ELMS – *Encouraging Local Produce Market Sustainability*

A research study into six farmers' markets in the South Shropshire area

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Shropshire Hills AONB

Acknowledgements

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1. Introduction

1.1 Aims of study

This study aims to identify ways in which farmers' markets which serve the communities in and around the Shropshire Hills Area of Outstanding Natural Beauty (AONB) can be improved. The study looks at issues to do with market management as well as producers' and customers' needs. It concentrates on six farmers' markets, all of which have been operational for a number of years. All markets stand to benefit from the final recommendations.

The research has three aspects:

- To further the knowledge and understanding of customers' needs;
- To further the knowledge and understanding of local producers' needs;
- To investigate the management of farmers' markets and possible strategic approaches;

The study has been funded by the Shropshire Hills AONB Sustainable Development Fund.

1.2 Context

1.2.1 Background

The need for a wider strategic approach encompassing South Shropshire was formulated after a key recommendation from the 'Local Food in the Ludlow Marches' conference in May 2005. The 'Food Events Group' was a result of this conference and it was at a meeting of this group in September 2005 that representatives from Church Stretton, Much Wenlock and Bishops Castle expressed concern about the small size and thus viability of their farmers' markets. Ludlow and Craven Arms were also concerned to increase and widen their customer bases. It was agreed that the first step to improving the situation must be to get more information about both producers and customers.

1.2.2 The Shropshire Hills AONB

The Shropshire Hills AONB is one of 41 designated 'Areas of Outstanding Natural Beauty' in England and Wales. The primary purpose of the AONB is to conserve and enhance the natural beauty of the landscape. The second stated purpose is to promote sustainable forms of social and economic development that in themselves conserve and enhance the environment. The AONB covers an area of 802 km^2, including the Long Mynd, The Wrekin, The Stiperstones and the Clun Valley. Of the six market towns surveyed only one, Church Stretton, is actually within the AONB, but the other five (Much Wenlock, Craven Arms, Bishops Castle, Knighton and Ludlow) are all on the boundaries. Agriculture is the major land use in the Shropshire Hills accounting for over 63,000 hectares or 78% of the AONB area. Agriculture employs 25% of the

9731 population of the AONB. More than a third of all farms are less than five hectares in size. Agriculture is the main industry in the AONB although it is in decline. The only sectors that are growing are the real estate, hotels and restaurant sectors.[1]

This study's findings highlight the fact that the Shropshire Hills landscape looks as it does because it is managed by people, predominantly farmers, and without this management the special qualities which have led to its designation as an AONB would be lost.

1.2.3 Why farmers' markets?

The last substantial piece of research on farmers' markets was by the NFU in 2003[2]. This demonstrated a phenomenon – a single fledgling market in 1997 has become a thriving industry in its own right, present in virtually every area of the country. In 2003 the number of farmers' markets had more than doubled in the preceding two years from 200 to 450 with a combined annual turnover of approximately £166 million. The report also stated that an individual's average annual earnings were in the region of £8,700 although farmers could earn up to £20,000 per year from farmers' markets alone. Most producers considered farmers' markets as a way of supplementing their incomes by allowing them the opportunity to sell directly to customers.

This evidence clearly shows that the potential for further growth in farmers' markets is substantial. However it is also recognised in the report that although four out of every five established farmers' markets are self-financing, support is required to help with start-up costs, to encourage their development and take them to a sustainable level.[3]

The importance of farmers' markets has been recognised in a number of fields, including environmental, economic and social as well as contributing to healthier diets. Farmers' markets are food markets where local farmers and producers bring their produce for sale direct to the public. The opportunity for customers to buy their food direct from the hand that grew, reared or made it, is rare in today's food purchasing experience. Farmers, local economies, consumers and the environment all benefit from farmers' markets.

Environmental benefits:

- Food travels less distance to consumer;
- They provide a crucial outlet for producers that provide less intensively produced food;
- They are popular outlets for selling small scale, premium organic products;
- The food has less packaging;
- They encourage good, sustainable land husbandry.

[1] Shropshire Hills AONB Management Plan 2004 - 2009
[2] National Farmers Union (2002) Farmers' markets: A business survey
[3] National Farmers Union (2002) Farmers' markets: A business survey

Economic benefits:

- They provide an additional source of revenue for the farming sector;
- They give farmers greater retail control as the middle man is cut out;
- They provide opportunities for local business start-ups;
- They offer opportunities for business expansions;
- They help contribute to supply chain of local/regional food economy;
- They reinforce local job and business networks, maintaining local employment;
- Money is spent locally and therefore stays longer within the local economy.

Social/health benefits:

- There is increased choice of fresh local produce, usually at competitive prices;
- They can offer fresh local produce in areas that may have few such options;
- They provide outlets for small scale, less intensively farmed products;
- They provide an opportunity for consumers to ask about product origins;
- They provide opportunity for producers to educate consumers on products;
- They strengthen community - a key factor in the quality of life.

1.3 Scope of Study

The six markets chosen for this study: Church Stretton; Bishops Castle; Ludlow; Craven Arms; Much Wenlock and Knighton are all very different. Therefore it is important to be aware of these factors when considering any findings.

Town	Population	Organised by	Frequency	Cost per stall	Usual no. of stalls
Bishops Castle	1,500	Town Council	Monthly	£10	5/6
Church Stretton	4,500	Town Council	Fortnightly	£6	8
Craven Arms	2,000	Community Group	Quarterly	£12	20
Knighton	3,000	Community Hall Association	Monthly	£10	13/14
Ludlow	10,000	Voluntary Group	Monthly	£18	34
Much Wenlock	3,000	Town Council	Fortnightly	£8.75	4

Fig 1: The characteristics of the towns and their farmers' markets

The study had four main stages:
1. A mapping exercise of who does what and where, and engagement of them with the project;
2. Development of two quantitative research surveys - one for the producers[4] and the other for the customers,[5] including test piloting;
3. Execution of finalised surveys at the six different sites;
4. Analysis of data and writing of report.

The research was conducted from late January through to early March 2006, traditionally a low period of activity in any market's year. It is during these particularly cold months that customers are likely to be low in numbers and variety of produce is limited especially in fruit and vegetables. It is important to take this into account when looking at the survey's results.

[4] See Appendix A
[5] See Appendix B

1.4 Methodology

The research methodology chosen for this particular project is a quantitative survey that allowed for both quantitative and qualitative input by those being interviewed. It was decided at an early stage that producers, customers and those that organised the markets would need to be interviewed in person to ensure a full 360 degree picture of the farmers' markets. The details of interview dates at individual markets and numbers interviewed are listed in Fig. 2 below.

Date	Market	Number of producers interviewed	Number of customers interviewed	Organiser interviewed
18th Feb	Bishops Castle	5	30	Jane Carroll Mayor
11th March	Craven Arms	15	46	Michael Turner C.A Community Food
17th Feb	Church Stretton	6	12	Christine Harvey Town Clerk
21st Jan 25th Feb	Knighton	5 4	20	Tom Taylor Knighton Community Centre
9th Feb 9th March	Ludlow	28 5	46	Peter Norman Ludlow 21 F&F Group
24th Feb	Much Wenlock	4	13	Ann Downes Town Clerk
Totals		**72**	**170**	

Fig 2: Market timetable.

Please note: Some producers were interviewed at more than one town's market, therefore the number of unique producers interviewed = 59

A sub-group of the Food Events group worked on the questionnaire design and both types of surveys were piloted with customers and producers at Ludlow Local Produce Market. There was also opportunity for Ludlow 21 Food and Farming Group, which includes producers, to make suggestions and comments on the questionnaire.

All producers present at each market were interviewed. However those present at any market must be regarded as a sample of the producers potentially attending the market. All markets were likely to have less producers than average due to the time of year. The chart below gives the reader a snapshot of the size of market according to number of producers.

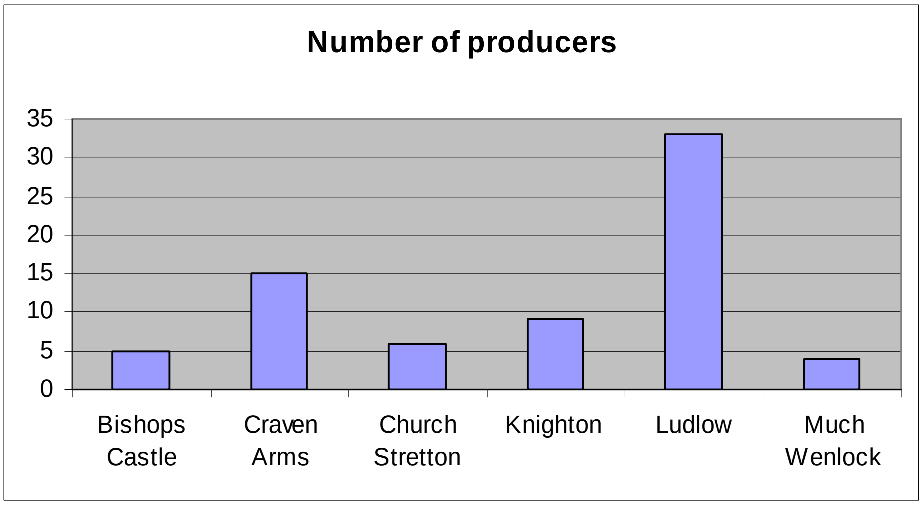

Fig 3: Number of producers (sample size 72)

Customers were interviewed in person and any bias in selection of interviewees was avoided so far as possible by interviewing the next available customer passing specific interview points. Proportionally the number of customers interviewed reflected the relative size of markets. When looking at customer findings as a whole (sample size 170) please bear in mind the sample's proportions as shown in Fig. 4 below.

