef** studies the impacts of the markets by engaging with market customers, stallholders, non-market customers, local retailers and a range of stakeholders.

Several key questions guide this study.

- How much revenue do the markets generate?
- What are the impacts of the markets on other local businesses?
- How much of the income generated by the markets is retained in the local economy?
- Do the markets serve those who would otherwise be financially or socially excluded?
- Are customers accessing healthy foods, for example, fruit and vegetables, which they would otherwise struggle to afford and access?
- To what extent do the markets serve ethnic minority communities?

- Is the market produce affordable compared to other local sources?
- What are the overall trends within the market sectors?
- What challenges face the two types of market? How can these be overcome?
- How can the London Development Agency (LDA), the Greater London Authority (GLA), London Food and other relevant authorities support the markets sector?

The study presents case studies and findings for each of the four markets. Following this the economic impacts of the markets are aggregated and findings presented on a number of key questions, for example, on food access and impacts on local retailers.

Given the above issues, questions and concerns, an independent study of the economic impacts of both street and farmers' markets in London is important and timely. This study contributes to a better understanding of the impacts of these markets on the areas in which they operate and the people living within those areas is crucial to determining why and how these markets should be supported and developed.

The London context

Food poverty – an inability to make healthy food choices because fresh, nutritious products are not readily available, accessible or affordable – has been identified as a problem in parts of London. It is estimated that four million people in the UK have difficulty in obtaining a healthy diet, because they live out of the reach of retailers selling fresh produce.¹ The figures reveal that 53% of inner London children and 33% of outer London children live below the poverty line, whilst 13 wards in East London boroughs have been identified as “food deserts” where there is no local provision of affordable fresh food.² In addition, food in London is more expensive when compared with other parts of the country.³ London’s Mayor, Ken Livingstone, established London Food in September 2004 to address some of these issues.

London’s food sector is an important element of the economy and is crucial to the creation of thriving communities. There are sixty thousand registered food businesses are based in London and Londoners spend nearly £11 billion on food each year. Ten per cent of all jobs in London are linked to the food sector and farming.⁴

The independent Policy Commission on the Future of Farming and Food, chaired by Sir Don Curry, was established in 2001 following the foot and mouth outbreak.⁵ It set out a vision for a sustainable, competitive and diverse farming and food sector that supported the rural economy and delivered environmental benefits. The Department for Environment, Food and Rural Affairs (Defra) responded to the Curry Report by producing *Facing the Future*, setting out the national strategy for sustainable farming and food. It tasked all of the regional development agencies to develop and implement regional policies on sustainable farming and food.

The London Plan sets out a vision for a sustainable and inclusive capital.⁶ It recognises the importance of vibrant and healthy neighbourhoods that provide access to a range of goods and services to all sectors of the population. The Plan sets out the need to increase the accessibility of retail and leisure services, particularly for those who are less mobile or on low incomes, and to maximise choice. It also recognises the importance of local retail facilities that provide

convenience, specialist or particular social services and encourages Boroughs to support such facilities.

The LDA is currently developing a London Food Strategy which will look at health, economic, environmental, social, cultural and security issues. This report on London markets is one contribution to this strategy.

Markets: an overview

The market sector in London is made up of wholesale markets, street markets, farmers' markets, small stallholders and a small number of specialist markets.

This study looks at only farmers' markets and street markets. Farmers' markets and street markets are part of the markets sector in London, but the two types of market have very different structures and histories. For this study, **nef** has profiled two farmers' markets – Ealing and Marylebone – and two street markets – Lewisham and Walthamstow.

Farmers' markets

Farmers' markets are those in which farmers, growers or producers from a defined local area are present in person to sell their own produce, direct to the public. All products sold must have been grown, reared, caught, brewed, pickled, baked, smoked or processed by the stallholder.⁷ These standards have been set by FARMA (National Farmers' Retail and Markets Association) and a certification procedure is in place to ensure the standards are met. The producers selling their goods at the 10 markets managed by London Farmers' Markets (LFM) come from within 100 miles of the M25. The range of produce on sale at farmers' markets can include meat, fruit, vegetables, dairy, eggs, baked goods, beverages, flowers, plants, herbs and crafts. The farmers' markets in this study are "certified" farmers' markets run by LFM with cooperation and support from the local councils where they are located.

Farmers' markets have experienced rapid growth since the first one was established in the UK in 1997. A 2002 survey conducted by the National Farmers' Union (NFU) revealed that there were 450 regular farmers' markets in the UK with a combined annual turnover of approximately £166 million. In May 2000, former Agriculture Minister Nick Brown, speaking at the launch of the National Association of Farmers' Markets, said that farmers' markets are "a significant development for the whole food industry" and offered the continued support of the Government for the movement.

The focus of farmers' markets has been to provide farmers with an additional source of income by allowing them the opportunity to sell directly to consumers. The frequency of these markets varies, but the NFU survey estimated that 7,500 individual markets took place in the course of one year. The average annual earnings of the stallholders that took part in the survey were £8,700, although farmers could earn up to £20,000 per year from sales of produce at farmers' markets. Seventy per cent of the markets in the NFU survey described themselves as thriving.⁸

Street markets

Street markets are a traditional part of London life and many have been trading for more than a century. The two street markets that nef studied are over 100 years old and are open six days a week for at least eight hours each day offering a variety of products, from produce and prepared food to toys, clothes and haberdashery. Most of the stallholders are self-employed and buy their goods from wholesalers.

There are at least 70 street markets in London and several other small clusters of market stalls. However, despite their continued existence, the street market sector appears to be in decline. As Phil Harriss argues in his book, *London Markets*, this decline in the number of street markets and the number of stalls at each market may have some important consequences.

“There is no doubt now that London’s local food markets are in jeopardy. Every year, dozens of traders, some of whose families had run a stall for a century or more, give up their barrows. Few young men and women are taking their places. Government and councils need to take action to reverse the decline, but so too do we, the punters, or all we’ll be left with is the monotony (and expense) of supermarkets.”¹⁹

Research by the UK Commission for Integrated Transport on market traders within the London congestion-charging zone found that traditional markets are in decline due to a number of economic factors and that there is an increase in the number of casual market traders.¹⁰ This increase could be due to more regular traders moving between markets to capitalise on their busiest days and the rapid means of establishing a livelihood provided by a market stall. The research also noted the increasing number of casual applications from London’s emerging ethnic minority communities.

Jean’s fruit and vegetable stall at Lewisham Market has been owned by her family for over a hundred years and has been worked by five generations. In the 40 years Jean has been the boss, she has seen the six-day-a-week street market change dramatically. Once boasting 52 fruit and vegetable stalls, the market is now down to fewer than twenty as footfall and profits have steadily declined. She claims that she is selling produce today at the same price as it was five years ago (she has the photos to prove it!)

Both Lewisham and Walthamstow markets have been running for over 100 years and families have been trading at both for generations. In the case of Lewisham Market, the great-grandfathers and -grandmothers of today’s stallholders were amongst those illegally trading on the old bombsite before licences were granted. Baskets of produce sat on the feet of the original traders to keep them off the pavement – it was an offence to let them touch the ground and arrests were common. With the help of the police, plots were eventually licensed and allocated: at the blow of a whistle each trader ran to their chosen site, many of which have stayed in the same family ever since.

With stalls being handed down from generation to generation, many current stallholders have worked on the market all of their lives and, as a consequence, have witnessed some significant changes. Most traders talk about the decline in footfall, the squeeze on margins and profits, and the demographic changes in their customers.

Ealing Farmers' Market: market profile and findings

Major findings

- Ealing Farmers' Market has an annual turnover for produce of approximately £305,000.
- Its customers spend £152,000 at local retailers per annum.
- Market customers are drawn from the local area and though most walk to the market a large proportion also drive.
- Of the customers Ealing market attracts, 66% also plan to shop elsewhere in the neighbourhood.
- Over £14,000 is spent by market stallholders on employing local people each year.

Ealing Farmers' Market and its neighbourhood

The Ealing Farmers' Market takes place every Saturday from 9.00 to 13.00 along Leeland Road, in West Ealing; this was the original site of an old street market. A certified farmers' market run by London Farmers' Markets, it attracts an average of 15 stalls¹¹ every Saturday and there are two traditional street traders selling fruit and vegetables alongside the farmers' market. As well as fruit and vegetables, there are several farmers' stalls selling meat, bread, pastries and plants.

Brought about by the efforts of the Ealing Centre Partnership, Ealing Council and London Farmers' Markets, Ealing farmers' market opened in September 2001. The market was an outgrowth of a strategy to revitalise the shopping centre of West Ealing. The Ealing Centre Partnership remains involved with the farmers' market and is keen to encourage improvements to the market environment which might include better paving of the road, more attractive stalls and the coordination of rubbish collection with market days.¹²

The fruit and vegetable traders at the end of the market, as well as the stall around the corner, appear to do a brisk business – busier than many of the market stalls. Leeland Road is lined with small shops and cafés. The closest car park is very busy during market hours and there are typically cars waiting to get parking spots.

The Ealing Farmers' Market is located within the Walpole Ward, which is within the Ealing Local Authority. The population of Walpole is 12,688 and the resident population of Ealing is over 300,000.¹³

Area profile

Table 1: Ealing area profile

Ealing Characteristics	Walpole Ward	Ealing Borough
Population	12,688	300,000
Average Annual Gross Salary (Local Authority) ¹⁴		£27,171 (13 th out of 33 boroughs in London)
Percentage White ¹⁵	79%	59%
Largest Ethnic Minority ¹⁶	Indian – 6%	Indian – 16.5%
Clone Town status	Clone Town	

The Borough of Ealing local authority ranks thirteenth out of the thirty three London boroughs in average annual gross salary – this is lower than the Marylebone farmers' market studied but higher than both the Lewisham and Walthamstow street markets. And according to a **nef** analysis, Ealing High Street is a clone town, indicating that a large proportion of the shops on the high street are chain stores. As a result the Ealing Farmers' Market adds significant diversity to the neighbourhood's shopping options.

Customer profile

nef conducted customer surveys at the Ealing Farmers' Market in April 2005 and obtained information from 38 respondents.

The vast majority of Ealing market customers live in the local area – 37 of the 38 surveyed lived within three miles of the market and 18 of those lived within less than one mile.

Table 2: Customer proximity

Live Within...	
...1 mile	49%
...3 miles	97%
...5 miles	100%

Despite living close to the market, 40 per cent drive to the market while 44% of the shoppers walk. This may be indicative of a neighbourhood that is suburban and generally reliant on cars; it is unclear whether the market is encouraging or discouraging driving. What is clear is that the market customers are drawn almost exclusively from the local community. This is further confirmed by the demographic breakdown of the market customers, which is similar to the demographics of Walpole Ward.

Table 3: Customer demographics

Market Customers	Walpole Ward	Ealing Local Authority
Percentage White		
86%	79%	59%
Largest Ethnic Minority		
Indian/Caribbean	Indian	Indian

Customers at Ealing spent an average of approximately £20.00 at the market, less than at Marylebone – the other farmers’ market profiled – and more than customers at both street markets profiled. A higher percentage of Ealing customers indicated, however, that they intended to shop elsewhere that day compared with those shopping in Marylebone, and the average customer spend for the entire day’s shopping (market and other retailers) was £35.00. While Ealing market shoppers anticipated spending more in total for the day, they spent a smaller proportion of that money at the farmers’ market than at Marylebone. This makes sense as the Ealing Farmers’ Market has fewer stalls and a smaller selection than the Marylebone market. Since Ealing customers planned to spend more in total, retailers should anticipate reaping some financial benefits from the market.

Ealing customers cited quality of the produce as the major reason for shopping at the farmers’ market. They were also interested in helping local farmers and purchasing healthy and organic products. Many market customers appeared to be regulars and spent time talking with traders or other customers.¹⁷

Table 4: Customer characteristics at Ealing

Average customer spend	£20
Percentage of customers who plan to shop elsewhere	66%
Amount spent elsewhere	£15.21
Top two most popular forms of transport to the market	<ul style="list-style-type: none"> • 45% on foot • 39% by car
Major reasons for shopping at Ealing Market	<ol style="list-style-type: none"> 1. Quality 2. Supporting local farmers 3. Healthy organic produce

nef also surveyed customers who did not use the farmers’ market in Ealing and found that all of the non-market customers buy their groceries at major supermarket chains. Several of these shoppers did not know about the market or thought that it was entirely organic; while others felt that the farmers’ market was “too pricey”.

Retail

The response from local retailers in the Ealing area is largely positive. Of those interviewed, 44% are positive about the market, 11% are negative, with the balance being neutral about the markets (45%). There are extremes in both groups: one business decided to open in their current location because of the proximity to the market, while another retailer anticipates closing within the year because of what he describes as 'unfair competition from market traders'. It should be noted that neither of these examples was investigated in depth.

The positive comments from retailers indicate that they are happy with the increased shopping activity on the street and benefit from additional trade. One food retailer who directly competes with the farmers is pleased with the market, "It has the feeling of an event." He claims that it brings people to the neighbourhood and has revitalised the area. A café owner claims to be very reliant on the business from traders on Saturdays.

Several shopkeepers whose businesses have been unaffected by the market still appreciate its potential effects. These retailers believe that the market brings potential customers to Leeland Road who might not otherwise shop there. Leeland Road is off the High Street and is therefore not necessarily well traversed. While these retailers are pleased with the additional footfall, they do not believe it has increased their turnover.

Of the negative comments most relate to specific issues with the market, issues that can be easily addressed. Addressing these issues could go a long way to ensuring retailer support for more markets. For example, several retailers are concerned that the market traders take up too much parking in the area making it difficult for their regular customers to visit on Saturdays. The food retailer who is concerned about losing his business claims that market traders are not subject to the same regulations that he is and therefore have an advantage over his business. These are specific complaints that can be addressed through planning for parking and setting a limit on the stalls that sell the same products as adjacent retailers.

Impact Analysis

Since the Ealing Farmers' Market is situated on a through street, counting the number of market shoppers is complicated. The number of people that pass through the street during market hours, as captured by footfall measurements, is well over 3,000, but the actual number of market customers is closer to 300.¹⁸

Market traders report income that ranges from £180 to £450 per stall. On the day of the survey, the total market turnover for produce was £5,865.

Despite the farmers bringing their goods to market from outside of London, there are some important local economic impacts, including local employment and increased local retailer income.

Table 5: Ealing market income

Ealing impacts	
Number of stalls	15
Average daily trader income	<u>X £391.00</u>
Daily market income	£5,865.00
Total annual market income (52 weeks)	£304,980.00

The annual income for the Ealing Farmers' Market is approximately £305,000.

Table 6: Customer spend on local retailers

Ealing impacts	
Customers at Market	292
Percentage of customers who plan to shop elsewhere	X 66%
Daily customer spend at local retailers	<u>X £15.21</u>
Total daily spend at local retailers	£2,931.27
Total annual spend at local retailers (52 weeks)	£152,426.10

As Table 6 illustrates, market customers spend approximately £3,000 on other local retailers, resulting in an annual expenditure of £152,000. It can not be said with certainty how much of this spending would have occurred without the market, though it is likely that the market has an important role.

