

An Evaluation of Two Village Produce Markets

Rolvenden and Broad Oak Brede

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1. Summary

Common Cause Co-operative has produced this report for Community Action for Food and the Environment, CAFE. The report aims to evaluate the benefits and disadvantages of two weekly village produce markets and to recommend best practices for setting up similar markets in other villages. The two markets, Rolvenden and Broad Oak on the Kent-Sussex boarder were selected by CAFE since they are weekly markets located in small rural villages and are different in character to the monthly town markets that are more common in the region. Village communities are often the ones that are most under threat from the economic problems of the countryside, for example, the decline in farm incomes and employment and the closure of ‘unprofitable rural services’ such as local bus and rail links, village shops and post offices.

Methods

The research methodology was based on that devised by Common Cause in its Farmers’ Market Survey Pack. This pack provided example questionnaires developed as part of an evaluation of three pilot Farmers’ Markets, held during the Autumn of 1998 in Lewes, East Sussex. The questionnaire survey aims to:

- Assess whether the markets are a success for the stallholders
- Find out about problems experienced by stallholders and their suggestions for improvements
- Build up a profile of market customers, and assess their attitudes to the markets and a range of issues related to food
- Assess the impact of the markets on local traders and gather information on their attitudes to the markets
- Assess the level of awareness of the Farmers’ Market and what they are promoting amongst the general shopping community.

Findings

The Farmers’ Markets at Rolvenden and Broad Oak Brede are evidently very successful and are supported enthusiastically by very local customers and producers. The markets are run on a voluntary basis with minimal financial inputs and low over-heads making them accessible to a range of stall holders who otherwise would not be able to afford a stall at larger markets. Key findings include the following:

Producers

- For the stall holders the markets are proving financially worthwhile - and in some cases an economic lifeline in very difficult times for local producers.
- The low cost of renting a stall was particularly important to the small businesses involved.
- The markets provide a variety of important social, charitable and personal benefits for stall holders. Notably a number of stall holders said the markets were very convenient both because they were so close to their businesses and because they fitted in with child-care arrangements.

Consumers

- Customers were immensely enthusiastic about the two markets. They thought that they were good value for money, had become important social events especially for many elderly customers without access to a car, and generally had improved the ‘community life’ of the villages.
- The markets provided customers with the opportunity to buy fresh produce, support local food producers and buy directly from producers. Many also considered the markets convenient both because it was close to home and also because it fitted in with child-care arrangements.
- One in four people were attracted to the market because of the organic produce that was found to be considerably cheaper than at the local supermarket.

Local Business

- Local businesses were evenly split over whether trade increased, decreased or remained unchanged on market days.
- The potential adverse impact of the markets on vulnerable village shops is an important issue - while a number of shop keepers felt the markets were significantly reducing their trade, evidence from the customer surveys suggested that this competition may not be as great as one would guess. The surveys suggested that competition is mainly between the local supermarkets and the markets.

Sustainable Food Production, the Rural Economy and Environmental Benefits

The research suggests that small Farmers’ Markets such as at Rolvenden and Broad Oak Brede can provide local environmental benefits and contribute to revitalising the rural economy.

- Many of the producers see the markets as a vital component of their aggregate income. Particularly given that a number sell produce at more than one local Farmers' Market.
- Many of producers at these markets are keenly aware of the importance of environmental issues to their customers, and are attuned to the need for best practices on their farms and in their business.
- The markets are encouraging customers to buy locally and to reduce Food Miles. Customers may also be traveling less to do their shopping by buying at these markets rather than at the distant supermarket - although this conclusion is tempered by the fact that most customers came by car to the markets and there is little evidence to suggest that they are reducing their shopping at the supermarket.
- Produce at these village markets tends to be less over-packaged than at conventional stores - so their success will in a small way help to minimize waste disposal and energy use.

Food and Low Incomes and Healthy Eating

While this research has only limited use for inferring what impact the markets have had on changing customers' eating habits and does not directly tell one about access and spending on food by low income groups - some of the findings suggest that the markets could be positively influencing customers.

- A wide range of social groups use these two markets.
- The market is perceived as good value for money by the majority of its customers.
- A substantial number of customers asked (40 %) felt the market was encouraging them to eat a more healthy diet.
- Customers spent most money at the markets on fruit and vegetables and many customers felt that they were eating more 'fresh fruit and veg' and were more likely to buy fresh fish because of shopping at the Farmers' Markets.

Conclusions and Recommendations

This evaluation of two village, local produce markets on the East Sussex/Kent boarder demonstrates significant benefits to the local rural economy, environment and community. There is evidence that the presence of the weekly markets increases local consumption of fresh fruit, vegetables and fish that may have significant health benefits. These markets provide a good model for other rural locations. Recommendations for a prospective organiser of a Village Produce Market are given.

2. Introduction

Farmers' Markets have attracted a large amount of public and political interest in recent years. Since the first pioneering markets were set up in Bath and Bristol numerous towns and villages across the UK have started their own markets. Indeed around the country over two hundred are now thought to be up and running.¹ Generally Farmers' Markets differ from traditional street markets in that stall holders are restricted to selling only that produce grown or produced locally - although the definition of what constitutes 'local' and the degree to which organisers insist on this rule can vary considerably from market to market.²

Advocates of Farmers' Markets argue that they provide a means of re-invigorating the links between consumers and local producers with many accompanying social and economic benefits. These include: helping local and small farmers to survive in the present difficult economic times, improving and maintaining biodiversity in agriculture, reducing the environmental impact of transporting food, regenerating local town and village centres, improving income for retailers in secondary shopping areas, improving consumers' (particularly from low income groups) access to fresh fruit, vegetables and other produce, encouraging and promoting organic farming and benefiting tourism and local community spirit.³

This research investigates some of these claimed benefits and explores any problems or conflicts that may arise at two village produce markets currently running on the Kent/Sussex Border. It aims to draw on their experience to learn lessons for other village communities wishing to set up their own markets. The research aims to '*evaluate the benefits and disadvantages of two weekly village produce markets and to recommend best practices for setting up similar markets in other villages*'.⁴ The work was commissioned by Common Cause Cooperative on behalf of the Community Action for Food and the Environment project (CAFE).⁵

¹ See National Association of Farmers' Markets (NAFM) web-site at nafm@farmersmarkets.net for more information.

² NAFM Guidance Criteria and Guidance Notes on interpretation of these criteria. 2001

³ See National Association of Farmers' Markets (NAFM) web-site as above for more information.

⁴ See Common Cause Co-operative - Consultancy Agreement for the research

⁵ CAFE is a project funded by East Sussex Brighton Hove Health Authority, The Countryside Agency, East Sussex County Council and Brighton and Hove Council. It seeks to encourage residents to improve their health by adopting healthier eating habits. The project supports the development of sustainable food production. Contact Johnny Denis at CAFE by telephone on 01273 485383 or by e-mail: jdenis@esbhhealth.cix.co.uk. Common Cause Co-operative is a not for profit co-operative company supporting environmentally sustainable community action, Tel: 01273 470600, comcause@commoncause.fsnet.co.uk, www.commoncause.co.uk.

3. The Village Produce Markets

Two small produce markets were selected for study for three reasons:

- On initial inspection they appear to be running very successfully
- They were running in two small villages in relatively rural locations
- They were run on a weekly basis - a remarkable feature given that many Farmers' Markets are held monthly - even in big towns and cities with great potential customer numbers.

Rolvenden and Broad Oak Brede

Rolvenden and Broad Oak Brede are within 10 miles of each other, situated close to the Kent/Sussex County Boundary. Rolvenden is in fact in Kent, within Ashford District Council's catchment area, while Broad Oak Brede is on the Sussex side of the border under the control of Rother District Council. The nearest towns are Tenterden, Cranbrook, Hastings, Rye and Battle.

Market Histories and Conditions

Rolvenden Farmer's Market has been run by Shelly Mitchell and other volunteers on a non-profit basis since February 2000.⁶ It is held every Thursday between 10.00 a.m. and 12.00 p.m. in two adjacent venues across a small road from each other - the modern Village Hall and the Parish church.

Most stalls are extremely cheap by comparison with many 'commercial' Farmers' Markets, at just £4 per table and £2 for half a table. Craft stalls have to pay £1 extra. Rents for the two venues are also relatively cheap at £6 per hour. The village hall which is used for longer, therefore costs £24 to rent per market while the Church costs £18. According to the organiser any profits from the market are spent on advertising and administration. The market is strongly supported by the local Vicar - indeed when the market first started the church did not charge any rent. In principle the Parochial Parish Council and Parish Council also support the market.

In about September 2000 the Rural Development Agency visited the market and suggested it apply for a grant. A free bus service to the market was proposed and £1000 was awarded to trial this idea for three months. The bus proved such a success that subsequently the market applied for, and won a grant of £2,500 from Community Action South Kent (CASK) that guarantees a bus service up until May 2002.⁷ The bus

⁶ More precisely it has been running for 20 months and at the time of the research has just had its 80th market.