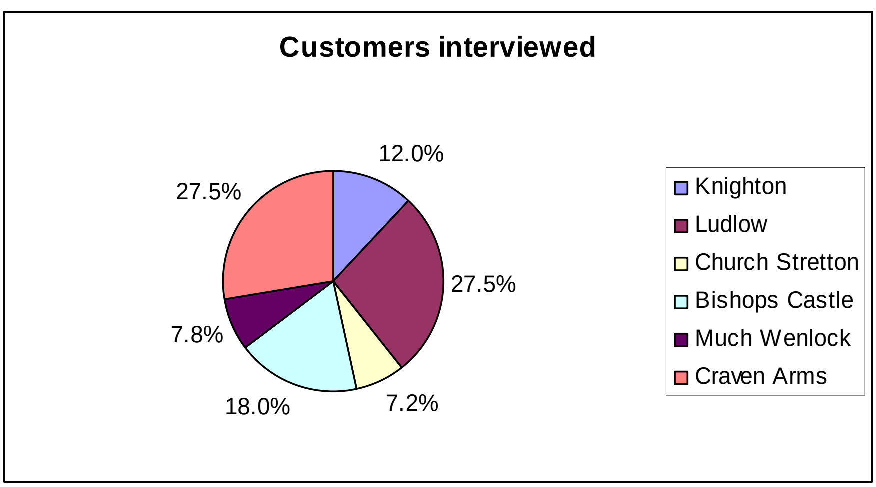

Fig 4: Customers interviewed (sample size 170)

In terms of confidence intervals these should be applied according to sample size and relative percentages found in results, please see Appendix C for more details.

2. Key findings: Producers

2.1. Critical markets – *How reliant are producers on farmers' markets?*

The research indicates that the role of farmers' markets within the local food economy is significant to those participating businesses' overall profitability.

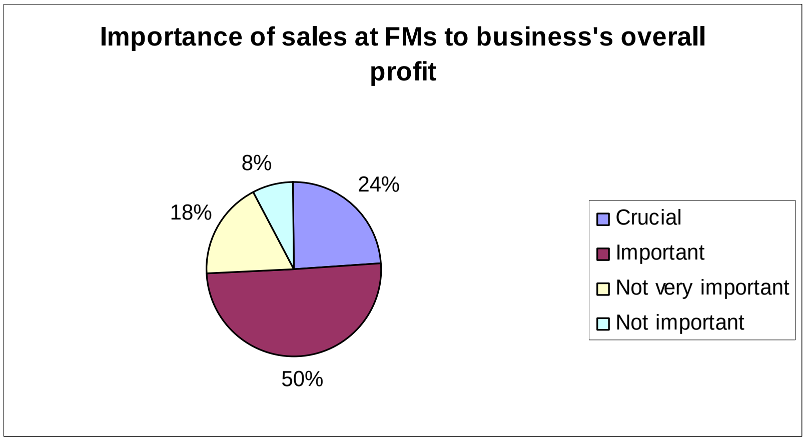

Fig 5: Sales at FMs (sample size 59)

Two thirds of producers surveyed said that their takings were either crucial (24%) or important (50%).This is despite the fact that 94% of producers sell their produce by other means, for example through independent shops or mail order (See Fig. 28 for details). This is partly because there is no reselling involved and all takings go directly to the producer. So although there may be a relatively low number of products sold in the context of their overall sales, products sold at farmers' market have better profit margins.

When asked, a large majority of producers described their takings as either adequate or good, proving that in general they are satisfied with their performance. However one must accept that there is scope for improvement as 71% regard takings as adequate or poor.

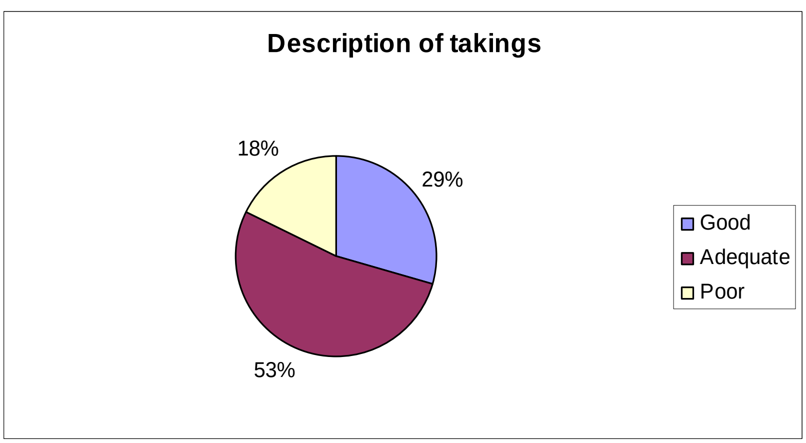

Fig 6: Producers takings (sample size 72)

This suggests that the growing role of Farmers' markets' in contributing to the rural economy post-Foot and Mouth is becoming important. Farmers' markets are a relatively new place for trade, perhaps replicating the function of the old trade-hall or guildhall for local communities. It's remarkable to think that the very first farmers' market introduced in this country was in Bath in 1997, two years after the launch of e-bay![6]

[6] e-bay was launched on Labour Day, 1995 http://pages.ebay.co.uk/help/newtoebay/founder-letter.html

2.2 Cash Cows – *How much money is being made?*

Every producer interviewed gave an indication of what their average takings were at the farmers' market that they were attending that day. The results show that there is a great variation in takings amongst producers, which is understandable when one considers the vast array of products for sale with thirteen main types of products and many variations within those; for example baking includes both bread and cakes.

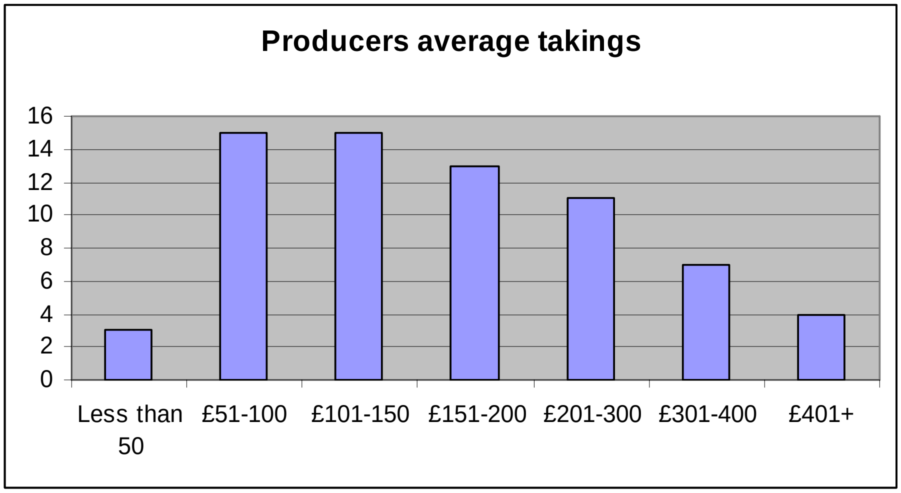

Fig 7: Amount of takings (sample size 72)

The median of average takings is £151 to £200. The difference in the cost of a joint of beef and a bag of muddy carrots is significant and certainly meat producers appear high in the takings. However it is worth noting that up in the highest category of takings (£401 plus) were both bread and fruit producers. This indicates that a number of variables contribute to the success of particular products at particular farmers' markets. These variables will be considered in the following sections of the study.

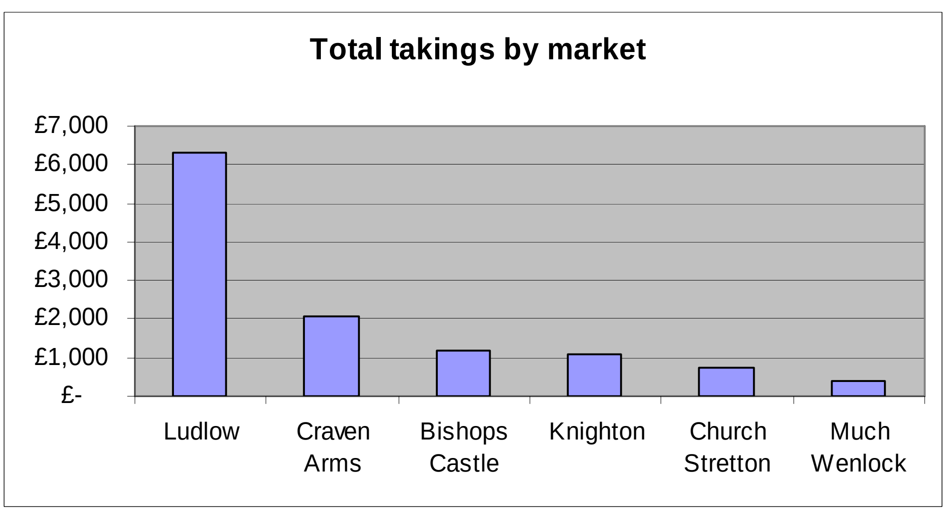

Fig 8: Total takings per market (sample size 72)

A very basic calculation gives an indication of gross takings for entire markets, with Ludlow taking over £6,000 per market, whereas Much Wenlock, the smallest of all the farmers' markets surveyed, is taking less than £400.