Additionally, on average, stalls at Ealing employ 0.7 full-time, local employees. At an average estimated pay rate of £25 per day,¹⁹ the Ealing market contributes £14,092 to the local economy annually in the form of local wages. This money is likely to stay in the local economy as wage earners spend locally, for example, on housing, food and services.

Table 7: Employment contributions to local economy

Daily rate of pay for a trader	£25.00
Total local employment at market	<u>X 10.80</u>
Daily income of local market workers	£270.00
Annual Employment	£14,040.00

Although the economic benefits to the area are not as large as the turnover generated by the farmers' market, they are an important source of additional income for the Ealing area. However, it can not be said with certainty that all of the money generated is a result of the market. However, the farmers' markets may be a source of interest and activity in West Ealing that did not exist before. As more people come to see the market or notice activity on Leeland Road and West Ealing, even though they are not shopping at the market, they may visit shops and businesses in the area that they had not been to before. As the market grows in popularity, these effects would be expected to increase.

Conclusion

The Ealing Farmers' Market is small and has a small customer base. However, customers appear to be enthusiastic about the market, attend regularly and are drawn entirely from the local area. Retailers' opinions about the market are largely optimistic suggesting a significant positive contribution to their trade and to the local economy.

The market is generating additional retail income for local shops and provides a focal point of lively activity in West Ealing on Saturday mornings. Complaints from retailers are very specific and could be addressed by town planners.

The total contribution to the local economy is over £166,500 per annum. It can not be said with certainty how much of this would have occurred without the market. However, this study does not consider the positive and additional multiplier effects of the market's activity. For example, of the wages that local employees receive for working at the market, a proportion will be spent locally, further enhancing the benefits for the local economy.

Marylebone Farmers' Market: market profile and finding

Major findings

- Marylebone Farmers' Market has an annual turnover of approximately £1.3 million.
- Its customers spend £295,000 at local retailers.
- Over £19,250 is spent on employing local people each year.
- Most of Marylebone's customers live locally and walk to the market.
- Customers cite quality of products as their major reason for shopping there.
- Most retailers are pleased with the market and believe that it helps their business and the neighbourhood.
- On average, customers spend more money per person at the Marylebone market than at any of the other markets profiled in this study.
- Marylebone Farmers' Market has the highest prices of any of the markets profiled, but the prices are competitive with local supermarkets.
- Having the market on Sunday is also helpful for local retailers and helps to make it a livelier day than would normally be anticipated.

Marylebone Farmers' Market and its neighbourhood

The farmers' market in Marylebone takes place every Sunday from 10.00 to 14.00 in the Cramer Street car park, just off Marylebone High Street. A certified farmers' market, managed by the London Farmers' Markets, it has been in operation since June 2003. After opening it quickly became the largest certified farmers' market in London with an average of 30-35 stalls each week.²⁰ The market is generally social and busy, and attracts a lot of families presumably doing their weekend shopping. The stalls include a wide variety of fruit and vegetables as well as fish, meat and several cheese stalls. The selection varies between more functional items, such as carrots and potatoes, and more specialty items, such as specialty mushrooms or venison sausages. Several stalls also sell prepared food making the market a varied shopping and eating experience.

The market attracts between 2,000 and 3,500 visitors each Sunday given good weather and traders generate anywhere from £450 to over £1,000 in income on comparable Sundays. It is likely that a large percentage of the visitors to the market are shopping because the market is located in a small car park: it is not a pedestrian thoroughfare and therefore most people entering the car park are doing so for the express purpose of shopping at the market. That said a large proportion of the visitors appeared to be families or couples who shop together.

Area profile

Table 8: Marylebone area profile

Marylebone characteristics	Marylebone High Street Ward	City of Westminster
Population	8,860	181,286
Average Annual Gross Salary (Local Authority) ²¹		£41,048 (4 th out of 33)
Percentage White ²²	79%	73%
Largest Ethnic Minority ²³	Indian	African
Clone Town Status	Border Town	

Marylebone is a lively, densely populated neighbourhood in west London in the City of Westminster. As of the 2001 Census, the population of Westminster was over 180,000; the Marylebone High Street Ward population was 8,860. The average annual gross salary in Westminster is the fourth highest in London at over £41,000.²⁴ The neighbourhood is more ethnically diverse than England, but the Marylebone Ward has a slightly lower proportion of ethnic minorities than Westminster. According to **nef**'s Clone Town Survey, Marylebone is considered a Border Clone Town – meaning that a large number of its local retailers are chain stores but that some independent shops remain in business.

Customer profile

On April 24 2005, **nef** surveyed 45 market customers to generate a typical market customer profile. The surveys were conducted on a random basis and, where possible, every tenth person was approached to respond to questions. The findings of the survey indicate that shoppers reflect the surrounding community and enjoy the farmers' market; the shoppers also spend substantial time and money in and around the market.

Customer demographics reflect the demographics of the neighbourhood, but do not mirror them. The vast majority are white and between the ages of 30 and 59.

Table 9: Customer demographics

Market Customers	Marylebone High Street Ward	City of Westminster
Percentage White		
96%	79%	73%
Largest Ethnic Minority		
Mixed	Indian	African

While three-quarters of the respondents live within three miles of the market, only 30 per cent work locally. Most of the shoppers arrived on foot.

Table 10: Customer proximity

Live Within...	
...1 mile	36%
...3 miles	77%
...5 miles	89%

Market customers spent more money at the Marylebone Farmer's Market than customers at any of the other three markets profiled by nef. The average customer spend at the market was approximately £24.00. Marylebone customers also visited an average of more than four stalls at the market.

Table 11: Customer characteristics at Marylebone

Average customer spend	£24
Percentage of customers who plan to shop elsewhere	55%
Amount spent elsewhere	£10.00
Top two most popular forms of transport to the market	<ul style="list-style-type: none"> • 51% on foot • 24% by car
Major reasons for shopping at Marylebone Market	<ol style="list-style-type: none"> 1. Quality 2. Atmosphere 3. Supporting local farmers

Approximately 55% of the market customers spent money at other retailers or cafés in the area bringing the average customer expenditure for the day up to £33.00. While the money spent at the Marylebone market was higher than at the other markets, the money customers spent at other retailers was less than at any other market.

Finally, 33 customers (out of 45) cited quality of products as their major reason for shopping at the market, with the second most popular reason being the atmosphere, while only four respondents cited price as a reason to shop at the market.

nef also surveyed several shoppers who did not visit the farmers' market. These shoppers had very similar profiles to the market shoppers; their demographics, daily-anticipated expenditure, and their proximity to the market all closely matched the same characteristics of the market shoppers. All of the non-market shoppers bought their food at a grocery chain and their reasons for not shopping at the market were varied. It is difficult to draw any strong conclusions from these responses, but the anecdotes are informative and can serve to guide market improvements.

Two non-market shoppers said that the farmers' market did not compare favourably to markets in their home countries, Australia and France, because of product selection and the traders' lack of knowledge. Some non-market shoppers had misconceptions about the market; for example, one shopper thought that groceries were only sold only in bulk quantities at the market. And several non-market shoppers don't like markets because they felt they are overpriced, unhygienic or just inconvenient.

Community reception

Retailers in Marylebone are overwhelmingly happy with the market. Of the ten retailers surveyed by **nef**, six believe that the market has had a positive impact on their business and while three retailers don't believe that there has been any impact on their business – positive or negative –two of these three businesses believe that the market has been good for the community.

Many retailers noted that because the market is on a Sunday, the streets in the area are livelier and have more shoppers than they would normally expect. A local supermarket manager claims that Sundays are now the shop's busiest day whereas he would expect Saturdays to be their busiest day. Most interesting is that specialty food shops and grocery stores, that would be expected to directly compete with the farmers' market, were happiest with the market, mostly because of the increased foot traffic on Sundays as well as how the businesses can actually complement one another. For example, an organic grocer claims that market customers often come to her shop looking for products that were not available at the market. The same grocer also believes that having a farmers' market "is a hallmark of a good neighbourhood", and will therefore attract more shoppers. A couple of retailers even wanted the market to open more often. And finally, several retailers mentioned that when the market moved temporarily, their business immediately declined because market shoppers could no longer see their shop from the market site.

Not all the retailers were satisfied with the market however. In one instance, a retailer was concerned that some market rules are being flouted and wholesalers have set up stalls that undercut her business. As a result, the retailer does not open her shop on Sundays.

Impact analysis

Counting footfalls at the Marylebone Farmers' Market is easier than at other markets because the market takes place in an enclosed car park. The number of footfalls on the study day was over 3,000. However, many of the people entering the market were families, so although there were two adults (or two footfalls) they were only shopping for one household. As a result the number of shoppers is significantly lower. The number of shoppers is estimated at just over 1,000 based on trader income and consumer-spend survey data.

Market trader income ranges from £150 per market day to £1,200 with an average of over £700 for produce sellers.

Table 12: Marylebone market income

Marylebone impacts	
Number of stalls	35
Average daily trader income	<u>X £716.00</u>
Daily market income	£25,060.00
Total annual market income (52 weeks)	£1,303,120.00

As Table 12 illustrates, the total income generated by the market is over £25,000 per week and over £1.3 million per annum. Marylebone Farmers' Market generates considerably more income than its Ealing counterpart; not least because of its size and the greater customer spend.

Marylebone market customers also spend at local retailers. As Table 13 illustrates, over £5,700 is generated for retailers in the vicinity of the farmers' market on a market day.

Table 13: Customer spend at local retailers

Marylebone impacts	
Customers at Market	1,064
Percentage of customers who plan to shop elsewhere	X 55%
Daily customer spend at local retailers	<u>X £9.69</u>
Total daily spend at local retailers	£5,670.60
Total annual spend at local retailers (52 weeks)	£294,871.20

The annual spend by market customers at other local retailers is approximately £295,000. It can not be said with certainty how much of this spending would have

occurred without the market, though it is likely that the market has an important role.

Additional economic impacts arise from the employment of local people to work on the market stalls. These employees are typically engaged in transporting goods, setting up the sales and selling the produce. On average the stalls employ 0.4 employees bringing total local employment at the market to 14.8 people.

Table 14: Employment contributions to local economy

Daily rate of pay for a trader	£25.00
Total local employment at market	<u>X 14.80</u>
Daily income of local market workers	£370.00
Annual employment	£19,240.00

As Table 14 illustrates, local employment contributes another £370 to the economy per week in the form of wages and over £19,000 per annum. This money that is paid to local people will be used to pay for local goods and services such as housing, food and entertainment.

The additional economic activity generated by the market for the local neighbourhood is significant and suggests that the farmers' market is an asset for the local economy and local retailers. Even retailers in the neighbourhood who did not experience direct benefits from the market feel that the market is good for the neighbourhood.

Conclusion

The farmers' market at Marylebone helps make the neighbourhood into a Sunday shopping destination for people living locally though it already has a large selection of shops and cafés. Not only does the community benefit from the market, but also the market no doubt benefits from the neighbourhood. As one retailer put it, "Marylebone and the market are good complements".

The total economic contribution to the local economy is over £314,000 per annum. It can not be said with certainty how much of this would have occurred without the market. However, this study does not consider the positive and additional multiplier effects of the market's activity. For example, of the wages that local employees receive for working at the market, a proportion will be spent locally, further enhancing the benefits for the local economy.

Lewisham Street Market: market profile and findings

Major findings

- Lewisham Street Market has an annual turnover of approximately £5 million on produce.
- Its customers also spend £3.6 million at local retailers.
- Over £390,000 is spent on employing local people each year.
- Most customers live within three miles of the market and use the bus to get there.
- The most popular reason cited for shopping at the market is price competitiveness.
- Lewisham customers spent an average of £10 at the market with 56% of the customers shopping elsewhere in the neighbourhood.
- Street market prices for fruit and vegetable are considerably lower than the prices at the major supermarket in the shopping centre adjacent to the street market.
- Retailers around the Lewisham market are very pleased with the market's presence; they depend on the market for business and interact well with the traders.

Lewisham Street Market and its neighbourhood

Lewisham Street Market takes place on Lewisham High Street in South East London. The market first opened in 1906 and was hit by a V1 bomb in 1944, which killed 56 people²⁵. It is open from 9.00 to 17.30 Monday to Saturday and a craft market also takes place on Sundays. Run by the London Borough of Lewisham, the market can have as many as 60 stalls, a large number of which sell fruits and vegetables, but it also features stalls selling fish, clothes, flowers and haberdashery.

Today the market appears to be the major attraction in the neighbourhood. By closing the street to traffic in 1994²⁶, the Council created a pedestrian thoroughfare that houses the market as well as other retailers and cafés. There is a large shopping centre adjacent to the market housing mostly chain shops and a large chain grocery. Most of the market shoppers appear to be doing their daily or weekly grocery shopping at the different stalls. There is some overlap of products between fruit and vegetable stalls, but there is also a wide variety; some stalls specialise in fruits, others in root vegetables and some in more unusual varieties. Lewisham does not seem to attract many tourists and most of the shopping is functional.

The Street Trading Section of Lewisham Council co-ordinates the running of four markets in the Borough: Lewisham High Street, Catford Broadway, Deptford High Street and Douglas Way. The Council issues licenses to traders for their pitches and is cognisant of maintaining a variety and balance of goods at the markets. The Council collects fees from the traders for their pitches ranging from £10 to £18 per day. The Street Trading Section of the Council is self-sustaining and has a budget of £750,000 a year which is paid for through pitch charges. In order to maintain the market the Council hires cleaners, trading officers and electrical workers – all contributing to employment in Lewisham. The Council is aware of several issues affecting the market including the need for a canopy to cover the entire market making it more accessible in poor weather, as well as limited parking, poor lighting and concerns over crime rates. In order to encourage market attendance, community events take place on the weekends, organised by the Street Trading Section and Town Centre Manager and can include face painting for children and blood donation promotions.²⁷

Area profile

Table 15: Lewisham area profile

Lewisham Characteristics	Lewisham Central Ward	Lewisham Local Authority
Population	13,190	248,922
Average Annual Gross Salary (Local Authority) ²⁸		£20,621 (30 th out of 33)
Percentage White ²⁹	62%	66%
Largest Ethnic Minority ³⁰	Caribbean	Caribbean
Clone Town Status	Clone Town	

Lewisham market is in the borough of Lewisham and specifically located within Lewisham Central Ward. The resident population of Lewisham Central, as measured in the 2001 Census, was 13,190; the resident population of Lewisham was 248,922. The Lewisham Local Authority ranks thirtieth out of 33 for annual gross income in London with an average annual gross income of £20,621. According to **nef**, Lewisham is a clone town meaning that it has a majority of chain shops rather than independent shops on the High Street.

Customer profile

In April 2005, staff from **nef** visited the Lewisham market and interviewed 48 customers. Only 19% of the customers reported working locally and 78% lived more than three miles away. Most respondents arrived at the market by bus, and the next largest group came to the market by car.

Table 17: Customer proximity

Live Within...	
...1 mile	17%
...3 miles	22%
...5 miles	66%

Despite the distance that people travelled, the customer demographics are similar to the neighbourhood demographics – 60% of the customers were reported as white, compared to 62% and 65% for the Ward and Local Authority populations respectively. The next largest two ethnic minorities represented at the market were African and Caribbean, which also reflects the community statistics.