⁷ CASK is run within Kent Rural Development Areas and is based at Ashford.

circumnavigates a meandering route from Wittisham to Rolvenden and back picking up anyone who wishes a ride.

When the market expanded into the village hall a café was started to provide lunches for customers. The Rural Development Agency provided a grant of £600 to buy equipment to allow this to comply with safety regulations. However, the enterprise proved to be unsuccessful (perhaps in part because the market closes too early) and now the café simply sells teas, coffees, cakes and biscuits at very reasonable prices.⁸ A café is also run in the church on a completely independent basis.⁹

Broad Oak Farmers' Market is also a weekly market held on Fridays between 10.00 a.m. and 12.00 p.m. It hasn't been running for quite as long as Rolvenden and is approximately half the size. Liz Stephens, the organiser, and the Village Hall Committee, started the market to provide a source of income for the village hall which was running at a loss of roughly £1500 per year. At the time of this research she was able to announce that enough money had been raised by the market to put the village hall £200 in credit.

Stalls are even cheaper than at Rolvendon at just £2 per table. Profits from tea and coffee sales (approximately £500 this year) are donated to a selection of local charities. As at Rolvenden some customers arrive at the market by bus - although this is provided independently by a local Housing Association for its elderly residents.

Both Shelly Mitchell and Liz Stephens approached the National Association of Farmers' Markets for information when they started their markets but only Rolvenden actually joined. Liz Stephens could not see any particular advantage in joining and she thought that the affiliation fee was rather expensive.¹⁰ In addition she felt that the Association's rules might be overly prescriptive for stall holders in terms of demanding that they only sell 'local' produce all year round. Shelly Mitchell, on the other hand, felt that the £98 annual fee Rolvenden pays is on balance worth while. The Association has provided useful information and advice on such matters as stall holder insurance and Foot and Mouth. In addition, Rolvenden was recently visited by a TV crew largely as a result of having been picked up off the NAFM website.¹¹ Shirley Mitchell also felt that it was important for small markets to have a voice with a national organisation and advocate 'small village markets and regular year round weekly markets'.

In principle, both markets try to ensure that produce originates from the immediate vicinity and adhere to a 30 mile radius rule winter or summer. The only exception to this

⁸ Shelly Mitchell has held onto the equipment and hopes to gradually develop the catering service.

⁹ The church café existed before the farmers' market was started and income generated from goes towards the church.

¹⁰ Membership fees are calculated according to how large and how often a market takes place. Thus weekly markets are more expensive than monthly or bimonthly markets. According to Liz Stephens it would cost towards £100 to join the NAFMs.

¹¹ According to Shelly Mitchell assistance with publicity - through providing leaflets and car stickers may also be provided by the NAFM.

is bread, which at Rolvenden is brought in by one of the stallholders because a more local supplier could not be found.¹²

Both organisers are immensely enthusiastic about their markets. They strongly feel that their enterprises have to be weekly events if they are to provide a realistic alternative to the supermarket - so that on a practical level the markets become part of local peoples' regular shopping routine. They also feel that it is wrong to suppose that just because the markets are run on a voluntary basis with low expenditures and returns, they are unsustainable. As Shelly Mitchell has made clear, 'there is a place for people at certain times in their lives to be active for non-financial reasons'. Not every thing has to be for monetary return and 'one of the advantages of village enterprises like this is that it gives people the opportunity to give time and knowledge without always calling for money'.¹³

Methodology and Evaluation

The research methodology was based on that devised by Common Cause in its Farmers' Market Survey Pack.¹⁴ This pack provided example questionnaires developed as part of an evaluation of three pilot Farmers' Markets, held during the Autumn of 1998 in Lewes, East Sussex.¹⁵ The aim of these questionnaires was to help Farmers' Market organisers assess the impact of a Farmers' Market on four stakeholder groups - stall holders, customers, local shopkeepers and the local community in general. More precisely as Common Cause state, the questionnaire survey aims to:

- assess whether the markets are a success for the stallholders
- find out about problems experienced by stallholders and their suggestions for improvements
- build up a profile of market customers, and assess their attitudes to the markets
- gather suggestions for improvements from customers
- gauge consumer attitudes to a range of issues related to food production, shopping and cooking
- assess the impact of the markets on local traders and gather information on their attitudes to the markets
- assess the level of awareness of the Farmers' Market and what they are promoting amongst the general shopping community.

Essentially the style and form of questions we have used are as identical as possible to the original survey questionnaires - in order that valid comparisons between different markets at other sites or even between the same market at different times can be made.

¹² This was agreed with the NAFM.

¹³ E-mail correspondence with Shelly Mitchell.

¹⁴ Farmers' Market Survey Pack: Questionnaire surveys and recommendations for evaluation Farmers' Markets. Compiled by Anne- Marie Bur. Produced by Common Cause Co-operative.

¹⁵ Anne-Marie Bur et al. (1999) *Sussex Farmers' Market. An Evaluation of Three Pilot Markets in Lewes*. Common Cause Co-operative

We did, however, modify the questionnaires to suit the particular circumstances of the Rolvenden and Broad Oak Brede markets, adding and removing certain questions. For example, we did not carry out a pre market survey - because both Rolvenden and Broad Oak Brede have been running for some time and we did not use a local community questionnaire because both villages were so small that almost nobody could be found in the street who wasn't either going to or coming away from the markets!

The evaluation of the data collected has been analysed in a similar manner to that used in the research carried out in Lewes by Annie-Marie Bur et al. in 1999 for Common Cause Cooperative.¹⁶ Since both markets were small but very similar in situation, data collected from each has been aggregated to provide a bigger sample size for analysis. Likewise, where the same question was asked in both, Customer Survey I and II, the data was amalgamated.

Copies of all the questionnaires used can be found in Appendix I. Surveys were conducted over the months of July and August on successive Thursdays and Fridays. The main findings are given below and fuller details of the results are provided Appendix II.

¹⁶ Anne-Marie Bur et al. (1999) *Sussex Farmers' Market. An Evaluation of Three Pilot Markets in Lewes*. Common Cause Co-operative.

4. Results of Surveys: Stall holders

Stall holders were surveyed at both markets using a modified questionnaire from Common Cause Cooperative's Farmers' Markets Survey Pack. In essence the questionnaire attempts to find out some very basic information about the stall holders business and relationship with the Farmers' Market. A copy of the questionnaire is included in Appendix I. The raw information that stall holders provided is however confidential and we have tried to analyse and discuss this data in a way which does not reveal any commercially significant or personal information.

In total twenty one stall holders were questioned. This does not represent the total number of stall holders at either markets at any one time because a number attended both markets and some stall holders only rented stalls at monthly intervals or at particular times of the year. Generally Rolvenden was bigger with approximately 17 stalls split between village hall and church, while Broad Oak had about thirteen stalls.¹⁷

The Stall holders and their businesses

A wide range of produce was sold at both Rolvenden and Broad Oak Brede. The largest number of stalls were organic and non-organic local vegetable growers. Garden plants, flowers, apples and pear juice and herbs were also sold. Other stall holders sold dairy produce, pies, pastries, bread and cakes, preserves and jams, free range eggs, fresh fish, smoked meats, free-range additive free meat and specialist soft cheeses. There were also some craft stalls at each market including hand-knitted children's garments, painted natural objects, wooden toys and wool. Finally there were miscellaneous stalls selling things such as 2nd hand books and birdseed. It is worth noting that some stalls sold a diverse range of produce while others were very specific. For example, a vegetable stall might sell cut flowers and garden plants as well, while another stall holder only sold sunflowers for a brief seasonal period.

The stall holders represented a variety of differing business enterprises both in terms of their individual turnovers at each market and the amount of land or employees they had. Thirteen of the stall holders farmed land which varied in size between under four acres to over several 100 acres. One third of the stall holders didn't employ anyone but themselves, but almost half employed either unpaid or paid family and friends. It is notable, that just three of the farm producers took on formal paid employees and even some of these were only employed part time. Different stall holder's turnover varied between just a couple of pounds per market to over £350 reflecting the type of products they sold. Despite these difference it is probably true to conclude most of the stall holders represented relatively small scale producers.

¹⁷ The number of stalls at each market varies from week to week and season to season.

Other outlets

Most of the stall holders supplied one or more other outlets - only four stall holders solely supplied Rolvenden and Broad Oak Brede markets. Interestingly only one of the stall holders supplied a supermarket, the rest supplied a range of other outlets mostly smaller retailers such as local farm shops and normal shops, other street markets, box schemes and wholesalers. It was notable also that many stall holders sold produce either from their own premises (farm shop, home or nursery) or at other Farmers' Markets.