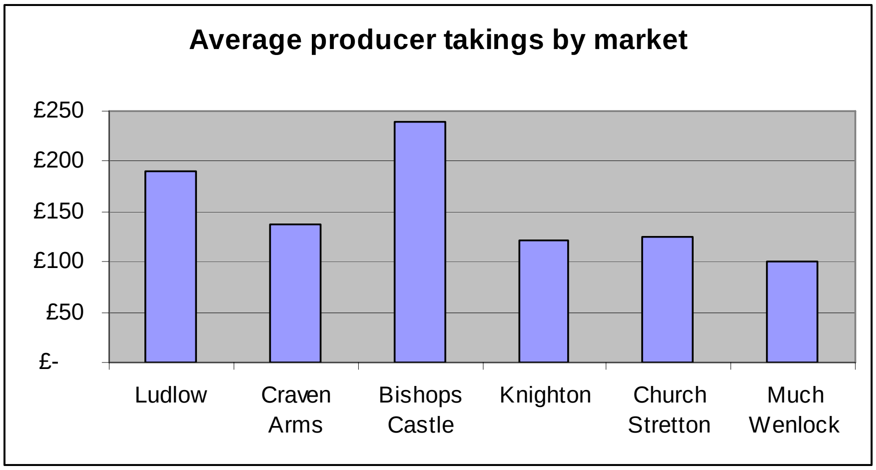

Fig 9: Average producer takings per market (sample size 72)

In contrast if we look at average takings across all producers at the individual markets Bishops Castle does very well with £240. This goes to proves that it's not necessarily the biggest markets that reap the best takings for producers.

2.3 Seeking the perfect farmers' market

Over half of all producers do two or more markets (other than the one they were attending on the day interviewed), with over a quarter doing four or more other markets on a regular basis. Interestingly 16% which constitutes nine producers in total do only one other farmers' market, whilst 31% don't do any others at all. The list of farmers' markets attended by those interviewed is impressive, citing fifty plus farmers' markets in and around the area, some at a considerable distance.[7]

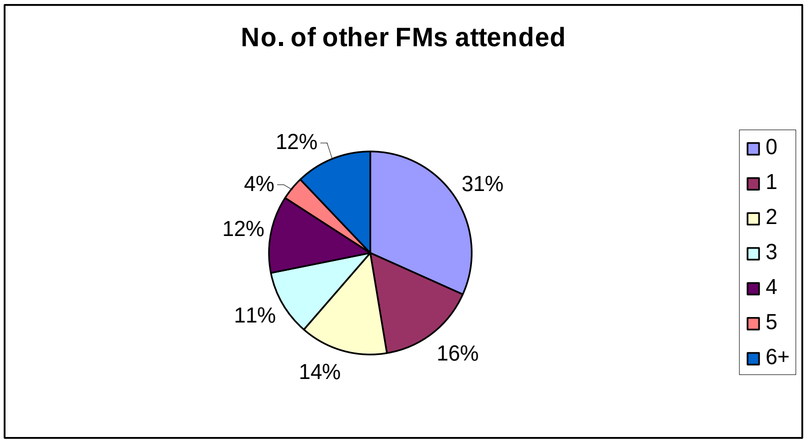

Fig 10: Number of other FMs attended (sample size 59)

Producers were questioned about the value of key attributes associated with farmers' markets, the results of which put venue and number of customers way above stall price and proximity to home (see fig 6 below). With popular farmers' markets now boasting waiting lists the seduction of a healthy farmers' market to a small producer of quality goods is considerable. Producers will naturally gravitate to the markets which present the prospect of greater profit. The time and energy expended in packaging goods, transport, and setting up stall and retailing is similar, regardless as to the size of the market and so producers may attend a smaller number of busy markets rather than a larger number of less profitable small ones. This is especially so as there are a limited number of days when market attendance is possible for any small producer.

[7] See Appendix D

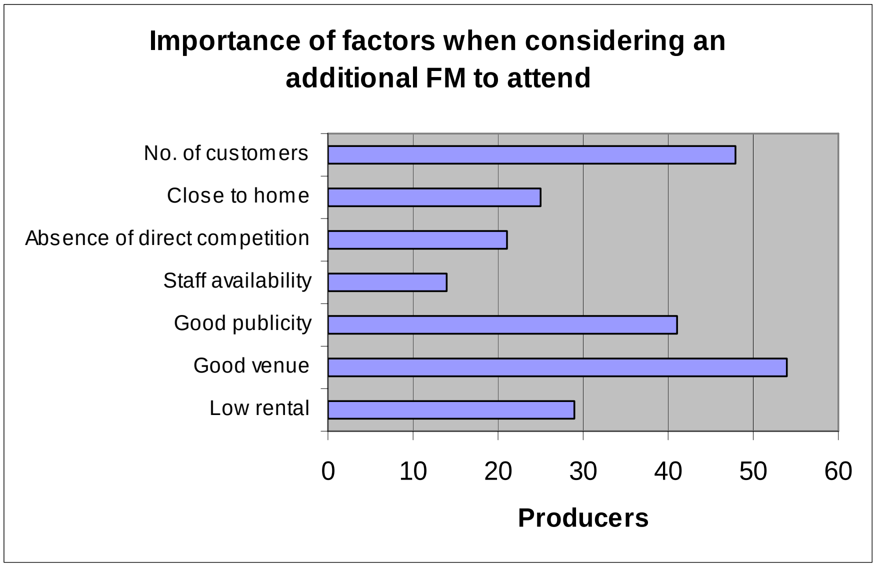

Fig 11: Reasons for attendance (sample size 59)

The most popular ‘other’ farmers’ market attended may give us some clues to what makes a successful farmers’ market. However, out of over fifty farmers’ markets listed as also attended, only twenty appear more than once, which indicates that a successful market for one producer is not necessary a successful one for another. The complexities of type of produce, venue, customer base, stall position, promotion and day of the week held are all factors that have an influence on performance on the day.

Some recognition must be given to the significant ‘top 3’ markets. Out of the fifty plus producers interviewed, Moseley received six and Ludlow five citations and Welshpool took three. Some reasons given for these choices were as follows,

Ludlow,

“’Has built up gradually to good sales. Lots of regulars.’

“Situation good , accessible from the West Midlands”

Moseley,

“Best sales, well organised and no quality food shops in area.”

“Lots of people. Big spenders.”

Welshpool,

“Most consistent for good sales.”

In terms of the six markets which are the focus of this report of the nine producers that attend more than one, there are two producers that attend four and all the others attend two. The only patterns that emerge are that those that are attended four times are the same markets and those that attend Much Wenlock also go to Church Stretton exclusively. See table below for details.

Product type	Bishops Castle	Knighton	Cravens Arms	Ludlow	Much Wenlock	Church Stretton
Bread		1	1			
Olives/antipasti			1	1		
Vegetables	1	1	1	1		
Meat (1)	1	1	1	1		
Meat (2)			1	1		
Meat (3)			1	1		
Meat (4)					1	1
Meat (5)					1	1
Bird products					1	1

Fig 12: Producers attending more than one market (sample size = 9, repeat attendances = 13)

2.4 Meeting the customer – *The importance of selling direct*

The producers were given an opportunity to say what their reasons are for attending markets other than financial. This open ended question resulted in the findings categorised below in Fig. 13. The value given by producers to meeting customers far outweighed other non-financial benefits of selling at farmers' markets. Being seen 'out and about' at the farmers' markets was frequently cited as a useful means of promotion with many stall holders receiving regular orders and enquiries for wholesale or visits to their farm shops from satisfied customers.

In addition to this, feedback from customers on particular products was considered a very cheap way of undertaking product research and development. Many producers value seeing their customer base build up as the quality of their produce earned them loyalty. The enjoyment had by producers was equally important, the very nature of farmers' markets is a social affair with plenty of conversation between customers and producers as well as networking amongst other producers and buying each others produce.

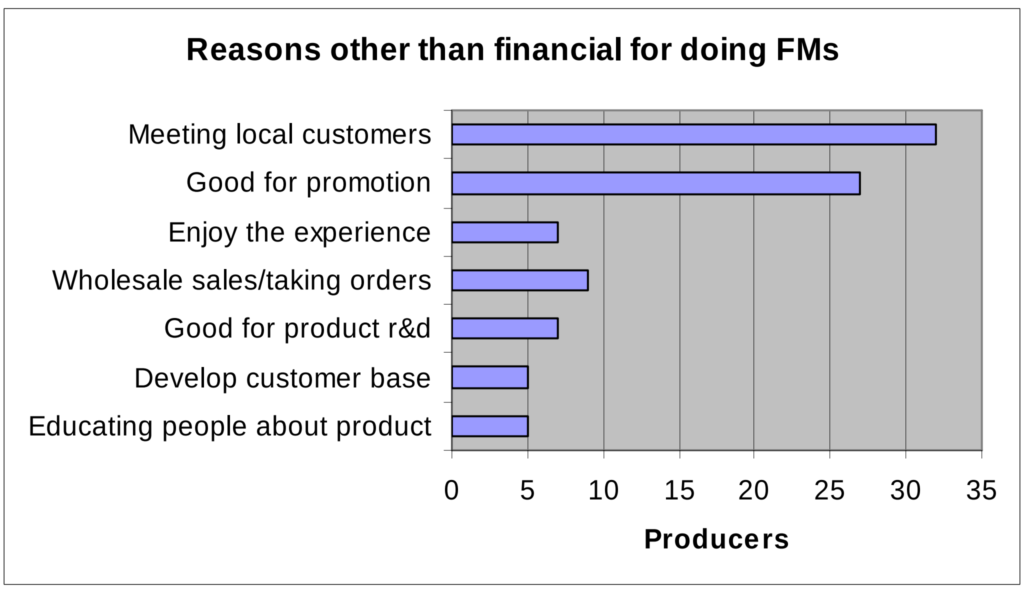

Fig 13: Non financial reasons (sample size 59)

2.5 FM or not FM - *The management of farmers' market*

None of the farmers' markets in this study are members of the National Association of Farmers' markets (NAFM) which provide a certification of compliance to a set of regulations. To see details of the NAFM guidelines see Appendix E. Of the six markets surveyed only two, Ludlow and Craven Arms, have a written policy on producers accepted (see Appendix F for details). However all the farmers' markets researched try to comply loosely with the three main principles which shape farmers' markets.