Table 18: Customer demographics

Market Customers	Lewisham High Street Ward	Lewisham Local Authority
Percentage White		
60%	62%	66%
Largest Ethnic Minority		
Mixed	Caribbean	Caribbean

The average customer at Lewisham spent £8.50 on food at the market and the average customer's total day spend was over £20, including non-market purchases. Only 56% of market customers reported spending money at area shops besides the market – this is much lower than the 71% of customers at Walthamstow market who reported spending money elsewhere. It is also slightly lower than at either of the farmers' markets where 55–66% of market shoppers intended to spend money at area retailers. The most popular reason cited for shopping at Lewisham was the prices. Given the relatively modest levels of spending and the reliance on buses to travel to the market, the importance of affordable, low priced bus travel is important.

Table 19: Customer characteristics at Lewisham

Average customer spend	£8.50
Percentage of customers who plan to shop elsewhere	56%
Amount spent elsewhere	£10.83
Top two most popular forms of transport to the market	<ul style="list-style-type: none"> • 48% on bus • 31% by car
Major reasons for shopping at Lewisham Market	<ol style="list-style-type: none"> 1. Price 2. Atmosphere 3. Quality

nef also interviewed customers not using the market. Of those non-market customers shopping for food, most use the chain supermarkets in the neighbourhood. Some of the non-market customers who responded occasionally use the market as well, but most prefer the convenience of the supermarket and being able to buy all their groceries at once.

Community reception

All of the retailers interviewed around the Lewisham area indicated that the market benefits their business and that at least some of their customers are also market

customers. All of the retailers interviewed thought that the market was complementary to their business and not competitive; one retailer commented that when the market is closed, "Lewisham tends to die". There is little concern by retailers that the market competes with their businesses. In fact, the retailers have a strong link to the market and a lot of interaction with the traders. One retailer provides services for the traders in return for a bag of fruit or vegetables. A café owner counts many traders amongst his customers. A travel agent says that traders arrange holidays through her and she does her fruit and vegetable buying at the market.

The market and retail sectors in Lewisham appear to be interlinked and there is a strong pattern of exchanging services and an apparent reliance of one on the other. The reasons for the dichotomy are likely to be twofold: street markets happen at least six days a week, and in the case of Lewisham, have been there since 1906 – longer than most of the retailers; farmers' markets are a newer phenomenon and only occur once a week making them less connected with the daily life of the neighbourhood.

Lewisham Street Market Trader

Having worked his stall for just four years, Mike is a relative newcomer to Lewisham, a traditional street market dominated by family-owned plots. He is keen to see the market move into the twenty-first century and key to this, according to Mike, is investment.

"No one seems to invest in markets," he says. "At the moment, the High Street still feels like something from the eighteenth century but with a bit of investment, the market could be so much better."

This is a feeling echoed by many at Lewisham not least because they were promised a canopy for the market some years ago but which has yet to happen. The impact on trade from providing customers with a covered market would be significant. As Mike says, "Who wants to shop in the rain when you can shop in the dry in a supermarket?" Investment in this would solve the issue of stalls becoming tatty from being exposed to the elements all year round.

The lack of investment in street markets, in Mike's opinion, is down to people's perception of market traders.

"Just because we work outside, people don't take us when we are all, in fact, small businesses. Some people look down on you when you work a stall but in fact we are professional, business people."

Impact analysis

Traders are unwilling to report individual income. However, hourly foot traffic through the market was measured as varying between 2,100 and 2,400. However, only about 10% of these footfall numbers were shopping for fruit and vegetables at the market; others were just walking through the market possibly on their way to the shopping centre or public transportation. However, **nef** has calculated the number of produce shoppers by estimating, for timed intervals, the number of customers shopping for produce.

nef's measurement of active shoppers indicates that approximately 1,900 customers shop for fruit and vegetable on a weekday in Lewisham.

Table 20 illustrates the turnover of market stalls at the market.

Table 20: Lewisham market income

Lewisham impacts	
Number of stalls	20
Average daily trader income	X £811.53
Average daily market income	£16,230.00
Weekly market income	£97,380.00
Total annual market income (52 weeks)	£5,063,760.00

The total market income for fruit and vegetable sales at Lewisham market is over £16,000 with a weekly take approaching £100,000. Annually the market has a turnover of over £5 million for produce (the total market turnover will be considerably higher).

Trader turnover averages £800 per day. Although this figure may seem high, this is an average for all stalls, including the relatively large food stalls. In addition, a large slice of trader turnover goes to expenses.

56% of Lewisham market shoppers spend money at local retailers close to the market. Table 21 illustrates market customers' spend elsewhere.

Table 21: Customer spend at local retailers

Lewisham impacts	
Produce customers at Market	1,909
Percentage of customers who plan to shop elsewhere	X 56%
Daily customer spend at local retailers	X £10.83
Total daily spend at local retailers	£11,577.70
Weekly spend at local retailers	£69,466.22
Total annual spend at local retailers (52 weeks)	£3,612,243.30

Market customers reported spending more money at area retailers than either on fruit and vegetables or at the market. Shoppers spend over £11,000 at area retailers on a market day in Lewisham. This creates an annual spend on local retailers of over £3.6 million. It can not be said with certainty how much of this spending would have occurred without the market, though it is likely that the market has an important role.

In addition to the money spent at local retailers, the market employs approximately 25 local residents generating approximately £7,500 per week in wages.

Table 22: Employment contributions to local economy

Daily rate of pay for a trader	£50.00
Total local employment at market	<u>X 25.00</u>
Daily income of local market workers	£1,250.00
Weekly income of local market workers	£7,500.00
Annual employment	£390,000.00

Of the annual £390,000 earned by local employees at market stalls, it is highly likely that significant amounts will be spent locally generating additional benefits.

Conclusion

Lewisham Street Market is an important part of the Lewisham economy and contributes economic activity through both employment and additional retail business.

It has a wider geographic draw than any of the other markets profiled and the market brings a significant amount of business to the local community. Traders and retailers work together and appear to complement one another's business. Lewisham Street Market also provides an important source of inexpensive fruits and vegetables to the local community and is a much less expensive option than the area's supermarket.

The total economic contribution to the economy local to the Lewisham market is over £4 million per annum. It can not be said with certainty how much of this would have occurred without the market. However, this study does not consider the positive and additional multiplier effects of the market's activity. For example, of the wages that local employees receive for working at the market, a proportion will be spent locally, further enhancing the benefits for the local economy.

Walthamstow Street Market: market profile and findings

Major findings

- Walthamstow Street Market has an annual turnover of approximately £3.8 million on fruit and vegetables.
- Its customers who buy produce also spend £4.5 million at local retailers – *more than they spend at the market.*
- Over £375,960 is spent on employing local people each year.
- Fruit and vegetables are a very small portion of the Walthamstow market – making up just over 5% of the 300 stalls.
- 56% of the market customers live within three miles of the market.
- Area retailers are mostly pleased with the market; however, many have specific complaints or suggestions on how to improve it.
- Concern was voiced by both the Council and area retailers about the declining quality of products offered at Walthamstow.
- The Walthamstow Council has been working on a regeneration plan, which includes improvement strategies for the market. Funding for the plan, however, is proving difficult to find.

Walthamstow Street Market and its neighbourhood

Walthamstow Street Market is located on Walthamstow High Street and is said to be the longest street market in Europe (however, it is not the biggest).³¹ The market currently has approximately 300 stalls that sell a variety of goods, including fruit and vegetables, clothes, shoes, household items, processed food, meat, flowers and music. It operates from Monday to Saturday and is open from 8.00 to 18.00. The market dates back to the nineteenth century, but the Council did not begin to issue stall licenses until 1932.³² Only 5% of the stalls sell fresh fruit and vegetables.

The Street Trading Office of the London Borough of Waltham Forest oversees the operation of the market. Its role is to license traders, to ensure that all regulations are being met and to collect fees. The operation of the market is financially self-sustaining. The Street Trading Office has a current annual income of £1.04 million. It aims to break even, with any surplus reinvested in the market. The running costs for the market includes staff costs and a cleaning team, which is on site when the market is open.

Walthamstow town centre is currently the focus of a regeneration programme that includes the redevelopment of the high street where the market is situated. Local residents were consulted at the beginning of the regeneration program and it emerged that while many thought the market was a good thing, they did not like the mess and untidiness it brought. To address this, the Council is reducing the number of stalls at the market and increasing the size of each stall area. This means that traders will be able to contain their rubbish and storage within their own site avoiding it spilling into the street. Walthamstow market did have 448 stalls, but the Council's goal is to reduce the number of stalls to 250 and so far, through attrition, the number of stalls has been reduced to 300 with no new casual or permanent licenses being issued since 2002. The Council is also introducing standard stalls and canopies to improve the appearance of the market. The regeneration program is improving the paving, lighting, bollards and seating along the high street.

The Council is also concerned with the quality or lack of quality of goods at the market and is hopeful that by reducing the number of stalls the quality of the products may improve. The Council also has a "clashing" policy whereby no two stalls selling the same goods can be within five stalls of one another. The policy attempts to improve the variety and diversity of products offered. Other issues, which the Council is trying to address, are crime – especially pickpockets – and lack of parking.

Area profile

Table 22: Walthamstow area profile

Walthamstow Characteristics	High Street Ward	Waltham Forest Local Authority
Population	11,152	218,341
Average Annual Gross Salary (Local Authority) ³³		£20,862 (29 th out of 33)
Percentage White ³⁴	59%	65%
Largest Ethnic Minority ³⁵	Pakistani	Caribbean
Clone Town Status	Home Town	

The market is located in the High Street Ward of the Waltham Forest Local Authority. The resident population of High Street, as measured in the 2001 Census, was 11,152 and the resident population of Waltham Forest was 218,341. The Waltham Forest Local Authority ranks twenty-ninth out of 33 for annual gross income in London with an average annual gross income of £20,862, making it one of the more deprived areas in London. According to **nef**, Walthamstow is a home town, meaning that it has a higher proportion of independent shops than chain retailers.

Customer profile

nef conducted customer surveys at the Walthamstow market on Friday, April 22nd and successfully interviewed 40 people. On that day, there were 15 fruit and vegetable stalls, two processed food stalls, three snack bars and one meat stall – making food a small proportion of the overall market. Of the customers surveyed, 56% lived with three miles of the market but only 17% reported working locally.

Despite the relative proximity of people's homes, the most popular form of transport was the car.

Table 23: Customer proximity

Live Within...	
...1 mile	44%
...3 miles	56%
...5 miles	78%

Of the customers surveyed, 59% were White. The next largest ethnic minority in the Ward and the local authority is Pakistani, but the largest minority group of market customers was Caribbean.

Table 24: Customer demographics

Market Customers	High Street Ward	Waltham Forest Local Authority
Percentage White		
59%	59%	65%
Largest Ethnic Minority		
Caribbean	Pakistani	Caribbean

On average customers spent £14 at the market, but only £9.70 on food. Shoppers spent an average of £30 for all of their shopping including shopping at area retailers with 71% of customers who shopped at the market also shopping elsewhere and the vast majority of them spending more at other retailers than at the market. Customers cited price as the major reason for shopping at the Walthamstow market.

Table 25: Customer characteristics at Walthamstow

Average customer spend	£9.70
Percentage of customers who plan to shop elsewhere	71%
Amount spent elsewhere	£16.39
Top two most popular forms of transport to the market	<ul style="list-style-type: none"> • 45% on car • 33% by foot
Major reasons for shopping at Walthamstow Market	<ol style="list-style-type: none"> 1. Price 2. Location 3. Atmosphere

nef also surveyed shoppers in the neighbourhood who were not using the market and found that all of them did their food shopping at the supermarket. These customers felt that the market offered low quality goods and that it was inconvenient.

Community reception

The retailers in Walthamstow were generally positive about the market but many voiced concerns that the quality of the market has been declining. All but one retailer claimed that the market had either a positive effect or no effect on their sales and that the market complemented their shops. One retailer, however, competes with a stall right outside of her shop and she believes it is having a negative effect on her business. All of the retailers agreed that more than half of their customers shop at the market and most thought that not having the market would be very bad for their businesses.

The retailers made some suggestions on how the market could help their business. Clearly, competing stalls could be placed further away from the shops. The retailers complained about the lack of parking, the decline in the quality of the goods and one shop suggested that there should be spaces between stalls so that market shoppers could more easily get to the shops.

Impact analysis

Footfall data gathered on the day of the survey indicates that between 2,400 and 3,000 people visit the market every hour. The number of shoppers has been calculated using browsing data. Surveyors observed the number customers at fruit and vegetable stalls for timed intervals. A very small percentage of people entering the market were shopping for fruit and vegetables, probably because fruit and vegetable stalls make up only 5% of the total number of stalls in the market. Furthermore, many people could have been heading towards the shops lining the market street and not the market itself. Finally, during the less crowded hours of the day people were seen strolling through the market but not actually shopping. nef's measurements indicate that the number of shoppers is just over 1,200 per day.

Table 26 examines market turnover for fruit and vegetable stalls.

Table 26: Walthamstow market income (food stalls)

Walthamstow impacts	
Number of stalls	15
Average daily trader income	<u>X £812.51</u>
Average daily market income	£12,188.00
Weekly market income	£73,128.00
Total annual market income (52 weeks)	£3,802,656.00

According to nef's calculations of how much customers spend, the total market turnover for fruit and vegetable stalls is over £12,000 per day with the average trader generating a turnover of over £800. The annual turnover of fruit and vegetable stalls in Walthamstow market is £3.8 million. It is not known what percentage of the total market turnover this represents.

Walthamstow customers spend an average of £9.70 on fruit and vegetables at the market and an additional £16 on items at other local retailers. Table 27 examines the contribution of spending at local retailers.

In total, market shoppers contribute over £14,500 to the local economy through shopping at retailers proximate to the market each day and over £4.5 million per annum. It can not be said with certainty how much of this spending would have occurred without the market, though it is likely that the market has an important role.

Table 27: Customer spend at local retailers

Walthamstow impacts	
Customers at Market	1,256
Percentage of customers who plan to shop elsewhere	X 71%
Daily customer spend at local retailers	<u>X £16.39</u>
Total daily spend at local retailers	£14,615.95
Weekly spend at local retailers	£87,695.70
Total annual spend at local retailers (52 weeks)	£4,560,176.40

In addition, the market also employs local people, as Table 28 illustrates.

Table 28: Employment contributions to local economy

Daily rate of pay for a trader	£50.00
Total local employment at market	<u>X 24.10</u>
Daily income of local market workers	£1,205.00
Weekly income of local market workers	£7,230.00
Annual employment	£375,960.00

The market employs approximately 24 local residents who collectively earn just over £1,200 a day. The weekly income for these local employees is over £7,000 with an annual income of over £370,000. It is likely that this money remains in the local economy and is used to purchase goods and services such as housing, food and entertainment.