Reasons for participating

Over half the stall holders considered the Farmers' Markets a chance to expand sales but they also mentioned a variety of other business motives:

- The opportunity to meet customers and gain feedback was mentioned by almost half the stall holders.
- One third of the stall holders felt the market would help them to encourage direct selling to customers.
- Over half considered it a means of building up a customer base.
- Almost one third of the stall holders felt the market offered them the opportunity to sell excess produce.
- It was also notable that the opportunity of starting a new business was cited seven times - implying that the Farmers' Markets had actually encouraged some new entrepreneurial activity in the area.
- The opportunity to test new lines was mentioned by only four stall holders.
- One stall holder also felt that the market helped him to make useful links with other businesses in the area.

Whilst purely business motives were important to most of the stall holders, the surveys also revealed that there were a variety of other reasons for participating in the Farmers' Markets.

- Social Benefits - Many of the stall holders mentioned the enjoyable social aspect of the market. Indeed for one less profitable stall this was the primary reason for attending the market.
- Charitable Benefits - In addition, at both Rolvenden and Broad Oak Brede some stalls were reserved for charitable aims e.g. one stall sold 2nd hand books to raise money for village hall rent, one stall raised money for a local charity and another stall enabled young people with learning difficulties to participate in the market.
- Personal Benefits - Several stall holders who were either retired or had been made redundant said they wanted to still 'do something creative'. Many noted how

convenient it was being able to sell so locally - particularly from the point of view of fitting in with child care arrangements.

Stall holder's general comments on the markets

Generally, as might be expected from participants, stall holders had extremely enthusiastic and supportive views about the two Farmers' Markets - indeed half the respondents could not think of anything negative to say. A couple of stall holder who sold produce at a number of Farmers' Markets commented that Rolvenden was 'probably the busiest and best market they went to'. There were, however two minor points that were mentioned by more than one stall holder at Rolvenden.

- Firstly, some felt that the market would be better if it was held in one venue.
- Secondly, some commented that customers were allowed into the market before the official opening time before the stall holder had time to set up properly.

At Broad Oak Brede:

- One stall holder felt that the market should promote itself more, particularly before Christmas.
- Another believed that some of the other stalls didn't price clearly - a problem which they considered should be addressed by a 'clear pricing policy'.

Every stall holder interviewed was happy with the day and time that the markets were held. There was less unanimity, however, about whether the markets should sell only local produce or both local and brought in produce. While about 14 of the stall holders felt that the markets should sell only local produce, seven said that this wasn't practical all year round - some brought in produce had to be allowed in winter. In principle all the stall holder supported the general ethos of selling local produce.

The stall holders were also asked how far away they would be prepared to travel to attend a hypothetical Farmers' Market. Most felt that traveling under ten miles was acceptable but any further would make the market too inconvenient. There were five stall holders who already traveled quite large distances to other Farmers' Markets, street markets and retail outlets and were prepared to travel over ten miles to sell their produce. For example, one stall holder sold produce at a Farmers' Market in London.

Problems and constraints

Stall holders were asked about any problems they experienced during the markets and what constrained them in regularly attending the market. Overall, none of the stall holders felt there were any really serious problems but some issues were mentioned.

- Parking - A number of stall holders at both Rolvenden and Broad Oak Brede commented on the problem of parking both for themselves and their customers at each site. It was evident that there was quite a 'rush hour' of traffic at the beginning of each market at both Rolvenden and Broad Oak. Both sites have small car parks and these filled up quickly forcing drivers to park on mass in the surrounding roads.
- Stalls - Others mentioned that they sometimes had difficulty stocking and restocking their stalls when demand was high. Only one stall holder found their stall too small for their business and one had problems with providing enough change for customers. Since both market are held inside it was not surprising that bad weather during unloading and loading was only mentioned as a problem by one stall holder.
- Competition - It is notable that competition between stalls was only perceived to be a problem by two stall holders - perhaps a reflection of the varied nature of the produce on sale at each market. One of these stall holders felt that they couldn't sell all the types of produce they wanted because this would infringe on someone else's product range.
- Time and Labour - As might be expected from small business people, many stall holders mentioned the time and labour required both to prepare and attend the market as being a constraint on their participation.
- Seasonality - Reflecting the number of fruit, vegetable and plant growers at each market, a high proportion of stall holders noted that the seasonality of produce did reduce both the number of markets they could attend in a year or the amount and variety of produce they put on sale. This would be a particular problem if they could not buy in any produce from wholesalers.
- Cost of Equipment and Regulations - For some specific stall holders the cost of equipment and certain regulations were a particular problem imposing extra costs on their business. For example, jam and preserve making, cheese and meat stall holders all incurred particular difficulties and extra costs.¹⁸ A couple of the stall holders said that they had felt unprepared for the investment in time, energy and money that

¹⁸ Stall holders had to comply with Public Hygiene, Weights and Measures, Trade Description and Health and Safety legislation. Some of these Rules and Regulation necessitate buying expensive equipment such as cold storage boxes, freezers and measuring devices (refractometers and digital thermometers). In addition, stall holders must be prepared for undergoing registration and inspection procedures and paying for it!

complying with regulations and buying equipment entailed. It is possible that stall holders could have benefited from some pre-market training and even financial assistance in these respects.

The economic impact of the markets

Almost every stall holder said that the market was very worthwhile attending in financial terms. Indeed a number of stall holders claimed that the markets had acted as a ‘life line’ allowing them to keep farming and stay in business. Another important aspect was the relatively high returns they could gain from selling direct to the public rather than through a wholesaler or other retail outlet. Some of the producers also made it clear that while one Farmers’ Market was not the main income source, it was crucial to their sales figures - particularly as they were now selling to a number of Farmers’ Markets.

- Turnover - Stall holders were also asked about their average taking at each market in order to try and: estimate each market’s turnover. Many were unable to provide exact figures and could only ‘guestimate’ possible upper and lower figures. The table below show the upper and lower estimates at each market calculated from these figures.

	Rolvenden		Broad Oak Brede	
Estimated Range	Lower	Upper	Lower	Upper
Total Market turnover	£1185	£1553	£675	£1280

Using these figures one can estimate approximate ranges for each market’s annual turnover. Thus, Rolvenden may generate a cash-flow of between £59,250 and £77,650 annually while the market at Broad Oak could be turning over something between £33,750 and £64,000. These figures assume that each market is held a nominal fifty times a year.

These sorts of sums are not striking by general business standards, but it is remarkable how small endeavors at each stall can accumulate at an aggregate market level to quite respectable sums. Whilst the financial implications of this income generation to the local economy are very difficult to gage they should not be disregarded - particularly when considered in the context of the problems facing small producers at present.

5. Results of Surveys: Customers

Two surveys were carried out consecutively at both Rolvenden and Broad Oak Brede markets. Detailed results are provided in Appendix II.

Customer attendance and how people heard about the market

- Most customers heard about the market through word of mouth - probably reflecting the local nature of the markets and the characteristics of the village community.
- Posters, leaflets and some adverts in local newspapers were the second most important means of publicity

The markets have become a regular shopping fixture for many local people, Thus, over eighty percent of customers had been to the market before and the vast majority of customers visited the market either on a weekly (44 %) or fortnightly (9 %) basis. However, it is also interesting that a sizable minority at each market were newcomers.

What appealed about the market

- It was notable that when asked what aspects of the market appealed to them, customers mentioned that the freshness of the produce the most number of times.
- The opportunity to buy local produce and support for local producer were the second most popular responses. Direct contact with producers was also important to almost a third of customers
- Many customers considered the social side of market as a particular attraction. Customers made many comments such as ‘a fun way to shop’, ‘a pleasant morning out’ and ‘a place for a cup of tea and a chat’.
- The market’s ‘reasonable prices’ were mentioned by over a third of customers.
- Over a quarter of the customers mentioned that the opportunity to buy organic was appealing but only seven people noted the opportunity to buy food unavailable elsewhere as attractive.

Many customers gave a varied list of other reasons for liking the market or comments about it. For example:

- Some mentioned the ‘good variety’ of produce available and noted particular products which were appealing e.g. fish, books and smoked meats.
- Some noted how convenient and near the market was to their home. A couple said that there was ‘little other option’ and ‘they could have their hair done at the same time’.

- Many customers stressed that they felt their market improved the ‘community spirit’ in their village.

General comments and aspects of the Markets that didn’t appeal

- The majority of customers, almost 70 % couldn’t find any aspects of the markets that didn’t appeals to them.
- Twenty one people had complaints about some aspect of the market - but many of these complaints were highly idiosyncratic or personal. For example, one person said the ‘hall smelt funny’ at Rolvenden.
- At Rolvenden market a couple of customers were not entirely happy with the church being used as a market on religious grounds. Most customers when specifically questioned about this however, were actually very much in favour of the church’s use and a handful noted that they had changed their minds over time.
- It is notable that only two customers mentioned that they were worried about the impact of the market on local shops. It may be that people to whom this was an issue might not have attended the market.
- Very few people had any other comments to make about the market or suggestions for improving it.