Firstly the producer must be local to the market. All producers interviewed were asked for their business postcode, each of these was entered individually through multimap.co.uk to provide a distance from the market 'as the crow flies'. All producers comply with the principle regarding proximity of farm/producer to market except two producers at Ludlow who are from beyond the thirty mile rule. This is allowed due to the nature of the product (i.e. fish and Indian cuisine) as this cannot be found within the thirty mile radius.

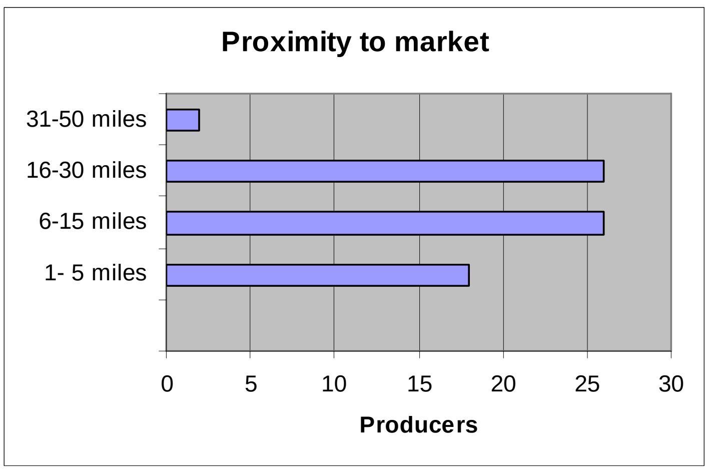

Fig 14: Proximity to market (sample size 72)

Secondly produce must be entirely local or local where possible and certainly processed in the area. There were one or two exceptions to this at the smaller markets. The addition of olives and olive-based products has been deemed acceptable by most due to their processing on local premises and often their enhancement with local products

The third major principle is that products must be sold by someone involved in their production with no 'middleman' involvement. There were a number of incidents where this wasn't the case at some of the smaller markets. Given the importance which customers gave to 'traceability' and 'supporting local producers' (see Fig. 17) it is that 'retail' selling is kept out of farmers' markets.

The management of farmers' markets is success to this research. The interviews with market managers gave important insights into how the markets operate. All the markets vary and will be discussed in detail in their respective sections. The markets that are organised by a committed group of volunteers are generally substantially larger in terms of both producers and customers than those managed by individuals. The smaller markets which operate on little more than receiving bookings for stallholders and minimal publicity are those that require attention. The amount of work that can be put into a farmers' market is substantial. Marketing and promotion can be time consuming and require a certain amount of skill and experience. Producers were asked how they thought the markets could be improved and the most popular responses are recorded below. This gives an indication of the main issues facing organisers. For more detail on specific markets see individual sections.

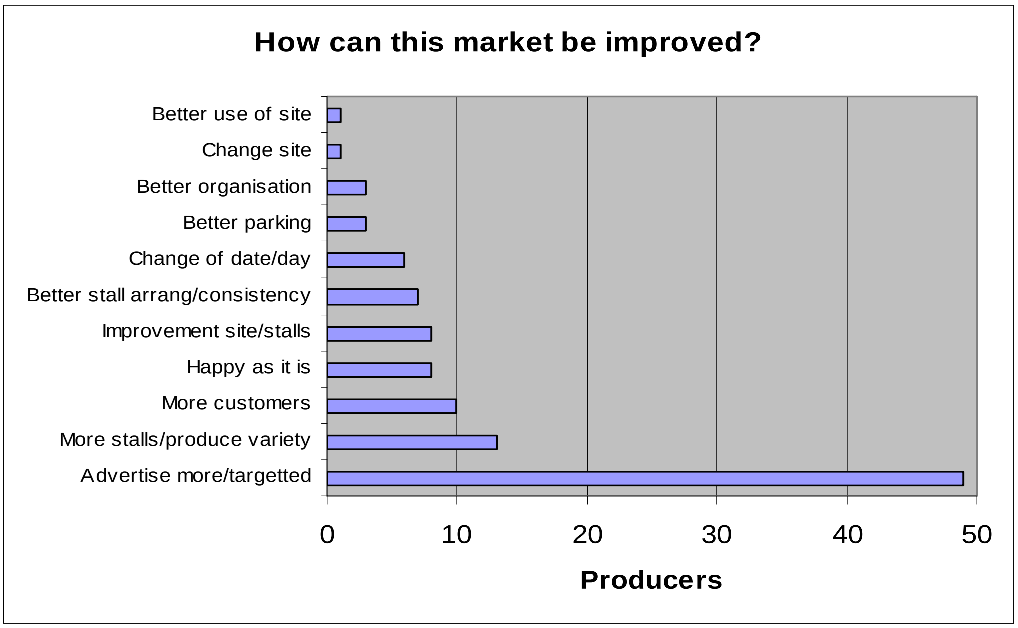

Fig 15: Management of FMs (sample size 72)

One other aspect of managing farmers' markets is the consideration of potential new producers that may be in direct competition with an existing producer selling at the market. Each market manages this in their own way, and some are self-managed by producers who have their own agreements amongst competitors who agree on ranges of produce offered. On the whole producers welcomed some form of management with regard to competition.

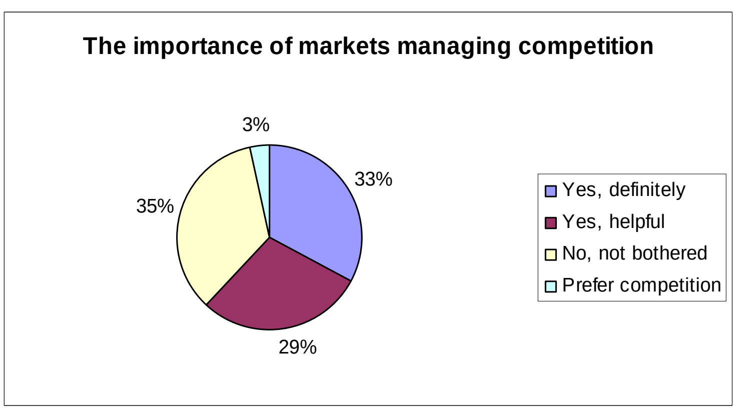

Fig 16: Importance of managing competition (sample size 59)

3. Key findings: Customers

3.1 Reasons for buying at farmers' markets – *Loyalty and trust*

The 'supporting local producers' was the (perhaps unexpected) main reason cited by customers for shopping at farmers' market. The staunch support shown by customers for those whose livelihoods are dependent on their use of the local land indicates an understanding between customers and producers. Apart from the obvious popularity of quality, other reasons of significance - 'traceability' and the 'reduction of food miles' show the growing importance to many customers of concerns about the environment and food safety.

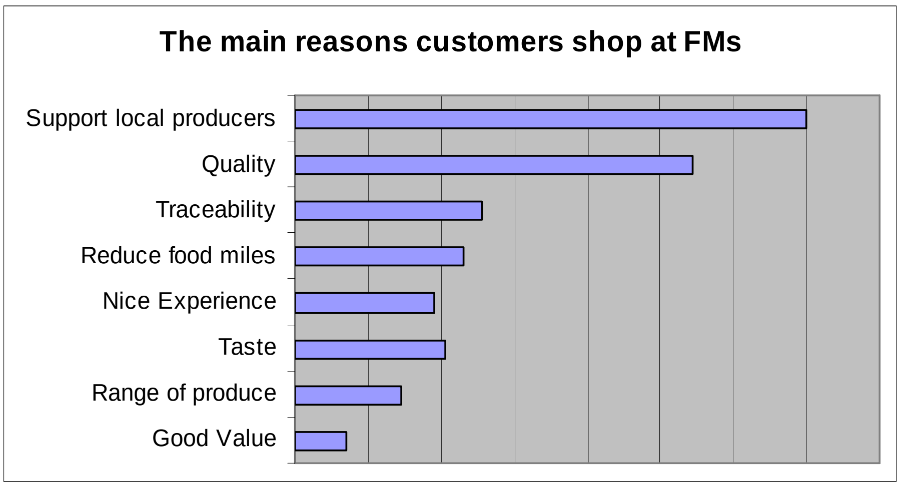

Fig 17: Reasons for shopping at FMs (sample size 170)

The ability to direct questions to the producers was often cited as the most important factor in purchasing decisions. The low score for 'good value' indicates where more public information is required, as there is evidence that, for some foods farmer markets are cheaper than supermarkets. The 'nice experience' category featured low on reasons for attending, but this may be attributed to the time of year the markets were surveyed - many interviews were carried out in sub-zero temperatures!