Conclusion

The Walthamstow Street Market is an integral part of the shopping experience in Walthamstow. Contributions to the local economy are made through the retail shopping that market shoppers do outside of the market as well as the local employment impacts.

Walthamstow Street Market provides a good source of inexpensive fresh fruit and vegetables for its local community. The market is also a shopping experience – there is good variety of stalls and a person's entire shopping needs can be met at the market. Additionally, the market provides opportunities for socialising within the community. The concerns over the quality of items at the market are difficult to address, but the involvement and support of the Council is key to maintaining the market as a vital part of the Walthamstow local economy.

The total economic contribution to the local economy is nearly £5 million per annum. It can not be said with certainty how much of this would have occurred without the

market. However, this study does not consider the positive and additional multiplier effects of the market's activity. For example, of the wages that local employees receive for working at the market, a proportion will be spent locally, further enhancing the benefits for the local economy.

Economic impacts: summary

nef has analysed several facets of the economic impacts of the four markets. Market impacts include:

- market attendance
- market and trader income
- impacts on the local economy
- employment effects
- total market impacts and multiplier effects.

In order to analyse market impacts, **nef** used multiple methods.

Market attendance

Market attendance is an important indicator of market popularity and the amount of turnover a market can generate. It drives many of the economic impacts and directly affects market traders as well as surrounding retailers. **nef** calculated market attendance through footfall measures. Our surveyors were positioned at the major entry points to the market streets and for timed intervals counted the number of persons entering the street.

Table 29: Market attendance and shoppers

	<i>Farmers' markets</i>		<i>Street markets</i>	
	<i>Marylebone</i>	<i>Ealing</i>	<i>Lewisham</i>	<i>Walthamstow</i>
Footfall	3,288	3,564	19,508	26,355
Number of food stalls*	35	15	21	15
Market Shoppers	1,064	292	1,909	1,256

**For street markets the number of fruit and vegetable stalls only.*

The footfall estimates vary widely across the markets and reflect not only the size of markets (in terms of the number of stalls) but also the market location. For example, Ealing Farmers' Market has fewer than half the number of stalls than Marylebone Farmers' Market, but a greater number of footfalls. Because Ealing Farmers' Market is located on a through street (Leeland Road) in West Ealing, replete with small shops and cafés, many of the people entering the market street had destinations other than the market.

In contrast, Marylebone Farmers' Market is in a car park that is mostly closed on Sundays and set aside for the market. Those who enter the car park at Marylebone are headed for the Farmers' Market; it is not a direct route to any other destination and, as it is fenced-off, shoppers cannot access shops from the car park. As a result the footfall numbers at Marylebone are less than those at Ealing, but more of the people entering the market at Marylebone are actual shoppers.

The footfall estimates at Lewisham and Walthamstow are several times larger than those at either of the Farmers' Markets. The total number of stalls at Lewisham and Walthamstow is far greater than at either of the Farmers' Markets – up to 60 at Lewisham and 300 at Walthamstow. Both markets are on streets that are closed to traffic and are filled with shops and cafés, and each has an adjacent shopping centre. The street that hosts Lewisham market is also a pedestrian route to other destinations. Despite the very large numbers of through traffic at the street markets, the relative number of actual shoppers, as well as their total income for fruit and vegetable, is similar to that of the Farmers' Markets.

While there is a relationship between footfall and the number of actual shoppers, it is different for every market. At Ealing, for example, as described above, the market street is a through street and many of the people passing the surveyors did not shop at the market. At Walthamstow, only 5% of the stalls are fruit and vegetable stalls, therefore, a small percentage of the total footfalls in the market will actually be shopping for fruit and vegetable.

To determine the number of shoppers at Farmers' Markets, **nef** used survey data on the amount that consumers spent and traders' takings to estimate the number of actual shoppers at the farmers' markets. To determine the number of shoppers at street markets **nef** surveyors assessed the number of shoppers at fruit and vegetable stalls during timed intervals.

The results of these two methods show that the street markets have many more shoppers than the farmers' markets. Despite the similar number of stalls at street markets, street markets draw many more customers for several reasons; they are open much longer than farmers' markets (8 to 10 hours a day) and have been in existence for over 100 years – making them well established shopping areas. The farmers' markets are only a few years old and are only open for four hours once a week.

Market and trader income

The total daily turnover for food stall at the markets varies widely from almost £6,000 at Ealing to £25,000 at Marylebone. The two street markets fall within this range at £16,000 for Lewisham and £12,000 for Walthamstow. There are multiple drivers behind these income figures including the number of stalls, the popularity of the market and product prices, but the relationships between these factors are not straightforward.

In most cases, the daily income of a total market is linked to the number of estimated customers. However, Marylebone Farmers' Market earns the largest daily income of any of the markets and has only the third highest number of estimated shoppers. Marylebone's overall income is highest because it has the greatest number of food stalls and the highest prices of all the markets; these factors counteract the relatively low number of shoppers.

Ealing Farmers' Market has the smallest daily income and the fewest number of estimated customers, but it has the same number of food stalls as Walthamstow. Ealing draws fewer shoppers than Walthamstow for several reasons. First, Walthamstow is open for 10 hours a day – six hours more than the Ealing Farmers' Market. It is also a very large street market with close to 300 stalls and therefore attracts a large number of people from the neighbourhood spending money on many different items.

Table 30: Market turnover (food stalls)

	<i>Farmers' Markets</i>		<i>Street Markets</i>	
	<i>Marylebone</i>	<i>Ealing</i>	<i>Lewisham</i>	<i>Walthamstow</i>
Daily trader income	£716	£391	£812	£812
Daily market income	£25,060	£5,865	£16,230	£12,188
Weekly market income	£25,060	£5,865	£97,384	£73,126
Annual market turnover	1,303,120	£304,980	£5,063,947	£3,802,548
Price of a standard basket of fruit and vegetables	£7.90	£6.90	£4.74	£4.80
Number of shoppers	1,064	292	1,909	1,256

The Lewisham and Walthamstow Street Markets draw large numbers of shoppers because of the nature of the markets as well as the low prices. The street markets attract customers for many items, not just food or fruit and vegetables, and this partly explains why there are a larger number of customers. At the same time, the amount of money individual shoppers spend on fruit and vegetables at the street markets is much lower than how much shoppers spend at the farmers' markets.

Impacts on the local economy

The largest direct impact on the local economy is from turnover generated for local retailers. The retailers surveyed clearly indicated that markets were good for their business. Of the customers surveyed at the markets, more than half at each market indicated that they intended to shop elsewhere that day or had already shopped elsewhere. By surveying how much money customers spent at other locations, **nef** analysed the income that markets bring to the local retailers.

By this estimate, market customers for food are spending between just under £3,000 and £15,000 each day in the local shops that surround the markets. This indicates that the markets benefit the local economies and bring additional business for local retailers. Presumably, increasing the number of shoppers would further increase revenues for local retailers.

It cannot be stated with certainty that market shoppers would not have spent money at the surrounding retailers even without the presence of the market. However, the experiences of farmers' markets provide some important insights as does the case study of the 'Lewisham strike' detailed in the next section. The responses from the majority of retailer surveys indicate that business has improved for most of the shops since the farmers' markets began and that the presence of the farmers' markets has attracted new retailers to the neighbourhoods.

Table 31: Additional turnover for local retailers

Local Impacts	Farmers' Markets		Street Markets	
	Marylebone	Ealing	Lewisham	Walthamstow
Percentage of customers who said they shop elsewhere	55%	66%	56%	71%
Average total daily spend elsewhere	£5,671	£2,931	£11,578	£14,616
Average weekly spend elsewhere	£5,671	£2,931	£69,466	£87,696
Annual spend elsewhere	£294,892	£152,426	£3,612,232	£4,560,192

The street markets have been in existence for so long that they are a more natural part of their neighbourhood's landscape than many of the retailers. As a result, the retail shops around the market have no experience of being in business without the market. However, some of these businesses have noted that trade falls when the market is closed and when it rains. Further, the perceptions of local retailers of the markets' impacts are positive.

Employment effects

The markets also benefit the local economies by hiring local residents as employees. In the case of street markets, many of the traders themselves are also local residents. As a result, turnover generated by the market often stays within the local economy. The employees and traders who live in the local area are likely to shop in the local area, eat at local restaurants and use services in the local area.

Table 32: Local employment effects

Local impacts	Farmers' Markets		Street Markets	
	Marylebone	Ealing	Lewisham	Walthamstow
Local employment by traders per stall	0.4	0.7	1.3	1.6
Total local employment at market	14.8	10.8	25.0	24.1
Daily income of market workers	£370	£270	£1,250.00	£1,205.36
Weekly income of market workers	£370	£270	£7,500.00	£7,232.14
Annual income of local market workers	£19,240	£14,040	£390,000	£376,071

Street markets have a larger local employment effect on their neighbourhoods than farmers' markets because many of the traders are local residents. Through local employment, street markets generate almost twice as much local income as the farmers' markets. Since most of the traders live locally, there is probably additional money spent in the local economy for supplies or services. Most of the produce that the stalls sell has been bought at one of the major wholesale

markets in London, so the money spent on produce does not typically stay within the market's local neighbourhood.

Farm employees or the farmers themselves generally man the stalls at farmers' markets and most of their income therefore leaves London at the end of the market day. However, the farmers' markets employ a few local residents and this generates an additional, estimated £270–£370 on market days, the majority of which is likely to stay in the local neighbourhood. Even though this is a fraction of the total market turnover, it remains an important contribution to the local economy.

The analysis demonstrates that the markets yield economic benefits for the surrounding neighbourhood. The benefits are greater for those neighbourhoods with street markets, but this is because the street markets have longer histories, take place six days a week and are mostly run by local residents. Farmers' markets also contribute to the local economy and much of this contribution is due to the additional business neighbourhood shops generate as a result of the market.

Several studies of farmers' markets in the UK and US have considered their impacts on the surrounding area. This has included the market's ability to attract people to the area, the effect on local businesses, the changed profile for the area and revitalisation of town centres. Most survey and anecdotal evidence supports the claim that farmers' markets have the knock-on effect of increasing trade for local businesses.

Total market impacts and multiplier effects

The impact figures presented do not capture the multiplier effects of money circulating in the local economy.

Multipliers provide a means of measuring the income generated by the market spent in the local area and can track how this money is then re-spent. A high multiplier means that money is circulating in the local economy and that the farmers' market is having a wider impact in revitalising the area. **nef**'s research into local multipliers found that income into organic-food-box schemes generates approximately twice as much wealth for the local economy as supermarkets.³⁶ The Sticky Economy Evaluation Device (SEED), developed by the Economics Institute at Loyola University New Orleans, is being used to measure the multiplier effects of farmers' markets in the US.³⁷ Research is needed to apply the techniques developed by **nef** and the SEED tool to further assess the broader impacts of markets on the economy.

Findings

This section highlights the major findings from this study. These include:

- retailers' reactions to the market
- customers' reasons for shopping at the market
- a comparison of market and supermarket prices
- an analysis of customer proximity to the markets
- forms of transportation used by customers
- opportunities for food education
- environmental benefits of the markets
- ability of markets to serve diverse communities.

Retailers: competition or complements?

The impact of markets on local retailers is a key factor in assessing their impacts. In some quarters there is a perception that retailers suffer loss of trade as a result of street markets and the introduction of farmers' markets. However, **nef** surveys of retailers and analysis of customer spend, as well as case studies of other markets, indicate that markets bring more business to retailers and help to regenerate shopping neighbourhoods.

Findings from published case studies

There have been some studies of impacts on retailers. A study of the Winchester farmers' market in 1999, a market of considerable size that attracts 10,000 customers per market day, found that local stores reported major increases in takings.³⁸ A Canadian study of 19 farmers' markets in Ontario found that 50% of customers shopped at other businesses on their way to or from the farmers' market.³⁹ Research conducted by the London Borough of Sutton believes that 50 per cent of local traders have seen business improvements due to the extra footfall generated by Wallington Farmers' Market and the only business to have suffered as a result of the market is the local florist, which is in direct competition with a market stall.⁴⁰

In 2000, Land Use Consultants and the Foundation for Local Food Initiatives reviewed a number of studies conducted into farmers' markets in England and found that, where measured, the response of local shopkeepers were mostly very positive with increases of 35–50 per cent in turnover reported on the days of the markets. In their own study of farmers' markets in southeast England, surveys of market organisers found that eight out of nine agreed that the presence of the market had a positive effect on local shops. The organiser of Barnes Farmers' Market was the only one to believe that local shops had been adversely affected – a view backed up by the Barnes' Town Centre Manager.⁴¹

Another report also demonstrates that local businesses can benefit from a neighbourhood market. The Project for Public Spaces (PPS) studied the economic impacts of a number of markets in the US. 60% of the customers it surveyed said they had or would visit other stores in the area and of these, two-thirds said that they visited those stores only on market days. PPS studied the Chinatown Night Market in San Francisco and concluded that it “is primarily responsible for a 50% increase in restaurant business in the area around the market when it is open”.⁴² The study recommended that markets would have a greater positive impact on their surroundings if they were open longer hours and had stronger connections with adjacent retailers. One market in the study, for example, was separated from nearby shops by a busy road, which prevented market customers from shopping nearby.

Retailer impact

nef’s surveys of area retailers yielded similar results to the studies above. A large majority of retailers believe that the markets are helpful for their business. Of the 36 retailers interviewed across all four markets, only two believe that the market had a detrimental effect on the shop’s business. Less than 25% of the respondents believe that there was a no effect on their business and the majority see the markets as beneficial to their businesses.

The examination of retail impacts is segmented into street markets and farmers’ markets, although as illustrated, the overall findings are similar.

Table 33: Street markets

Market's Effect on Retailer Turnover (% of respondents)				
	Positive	Negative	Neutral	Don't Know
Lewisham	100	0	0	0
Walthamstow	57	14	0	29

Most retailers are happy with the markets and believe that the market contributes not only to their business but also to general neighborhood improvement. Most of the retailers have not been in business as long as the street markets. Therefore, their initial decision to open a business near the market was no doubt affected by the draw of the street markets. Only when direct competition from stalls occurs near a business is there any concern on the part of retailers that the market competes with their business. The neighbourhoods immediately surrounding the street markets are often defined by the market, therefore, a portion of the turnover that the shops generate can be attributed to the market. In many cases, the life of the shops is dependent upon the life of the market. Several retailers at Walthamstow mentioned that businesses suffered on Mondays, when the market had closed on Mondays. One retailer mentioned that when it rains, people think the market closes and so neighbourhood activity dies.

One of the ways that street markets help local businesses is to supply them with fresh produce. Transport costs often make it uneconomic for some local restaurants, pubs and cafés as well as small grocers to make a trip to the wholesale markets for the small quantities they require. As a result, some traders on the markets provide tomatoes and mushrooms to cafés, lemons to pubs and vegetables to local restaurants.

The Lewisham ‘Strike’

“A market is the life of a town” claims one Lewisham market trader. Whilst many would agree, it could be argued that in the case of Lewisham it has been proved.

An awareness of the impact and value of the market to other businesses in the area was brought about by an incident when the Council mooted the idea of moving the market to another, less prominent site.