Travel and transport

The survey revealed most customers were very local. The majority of customers traveled under one mile to the market; over sixty percent came from under three miles away and a quarter of customers questioned had traveled between three and ten miles. Only twelve percent of the customers had traveled over ten miles to the market.

- Against these figures it was notable that over 70 % of the customers surveyed traveled to the market by car.
- Almost 20 % of customers walked to the market
- 10 % of customers (many, though not exclusively, elderly) came to the market by bus. This is interesting because the number of people who do not have access to cars in rural areas is often under estimated and can be a significant aspect of rural deprivation. It is also interesting that of those people surveyed over 16 % customers actually did not have access to a car - these were often the elderly or women at home in households with only one car.

The high proportion of customers who drove to the market may reflect the rural isolation of the markets, the age distribution of the customers, the fact that shoppers have to carry shopping away from the market and the relative convenience in the traffic free countryside of ‘dropping in’ with the car. Although Rolvenden and Broad Oak were both served by a market bus of some sort, the use of cars probably also reflects the generally poor public transport links to these villages.

Customer profiles

Over 80 % of customers were over 41 years of age and 41 % were over 60. Compared with the general population in the Rolvenden and Broad Oak Brede districts the customers represented a significantly higher concentration of these age ranges. As one might expect, the customer profile showed that a high proportion of shoppers were women - 75 % in fact. Also not surprisingly the 16-20 age band was significantly under represented - in fact nobody in this age range was interviewed although they were present at some of the markets.

Customers were also asked an optional question about their total household income. Quite a high proportion (approximately 25 %) declined to answer this question. The figures for those customers who did provide data are shown below:

Household income per year	% of sample
Less than £10,000	20.8
Between £10,000 and £20,000	21.9
Between £20,000 and £30,000	23.0
Over £30,000	34.0

Although these figures are interesting in that they indicate that a wide range of income groups are using the market - they are likely to be rather inaccurate given the fact that so many people declined to answer the survey and the likelihood that people both under and over estimated their household incomes. Our intuitive guess is that overall elderly pensioners on low incomes may actually be less well represented than other groups. They are less likely than other age groups to disclose their household incomes and a number made clear that they felt this question was impolite and nosy! If this were true then the proportion of higher income households using the Farmers' Market may be over represented.

Customer Spending

Virtually everyone who was interviewed had bought something at the market. Buyers were asked what they had bought, how much they had spent on various categories of goods in five price bands (from under £1 to over £10).

- The average spend per buyer was £11.41
- Most money was spent by shoppers on non organic fruit and vegetables, followed very closely by meat and fish.
- Four categories of goods were bought by the most number of customers.

They were also asked where they normally did most of their shopping and where they would normally buy specific goods had they not purchased them at the market. Given the conflicts of interests that potentially arise between maintaining economically viable small shops in towns and villages, the encroachment of supermarkets into small provincial towns and the growth in the number of Farmers' Markets this was a particularly significant question. We hoped the answers might reveal which retail outlets these markets might be most competing against. The data from these surveys is shown in Appendix II. Analysis of the surveys revealed a number of quite interesting and significant points:

- In agreement with a previous study in Lewes, it was found that supermarkets were the main alternative source of produce for the shoppers. Over 60% of the customers said they did most of their shopping at supermarkets.¹⁹ This strongly suggests that supermarkets are the main competition for all other retail outlets.
- Many market customers supported a wide variety of other retailers too. Over 18 % said they did most of their shopping at the local shops (despite coming to Farmers' Markets).
- Interestingly, almost 7 % of customers said that they did most of their shopping at other Farmers' Markets.

In relation to what other retail outlets may be suffering as a result of Farmers' Markets it was notable that:

- Supermarkets were mentioned the largest single proportion of times (39 %) as the retail outlet where purchases would have been made.
- Almost 9 % of goods bought wouldn't have been purchased if the customer hadn't shopped at the Farmers' Market.
- Other Farmers' Markets were actually cited 16 % of times as likely places where goods would have been bought.
- Customers mentioned other town shops 8 % of times - suggesting that some trade was being lost from local towns.

¹⁹ Anne-Marie Bur et al. (1999) Sussex Farmers' Market. An Evaluation of Three Pilot Markets in Lewes. Common Cause Co-operative, p12

- While other rural outlets such as local village and farm shops, nurseries, fish farms, and WI markets were mentioned 27 % of times as alternative retail outlets, it was notable that the local 'village shop' was only mentioned approximately 7 % of times. This implies that although there is probably a negative competitive (trade) consequence for many local rural retailers overall, individually the impact of the Farmers' Market is not perhaps as significant as one might guess - particularly for village shops.

Customers were asked why they hadn't bought other things at the market. There were a wide variety of responses.

- Over 10 % of the customers remarked that they were just about to go on holiday and didn't want to buy too much food. In addition, over a third of customers noted that they had already done their weekly shop - These figures imply that if this hadn't been the case the amount bought at the market would be substantially higher.
- A small number of customers, all elderly shoppers, mentioned having too much to carry as a reason for not buying anything else.
- Four customers remarked that they were loyal to other small outlets such as local farm shops, butchers and WI markets.
- About a dozen customers grew their own vegetables and fruit and so didn't want to buy these at the market.
- Only four customers said that the price of goods had stopped them buying produce - in both cases this was meat.
- It was notable that about 14 % of customers interviewed hadn't finished their shopping when interviewed - so the results indicate a slight under estimate of what was bought by each buyer.

Healthy Eating

In both surveys customers were asked whether they felt that shopping at the Farmers' Markets had encouraged them to eat a healthier diet.

- While approximately 60 % of customers in both surveys did not think this was true, generally commenting that 'they already ate healthily', a significant number of people (40 %) did feel the market was encouraging them in this way.
- Notably these customers often commented that they were 'probably eating more vegetables and fruit', more 'fresh veg and fruit' and that they were 'more likely to buy fresh fish'.
- Some customers also mentioned the fact that they were able to buy organic produce as contributing to a healthier diet.

Attitudes to shopping

The second customer survey investigated the attitudes of the customers towards some issues involved with local produce, shopping outlets, food prices and cooking skills. Customers were presented with a list of statements and asked which ones they agreed with or which applied to them. The results are presented in Appendix II. A number of points are suggested by the data:

- Support for local food production - Customers unanimously wanted more food produced by local farmers to be available to shoppers. They appeared more concerned that food should be local than organic and generally felt there was some sort of link between local production and protecting the environment. Customers also seemed to have less confidence in how food was produced if it came from far away in other countries or regions. For over half the customers the local Farmers' Market was part of their regular shopping routine.
- Mistrust and Ambivalence toward supermarkets - Customers were fairly evenly split over whether the supermarket's ability to make all kinds of fresh produce available all year round was desirable. And 66 % did not have confidence in the standards set by supermarkets.
- Value for money -The majority of customers (over 80 %) thought Farmers' Markets offered good value for money and did not believe that supermarkets were better in this respect.
- Organic production - As already mentioned, the fact that food was organic was not perceived as important as it being local. Customers seemed to contradict themselves in relation to organic food and prices. On the one hand, 88 % of customers surveyed were prepared to pay more for organically produced food. But at the same time 66 % wanted to buy more organic food only if prices were similar to food produced using chemicals. It is possible that some misunderstanding of the question occurred.
- Education and fresh food - Whilst 92 % of respondents felt confident about cooking fresh produce and already ate a lot, over 70 % of customers admitted that they would probably buy more if they knew more about how to cook it. This suggested that targeted customer education might be helpful in encouraging shoppers to buy more fresh produce.

6. Results of Surveys: Local Businesses

Local businesses in and around Rolvenden and Broad Oak Brede were invited to give their comments about the market. A copy of the survey sheets is shown in Appendix I. Unfortunately, only seven businesses could be found to be interviewed in Rolvenden and just four in and around Broad Oak Brede - a sad reflection on the state of consumer services in this rural area. One of the three shop keepers in Broad Oak told us that at one time there had been over half a dozen shops in the village. It is likely that the pressures on local shops in the vicinity will not be improved if the current proposals to build a new TESCO supermarket in Tenterten are realised. The main significant results of these surveys are as follows:

Impact on trading

Traders were fairly equally split between those who believed that the market had coincided with a decrease in their business, those who thought that their business might have increased, and those traders who hadn't noticed any impact at all. In addition two traders noticed that the markets had changed the customer flow during the respective mornings - causing a rush before and after the market.

Traders views on the market.