3.2 Creatures of habit – *Frequency, purchasing and what are they buying?*

The customers are very loyal, with over half attending every possible market at a site and if those attending every other one are included then that accounts for about two thirds of all customers surveyed during this season – although it is recognised that the pattern of attendance at markets in the summer months may be different.

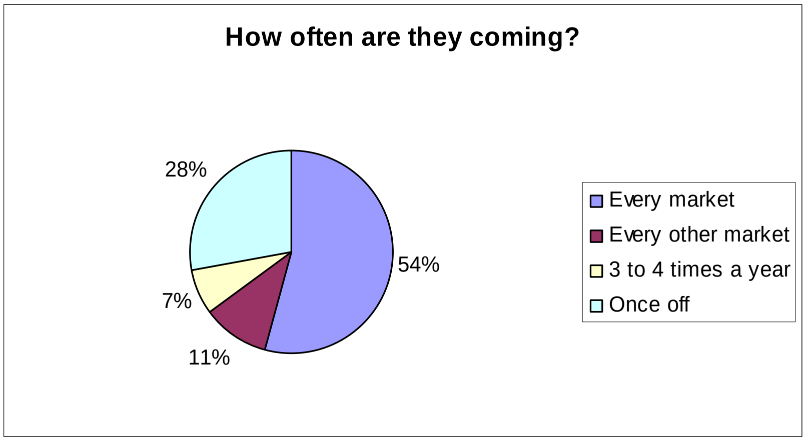

Fig 18: Frequency (sample size 170)

Interestingly, there is a reasonable number of 'first timers' or 'one offs', especially in a period of low season in terms of tourism and produce. This 28% is crucial to the market development of the customer base.

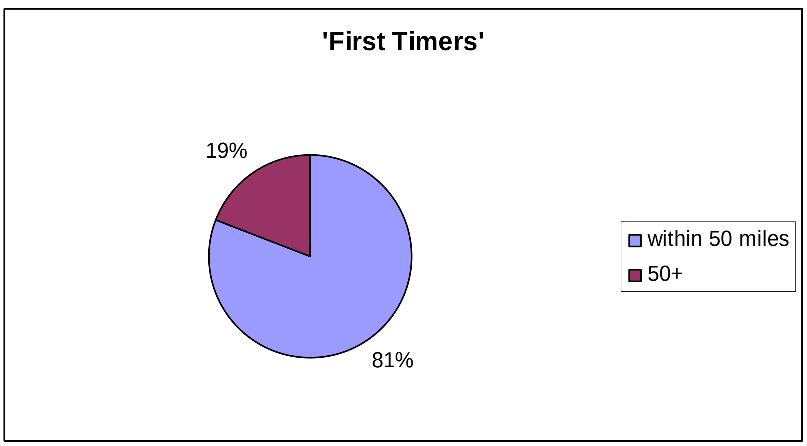

Fig 19: 'First Timers' (sample size 46)

Of those people that were 'first timers' there is an approximate 81% in a position to easily revisit i.e. within 50 miles radius of market. This proportion of 'first timers' would have formed an opinion as to whether they would be likely to attend again. This is why it is crucial to put every effort in to ensuring that every farmers' market event is the best possible.

What customers buy is clearly affected by what is on offer. This may explain the prominence of meat, which is the main product on offer at the smaller markets, especially in the winter months. From a 'healthy eating' point of view the good score for fruit and vegetables is very pleasing, especially as they are limited in choice during this season. In addition to this people are clearly keen to buy dairy products, baking and some 'treats' where they are available.

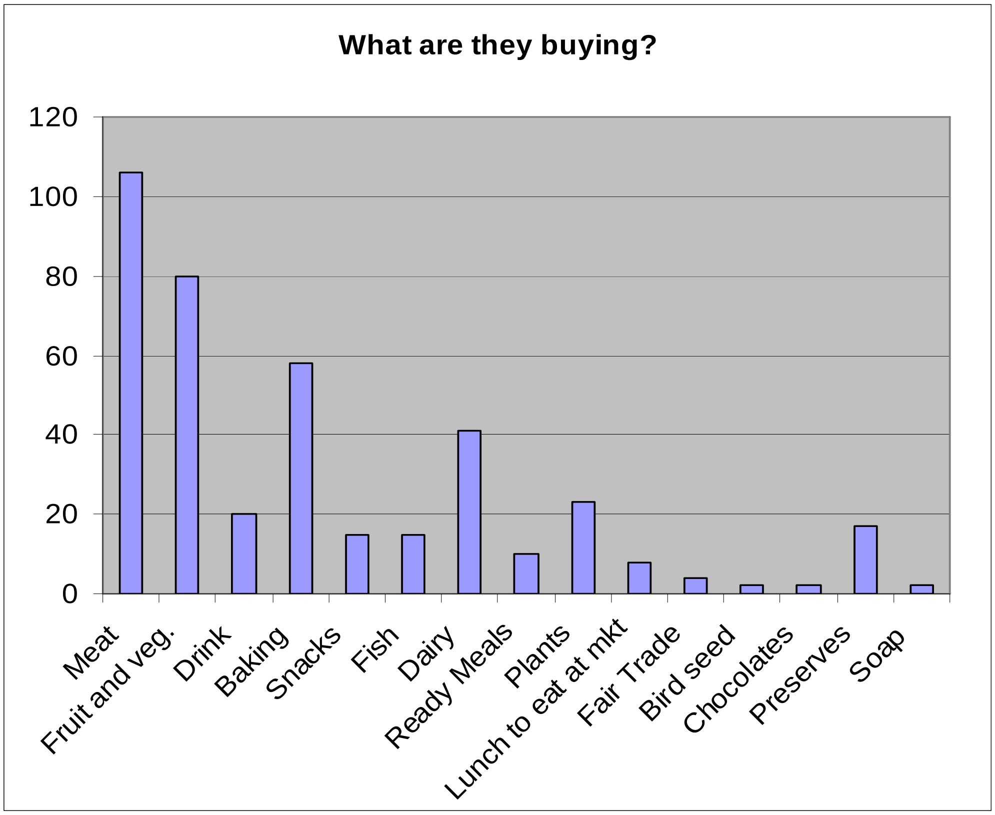

Fig 20: What are they buying? (sample size 170)

3.3 More please - *The call for more variety and the organic question.*

Variety did not appear high on reasons as to why people shop at farmers' markets. However the demand for more variety was made by 76% of the customers. Some of the most popular suggestions included a wider range of fruit and vegetables, although obviously seasonality is an issue here. More (or in most cases some) cheese was desired at all markets and smoked fish was popular in choice. At the smaller markets the demand for homemade cakes and bread as well as juices and wines were also of note. For more detailed analysis of products missing from particular markets please see individual sections.

A sizeable number of customers requested organic chicken which leads onto the issue of the importance of organic produce. This is high on people's agendas, although many were keen to say 'quite important' as opposed to 'very', explaining that source is important and knowing that the meat or fish was well cared for and local was more important to them.

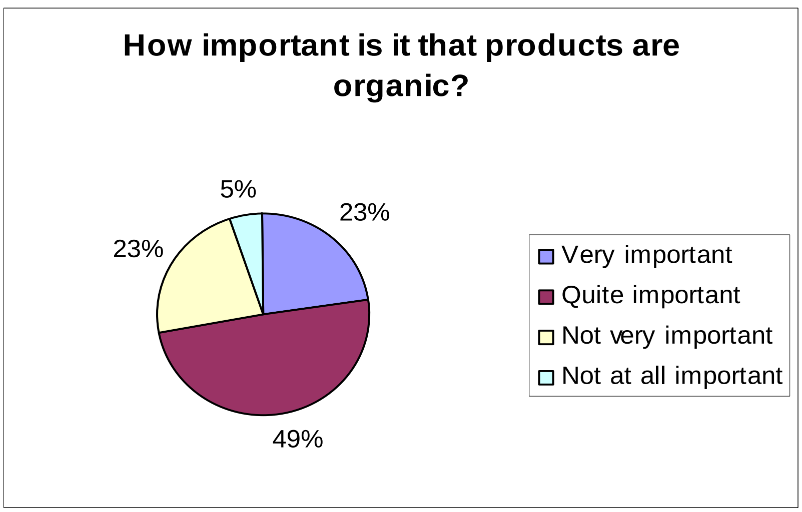

Fig 21: Products are organic? (sample size 170)

3.4 How much money is being spent - *or how much can we spend?*

Every customer that was interviewed was asked how much they had spent or were spending that day and answers were recorded in ranges as can be seen below. By taking a mid-point spend within the bracketed amounts it is possible to work out some averages. Significant is both the fact that about half of customers are spending over £11, and the mean of about £20. This along with the knowledge that 56% of customers are regulars indicates that farmers' markets seem to be providing more than just a few specialist luxury goods for customers.