“The traders didn’t turn up for one week in protest” recounts one stallholder, “and businesses in the centre like M&S suffered a fall in sales because we weren’t there. It was only when M&S petitioned the Council to keep the market on the same site, that it dropped its plans.”

Another trader echoes the importance of this relationship between the market and surrounding shops: “The local shops depend on the market. We provide a service to people; they help our business. We help the businesses around us, which helps the whole of Lewisham!”

A regular customer at Marylebone Farmers’ Market agrees. Having lived in the area for 40 years, and seen it in decline, he describes the arrival of the market as “a real boon to the area”.

Table 34: Farmers’ markets

Market's Effect on Retailer Turnover (% of respondents)				
	Positive	Negative	Neutral	Don't Know
Ealing	44	12	44	0
Marylebone	60	0	40	0

Most of the shops around the farmers’ markets are pleased with the presence of the markets. Even those retailers reporting no increase in trade appreciate that the farmers’ markets were helping to generate additional foot traffic to the neighbourhood. One shop opened on the market street because of the market.

Surprisingly, many of the shops that directly compete with the farmers’ markets are among their biggest fans. For example, in Marylebone, several food retailers – including a supermarket, cheese shop and an organic food store – experience increases in sales on market days and are very supportive of the farmers’ market. In Ealing, a vegetable stall not associated with the market, believes that the market brings more customers to the area and to his stall and complements his offerings. An owner of a food shop stated that it is the hallmark of a good neighbourhood to have a market. An owner of a permanent vegetable stand commented that the market has “the feeling of an event”.

Retailers are generally positive about increased foot traffic in their stores, especially on a typically slow shopping day like Sunday. However, there are some negative stories from retailers.

In Marylebone a florist opened her shop on Sundays because of the farmers’ market until, she alleges, a wholesale florist at the farmers’ market was able to undercut her sales. She no longer works on Sundays because her turnover is too low to remain open.

A butcher shop in Ealing believes he will close within a year because of the farmers’ market. The butcher was able to compete with the local supermarket because he could provide a better product for less money. However, the farmers at the market don’t have to pay the same levels of rent and he argues they are not subject to the same preparation rules. As a result, he argues that he is unable to

compete with them and his shop has become very, very quiet on Saturday mornings – “a butcher’s busiest time”. Clearly, these two examples require closer investigation but if accurate raise important points.

Conclusion

The main finding is that most retailers are happy with the markets’ presence and in the majority of cases perceive benefits to their businesses. Where there are negative stories from retailers, there seem to be solutions to the complaints. For example, a closer examination of competing wares might be warranted at both street markets and farmers’ markets. It should be noted that **nef**’s methodology is likely to contain an inherent bias towards those retailers with negative reactions; the retailers who feel negatively affected were more eager to respond to the survey and had very strong opinions. Therefore, the positive responses from retailers are perhaps even stronger than those uncovered. Furthermore, the literature published on other market case studies supports **nef**’s findings that markets benefit area retailers.

Markets can complement a local retail offer by attracting increased footfalls and contributing to an area’s profile as a shopping destination.

Reasons for shopping at the markets

This section examines the key drivers for people choosing to shop at both the street and farmers' markets. Shoppers have different reasons for shopping at either farmers' markets or street markets; and even within each market category individual markets attracted shoppers for slightly different reasons. However, a major theme that emerged from the customer surveys was that shoppers and traders at *all* of the markets enjoy the personal interaction and social capital that the markets can provide. The surveys yielded overwhelmingly positive comments about both the farmers' markets and the street markets and even those people interviewed who did not shop at the markets had little negative to say about the markets.

Farmers' markets

The major reason cited for shopping at both the Ealing Farmers' Market and the Marylebone Farmers' Market was the quality of the produce. "Freshness" is one of the key reasons customers say they choose to buy produce at the Farmers' Markets over anywhere else. One customer travelled to Ealing Farmers' Market just to buy "fresh, natural eggs" (four dozen of them!) The customer, an Iraqi businessman, said he liked the fact that he knew they had come straight from the farm. Another liked to know that "the veg [sic] has just come out of the ground".

Table 35: Reasons for shopping at farmers' markets

Reason (in order of priority)	Ealing	Marylebone
1	Quality	Quality
2	Supporting local farmers	Atmosphere
3	Healthy or organic products	Supporting local farmers

Quality of food is a difficult, if not impossible measure to judge objectively. One of the requirements of certified farmers' markets is that products for sale have to be reared or prepared within 100 miles of the M25, so although quality cannot be objectively measured, the farmers' markets have standards that may contribute to the freshness of the food. Additionally, the shoppers surveyed had numerous positive insights into the quality of products at both farmers' markets.

- Food is perceived as being of "better quality" with better flavour.
- Produce lasted longer in the fridge. "The vegetables don't go off as quickly as from supermarket".
- Food hasn't had to be "tampered with".
- "It's not been 'preserved' in fridges".

- Being fresh and local means that there are fewer food miles involved in transporting it to market.

According to the surveys, customers also shop at farmers' markets to support local farmers, which is a key reason that the markets were started. How the food came to market and who was benefiting from the trade are important issues for many shoppers. This was either expressed as a positive action: supporting local producers; or as a negative action: not wanting to support or shop in supermarkets.

- "Knowing my money goes straight to the producer is terribly important."
- "I prefer to give money to producers over supermarkets."
- "It's nice to support local markets. I don't want to give Tesco all my money."
- "I disapprove of supermarket trading ideals."
- "I'm anti-supermarket and the way they squeeze growers."
- "I'm not giving money to big business. I like to help people [producers] to help themselves."

Some shop at farmers' markets to be able to choose from a different variety of product. One woman visits Ealing Farmers' Market for the apples. "I can get varieties of English apples here that you can't find in the supermarkets," she says. Another finds cheeses at Marylebone Farmers' Market "that you don't see elsewhere".

Customers also spoke about the advantages of being able to select the amount of food they wanted and avoid having to buy pre-weighed and pre-packed supermarket food:

- "I buy only what I need so there's less wastage and I spend less on food."
- "I can buy the amount I need because it's not pre-packed."
- "I saw a programme about packaging of food. It freaked me out to think how much is used and wasted. This is a better alternative."
- "I'm dissatisfied with the production and packaging at supermarkets."
- "It's fresh, farm produce. It's not been packaged in the supermarkets."

Street markets

Table 36: Reasons for shopping at street markets

Reason (in order of priority)	Lewisham	Walthamstow
1	Price	Price
2	Atmosphere	Location
3	Quality	Atmosphere

Price emerges as the most common reason for shopping at street markets. In Lewisham, 43% of respondents and in Walthamstow, 40% of respondents said that price was a major reason. This reflects the findings in this study regarding the prices of street markets in comparison with those of local supermarkets (see Appendix D for Pricing Analysis.).

Produce on both street markets is available to buy by weight or by the 'scoop', with some offering both. 'Scoops' are predominately Class 2 produce – misshapen and smaller in size - that is sold for £1 per scoop. These scoops provide a cheap way of buying fruit and vegetables in significant quantities. The practice of 'scooping' is criticised by some traders for degrading street markets (and presumably because it operates purely on price) for driving prices down. However, it enables people with very little money to buy a large amount of fresh produce at rock-bottom prices.

One stallholder, Daniel, expressed his view on the importance of providing access to food.

"I don't want people leaving Lewisham without them being able to afford to buy something ... we try to offer something for everyone."

Social capital and atmosphere

At three of the four markets where people were surveyed, atmosphere appeared as one of the top-three reasons to shop at the market. When people refer to atmosphere they are referring to several intangible aspects of the markets. All of the markets provide a place where the community can congregate and interact. Standing in any of the markets it is immediately obvious that they are social places and people are seen meeting neighbours and friends; people are sharing experiences and asking questions of the traders. Traders provide each other with goods and will watch over one another's stalls. The markets create a sense of neighbourhood and social capital that can be difficult to find in London.

"People come here for more than their shopping," says Jean, a long-time stallholder at Lewisham Street Market. "I know sometimes that I'm the only person some people will talk to all day."

One regular at Lewisham Market for five years explains that he enjoys the "personal contact" you get at the market, which he describes as:

"...having colour and vibrancy. You build rapport and relationships. I even practice Spanish with one of the stall holders."

Non-market shoppers

Perhaps the strongest endorsement of the markets comes indirectly from those shoppers surveyed who do not use the markets. These shoppers did not have overwhelmingly negative opinions of the market, but use the supermarkets because they are perceived as more convenient and more consistent. Others commented that they had forgotten about the farmers' market or they shop at both the markets and the supermarket. Only at one market, Walthamstow, were some of the non-market shoppers' comments negative. The majority of non-market shoppers at Walthamstow commented that the market products were below standard, but several also commented on the convenience of supermarket shopping.

Price

Price comparisons can be misleading because they ignore issues of food quality, sourcing, and environmental impacts. However, this section examines price and the roles that street markets and farmers' markets play in providing affordable food. nef conducted a shopping basket survey of all the markets studied; a supermarket in close proximity to each market; and prices from two well-known, on-line grocery services.

The findings from the surveys indicate that all the markets are priced competitively within their communities. Street markets are substantially cheaper than the

neighbourhood supermarket; farmers' markets are at least competitive with the neighbourhood supermarket.

The basket of fruit and vegetables used by **nef** includes basic items such as apples, potatoes, cucumbers and tomatoes (a complete list with prices is available in Appendix D). When items were not available, they were either substituted or online prices were used, in the case of grocery stores.

Farmers' markets

Farmers' markets are generally perceived as higher priced and inaccessible to those on lower incomes. However, while prices are higher than at street markets, comparisons with local supermarkets yield a more complex picture.

Table 37: Total price of shopping basket for Farmers' Markets

Farmers' Markets		
	Ealing	Marylebone
Market	£6.90	£7.90
Supermarket	£5.81	£8.90
Differential	£1.09	-£1.00

As Table 37 illustrates, prices at farmers' markets can be either greater or less than supermarket prices, but the difference is relatively small. Farmers' markets appear to be priced competitively for their neighbourhoods and can therefore provide a source of fruit and vegetables for a diverse population in the local area.

There is controversy regarding whether farmers' markets provide access to food for those on low incomes. A study in 1999 found that Lewes Farmers' Market could make locally grown fresh produce available and affordable for families on low incomes, and that farmers' markets in general have the potential to improve access to food for people on low incomes.⁴³ However, in contrast a survey of farmers' markets across southeast England found that: "It is not generally thought by market organisers that farmers' markets have improved access to fresh products for low-income groups. Town centre managers agree the prime consumers at farmers' markets are in the A/B socio-economic bands."⁴⁴

Street markets

The street markets studied offer an abundance of low priced food of reasonable, and in many cases, good quality.

Table 38: Total price of shopping basket for Street Markets

Street Markets		
	Lewisham	Walthamstow
Market	£4.74	£4.80
Supermarket	£7.18	£6.79
Differential	-£2.44	-£1.96

The street market prices for fruit and vegetable are significantly cheaper than supermarket prices and provide good alternatives, especially for families. Many of the stalls offer fruit and vegetables for a “pound a punnet” or a “pound a scoop”. Additionally, competition between stalls helps to maintain low prices. Fruit and vegetable retailers around the street markets do a lively business, indicating that although competition may keep prices low, there is enough business for all the traders and the businesses can be complementary.

Conclusion

This study suggests that farmers’ markets are not uncompetitive with supermarket prices, contrary to the expectations of many interviewees. Furthermore, it is clear that street markets offer lower costs for a similar basket of goods as supermarkets. The implication of these findings may be that markets can offer an alternative to supermarket food and may compete with supermarkets on prices and quality of food.

The findings of this study are supported by evidence from the United States that demonstrates the positive role markets play in increasing food access for low-income neighbourhoods. “Direct markets provide access to fresh fruit and vegetables for consumers - especially minority consumers in the inner city - who would otherwise not be able to get fresh produce.”⁴⁵

Proximity of customers

All of the markets draw the largest percentage of their customers from the surrounding neighbourhoods – defined as within three miles: 36% of the customers live within one mile of the markets, 69% live within three miles and 83% live within five miles.

Table 39: Farmers’ markets: how far customers travel

Distance travelled	Ealing	Marylebone
Percentage living within three miles	97%	77%

Table 40: Street markets: how far customers travel

Distance travelled	Lewisham	Walthamstow
Percentage living within three miles	47%	56%

Lewisham Street Market draws the most customers from outside a radius of five miles, followed by Walthamstow. The larger geographic draw at these two neighbourhoods may reflect two issues.

1. Walthamstow and Lewisham are less dense neighbourhoods than found in Central London so that residents are accustomed to travelling a few miles for services. However, this may be countered by the difficulties faced with parking.
2. The market may provide key services for the surrounding neighbourhoods as well as the immediate neighbourhood.

Whether or not this is an intended consequence of markets, the markets seem to be effective at garnering local patronage as well as providing a service to their local communities. However, there does not seem to be a large draw from outside of the surrounding neighborhood to either farmers’ markets or street markets. This

is a somewhat surprising finding considering the number of tourist guides that tout London as a city of markets. It is possible that the markets profiled by nef do not draw tourists as much as some other more popular venues such as Borough Market or Columbia Road Flower Market. Additionally, it is less likely that tourists will be buying fresh fruit and vegetables. The markets play a significant role in their local communities but the very localised draw has implications about the potential need for more, small markets as opposed to increasing the size of existing ones.

Transport: how people get to markets

<i>Form of Transport</i>						
<i>Market</i>	<i>Foot</i>	<i>Car</i>	<i>Bus</i>	<i>Tube</i>	<i>Train</i>	<i>Other</i>
Ealing	45%	39%	11%	0%	0%	5%
Marylebone	51%	24%	4%	11%	2%	7%
Lewisham	8%	31%	48%	0%	6%	6%
Walthamstow	33%	45%	20%	0%	3%	0%
Average	33%	35%	22%	3%	3%	5%

Given the local draw of the markets, and the complaints about the difficulty parking, it is somewhat surprising that cars are the most popular form of transportation to the markets. The markets chosen may bias the result and walking is by far the most popular form of transport at Marylebone, which is the most metropolitan neighbourhood of all the markets profiled. Overall, walking to the market is an encouraging close second to driving. Furthermore, even though many people may drive to the market, this apparently does not affect the social benefits of the markets. By going to the markets, people are driving to a community meeting place and, judging from the surveys, enjoying their social interaction once they arrive.

Food education

Farmers' markets offer a number a ways of learning about food. With farmers and producers often manning stalls, information about provenance and processing is readily available.

People who shop regularly at farmers' markets learn about growing seasons, with stalls coming and going as produce does. Some enjoy this aspect of market shopping, such as the customer at Ealing Farmers' Market, noting that the apple stall had stopped trading. "He must have run out," he says "but I like the idea of waiting until the season comes round again." Another woman claims, "Being forced to eat in season means I get a more varied diet."

Farmers' markets also provide the opportunity to sample new foods. As one woman says of Marylebone "I've tried things here that I've never tried before." Another shopper takes his children to the market to try the different foods, such as regional cheeses. One speciality bread maker at Ealing sees this educative role – teaching the public about his product and offering tastings – as the chief reason for having a stall. At the same time a market trader noted that people don't seem to be interested in eating fruit and vegetables and noted how unfortunate it is that people don't understand the importance of healthy eating.