- A minority of local business people expressed enthusiasm and support for the Farmers' Markets - these were mostly in businesses which could only benefit from extra custom such as local antique shops, garages and pubs.
- Most of the local business people were either ambivalent about the market or actually objected to them for a variety of reasons.
- Almost all the traders, irrespective of their views were concerned about the impact that the market might have their own and other local business' viability - particularly the 'village shop'. Many, local traders considered the village shop as a very important asset which was highly vulnerable to competition and already under threat from the supermarkets.
- A number of traders believed that their local market was trading unfairly against them and under false pretenses. So for example, they argued that the market traders were not local farmers and didn't necessarily sell local produce and that the market didn't have proper weights, measures and hygiene controls and allowed people to get away with not having to pay any normal taxes and VAT. While these perceptions are, as far as we are aware, entirely unjustified they highlight the need for the market to

communicate more effectively with the local traders. Market organisers must make strenuous efforts to convince local traders that they are not being unfairly traded with and that proper controls are in place. If possible organisers could try to give them some 'stake' in the market - such as letting them advertise or sell particular products. It is interesting and possibly relevant to the trader's negative views at Rolvenden and Broad Oak, that a high proportion of them had actually never visited the markets in their village either because their work didn't allow it or because they were actively boycotting the event.

7. Price Comparisons

Results from Customer Surveys 1 and 2 suggest that most people shopping at the market did not feel that the prices were too expensive. Indeed, the 'reasonable prices' were one of the main reasons customers came to the market and 80 % considered the Farmers' Markets offered 'good value for money. In fact, only four customers surveyed hadn't bought a product because the price had been too great.

In addition, customers did not believe that supermarkets offered better value for money than the Farmers' Markets. In order to put some figures to these perceptions, a comparison of prices for various fresh vegetables and fruit sold at the markets, at the village shop in Rolvenden and at the Supermarket in Tenterden was made during the course of the research. While these figures are of fairly limited value since we only looked at one supermarket and shop and prices fluctuate over time, a couple of points are worth noting:

- Many of the organic items sold at the market were cheaper than at the supermarket and in a few cases non-organic vegetables were cheaper than in the supermarket.
- Many items sold at the markets such as cherries, strawberries and red currents were very seasonal. Whilst at the supermarket they might be available all year round, at the market they were only sold for a short period on a number of stalls and then disappeared. It was noticeable that at these times of seasonal surplus they could be extremely cheap - with special offers available. Although it is difficult to compare prices over the long term for this kind of produce, it is likely that consumers are able to benefit from buying very cheap fruit in bulk with this kind of direct consumer relationship.

It is difficult to compare prices for the various meat and cheese products sold at the market - particularly as some are not sold at the supermarket but the general comments from customers suggested that they considered the prices to be similar or believed that 'one was paying for quality'. Edited results of the price survey are given in table 1 in Appendix III.

8. Food and Low Income

The importance of eating enough fruit and vegetables has increasingly been recognized by the Government's Health Guidelines and concern has also focused on the links between poverty, diet and ill health.²⁰ One of the claimed benefits of Farmers' Markets is that they can improve consumer's access to fresh fruit and vegetables - particularly for low income groups.²¹ Some past research has, however, found that Farmers' Markets tends to appeal to the more wealthy sections of society.²² Alternatively, more recent research in Lewes found that Farmers' Markets and other initiatives have the potential to increase the accessibility of local fresh produce for families on low income.²³

While this research cannot be conclusive. It has found that:

- A wide range of social groups use these two village produce markets - despite the possibility that low income groups may have been less well represented in the survey.
- The markets are also potentially very valuable for local people without or with limited access to car transport. It was notably that at least 10 % of the customers survey had come to the market by bus.
- Customers considered the markets offered them very reasonable prices.
- Most money was spent on fruit and vegetables.
- 40 % of customers felt that the market had encouraged them to eat a healthier diet.

²⁰ These recommend that people should eat at least five 'portions of fruit or vegetables' a day. See for example, Department of Health. (1996) *Low incomes, food, nutrition and Health: strategies for improvement*. Nutrition Task Force and Low Income Project Team. And Acheson, D (1998) *Independent Inquiry into Inequalities in Health*, HMSO

²¹ See National Association of Farmers' Markets (NAFM) web-site as above for more information.

²² Chubb, A (1998) *Farmers' Markets the UK Potential*. Co-logic books, Bath cited in Common Cause Cooperative (1999) *Sussex Farmers' Market. An evaluation of three pilot Markets in Lewes*. P21

²³ Bur, A.M. 1999 *Can Farmers' Markets Improve Access to Fresh Local Produce for Families on Low Incomes? A report of a participatory investigation held in conjunction with pilot farmers' markets in Lewes, East Sussex*, Common Cause Cooperative, Lewes.

9. Conclusions

This report has tried to assess the potential benefits and disadvantages for 'stakeholders' such as producers, customers local businesses at two small village produce markets at Rolvenden and Broad Oak. These markets are particularly interesting because they are weekly markets held in relatively isolated rural locations - where there aren't the same mass of consumers potentially available to buy produce as you might find in a city or market town. These communities are also often the ones that are most under threat from the economic problems of the countryside, for example, the decline in farm incomes and employment and the closure of 'unprofitable rural services' such as local bus and rail links, village shops and post offices.

The Farmers' Markets at Rolvenden and Broad Oak are evidently very successful and are supported enthusiastically by very local customers and producers. Given this and the virtual absence of criticism from customers, one can only conclude that they are run extremely well. The fact that the markets are run on a voluntary basis with minimal financial inputs and low over-heads possibly makes them accessible to a range of stall holders who otherwise would not be able to afford 'commercial' stall prices. It is very heartening to see that there is still a place for people to come together to run community events - and their example is inspirational for other small villages thinking of starting their own markets.

Overall the following general conclusions can be made from the results:

Producers

- For the stall holders the markets are proving financially worthwhile - and in some cases they are an economic lifeline in very difficult times for local producers.
- The low cost of renting a stall was particularly important to the small businesses involved.
- In general producers benefited from being able to sell at better prices than they might have through wholesalers or other retailers. For some products this was particularly marked. In addition,
- Producers also valued a range of business advantages the market provided such as providing a venue for customer feedback and allowing the opportunity to sell excess produce (e.g. summer gluts of soft fruit) or produce that couldn't be sold to the supermarket.

- Other advantages included allowing producers to advertise their farm shops and encouraging direct selling outside of the market.
- The markets provide a variety of important social, charitable and personal benefits for stall holders. Notably a number of stall holders said the markets were very convenient both because they were so close to their businesses and because they fitted in with child-care arrangements.
- Very few stall holders found competition between each other a problem - reflecting the varied range of producers the organisers had persuaded to attend.
- There were remarkably few complaints, criticisms or problems at either market for the stall holders. For some stall holder, information and costs involved in buying equipment and meeting regulations were notable problems. Other problems mentioned included the stocking of stalls, seasonality of produce, time and labour needed to prepare and attend the markets and the problems of parking for both themselves and their customers.

Consumers

- The customers were immensely enthusiastic about the two village produce markets and generally were very uncritical of them.
- Amongst other things, customers particularly liked the markets because they believed they provided them with the opportunity to buy fresh produce, support local food producers and buy directly from producers. Many also considered it convenient both because it was close to home and also because it fitted in with child-care arrangements.
- Overall customers considered the market to be good value for money.
- The opportunity to buy organic produce was not a major issue for most of the customers. But having said that, one in four people were attracted to the market because of these producers and at the organic fruit and vegetables available at the market were considerably cheaper than at the local supermarket.
- The markets have become important social events for many of the customers - including many elderly customers without access to a cars. They are also seen by many customers and producers as improving the 'community life' of the villages.

Local Business

- Local businesses were evenly split over whether trade increased, decreased or remain unchanged on market days.

- The potential adverse impact of the markets on vulnerable village shops is an important issue - while a number of shop keepers felt the markets were significantly reducing their trade, evidence from the customer surveys suggested that this competition may not be as great as one would guess. For example the survey suggests that competition is mainly between the local supermarkets and the markets. Secondly, that only a small percentage of customers would have bought their shopping at the village shops if they hadn't bought it at the market. It may be that the market might actually encourage customers to buy top up items at the local shop, rather than go to the supermarket.
- A number of shop keepers appeared very misinformed and distrustful of the markets: they believed they were being unfairly traded against - that the stall holders were not really 'local' producers and that the market business' didn't pay taxes and meet regulations as a shop keeper would have to.

Sustainable Food Production, the Rural Economy and Environmental Benefits

It is beyond this report to go into the complexities of the relationship between agriculture, the environment and sustainable development. But it is not controversial to acknowledge that small scale producers are immensely important to both the rural economy and the local environment in East Sussex and Kent - shaping the landscape, providing employment and bringing money into rural areas.