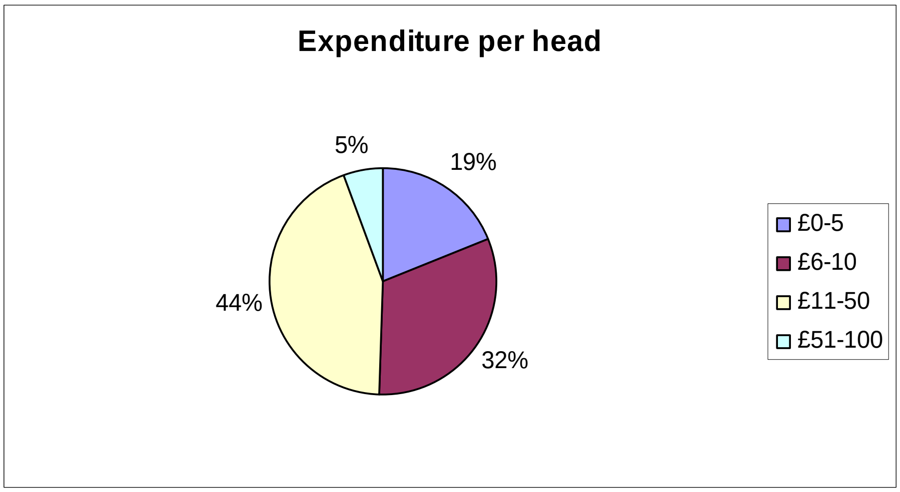

Fig: 22 Expenditure (sample size 170)

At some of the smaller markets there were a number of comments with regard to customers wanting to spend more, but being limited by the variety available, as one customer said "There's only so much meat you can buy if you're not wanting to freeze". In addition to this some of the tourists were restricted in what they were able to purchase due to storage issues, but for those that had made special trips and saw the monthly market as an opportunity to 'stock-up' on a number of valued items, it was a valuable shopping experience.

3.5 Who are the customers? *age/employment status/gender*

The spread of ages reflects the relatively high number of older people residing in the towns surveyed, with over half aged over 55. Age and employment status may well be affected by the mix of weekdays and weekends at which markets were on. Please see individual market findings for a more detailed analysis.

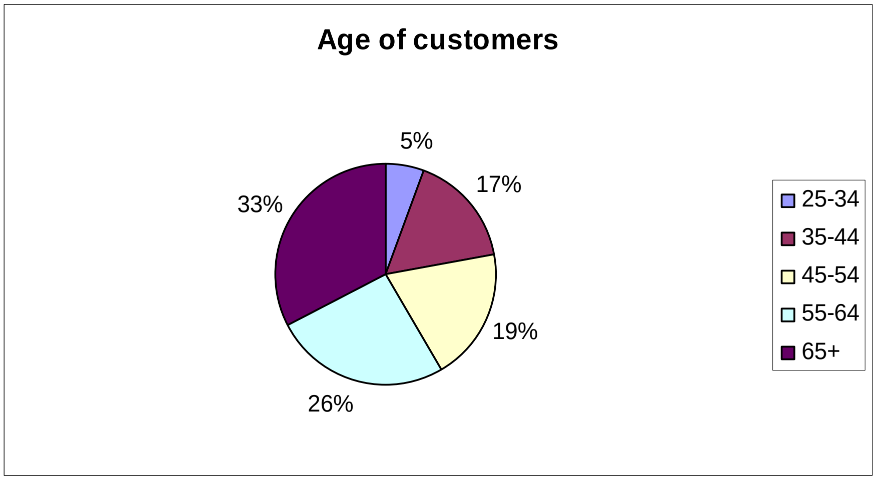

Fig 23: Age of customers (sample size 170)

The ages are reflected in the employment status of customers, with over half not being in employment. For further detail with regard to the individual markets, please see section 5.

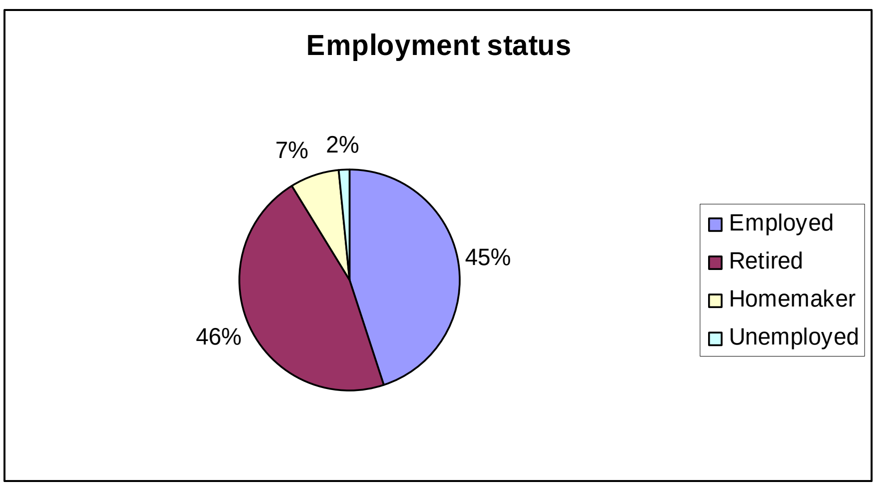

Fig 24: Employment status (sample size 170)

Gender is more of an imbalance, with females making up the majority of customers as is indicated in the chart below.

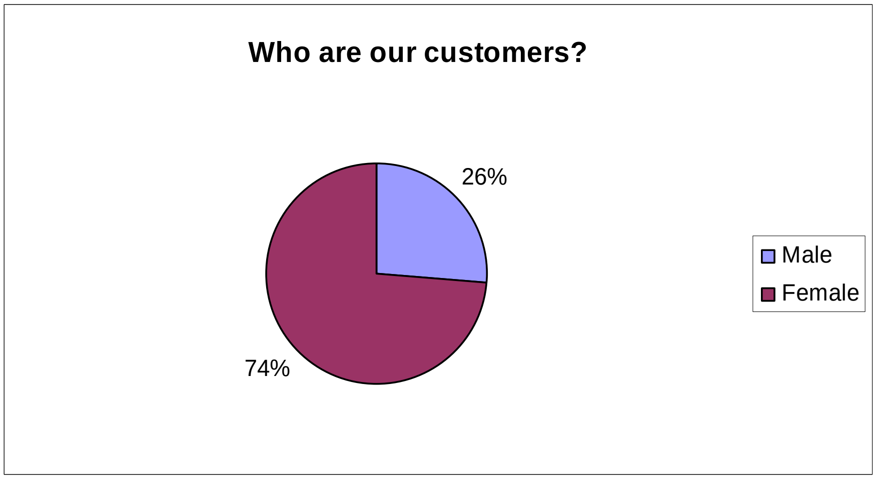

Fig 25: Gender (sample size 170)

3.6 Where are customers coming from?

Every customer was asked for their postcode and these were entered into multimap.co.uk to estimate their distance from the market ‘as the crow flies’. The majority are locals, with two thirds living within five miles of the market. In total 16% live over sixteen miles away. This equates with the results of how people get to the markets with a very healthy 33% arriving by foot. This raises the issue of the amount of shopping being purchased, because the customer must be able to carry the produce home. A number of producers are aware of this and either offer or are thinking of offering home deliveries of heavy goods.

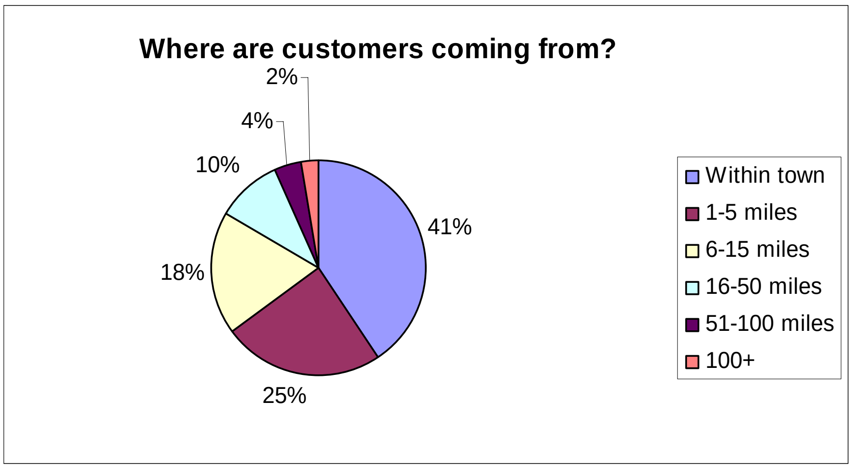

Fig 26: Customers’ origins (sample size 170)

Unfortunately there were only three customers that used a public bus to get to market, which seems disproportionably low. Maybe this is enough evidence to argue for a bus service which would serve remote rural communities!

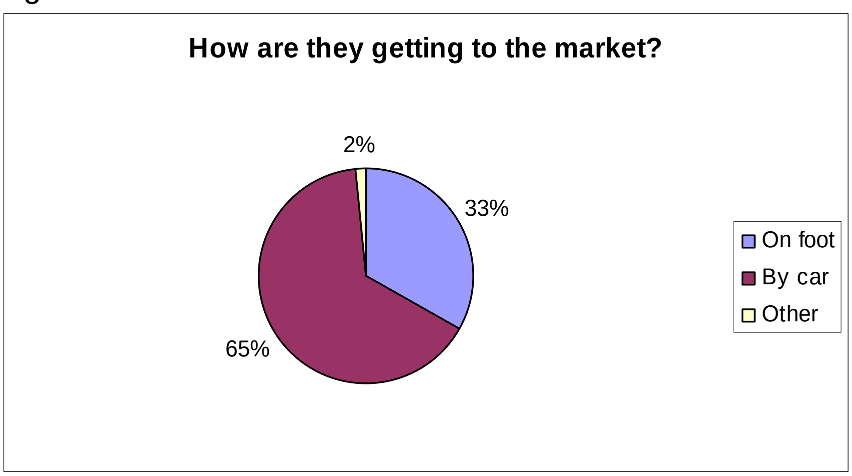

Fig 27: Transport (sample size 170)

It was encouraging to see innovative approaches to transporting goods home which included bringing a wheel barrow along to get the bag of potatoes home!