Information about food – how it is produced, processed or should be prepared – is often readily available from traders at farmers' markets. "It's good to talk about food to other people who are interested in it too," says one customer with an enthusiasm for learning about food at Marylebone Farmers' Market.

Farmers' markets are used primarily to promote artisan bread to consumers. The bakery will produce 3-4000 units of bread a day but they expect to sell only a tiny proportion of this at Ealing Farmers' Market. According to Bradley, who grew up working on North End Road Market, with artisan bread, it's crucial to "educate the public about it, how it is made and what makes it different, and allow consumers to try things". Farmers' markets are a good way of exposing their bread to the public.

Environment

The major environmental effects of food shopping are the emissions and use of petrol to transport food – from farm to the store and from the store to the household. Both farmers' markets and street markets use fewer food miles to deliver food to people's houses than the major supermarket chains. The average supermarket trolley contains goods that have travelled 3,000 miles, of which perhaps one-fifth (600 miles) consists of fruit and vegetables.⁴⁶

Certified farmers' markets in London require that all food sold at the markets has been reared and prepared within 100 miles of the M25. Farmers' markets are by far the best choice to reduce food miles and therefore reduce usage of petrol and fuel emissions.

The vast majority of the street-market traders buy their goods from wholesale markets in London. According to one source, seventy five per cent of the wholesalers' produce is from international sources, which is not good news for the environment. However, since the wholesale markets are in London, this reduces the travelling that individual traders need to do to pick up the goods, thus having a positive impact on a food miles calculation.

The majority of customers had zero or a small environmental footprint: 33% of customers walked to the markets while 28% took public transport. Although 35% of market shoppers surveyed drove to the market, supermarkets that lie on the outskirts of London have virtually no pedestrian access. Therefore, if there were no market options, the large numbers of market shoppers who walk or take public transportation may be forced to drive to super markets.

The closure of local fresh food outlets in the face of increasing competition from supermarkets is forcing people to travel further for their shopping. Many supermarkets are developed on out-of-town sites and can be difficult to reach by public transport. People without a car are increasingly disadvantaged. A 2003 survey by Living Streets found that shops had moved further away for a quarter of older and disabled Londoners.⁴⁷

Markets in London have the potential to reduce negative environmental impacts while serving communities that may otherwise struggle to buy healthy, diverse food.

Serving diverse communities

Market traders are able to serve their different communities in large part because of the personal relationships they have with their customers. Our surveys demonstrated the flexibility of market traders in responding to diverse, immigrant communities, the elderly and the disabled.

The surveys found that both street markets and farmers' markets are flexible and can therefore serve a diverse group of people. Market traders have responded to the diversity of their customers by offering more of a mix of indigenous and ethnic

fruit and vegetables. "We have more exotic fruit and vegetables to cater for the local community," says one trader, so yams and mangoes sit alongside King Edwards and rhubarb.

As well as providing the produce customers want, one trader sees the market as a valuable introduction to the area for immigrants.

"All the people around here enjoy coming to the market, especially immigrants. A market is a familiar place to many of them - they know them from home" says one a long-time stallholder at Lewisham Street Market. "It's a meeting place where ordinary people like me can talk to them. You can tell that they enjoy the exchange they get at the market, even if they can't speak much English."

Stallholders, like most in sales, take notice of the different buying habits of customers. One stallholder noted that immigrants from Eastern Europe were spending more money than most on fruit and vegetables.

Elderly

Many of the stallholders have a lot of regular customers; they attend the market five or six days a week and some have been at the markets for more than 40 years. These regular customers include the elderly who are often more likely to be shopping in the middle of the week during the day. As Jean, a stallholder at Lewisham Street Market notes, the disappearance of a 'regular', especially when they are elderly, is noticed. "If you haven't seen them for a while you wonder whether they've moved to the seaside." [a euphemism for dying].

Their experience at the markets provides personal contact that can be absent for some elderly people.

"People come here for more than their shopping ... I know sometimes that I'm the only person some people will talk to all day."

However, traders drew attention to some barriers facing the elderly at street markets. One trader in Lewisham described how the elderly went home when the children come out of school and advocated having a more high-profile police presence. "The pensioners all go home when the kids come out of school. We need more coppers on the beat to control the youths."

Also parking can be a problem as another trader explained, "Old people are frightened of multi-storey car parks. We need more parking on the street with meters."

People with disabilities

The markets are accessible to the physically disabled though not all of the roads and pavements provide ideal access for wheelchairs. One customer surveyed was visually impaired and finds having someone on the stall to ask about produce means that she can shop more easily "without me having to just peer at food".

Another shopper at Ealing Farmers' Market, who has cerebral palsy, asks for advice from stallholders on how to cook produce. "I live alone and cook for myself," he says. "Coming to the market I can get advice on how to cook which I wouldn't get in a supermarket."

Challenges

The changing shopping patterns of Londoners and specifically the rise of the chain supermarket and superstores threaten not only the High Streets but also the viability of street markets and farmers' markets.

One of the factors likely to hasten the decline of street produce markets is increasing competition from supermarkets. Research published by **nef** demonstrates the detrimental effects of supermarkets on their local economies and charts the dramatic decline in the provision of local retail and local services.⁴⁸

Supermarkets have come under pressure for their dominance of the high street and the negative effect of their out-of-town stores on town centres. Research by the Department of the Environment, Transport and the Regions (DETR)⁴⁹ and the Environment, Transport and Regional Affairs Committee,⁵⁰ found that new out-of-centre supermarkets have a serious adverse impact on existing independent shops in villages and town centres, resulting in their decline and sometimes their closure.⁵¹ **nef** has characterised these forces as creating 'Ghost Towns' with food deserts at their heart. Supermarkets have also been criticised for undermining local producers and non-local sourcing of produce. However, supermarkets can play a positive role as part of the retail mix, for example, by sourcing more products locally and helping to alleviate parking pressures.

Markets face an uphill battle if they are to receive fair treatment in the face of the proliferation of chain stores and current trends in regeneration to attract large retail inward investment. The evidence presented in this study indicates the significant economic and social contributions of street markets and farmers' markets.

Some traders expressed strong dissatisfaction with what they perceive as preferential treatment given to supermarkets, for example, by councils.

"They are allowed to sell produce below cost and recoup the money on other lines (illegal); they get free parking; they offer idiot jobs and push everyone else out of business. Any newcomer to the market trade wouldn't be able to make it now."

Another trader added,

"We built the town up, now they want to give it to the supermarkets. England is the only country in the EC where we don't care about what markets have to offer. It's all about supermarkets and backhanders."

The markets studied can provide an important alternative source of fresh produce to the supermarkets and offer good food access for a wide range of people and communities.

Threats to street markets

The decline in street markets has been documented. The National Market Traders' Federation has experienced a drop in membership in recent years, after a period of expansion.

The National Association of British Market Authorities' (NABMA) believes that markets suffer two main weaknesses: a perception that they sell lower quality goods and a lack of investment.⁵² A study by Leicester Business School in 1991 of 2,000 shoppers at Leicester Market found that trust was also a key concern. The study revealed 40% felt that they could not always trust the stallholder or get satisfaction; for instance, if a product was found to be sub-standard when the shopper got home (it is not clear to what extent this applies to food).

The location of markets and the space they occupy are key factors in their success. A central location is ideally required for a market that is accessible, visible and contributes vitality to the town centre. Accessibility to public transport and the provision of parking are important elements of a good location.⁵³ Given Londoners' reliance on public transport, it is important that people can access local shops and services on foot or by public transport.

By ensuring a range of products is offered, market managers can capitalise on one of the traits that draws consumer to the market. Supermarkets tend to have limited varieties of produce making markets a better alternative.⁵⁴

Investment, lack of vision and loss of skills

One Lewisham trader says:

"no one seems to invest in markets ... At the moment, the High Street still feels like something from the eighteenth century but with a bit of investment, the market could be so much better."

This is a feeling echoed by other street-market traders. Another stallholder in Lewisham sets out his vision for how the market could be given the right support.

"We want this to be a twenty-first century market. For example, we could be recycling everything at the market - most of what we chuck out is cardboard - but we couldn't get support for this to happen."

For street markets to flourish they need the active engagement of both stallholders and the Council. As one market trader in Lewisham notes:

"we are constantly battling the Council for help. The Council admin costs go up but we see nothing for it. If we want markets to be here in twenty years time, we need them [the Council] to be behind us otherwise we will die."

Another trader describes the relationship between traders and the council in Walthamstow.

"The people running the market have never worked on the market. They never even ask our opinion on things. It's an 'us and them' situation where they seem to be working against us all the time."

In the opinion of one market trader, the lack of investment in street markets is down to people's perception of market traders.

"Just because we work outside, people don't take us seriously, when we are all, in fact, small businesses."

Another supports this observation saying:

"some people look down on you when you work a stall but we are professional, business people."

The costs of running stalls at street markets are significant as a life-long trader notes:

“it’s getting so it’s no longer viable for professionals to stay in the business as costs go up and the threat from development increases.”

When asked what they would do if the market were to disappear, many (of the older traders) said they would retire. Others said they would find another trade. Very few said they would try and find another stall on a market, which, according to them, is a very difficult thing to do due to availability of plots.

Threats to wholesalers

The number of wholesale markets in the UK is declining rapidly yet these provide the basis for the street markets. Almost all the stallholders surveyed were happy with the produce they could buy at the wholesale markets, with the most popular being New Covent Garden and New Spitalfields. The markets provide an important source of revenue for wholesalers in a symbiotic relationship. The London Wholesale Markets Review that recommends the consolidation of wholesale markets in London from five to three is a serious threat to the sustainability of the street markets.

One street-market trader notes, “The wholesale markets are fine. We can get everything we want there. It’s us, the market traders that need the investment. If we’re not selling then the wholesalers are in trouble. Invest in markets and everyone wins.”

Another trader talked more about the produce available wholesale. “The supermarkets over order and what they don’t want they dump on the wholesale markets. I am selling pears that were Asda’s. Last week I had strawberries, which were perfect, that were Tesco’s. There is no difference; they just tear the labels off the crates. The supermarkets can’t lose, it’s like sale or return.”

The weather and covered markets

Markets are highly susceptible to weather changes, and, in the case of bad weather, suffer greatly. As one trader at Lewisham noted:

“if it rains for a fortnight, we earn nothing.”

These concerns have led to calls for more covered markets that would enable all-weather shopping. Lewisham market traders have actually paid for plans and the footings of a canopy to be erected on the site of the market. As one trader points out:

“who wants to shop in the rain when you can shop in the dry in a supermarket?”

Investment in a canopy would also solve the issue of stalls becoming tatty from being exposed to the elements all year round.

A number of street market traders see themselves in competition with other traders rather than supermarkets with some, like Alan from Walthamstow, who seem resigned that:

“supermarkets have won the war. I’m not complaining, that’s just how it is.”

Another Walthamstow trader, George, agrees with him:

“supermarkets are not in the same game. We’ve lost those customers now.”

However, many traders on both Lewisham and Walthamstow Street Markets think that the odds of them surviving are stacked against them. Lack of car parks, public toilets and investment in structural projects like canopies are all cited as reasons why markets are in decline.

Parking

Traders at the street markets surveyed expressed frustration with the lack of either free car parks or at least more convenient parking for customers, something that they think has affected footfall and their profits. One Walthamstow traders says:

“We need a free customer car park here. People are prepared to go to Tesco and pay a bit more because they get free parking.”

There are three car parks used by the market’s customers in Lewisham as well as some on-street metered parking. The car parks are criticised by the traders for being too small; too difficult to get to (one trader made the point that “If you are a nervous driver or new to the area, it’s a nightmare”); or unsuitable for the elderly customers who visit the market.

Another trader (Daniel), who, over the years, has owned stalls on a number of south London street markets, complains of the “petty militancy of the authorities” when it comes to parking.

“They keep slamming people with more rules and regulations. They need to relax and stop making people feel like criminals when they come shopping. It’s pushing people away. No one is going to come to the market for a couple of quid of veg, if there is a danger that they’re going to get a £50 parking fine.”

The trader suggests that Thursdays, Fridays and Saturdays be ‘free parking’ in Lewisham town centre. This would be enough to stop Lewisham Street Market from going the way of Wandsworth, Balham (and other) markets, which according to the trader, have all been killed by parking restrictions.

In Walthamstow, they too are fighting for better parking facilities. At the moment, stallholders complain that parking is too complicated for people to bother with (too many different badge holders etc) and that it needs a simple ‘pay and display’ system. One trader says:

“I think people would be prepared to do that (i.e. pay at a meter) but at the moment it’s just too complicated.”

Clearly, many street market traders feel supermarkets gain an unfair advantage given the resources they leverage to build car parks.

Starting a farmers’ market

Despite the benefits that farmers’ markets provide, there is resistance from some quarters to their expansion, including in some local authorities. At least one community group in London has been set up to “protect residential neighbourhoods from the unwelcome advances of unnecessary Farmers Markets”. The group in the Borough of Richmond believes that farmers’ markets bring unnecessary noise and disruption to quiet, residential communities.⁵⁵ Currently, there is no clear channel for handling complaints about the markets and helping to address concerns.

Farmers themselves face barriers in attending markets, including poor selection of sites and high stall charges.⁵⁶ There is also little support in terms of marketing and publicity, yet this is central to building awareness of the markets and to capitalising on their potential.

Some of these barriers to entry can be addressed by a Council or planning committee. This report makes a series of recommendations about how to better support farmers’ markets.

Conclusions

Farmers' markets and street markets are making significant contributions to their local economies, local communities and to improving food access for Londoners.

Street markets have a particularly strong role in addressing food access for low-income groups given their ability to provide plentiful and affordable fresh produce. Their prices are considerably lower than those of supermarkets and they draw their customers from the local area. However, support for street markets is not fashionable and appears to vary between boroughs. Given the clear evidence of their positive impacts, greater focus must be placed on this declining sector.

Farmers' markets are also more price competitive than is often presumed and, as the price analysis demonstrates, can compete effectively with supermarkets.

Both street markets and farmers' markets provide destinations for customers and encourage people to shop in the areas in which they are based. Interviews with local retailers and analyses of customer spending indicate significant positive impacts on trade for retailers based near the markets. In addition, many retailers note the importance of the markets in creating attractive destinations for shoppers and for improving the environment for all of their customers.

Markets from both sectors provide valuable, and often missing, social capital for the communities in which they are based. They act as meeting places and locations for social exchanges, for learning about food and for engaging in the community. The benefits appear to be particularly important for the elderly.

Given their positive and significant contributions to local economic welfare, diet and sense of place, street markets and farmers' markets should be encouraged. Both farmers' markets and street markets could do even more with appropriate support. Given their effectiveness in serving local people, London would benefit from a greater number of street and farmers' markets, rather than a strategy that focuses solely on expanding existing markets. As the following recommendations make clear, there are important roles for local authorities and other public bodies to provide leadership and support in driving the sector forward.