Data from the surveys at Rolvenden and Broad Oak Brede suggests that the small local food producers involved are benefiting both economically and in a variety of other ways from the markets. Despite the fact that the turnovers at these individual markets are not enormous by commercial standards - many of the producers see the markets as a vital component of their aggregate income. Particularly given that a number sell produce at more than one local Farmers' Market. Whilst small producers are not necessarily more environmentally friendly in their agricultural practices, many of producers at these markets are keenly aware of the importance of these issues to their customers, and are attuned to the need for best practices on their farms and in their business. In addition, at both markets there were a range of organic producers whose 'raison-d'etre' is to minimise chemical inputs and maintain soil fertility.

From the two villages communities point of view the markets are encouraging customers to buy locally and therefore reduce the massive distances that products are transported in the modern supermarket retail economy. Customers may also be traveling less to do their shopping by buying at these markets rather than at the distant supermarket - although this conclusion is tempered by the fact that such high proportions of customers arrived at the markets by car and there is little evidence to suggest that they are abstaining from still shopping at the supermarket. Another interesting issue - given the current debate surrounding waste disposal in Sussex, is that produce at these village markets tends to be less over-packaged than at conventional stores - so their success will in a small way help to minimize waste disposal and energy use.

This research suggest that small Farmers' Markets such as at Rolvenden and Broad Oak Brede can provide local environmental benefits and contribute to revitalising the rural economy - findings which are in agreement with the UK Round Table on Sustainable Development which reported in 1998 that:

*'Local sourcing, traditional varieties and organic production all have the potential to contribute to sustainable agriculture on a wider scale.'*²⁴

Food and Low Incomes and Healthy Eating.

While this research has only limited use for inferring what impact the markets have had on changing customers' eating habits and does not directly tell one about access and spending on food by low income groups - some of the findings suggest that the markets could be positively influencing customers.

- A wide range of social groups use these two markets - despite the possibility that low income groups may have been under represented in the surveys.
- The market is perceived as good value for money by the majority of its customers, which implies that low income groups would not necessarily consider it too expensive.
- A substantial number of customers asked (40 %) felt the market was encouraging them to eat a more healthy diet.
- Many customers felt that they were eating more 'fresh fruit and veg' and were more likely to buy fresh fish because of shopping at the Farmers' Markets.
- Customers spent most money at the markets on fruit and vegetables.

²⁴ UK Round Table on Sustainable Development, July 1998. *Aspects of Sustainable Agricultural and Rural Policy*. London. Cited in Anne-Marie Bur et al. (1999) *Sussex Farmers' Market. An Evaluation of Three Pilot Markets in Lewes*. Common Cause Co-operative

10. Recommendations

This evaluation of two village, local produce markets on the East Sussex/Kent boarder demonstrates significant benefits to the local rural economy and community. There is also evidence that the presence of the weekly markets increases local consumption of fresh fruit, vegetables and fish which may have significant health benefits. **The model that these markets provide is highly recommended for other rural locations.**

Recommendations for a prospective organiser of a Village Produce Market include:

Objectives	Activity
1. First exploratory meeting	a. Identify who from the local area would like to be involved b. Who's going to run the markets and how c. Identify opportunities and obstacles d. Identify possible market manager e. Identify key questions to be answered eg: <ul style="list-style-type: none"> • purpose of market • target customers • which is the best day of the week • location • market conditions • impact on local shops (beneficial and adverse) • stall hire if necessary • dates for pilot markets • type and cost of insurance
2. Identify best location	Visit a number of sites. Considerations include: <ul style="list-style-type: none"> • indoor or outdoor • electricity source • permission required • site fee • access for unloading • public transport • car parking • refreshment area
3. Evaluate interest from producers	Identify local producers in the area, who is interested in selling at the market, which day of the week is best, how often they are interested in attending markets.
4. Evaluate views of shops	Gain an understanding of support or opposition to a regular market

5. Gain views of key organisations	<p>For example:</p> <ul style="list-style-type: none"> • WI • Other market managers in the area • Local authority • Church organisations
6. Review experience gained at other Farmers' Markets	<p>Useful contacts include:</p> <ul style="list-style-type: none"> • Rolvenden and Broad Oak market organisers • other nearby Farmer's Market organisers (contact SRCC below) • Common Cause Co-operative Tel: 01273 470900, e-mail: comcause@commoncause.fsnet.co.uk, web site: www.commoncause.co.uk • Sussex Rural Community Council (SRCC) Farmers' Market Co-ordinator Tel: 01273 473422 • CAFE Tel: 01273 485383 e-mail: jdenis@esbhhealth.cix.co.uk • National Association of Farmers' Markets Tel: 01225787914 e-mail: nafm@farmersmarkets.net web site: www.farmersmarkets.net
7. Draw up action plan and costings for pilot markets	<p>Pull together all relevant information to include:</p> <ul style="list-style-type: none"> • answers to questions above • publicity strategy (including advertisement materials and press releases to radio, TV and local papers) • income from stall bookings
8. Fund raise	<p>Grants may be available for:</p> <ul style="list-style-type: none"> • pilot markets • a bus service to the market to reduce the number of people traveling by car and make the event accessible to the elderly and those without access to a car.
9. Run pilot markets and evaluate	<p>Assess long term viability of market. A market can be viable if costs don't exceed income.</p>
10. Market development	<p>Either before a market is set up or in its initial stages:</p> <ul style="list-style-type: none"> • stall holders and organiser could benefit from education and training on issues such as marketing, food hygiene and weights and measures regulations, health and safety. • For some small producers investment in new equipment can prove very expensive. Organisers should investigate the possibility of proving either a small grant or a loan to help these producers set up.

Appendix I

Customer Survey One

Date:

Interviewer: _____

1. How did you hear about the market today?

- word of mouth
- poster/leaflet
- newspaper (which?)
- radio/TV
- came across it
- came across earlier market and made a point of coming to this one
- other (specify) _____

2. Have you been to the market before? yes no

How often do you come to the market

- weekly
- fortnightly
- monthly
- once or twice a year

3. What appeals to you about the market? (unprompted)

- opportunity to buy local produce
- general atmosphere
- supporting local producers
- freshness of produce
- opportunity to buy organic / low input / free range produce
- direct contact with producers
- reasonable prices for quality of produce
- food not available elsewhere
- other(please explain) _____

4. Are there any aspects of the market that don't appeal to you?

5. Any other comments you have about the market, or suggestions for improving it.

6a. How did you get to the market today?

- Bus
- Car
- Walked
- Cycled
- Other

What? _____

6b. Do you have access to a car? _____

7. Was there anything you would hope to find at this kind of market that you didn't see today? _____

8. Did you buy anything? yes no If yes:

How much did it cost?

Where would you buy it normally?

	£ →1	£ 1-3	£ 3-6	£ 6-10	£ 10+	super- market	other town shop	village shop	farm shop	don't normally buy	other - say where
organic veg/ fruit											
other veg/fruit											
preserves											
honey											
bread											
cakes/ pies											
f/r eggs											
cheese											
meat											
flowers											
plant / shrub											
fish											
crafts											
other											

9. Why haven't you bought other things?
(unprompted)

10. How far away do you live?

- had done my weekly shop
- too expensive
- too much to carry
- didn't know how to cook it
- haven't finished yet
- other (please explain) _____

- 0-1 miles
- 1-3 miles
- 3-10 miles
- 10+ miles

- | | | |
|--------------------------------|---------------------------------|---|
| 11. Age | 12. Sex | 13. Total Household Income (optional) |
| <input type="checkbox"/> 16-20 | <input type="checkbox"/> male | <input type="checkbox"/> (1) less than £10,000 |
| <input type="checkbox"/> 21-40 | <input type="checkbox"/> female | <input type="checkbox"/> (2) £10,000 to £20,000 |
| <input type="checkbox"/> 41-60 | | <input type="checkbox"/> (3) £20,000 to £30,000 |
| <input type="checkbox"/> 60+ | | <input type="checkbox"/> (4) over £30,000 |

14. Where is your nearest food shop? (street or village) _____

15. Where do you do most of your food shopping?

- At the market
- At the supermarket
- At the local shop
- Other

16. Do you think shopping at this farmer's market has encouraged you to eat a healthier diet?

yes no Explain _____

17. Have you also completed Customer Survey Two? yes no

Thank you very much for completing this questionnaire

Customer Survey Two (Attitudes to Food and Shopping)