4. Other key findings

4.1 The role of farmers' markets in the local food economy

This research has indicated that farmers' markets are crucial to many producers' incomes. Spending money on locally-produced food generates almost twice as much income for the local economy as the same amount spent in a typical supermarket.[8] Therefore support of the markets and consideration of their sustainability is an important aspect of the area's economic capability. The current way in which farmers' markets are organised and run in the AONB area does not reflect the economic importance they can offer to local communities.

The opportunity which farmers' markets offer to business start-ups cannot be over-emphasised, as they offer reasonably priced access to an already developed consumer base, with fewer overheads and more flexibility than selling through other retailers or opening their own shop. They present one of the easiest entry points for any small producer to test their products and viability, providing the first step towards trading on a regular basis and lead into sustainability for many. A number of stall holders have gone on to open their own shop or to have such extensive wholesale sales that the role of the farmers' market in their income is now marginal.

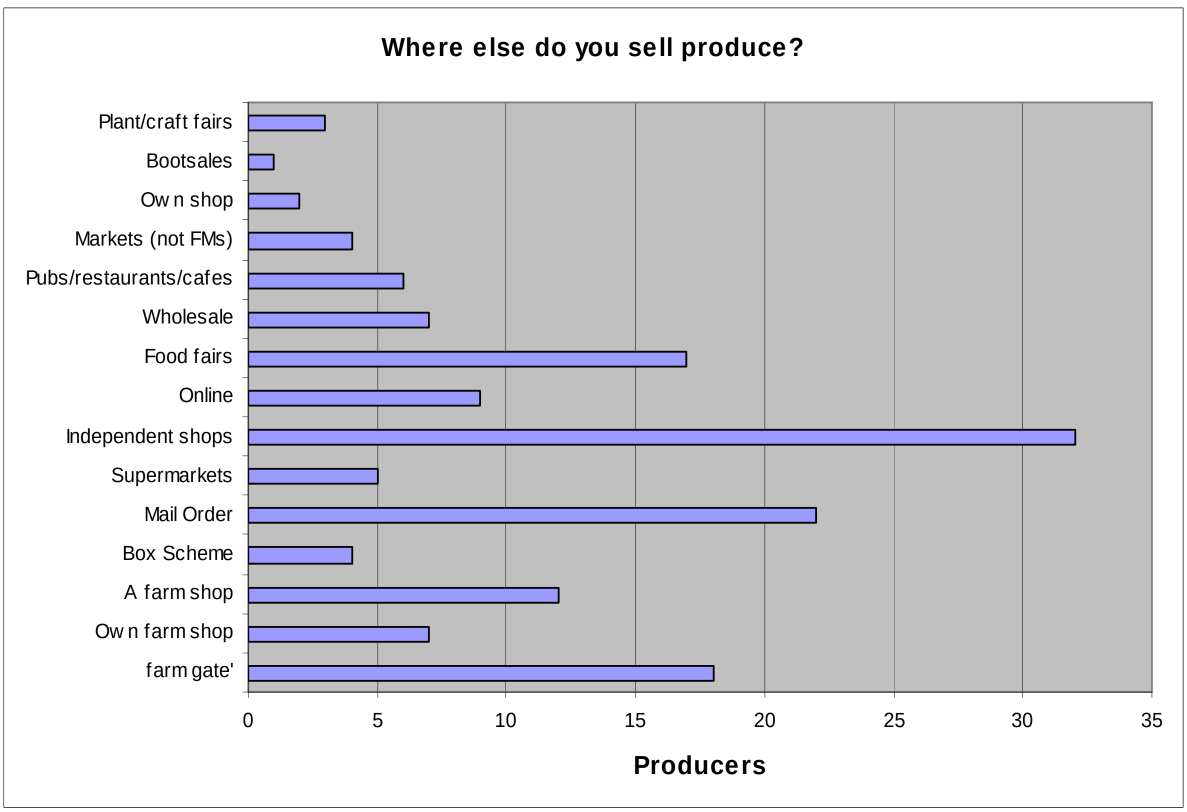

Fig 28: Retail outlets (sample size 59)

[8] Caroline Hill, (2001), Local food better for rural economy than supermarket shopping. New Economics Foundation

Many producers have diverse sales routes with independent and farm shops stocking producers' goods an important avenue for sales. There are a high number of producers, thirty-two in fact, that do sell through independent shops. This shows that there is scope for farmers' markets to operate alongside independent shops even in places where there is great density of shops such as Ludlow. The research also indicates the importance of plant and food fairs and festivals as another valuable outlet for producers. Although outside the confines of this report, it may be worth considering a more strategic approach to the planning of these events in relation to farmers' markets. The fairly low number of those selling to pubs/restaurant and other wholesale is an area where, with appropriate support and promotion, growth could be expected.

There also appears to be a significant number of producers (twenty-two) using mail order and nine of which sell online. This is expected to grow as all producers who were asked if they were interested in selling online and one third of those that don't currently are interested in this as an opportunity.

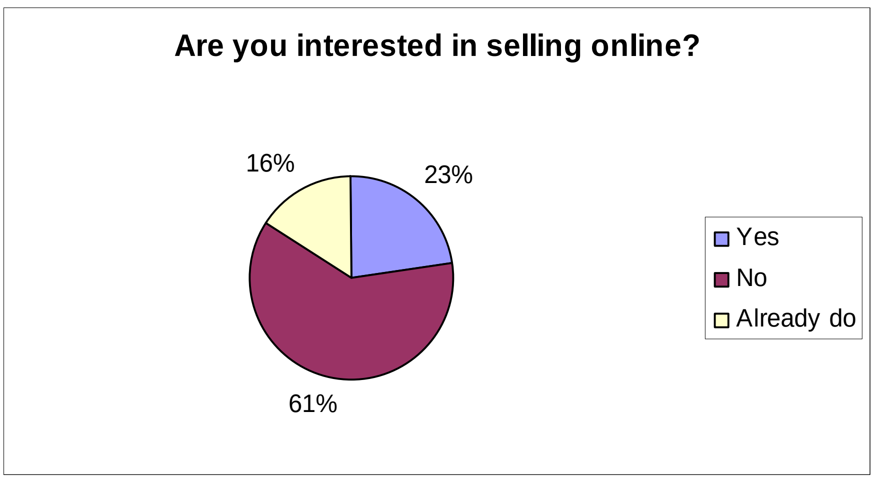

Fig 29: Selling online (sample size 59)

4.2 Our landscape and the producer – *Perceiving the conservation of landscape*

This question allowed producers to consider the relationship they feel they have with their immediate landscape. For some there was no effect (17%) but for most (80%) they felt they either enhanced and/or conserved the natural landscape.

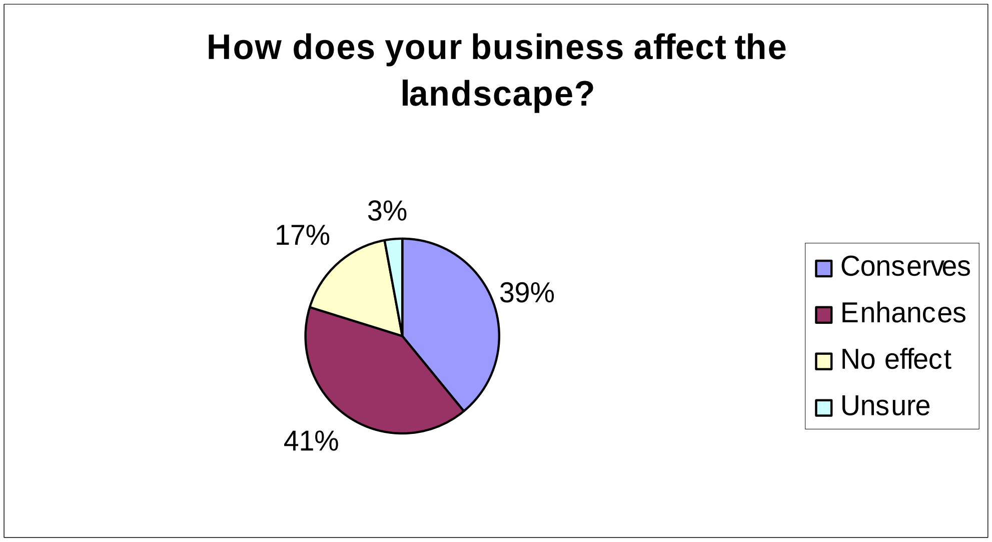

Fig 30: Effect on landscape (sample size 59)

The comments made by producers were positive ones where they explained how their activities affected the landscape. The comments illustrate the different ways in which the question was perceived. Comments by producers included,

"We're very conscious of surroundings and we're sympathetic to the landscape"

"We keep sheep and preserve apple varieties."

"We maintain grazing moor land."

"We breed traditional pig breeds, they're small therefore have low impact on environment."

''Improve the grass and conserve wild birds''

"We buy and use local produce in all our products."

''All ingredients local/packaging recycled where possible''

''We work from home which helps maintain economic activity in the countryside.''