Farmers' markets and street markets have different historical contexts, different structures and regulations and attract customers for different reasons. As a result, some of the research findings demonstrate trends that are unique to each market sector. For example, farmers' market customers spend significantly more money than street-market customers, an average of £22 versus £12. However, there are important commonalities in terms of their positive impacts.

With the right mix of support and appropriate strategies, street markets and farmers' markets can play very significant roles in tackling food poverty, promoting stronger communities and increasing the impacts of regeneration across London.

Recommendations

Roles for LDA, GLA and London Food

- **Strategic policies.** Ensure that the positive social and economic contributions of street markets and farmers' markets are recognised and supported with specific policies and integrated into all relevant strategies. The London Food Strategy should recognise the important roles of markets and examine how to provide greater support and promotion for existing markets and increasing coverage across London. The threats to wholesale markets should be considered as part of the broader strategy to support and promote markets.
- **Investment in markets.** Markets face challenges as a result of their relatively poor physical infrastructure. For example, incomes from markets are highly dependent on the vagaries of weather conditions and covering the markets would provide more consistent incomes for traders and better year-round facilities for shoppers. In addition, the areas in which markets are based require investment, for example, to ensure that disabled access is improved.
- **Support for recycling.** Markets generate considerable waste but are not well supported in terms of recycling packaging and other waste. Leadership is needed on this issue from the GLA and LDA to ensure that recycling is implemented in a way that does not over burden traders; considerable environmental benefits should result.
- **Marketing and Promotion.** Promotional activities are currently limited. Indeed, even signposting of the locations of markets is largely inadequate leaving people uncertain of the times, frequency and locations of the markets. Promotion of London's markets could be increased to increase awareness among all groups in London's communities. The affordable pricing of street markets could be one clear angle for a promotion campaign.
- **Tourism.** Street markets and farmers' markets offer good destinations for visitors and tourists. They are not currently a central part of the city's tourist offer but Visit London could play a key role in improving their profile and status as tourist destinations.
- **Keep bus fares low.** Given the importance of buses in transporting customers to markets, it is important that these remain affordable. This is particularly important for those on low incomes.

- **Market traders and business support.** Greater clarity is needed about the status of market traders and their role in enterprise initiatives and business support. Providing specialised business support for traders could help improve their sustainability and improve their status and self-confidence as business people.

Potential roles for town planners and local authorities

- **Encourage local markets.** The vast majority of market customers are local to the markets they use. Therefore, rather than focus solely on expanding existing markets, the approach should be to increase the number, and thereby the accessibility, of the markets.
- **Establish policies to support markets.** Town planners need to consider the full benefits provided by existing (and potential) markets. Section 106 agreements, from the Town and Country Planning Act of 1991, enable councils to oblige housing developers to provide affordable and social housing. These agreements should be extended to consider how support could be put in place for markets as part of a balanced and varied retail offer.
- **Make markets part of the well-being of a community.** The Local Authority Act of 2000 created a new Power of Well-Being for local authorities. This enables local authorities to act in the interests of the communities they serve and make decisions in more 'holistic' ways. Therefore, planning decisions can be more sophisticated and ask the questions, "How does this development increase the well-being of our community?" and "What are its contributions to regeneration?"
- **Assist markets with start up process.** Town planners and town centre managers can assist markets with marketing, choosing a location, ensuring product variation and quality, and linking infrastructure improvements to the market.
- **Be aware of supply chain.** Wholesalers are essential to the supply chains of street markets. The decline of wholesalers in the UK and the threats to existing wholesalers could undermine the benefits of markets. Almost all the street-market traders procure from London wholesalers. This is an important part of the business for wholesalers and conversely, wholesale prices allow the street traders to sell their produce at very reasonable and accessible prices.
- **Provide community transport for the disabled and elderly.** Community transport services provide benefits for elderly and marginalised people to access the street markets and their role should be encouraged.
- **Parking Policies.** Explore measures to redress the inequalities that result from supermarkets' provision of free parking and the costs and availability of parking near the markets.
- **Make price accessible.** In order to have more farmers' markets in poorer areas to encourage food access, more start-up grants and lower stall fees should be considered. In the US a locality rented space to farmers for \$1.00 per year is used to encourage the establishment of a market.⁵⁷
- **Create publicity around markets.** Farmers' markets need to be promoted both within the council, to ensure that all departments understand the potential benefits and are supportive, and externally to the general public and local retailers. Currently, there is little signage at

markets or in the surrounding neighbourhood leaving people uncertain of the times, frequency and locations of the markets.

- **Establish a market contact.** Appoint a single point of contact such as an Environment, Local Agenda 21 officer or a Town Centre Manager to manage all business associated with the market, including complaints and problems from shoppers and area retailers.
- **Perform regular inspections.** Regular and transparent inspections can both ensure that market rules are being followed and develop the trust of market customers and the community in the quality of the food being sold. Town councils, or those organisations that manage markets, could perform inspections as long as the criteria for the inspections, as well as the results, are well publicised and consistent.

Gaining local support for markets

- **Engage successful retailers.** Many retailers at established markets are very happy with the markets and believe that the markets enhance the neighbourhood and improve their businesses. Some of these retailers are enthusiastic and may be willing to work with another Local Authority to garner retailer support for other markets. Set up public planning consultations for area retailers and invite successful retailers from other areas with markets to speak on panels and take questions about the success of their business and the market.
- **Provide area maps of retailers.** Ensuring that area retailers benefit from a market is vital to garnering support in the community and ensuring a market's long term sustainability. Provide small street maps of the local area with the local shops identified to market shoppers. This would serve as a free source of advertising for area retailers and would encourage market shoppers to patronize area shops.
- **Set some limits on stalls.** The Walthamstow Local Authority has a "clashing" policy whereby no two stalls selling the same goods can be within five stalls of one another. This ensures some variety of products at the market. Similar policies can provide diversity within markets and prevent unfair competition with area retailers. For example, a farmers' market could consider limiting the number of stalls selling one item, such as meat or cheese, at each market. In this way, similar area retailers may be able to maintain a segment of the market, at the same time healthy competition is not eliminated.

Accessible prices

- **Further analysis of pricing policies.** Evidence from this study indicates that farmers' markets' prices are competitive with the local neighbourhoods. The perception of farmers' markets is that they are much more expensive than the local supermarkets. Further analysis of the price differential between farmers' market and area retailers is warranted. Perceptions of higher prices keeps potential market shoppers away from markets, and definitive evidence on the topic would increase the popularities and demonstrate how markets may actually be a source of price competition for supermarkets.

Food education

- **Set up food education stalls at markets.** Markets offer an ideal setting in which to engage in food education. A case study of several American farmers' markets mentioned several methods by which food education was being offered at the markets. Some markets sponsor cookery demonstrations using market ingredients. At one market in California, the State Department of Health offers a monthly nutrition program to market shoppers. Other markets staff a table with nutrition and health-related information.⁵⁸ Although some of this takes place informally, mostly at the farmers' markets, there is a role for food education at both street markets and farmers' markets and the concept of food education fits well into London's overall food strategy. Food education could easily fit into the market atmosphere and reap the benefits of the established community ties and social capital.
- **Provide recipe information and other marketing tools.** Currently supermarkets offer free recipe cards and sample tastings and in that way participate in food education. Local authorities can publish and distribute similar recipe information and even ask stallholders to provide recipes or cooking suggestions to be published in an informal way through free leaflets or newsletters.
- **Promote food diversity.** Cooking stalls set up at the markets can also be used to share the ethnic diversity of foods available. Cooks from different ethnic communities can be invited to do demonstrations on busy market days of ethnic dishes that use ingredients from the market.
- **Educate school children.** Arrange for local schools to make trips to the markets with assignments about their own nutrition. For example, identify three fruit and vegetables that you have never eaten before or learn how to cook a seasonal vegetable.

Market procurement

- **Promote restaurant procurement.** Set up directories of stallholders who can supply fresh produce and restaurants or other businesses needing supplies to encouragement area restaurants and caterers to buy produce from market stallholders. Organise an annual or seasonal outing for stallholders and restaurant managers, owners and cooks to an area location to encourage socialising and networking.
- **Promote public procurement.** Encourage schools, hospitals and other public bodies to buy food from the markets.

Maintain market area

- **Regular rubbish collection.** Co-ordinate rubbish removal with market days or at the best time of the day for the markets. The creation of rubbish by the markets leads to ill will with customers, market traders and area retailers.
- **Support recycling teams.** The markets generate considerable waste, which with more support from the local authority, could be recycled efficiently.
- **Maintain street paving and accessible footpaths.** Maintain street paving and footpaths to encourage the elderly and disabled to use the

markets. A barrier for these groups to use of the markets is uneven and broken streets and footpaths.

- **Ensure safety.** Though crime did not emerge as a significant problem in this study, it is important to have an appropriate community policing to ensure that the markets remain pleasant environments for shoppers of all ages. Traders at Lewisham Street Market said that although crime still exists it has decreased since a 'no drinking zone' was established in the centre and more 'specials' were introduced onto the streets.

Community events

- **Bring in free events.** Lewisham Street Market brings in events on Saturdays for the entire family such as face painting and blood donation promotions. Other events that can encourage market participation include local musicians, street performers and summer fairs.
- **Create seating areas.** To capitalise even further on the social capital created by markets seating areas will encourage more socialising at the markets and make it easier for the elderly and disabled to spend more time at the markets.

Health Professionals

- **Food vouchers.** Given the health benefits from fresh produce, markets can play a role in the active promotion of healthy eating. One idea is for GPs to provide vouchers for healthy foods that can be redeemed at the markets. This would have positive health effects and provide a route for education about healthy eating.
- **Links with government programmes.** Markets should be promoted and given an active role in the government's '5 A Day' programme and School Fruit and Vegetable Scheme.

General policies

- **Donate unsold food.** Following the example of the farmers' markets in New York City, unsold food can be donated to local organizations to feed the hungry.
- **Develop a wholesale farmers' market.** Investigate the possibility of a wholesale farmers' market that could sell to street market traders, restaurants and other food retailers. The current wholesalers in London import the majority of the food from abroad. A farmers' market wholesaler could potentially open up a large market for local producers.
- **Extend market hours.** Farmers' markets and some street markets could extend trading hours past 18.00. Currently, supermarkets have hours that cater to working people by allowing them to shop in the evenings. By remaining open into the evenings at least once a week, markets could potentially capitalize on this large opportunity.
- **Add additional venues.** Investigate schoolyards and gyms and other public locations for markets that can combine food and education and potential procurement.

Appendix A

The following key questions are addressed to provide the quantitative and qualitative data.

Economic impact

- How much revenue do the markets generate?
- What is the level of footfall at the markets?
- How much of the income generated by the markets is retained in the local economy?
- What are the impacts of the markets on other local businesses? Do they create increased trade for local shops and services? Do they reduce trade?
- How many jobs do the markets create?
- How many jobs do the markets secure, including those for local retailers and suppliers?

Customers

- Who are the markets' customers?
- Where are the customers drawn from?
- Do the markets serve those who would otherwise be financially or socially excluded?
- Are customers accessing healthy foods, for example, fruit and vegetables, which they would otherwise struggle to afford and access?
- To what extent do the markets serve ethnic minority communities?
- How accessible are the markets? Do the markets serve those who may suffer the challenges of physical access, for example, the elderly, incapacitated or those with young children?
- Are there social and community benefits for customers? How do the markets contribute to the sense of community and people's well-being?
- How do customers reach the markets? On foot, by public transport, car etc?

Produce

- How far has the produce travelled to reach the market?
- Is the market produce affordable compared to other local sources, for example, supermarkets?
- Do the markets sell ethnically diverse and specialist produce that meets the demands of local people and ethnic minority communities?
- What is the range of products sold? Do the markets have flexibility over the produce on offer?

The sector

- Where are the markets in London?
- What are the overall trends within the market sectors? How do these differ for street markets and farmers' markets?
- What challenges face the two types of market? How can these be overcome?
- What challenges face farmers' markets when seeking to operate in new areas?
- What are the growth prospects for the markets?
- What role can planning play?
- How can the LDA, the GLA and other relevant authorities support the markets sector?

Appendix B: Methodology

- Surveys
- Statistical significance
- Footfall
- Browsers

Measuring impacts

Market impacts will be analysed by collecting a range of data including:

- Footfall data and number of people visiting the markets.
- Average spend per customer.
- The number of London jobs dependent upon the market, both directly and indirectly.
- The local multiplier effects of money spent in markets using the principles of **nef**'s LM3 tool.
- The number of market customers using other local businesses and revenue generated for these businesses.
- The amount spent by market traders with suppliers and with other businesses within the local area.

Our analysis will also be informed by quantitative information gained through in-depth and short interviews with:

- at least 40 market traders
- at least 160 market customers
- at least 40 other local businesses.

Appendix C: Locations of farmers' markets

There are now 26 farmers' markets operating or planned for Greater London.⁵⁹

Market	Operator	Frequency	Certified Farmers' Market
Barnes	English Farmers' Markets	Weekly	No
Blackheath	London Farmers' Markets	Weekly	Yes
Bromley	London Borough of Bromley	Twice weekly	No
Camden		Weekly	No
Chiswick	Friends of Dukes Meadows	Weekly	No
Croydon - New Addington	North East Surrey Farmers' Markets – NESFM	Monthly	Yes
Dulwich	City Farmers' Markets	Monthly	No
Ealing	London Farmers' Markets	Weekly	Yes
Forest Hill	City Farmers' Markets	Monthly	No
Hammersmith	English Farmers' Markets	Weekly	No
Islington	London Farmers' Markets	Weekly	Yes
Kensington	English Farmers' Markets	Weekly	No
Lee Green/ Manor Park	City Farmers' Markets	Monthly	No
Marylebone	London Farmers' Markets	Weekly	Yes
Notting Hill	London Farmers' Markets	Weekly	Yes
Parson's Green	English Farmers' Markets	Weekly	No

Market	Operator	Frequency	Certified Farmers' Market
Peckham	London Farmers' Markets	Weekly	Yes
Pimlico Road	London Farmers' Markets	Weekly	Yes
Putney	English Farmers' Markets	Weekly	No
Richmond	English Farmers' Markets	Weekly	No
Stoke Newington	Growing Communities	Weekly	Yes
Swiss Cottage	London Farmers' Markets	Weekly	Yes
Twickenham	London Farmers' Markets	Weekly	Yes
Wallington	North East Surrey Farmers' Markets – NESFM	Monthly	Yes
Wimbledon Park	London Farmers' Markets	Weekly	Yes

Source: updated from Capital Eats

The following map shows the locations of the markets managed by London Farmers' Markets.