Date: _____ Interviewer: _____

1.I'm going to read some statements: can you tell me which ones you agree with or apply to you?	1	2	3	4	5	6	7	8	9
a)Where food comes from isn't important to me as long as it's good quality									
b)I would like more food produced by local farmers to be available to shoppers									
c)Buying local produce helps to protect the environment.									
d)The Farmers' Market is part of my regular shopping routine.									
e)I'm concerned about the fact that if food comes from other regions or countries, it's hard to know exactly how it's been produced									
f)I like the fact that at supermarkets you can get all kinds of fresh produce all year round									
g)I have confidence in the standards of food quality set by supermarkets									
h) Supermarkets offer better value for money than this kind of market									
i) I like the idea of the market but most things are too expensive									
j)I'm prepared to pay more for produce if it's grown or produced organically (without using chemicals)									

k)I'd like to buy more fresh produce grown organically but only if the prices are similar to food produced using chemicals									
l)The fact that produce is local is more important to me than it being organic									
m)I do most of my shopping on weekdays to avoid having to take my children with me									
n)I'd probably buy more fresh produce if I knew more about how to cook it									
o)I feel fairly confident about cooking fresh produce and already eat a lot									
p) Shopping at the Farmers' Market has encouraged me to eat a healthier diet.									
2.How far away do you live?									
0-1 miles									
1-3 miles									
3-10 miles									
10+ miles									
3. Age									
16-20									
21-40									
41-60									
60+									
4. Sex									
male									
female									
5. Total Household Income									
(1)less than £10,000									
(2)£10,000 - £20,000									
(3)£20,000 - £30,000									
(4)over £30,000									
6. Where is your nearest food shop? (street/area)									

7. Filled in Survey 1?									
------------------------	--	--	--	--	--	--	--	--	--

Survey of Local Shops and Cafés

Date: _____

Manager's Name: _____

Name of Shop/Café: _____

Address: _____

Telephone: _____

My name is _____. I'm phoning in connection with the Farmers' Markets which are currently being held in Rolvenden and Broad Oak Brede. We are assessing the impact of the markets and as part of that we'd be very interested to hear what you thought of them.

General Comments

In some areas it has been found that Farmers' Markets bring more business to local shops, though some people are concerned markets might reduce business. What was your experience?

increase in business

decrease in business

no impact

other (specify)

Stall Holder Survey

Name _____

Address _____

Telephone _____

1. What do you produce?

2. Where else do you sell your produce?

(Indicate % sales of each outlet where applicable)

- | | |
|---|-------|
| <input type="checkbox"/> no current sales | |
| <input type="checkbox"/> supermarket | % |
| <input type="checkbox"/> wholesaler | % |
| <input type="checkbox"/> farm shop | % |
| <input type="checkbox"/> box scheme | % |
| <input type="checkbox"/> local shops | % |
| <input type="checkbox"/> other street markets | % |
| <input type="checkbox"/> WI market | % |
| <input type="checkbox"/> other (specify) | % |
| (_____) | ----- |
| Total | 100 % |

3. Why have you decided to participate in the Farmers' Market?

- chance to expand sales
- opportunity to meet customers and get feedback
- opportunity to test new lines
- chance to sell excess produce
- start new business
- want to encourage direct selling initiative
- other (please specify) _____

4. Are you happy with the day and time that this Farmers' Market operates?
Yes No

Which day of the week should it operate? _____

Which hours of the day? _____

- How often? once a week
 once a fortnight
 once a month
 once or twice a year

5. Should the market:

- sell both local and brought in produce
 sell local produce only

6. Would you prefer to attend:

- a regular market in a fixed location
 a roving market (held in a different place each time)

How far would you be prepared to travel? _____ miles

7. Do you supply a Farmers' Market all year round?

- yes
 no

If not, which months do you attend the Farmers' Market?

A S O N D

J F M A M J J

8. How much land do you have? _____

9. How many employees do you have?

- paid family members unpaid family members and friends
 paid non-family

8. Do you have any comments on the markets or suggestions for improving them?

9. What problems (if any) you do experience on the day of the market?

- parking
- lack of stall space
- stocking/restocking the stall
- weather
- competition
- insufficient stock
- other (please specify)

10. What constraints are there on your regularly attending a market?

- time/ labour needed to prepare for the market
- time/ labour necessary for attending the market
- seasonality of produce
- cost of equipment (specify _____)
- regulations (specify _____)
- other (specify _____)

11. Is it worth your while attending the market?

- in financial terms
- in terms of building up a customer base
- other (specify)

12. In order to understand the economic impact of this Farmers' Market, we would like to collect figures for the total market turnover. Individual figures are confidential and will not be released. Please could you assist us therefore by giving us your approximate turnover for this market.

Appendix II

Results of Consumer Survey I

Surveys were carried out at Rolvenden and Broad Oak Brede markets over the course of two months. Since the markets were relatively small and very similar in the type of stalls, the results were aggregated together. However where results are specific to a particular market this is acknowledged. Some results from Customer Survey I and II have been aggregated, where the question were the same, in order to increase the sample size.

Question 1: How did you hear about the market today?

Word of Mouth	Poster/leaflet	Newspaper	Radio/TV	Came across it	Came across earlier market	Other
88	22	22	0	2	8	2

N.B Some respondents gave more than one answer

Most of the customers interviewed had heard about the market through word of mouth and from local posters/leaflets

Question 2a: Have you been to the market before?

Yes	No
110	26

Most customers had been to the market before - although their appeared to be a substantial number of 'new faces' at each market.

Question 2b: How often do you come to the market?

Weekly	Fortnightly	Monthly	Once or twice a year
60	18	24	8

Most of the customers came to the market on a regular basis if they could manage it

Question 3: What appeals to you about the market?

Opportunity to buy local produce	General atmosphere	Sup' local prod'	Fresh Produce	Opportunity to buy organic	Direct contact with prod'	Reasonable prices	Food not available elsewhere	Other
90	70	78	110	32	38	50	14	52

Customers were not prompted with possible categories and could give as many or few answers as they wished. Quite a number of customers listed a range of other reasons for liking the Farmers' Markets. Amongst other reasons, customers made comments such as: 'easy access and free parking', 'convenience and lack of any realistic alternative', 'some products particularly appealing', 'fun way to shop', 'good variety of produce', 'informality', 'church crèche facilities' (at Rolvenden) and 'hatred of supermarkets'.

Question 4a: Are there any aspects of the market that don't appeal to you?

No	Yes
94	42

The majority of customers made no criticism of the Farmers' Markets. Just nineteen people had complaints about some aspect of the market but a number of these criticisms were very idiosyncratic or personal. For example, one person remarked that the village hall at Rolvenden 'smelt funny'!

Four customers at the Rolvenden market were specifically concerned about the use of the church as a market - generally customers liked the church being used. Interestingly only four customers at the markets mentioned that they were worried about the impact of the market on local shops.

Question 5: Any other comments about the market, or suggestions for improving it.

Customers could not think of any responses to this question except to re-iterate previous answers.

Question 6a: How did you get to the market today

Bus	Car	Walked	Cycled	Other
14	96	26	-	-

The majority of customers at both markets arrived by car but a substantial number walked to short distance from their houses to the market and some came by bus. It is possible that the percentage arriving by bus was greater than suggested by this figure due to the fact that a number of elderly customers who had come by bus sat together en masse and were less inclined to be interviewed.

Question 6b: Do you have access to a car?

Yes	No
114	22

Interestingly over 16 % of the customers asked didn't have access to a car and it is possible that this was an underestimate because of the difficulties in interviewing 'gangs' of elderly customers sitting in the tea and coffee areas.

Question 7: Was there anything you would hope to find at this kind of market that you didn't see today?

No	Yes
114	22

Some customers thought of a variety of produce which they hoped might have been at the markets. Items included some products which had sold out at the market such as soft fruit, prawns and smoked meat or fish. But some customers mentioned that they were expecting 'more stalls' - particularly craft and bread sellers and 'background music' ! It is worth pointing out that at both markets some of the craft stalls only attend intermittently and so if a customer comes on the wrong week they may be disappointed.

Question 8: Did you buy anything?

Buyers were asked what they had bought, how much they had spent on each category in five price bands (up to £1, £1-3, £3-6, and over £10. They were asked if and where they would normally buy each of the categories.

Supermarket	Other town shop	Village shop	Farm shop	Don't normally buy	Other
214	44	40	50	50	156

Of the 156 times that customers mentioned 'other' as the place they bought a products this figure was broken down into eight categories

Farmers' Market	Local butchers	Make my own	Trout farm	Fish shop	Nursery	Grow own	WI	Anywhere
90	18	6	4	6	12	10	4	8

Only one person didn't buy anything at the market

Question 9: Why haven't you bought other things? (unprompted)

Had done my weekly shop	Too expensive	To much to carry	Didn't know how to cook it	Haven't finished yet	Other
44	4*	3	-	18	58

- NB. Four customers felt the meat was too expensive.
- Other reasons for not buying produce were numerous. Sixteen customers were going on holiday and so didn't want to buy too much food. A dozen people noted that they grew or made their own food. Some customers didn't find what they wanted at the market eg butter and fruit. Another notable comment was that customers (particularly in the 60 + category) kept a small larder and didn't like to buy too much. Finally some customers were loyal to other small outlets eg local WI markets and farm shops)

Question 10: How far away do you live?

0-1 miles	1-3 miles	3-10 miles	10+ miles
54	32	34	16

The results suggest that most customers are very local. But interestingly just over 10 % travel more than 10 miles to visit the market.

Questions 11: Age?

16-20	21-40	41-60	60+
-	16	64	56

Whilst this data indicates that most customers were aged between 41-60 year and that the 16-20 year olds were not at the market, these figures should be interpreted cautiously. Again the older age range was

probably under represented because of the difficulties of interviewing groups of socialising pensioners! Younger shopper were present at the market, often with their parents but were not interviewed.

Question 12: Sex?

Male	Female
32	104

Approximately 23.5 % of customers were male and 76.5 % were female.

Question 13: Total Household Income?

Less than £10,000	22
£10,000 to £20,000	32
£20,000 to £30,000	18
Over £30,000	26
Declined to answer	38

The data on household income should be interpreted cautiously because it is likely to be fairly inaccurate. Firstly it is fairly likely that respondents may have both under and over estimated their household income figures. Secondly, almost 28 % of customers interviewed declined to answer the question and they were often the elderly who possibly were on lower incomes. In addition, as already mentioned it is likely that the elderly were under represented in the survey anyway because of the difficulty of interviewing them at the markets. Thus overall, there is a possibility that higher income groups are generally over represented in the figures.

Question 14: Where is your nearest food shop?

Customers provided a variety of answers related to how far they had come to the market. As one might expect the largest proportion mentioned the village shop in Rovenden and the two in Broad Oak as their nearest shops. Relatively few people mentioned supermarkets as their nearest food shop.

Question 15: Where do you do most of your food shopping?

At the market	14
At the supermarket	108
At the local shop	30
Other	10

A number of people mentioned more than one category of shop - so the figures are inflated. The supermarket was mentioned by 66 % of customers as either their main or one of their main shopping outlets - illustrating how dominant this sector has become in rural areas. Shops mentioned in the 'other' category included: wholefood shops, a variety of town shops in Cranbrook, Tenterden, Hastings and Battle and a number of local farm shops. Only one person claimed they did most of their main shopping on the Internet.

Question 16: Have you also complete Customer Survey two? O

None of the customers interviewed had complete customer survey two because this survey was conduct before hand.

Question 17: Do you think shopping at this farmer's market has encouraged you to eat a healthier diet?

Yes	No
30	52

Not everyone was asked this question because it was only included after the survey had been started. However, the results are interesting because over 36 % of respondents did believe that shopping at the Farmers' Market had encouraged them to eat a healthier diet. A number commented that they thought they bought and ate more fresh fruit and vegetables and that the fresh fish stall prompted them to eat more seafood.

Consumer Survey II

I'm going to read some statements: can you tell me which one you agree with or apply to you?	Yes	No
Where food comes from isn't important to me as long as its good quality	28	26
I would like more food produced by local farmers to be available to shoppers	54	0
Buying local produce helps to protect the environment	44	10
The Farmers' Market is part of my regular shopping routine	26	28
I'm concerned about the fact that if food comes from other regions or countries, it's hard to know exactly how it's been produced.	50	4
I like the fact that at supermarkets you can get all kinds of fresh produce all year round	28	26
I have confidence in the standards of food quality set by supermarkets	18	36
Supermarkets offer better value for money than this kind of market	8	44*
I like the idea of the market but most things are too expensive	10	44
I'm prepared to pay more for produce if its grown or produced organically (without using chemicals)	48	6
I'd like to buy more fresh produce grown organically but only if the prices are similar to food produced using chemicals	36	18
The fact that produce is local is more important to me than it being organic	40	14

I do most of my shopping on weekdays to avoid having to take my children with me	20	34
I'd probably buy more fresh produce if I know more about how to cook it	12	42
I feel fairly confident about cooking fresh produce and already eat a lot	50	4
Shopping at the Farmers' Market has encouraged me to eat a healthier diet	22	32

Question 2 : How far away do you live?

0-1 miles	1-3 miles	3-10 miles	10+ miles
22	14	6	12

Most customers were local. Over 65 % of customers came from within a 3 mile radius of the market but approximately 22 % came from over 10 miles away.

Questions 3: Age?

16-20	21-40	41-60	60+
-	12	20	22

Over 40 % of customers were over 60 years old. However see previous survey for discussion of possible bias in these results.

Question 4: Sex?

Male	Female
18	36

Over 66 % of customers were women.

Question 5 Total Household Income?

Less than £10,000	8
£10,000 to £20,000	4
£20,000 to £30,000	12
Over £30,000	18
Declined to answer	12

Over 22 % of customers declined to answer this question in the survey. Of the rest 42 % had household incomes over £30,000 but 19 % had incomes below £10,000. See previous survey for discussion of possible biases in these results.

Question 6: Where is your nearest food shop?

As in previous survey customers mentioned a shops reflecting the distance that they had traveled to the market. The majority were very local and therefore mentioned village shops at Rolvenden and Broad Oak Brede. See above.

Question 7: Have you also complete Customer Survey two? O

None of the customers interviewed had complete customer survey two because this survey was conduct before hand.

Appendix II: Price Comparisons

**Table: Prices of Fresh Produce Sold at Rolvendon Farmers' market, Rolvendon village shop and a local Supermarkets,
2nd August 2001**

Item				Price (£/kg) ²⁵	
	Market		Village shop	Supermarket	
	Organic	Non-Organic		Conventional	Organic
Apples	GSmith		1.10 (NZ)	1.79 (NZ)	2.69 (NZ)
	BraeBurn		1.50 (NZ)		2.59 (NZ)
	Jonagold		0.75		-
	Cox		-		-
	Bramley		-		-
	Pink Lady		-	3.00 (Austral)	-
	Gala				2.69 (NZ)
	Discovery	1.50/kg			
Artichoke (Jerusalem)			-	-	-
Artichoke (Globe)			-	1.19 (Fr)	-
Asparagus				7.96 (Peru)	
Aubergines			-	0.75 each	3.99 (Dutch)
Beetroot		£1/bunch	-	1.09/bunch ²⁶	-
Broad beans		£1/300g		1.59	3.30
Broccoli			0.65 (Sp)	1.09	2.79
Brussel Sprouts			-	-	-
Cabbage			1.30	0.69	?
Cabbage Red			-	-	-
Carrots			-	0.69	1.38 (Austria)

²⁵ Unless otherwise indicated all prices are in £ / Kg and all produce comes from the UK unless otherwise marked.

²⁶ Approximately 13/4 lb

Cauliflower			0.75 each	59-89p each	-
Celery	Green		0.75 each (Sp)	0.58 each	1.09
	White		-	0.69 each	-
Chard, Ruby			-	-	-
Cherries		£3/800g	2.41	7.48 (US) 8.99 (BrC)	-
Chicory			-	3.96	-
Chilies	10p each				
Courgettes	1.40/kg	£1/5 courgettes	1.50	1.39	1.99 (Sp)
Cucumber	50p each		0.70	48p each	0.72 each
Garlic	40p each		1.88 (Egypt)	49 each	9.38 (Egypt)
Gooseberries			-	3.76	-
Green beans			-	-	9.27
Kale			-	-	-
Leafbeet			-	-	-
Leeks			2.10	1.99 (Sp)	
Lettuce	Iceberg	50p each		0.39 each	0.99 each
	Little gem			-	0.99/two
	Density			-	-
	Romaine			0.49 each	0.745 each
	Batavia			-	0.99 each
Marrow		50p each	-	0.79/each	-
Mushrooms			3.50	2.39	-
Onion	White		0.42(UK) 1.25(Dutch)	0.69 (NZ)	-
	Red		-	1.99 (Ital)	2.18 (Ital)
Parsnips			-	1.99	-
Pears			1.15	2.39 (S.Afr)	1.99 (Arg)
Peas (in pod)		£1/300g	-	1.59	-
Peppers	Red	40p/each	-	3.99	-
	Green		-	3.99	-
	Yellow		-	3.99	-
Plums		£1.5/500g	-	3.78	-
Potatoes	New		46p (UK 50p)	51-91p-	?

Baking			25p each	55-99p	
Pumpkin			-	-	-
Radishes	50p bunch	50p bunch	-	3.94	-
Raspberries			1.00/punnet	-	-
Red Currents			1.20/punnet	8.77 (Holland)	-
Rocket			-	1.98	-
Runner beans			1.50	2.19	-
Salad packs	£1/100g		-	6.75	-
Spinach			-	7.51	-
Spring Onions		50p/bunch	-	55p/bunch	-
Squash			-	-	-
Strawberries		£1.80 or £1.50	90p/ punnet (local)	4.98	-
Sugar Snap peas	-	-	-	9.27 (Zambia)	-
Swede	-	-	-	-	-
Sweetcorn	-	-	-	0.52 each	-
Tomatoes	Standard	£1/kg	1.30	0.89	1.19/lb(six)
	Cherry	70p/400g	-	3.49	3.96
Watercress		-	-	11.70	-