Appendix D: Pricing analysis

	Ealing Farmers' Market	Ealing Supermarket	Lewisham Market	Lewisham Supermarket	Marylebone Farmers' Market	Marylebone Supermarket	Walthamstow Market	Walthamstow Supermarket	Online Grocery A	Online Grocery B
<i>bag of 6/7 cooking onions</i>	£0.80	£0.69	£0.50	£0.97	£0.80	£1.09	£0.25	£0.38	£0.88	£0.97
<i>beefsteak tomatoes (ea.)</i>	£0.70	£0.69	£0.22	£0.69	£0.70	£0.89	£0.40	£0.69	£0.49	£0.66
<i>1 lettuce</i>	£0.80	£0.43	£0.40	£0.39	£1.00	£0.42	£0.50	£0.39	£0.35	£0.43
<i>1 cucumber</i>	£0.80	£0.58	£0.35	£0.58	£0.80	£0.89	£0.49	£0.49	£0.58	£0.58
<i>1 cabbage</i>	£0.50	£0.52	£0.60	£0.75	£0.50	£0.99	£0.80	£0.59	£0.58	£0.75
<i>4 baking potatoes</i>	£1.00	£0.41	£0.42	£1.02	£1.00	£1.19	£0.60	£0.79	£1.20	£0.75
<i>6 apples</i>	£1.00	£1.05	£1.00	£1.34	£1.50	£1.79	£0.60	£1.25	£1.28	£1.34
<i>1 kg carrots</i>	£0.80	£0.75	£0.75	£0.75	£0.80	£0.85	£0.60	£0.69	£0.69	£0.75
<i>1 cauliflower</i>	£0.50	£0.69	£0.50	£0.69	£0.80	£0.79	£0.66	£1.49	£0.69	£0.69
<i>Total</i>	£6.90	£5.81	£4.74	£7.18	£7.90	£8.90	£4.90	£6.76	£6.74	£6.92

- Substituted price of cucumber from Marylebone Farmers' Market at Ealing Farmers' Market due to lack of availability.
- At Lewisham Market and Lewisham Supermarket three large onions were substituted for six small cooking onions.
- At Supermarket in Marylebone online prices were used for Beefsteak tomato and cabbage due to lack of availability.
- At Walthamstow Market two vine tomatoes were substituted for one beefsteak tomato; iceberg lettuce was substituted for round lettuce.
- At Online Grocery B 3 large mild onions were substituted for six small, cooking onions; two regular tomatoes were substituted for one beefsteak tomato.

Appendix E: Sample questionnaires

Market Customer Survey (To be completed by surveyor)

1. How often do you visit the market?

- More than 3 times a week
- 2 or 3 times a week
- Weekly
- Fortnightly
- Monthly
- Several times a year
- Rarely
- This is my first time

2. When did you first start shopping at this market?

3. What was the main form of transport you used to get to the market today?

- Foot
- Car
- Bus
- Tube
- Train
- Other

Please specify _____

4. Do you live in the local area? What is your postcode (prompt for as much of the postcode as possible – at least first 4 digits?)

5. Do you work in the local area?

Yes No

6. How many stalls have you bought from today?

7a. How much do you think you've spent today at the market? £_____

7b. How much do you think you have spent on food at the market today? £_____

8. Have you spent or do you plan to spend money elsewhere in the area today?

Yes No

9. If yes, how much will you spend? £.....

10. What produce have you purchased today?

11. If the market were not here where would you go to buy these goods?

12. Does the market offer anything you can't get elsewhere?

13. Why do you shop at the market?

Prompts: Quality, Price, Service, Atmosphere, Variety of produce, Meet Friends
Convenience, Location, Specialist produce, Healthy/organic produce, Supporting local
traders

14. Do you enjoy the market?

15. How could the market be improved?

16. Gender:

Male Female

17. Age

Under 16

16 to 19

20 to 29

30 to 39

40 to 49

50 to 59

60 to 74

75 and over

18. To which of these ethnic groups do you consider you belong?

White

British

Any other White background

Mixed

White and Black Caribbean

White and Black African

White and Asian

Any other mixed background

Asian or Asian British

Indian

Pakistani

Bangladeshi

Any other Asian background

Black or Black British

Caribbean

African

Any other Black background

Chinese or other ethnic group

Chinese

Any other

19. What is your occupation?

(Prompts if occupation not known ask if employed/unemployed/student/carer etc)

20. Do you have a long-term illness, health problem or disability that limits your daily activities?

Yes No

21. Any other comments?

Street Markets – Local Business Questionnaire

1. What effect does the market have on your business?

Positive

Negative

No effect

Don't know

2. Can you estimate what percentage of your customers also shops at the market?

Or, what proportion of your customers also shop at the market?

All

Most

About half

Less than half

Almost none

3. Do you view the market as a competitor for business? (Or complementary?)

4. Do you think the market brings in people from outside the local area?

5. How does the market's presence contribute to store's income (turnover? Sales?)?

Increases

Decreases

No effect

7. If the store's income is affected, by how much?%

8. Or, does it:

Double

Increase by more than half

Increase by less than half

Stay the same

Decrease by less than half

Decrease by more than half

9. Does the market have any other effects on your business?

Prompts; congestion, parking, noise, crime, waste

10. If the market were to close what would be the impact on your business?

11. Can you quantify that effect?

If not, business would:

Increase significantly

Increase somewhat

Stay the same

Decrease somewhat

Decrease significantly

11. How long have you been based here?

12. Has the market's impact on your business changed over recent years?

13. Do you have much interaction with the market traders? Do you buy from/sell to them?

14. How could the market have a better effect on your business?

15. Has the market affected other neighbouring businesses? Do you know of any businesses that have closed down due to the market? Does the market attract new business?

Surveyor should take notes on

Name of shop:

Address:

Name of interviewee:

Proximity to market,

Does the shop have its own stall?

Chain store

Independent

Type of business:

1 Food retailer (butcher, baker, supermarket, etc.)

2 Newsagents/tobacconists

3 Stationery/books

4 Department and catalogue stores

5 Restaurant/takeaway/fast food/coffee shop

6 Pub/bar

7 Off licence

8 Professional (insurance, accountancy, legal, etc.)

9 Estate agents

10 Health care shop/pharmacy

- 11 Household items (furniture, kitchen, etc.)
- 12 Clothing retailer (shoes, accessories, etc.)
- 13 Cinema/theatre
- 14 Electronic/IT (TVs, phones, computers, etc.)
- 15 Pet shop/pet supplies/vets
- 16 Barbers/hair salons/beauticians and cosmetics
- 17 Toys/sports/cycling/outdoor leisure
- 18 Mechanics/car accessories/petrol station
- 19 Music/games/DVD/video (includes rentals)
- 20 DIY/builders' merchant
- 21 Garden centre/Florists
- 22 Dry cleaning/laundrette
- 23 Travel agents
- 24 Camera/photo developing shops
- 25 Other (betting shop, casino, taxis, antiques, watch repairers, charity shop, cobblers, jewellers, etc.)

Street Market traders

(To be completed by surveyor)

What is your relationship to the market business?

- Owner/co-owner
- Family member
- Employee
- Other

How often do you have a stall at this market?

- 6 times a week
- 4-5 times a week
- 2-3 times a week
- Weekly
- Every two weeks
- Monthly
- Less than monthly
- Other

Please specify

1. How long have you had a stall here?
2. How has the market changed in recent years?
3. Why do you have a stall at this market?
4. How could the market be improved?
5. Including yourself, how many people work for the business?
Full-time Part-time
6. Do any employees live in the local area?
Full-time employees Part-time employees
7. What is your home postcode?
8. Do you have a stall at other markets?
Yes No
9. If yes, which markets?
10. Without this market, where would you sell your produce?

11. Where do you get your produce? (Please be as specific as possible)
12. How much flexibility do you have over the produce you sell?
13. Do you use the services of other local businesses?
Yes No
14. If yes, please give details
15. Do you sell produce to other local businesses? (Restaurants, pubs, shops etc)
Yes No
16. If yes, please give details
17. What are the challenges of running a market stall?
18. Who are your competitors?
19. How do you compete?
20. What do your customers spend on average?
21. What is your weekly profit from the stall? £.....
22. What is your weekly income from the stall? £.....
23. What percentage of your income do you spend on:
Wages
Suppliers
Overheads
Other
24. Name of trader
25. Any other comments

Shoppers not using the market

1. Did you shop at the market today?
Yes No
2. If yes, switch to customer survey
If no, continue to question 2
3. Where do you shop?
4. Why do you shop where you shop?
5. 4 Why not at the market (if relevant)?
6. (Prompts: Price, Quality, Convenience, Variety of produce available, Accessibility, Service)
Try to capture push and pull factors
7. How often do you shop here?
More than once a week
Weekly
Fortnightly
Monthly
Several times a year
Rarely
This is my first time
8. What was the main form of transport you used to get to the shop today?
Foot
Car
Bus
Tube
Train
Other
Please specify
9. Do you live in the local area? What is your postcode (prompt for as much of the postcode as possible – at least first 4 digits?
10. Do you work in the local area?
Yes No

11. How much do you think you've spent at the shop today? £.....
12. Have you spent or do you plan to spend money elsewhere in the area today?
 Yes No
13. If yes, how much will you spend? £.....
14. Gender
 Male Female
15. Age
 Under 16
 16 to 19
 20 to 29
 30 to 39
 40 to 49
 50 to 59
 60 to 74
 75 and over
16. To which of these ethnic groups do you consider you belong?
- White
 British
 Any other White background
- Mixed
 White and Black Caribbean
 White and Black African
 White and Asian
 Any other mixed background
- Asian or Asian British
 Indian
 Pakistani
 Bangladeshi
 Any other Asian background
- Black or Black British
 Caribbean
 African

- Any other Black background
- Chinese or other ethnic group
 - Chinese
 - Any other

17. What is your occupation?
(Prompts if occupation not known ask if employed/unemployed/student/carer etc)

18. Any other comments?

Endnotes

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- ¹ Quoted in Jones J (2003 v1a) *Farmers' Markets – Building Bridges between Farmers & London Shoppers*
 - ² Sustain (2004) *Capital Eats: An analysis of London's food economy*
 - ³ Greater London Authority (2005) *Grocery retail in London*. Data from the Office of National Statistics (ONS) shows that the price of food in London is around three per cent higher than in the UK as a whole.
 - ⁴ Sustain (2004) *Capital Eats: An analysis of London's food economy*
 - ⁵ <http://archive.cabinetoffice.gov.uk/farming/> (accessed 12 June 2005).
 - ⁶ The Mayor is responsible for producing a new planning strategy for London. This replaces the previous strategic planning guidance for London (known as RPG3), issued by the Secretary of State. The London Plan is the name given to the Mayor's spatial development strategy. The final London Plan was published on 10 February 2004. The full document and a summary may be downloaded at <http://www.london.gov.uk/mayor/strategies/sds/index.jsp>.
 - ⁷ Certification guidelines of National Association of Farmers' Markets
 - ⁸ National Farmers' Union (2002) *Farmers' Markets: A business survey*
 - ⁹ Harriss P (2002) *London Markets* (London: Cadogan Guides).
 - ¹⁰ UK Commission for Integrated Transport (2002) *The Impact Of Congestion Charging On Specified Economic Sectors And Workers*
 - ¹¹ Interview with London Farmers Markets.
 - ¹² Based on interviews with London Farmers Markets and Ealing Civic Society Newsletter, Spring 2002 (<http://www.ealingcivicsociety.org/index.php?f=nspring2002&t=Spring+2002+Newsletter&m=-1>), & Ealing Centre Partnership (<http://www.ealingcentrepартnership.co.uk/>)
 - ¹³ 2001 Census
 - ¹⁴ Office of National Statistics, *Annual Survey of Hours and Earnings*.
 - ¹⁵ 2001 Census
 - ¹⁶ Ibid.
 - ¹⁷ Surveyor observations

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- 18 Based on model using customer spend.
- 19 Trader income is very difficult to determine because of traders' unwillingness to discuss or release information. Our estimate is based on two sources: <http://www.learn-direct-advice.co.uk/helpwithyourcareer/jobprofiles/profiles/profile650/> & <http://www.connexions.gov.uk/jobs4u/furtherdetails.cfm?id=80&parentID=641> . Both websites provide information on being a market trader in the U.K. and estimate a market trader's earnings.
- 20 Interview with London Farmers Markets.
- 21 Office of National Statistics, *Annual Survey of Hours and Earnings*.
- 22 2001 Census
- 23 Ibid.
- 24 Office of National Statistics, *Annual Survey of Hours and Earnings*.
- 25 <http://www.lewisham.gov.uk/LocalHistory/historylewisham.asp>
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- 27 Based on interviews with Christine Hull from the Lewisham Council Trading Section.
- 28 Office of National Statistics, *Annual Survey of Hours and Earnings*.
- 29 2001 Census.
- 30 Ibid.
- 31 Harriss op.cit.
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- 33 Office of National Statistics, *Annual Survey of Hours and Earnings*.
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- 36 Sacks J (2002) *The Money Trail: Measuring your impact on the local economy using LM3* (London: nef).
- 37 <http://www.crescentcityfarmersmarket.org/seed/>
- 38 Quoted in Friends of the Earth (2000) *The economic benefits of farmers' markets*.
- 39 Cummings, H et al. (1998) *Farmers' Markets in Ontario and their Economic Impact*, School of Rural Planning and Development, University of Guelph.
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- 41 Land Use Consultants and the Foundation for Local Food Initiatives (2000) *Farmers' Markets In The South East Of England* The Countryside Agency.
- 42 Project for Public Spaces, Inc. (2003) *Public Markets & Community-Based Food Systems: Making Them Work in Lower-Income Neighbourhoods* The W.K. Kellogg Foundation
- 43 Quoted in Bullock, S (2000) *The economic benefits of farmers' markets* (London: Friends of the Earth).
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- ⁴⁶ Nichol, L (2001) *How can planning help the local food economy? A guide for planners*, (Oxford: Oxford Brookes University, School of Planning).
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- ⁴⁸ Simms, A et al (2002) *Ghost Town Britain: The threat from economic globalisation to livelihoods, liberty and local economic freedom* (London: nef).
- ⁴⁹ DETR, *The Impact of Large Food stores on Market Towns and District Centres* (1998)
- ⁵⁰ Environment, Transport and Regional Affairs Committee; *Second Report: Environmental Impact of Supermarket Competition* (2000)
- ⁵¹ Cited in Nichol op. cit.
- ⁵² White, F.B. (1996). Outline of NABMA view on the way for markets in the UK. paper to the Association of Metropolitan Authorities and City of Birmingham conference: Markets at the Crossroads. Birmingham. March 21 1996.
- ⁵³ Quoted in Jones, J. (2003 v1a.) *Farmers' Markets – Building Bridges between Farmers & London Shoppers*
- ⁵⁴ Bullock op.cit.
- ⁵⁵ www.englishfarmers.com
- ⁵⁶ A report on challenges facing farmers is by Land Use Consultants and the Foundation for Local Food Initiatives (2000) *Farmers' Markets In The South East Of England* The Countryside Agency
- ⁵⁷ Project for Public Spaces, Inc. (2003) *Public Markets & Community-Based Food Systems: Making Them Work in Lower-Income Neighbourhoods* The W.K. Kellogg Foundation, 24.
- ⁵⁸ Project for Public Spaces, Inc. (2003) *Public Markets & Community-Based Food Systems: Making Them Work in Lower-Income Neighbourhoods* The W.K. Kellogg Foundation, 31.
- ⁵⁹ Sustain (2004) *Capital Eats: An analysis of London's food economy*.

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