Customers were also asked whether they agreed with the following statement, 'Buying local produce helps to conserve the landscape'. There seemed to be a general consensus that the producers who are selling at farmers' markets were of a size and nature that their farming methods were beneficial, or at least not detrimental, to their immediate environment.

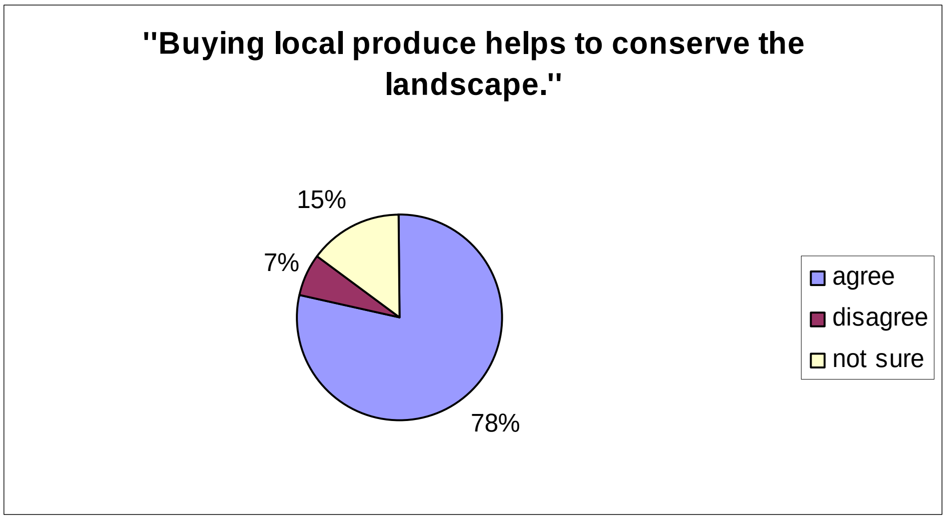

Fig 31: Buying local effect on landscape (sample size 170)

There was recognition by customers though that the 'local' didn't necessarily mean that they helped conserve the landscape. There was concern as to whether South Shropshire producers would start using large swathes of poly-tunnels, as people felt this would be detrimental to the beauty of the landscape. In addition to this a number of customers recognised the importance of the role that farmers have on the landscape saying that the landscape requires activity in the way of farming otherwise it wouldn't look the way it does, which is the way people like it. Comments by customers included:

"We have to rely on the farmer to keep the landscape- we keep the farmer"

*"If [*the land is] *productive for farmers then it's being conserved."*

"The landscape will change we don't want poly tunnels in Shropshire like Herefordshire."

"Saving oil on transport is a good thing."

"It's a reduction in intensive farming"

"Without animals the whole countryside would change."

"Depends on the scale of the farming."

5. Individual Market Findings

5.1 Bishops Castle - Market profile and findings

Bishops Castle, population 1,500, has a regular farmers' market on the third Saturday of every month throughout the year. It has been operational for three years and is run by the Town Council, principally Jane Carroll, the town's Mayor. The market takes place in the Town Hall and has, on average, five to six stalls. The charge per stall is £10.

All of the producers at Bishops Castle are regulars or regular with regard to season. All the producers were within a 30 mile radius with two being as close as five miles. The majority of the producers had been attending the farmers' market for five years or more, with only one stallholder having joined in the last six months. The producers were split evenly between those from just outside the town and those of up to twenty miles into Wales.

The producers' average takings varied enormously, with one producer boasting £400+ sales and two taking between £51 and £100. On the whole producers felt their takings were good or adequate. There was only one producer that felt their takings were poor. A calculation based on these figures has been made to establish the overall takings at an average market. In terms of Bishops Castle the takings would be in the region of £1125, a reasonable figure for only five stalls.

Producers were asked to rate certain aspects of market out of a possible five. It included cost of stalls, venue, organisation, promotion and number of customers. The results can be seen in Fig. 32 below. The highest score was 3.8 for cost of stalls, although the one above the mean of all the markets was number of customers. There is probably scope for improvement in all areas, with promotion and organisation perceived as the areas requiring most attention.

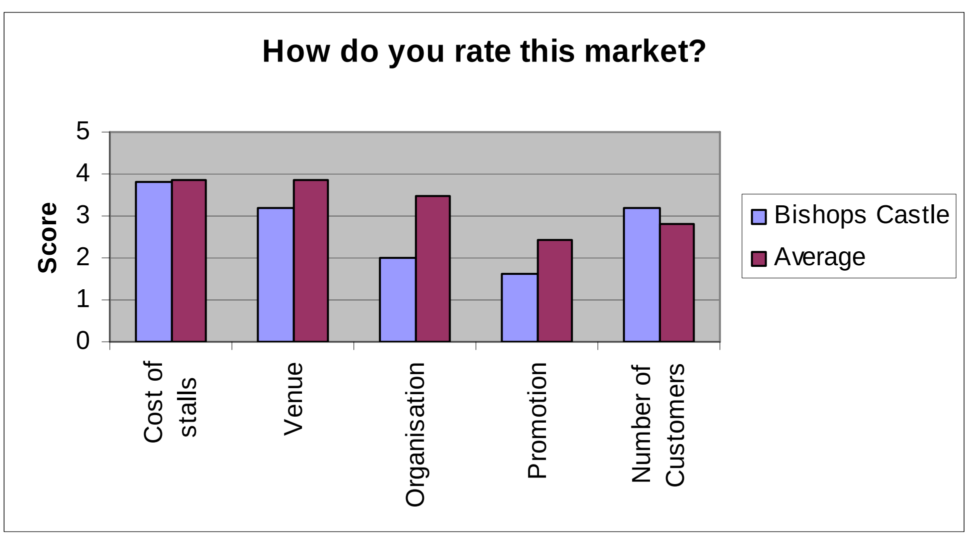

Fig 32: Rate market Bishops Castle (sample size 5)
Average: Mean of all individual market ratings

Ways in which the producers felt that the market could be improved included more support from the organisers. As an example the producers reported that any signs for the market were put up by the producers themselves. A number of producers also felt that more stall holders to fill the hall would create an atmosphere more representative of a farmers' market. The major drawback from producer's point of view was that access to the venue is difficult as there are a number of steep steps into the hall and some producers interviewed at other markets cited this as to why they wouldn't attend Bishops Castle market. One producer asked whether it could be moved to the old cattle market site. There was a general consensus from all the producers that fliers with dates on needed producing and distributing as well as additional signs on all major roads into town.

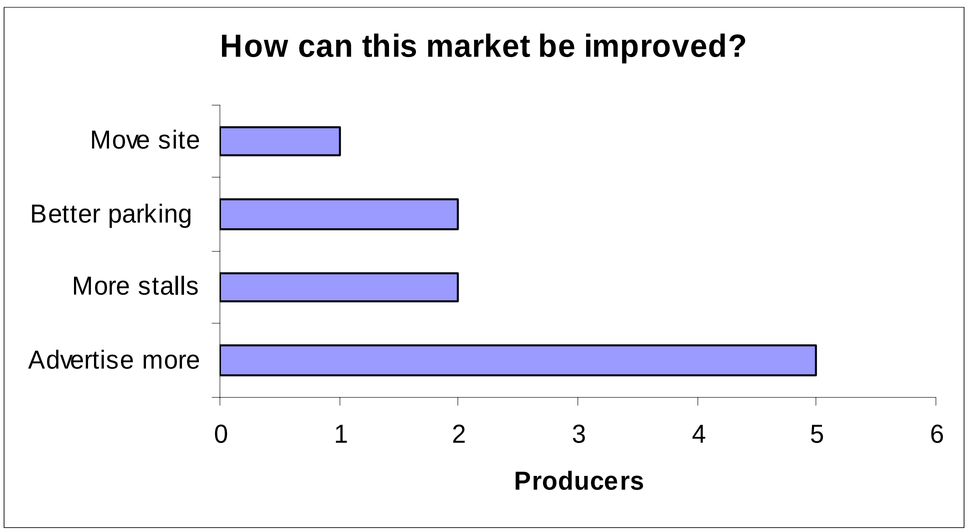

Fig 33: How can market be improved Bishops Castle (Sample size 5)

On the day thirty customers were interviewed with 40% of them saying they attended every market and 43% first timers. This may partly be explained by the fact that there was an auction on nearby on that particular day. There was also a high proportion of customers that arrived by car (60%), which may reflect the remoteness of Bishops Castle and possibly the high number of those that had travelled in especially for the auction on that day.

A notice board that was placed on the main road by one of the producers was a major drawing point to those that were walking around the town. In addition to this there was an article in the South Shropshire Journal that week which had also prompted people's attendance. A number of customers mentioned a leaflet, which the Mayor also referred to as 'new', although there was no evidence of it at the venue.

Of all the customers surveyed, more than two thirds go to other farmers' markets and in most cases they commented on the fact that the Bishops Castle market was a lot smaller than others with a significantly smaller range of product. Of the five stalls selling on the day, three were meat, one vegetables (potatoes and carrots) and one offering cakes, preserves and soap. Of the 30 customers asked, 23 were buying meat, 14 vegetables and six cakes and preserves. When prompted about any products which they felt were missing from the market the majority of people suggested a wider range of fruit and vegetables with three other popular suggestions of drink, fish and eggs. There were three individual customers who really wanted to get hold of organic chicken.

In terms of average expenditure, over two thirds of all customers spent between £6 and £50, which, considering there were only five stalls, are very sizeable spends. As the market is only monthly an assumption of 'stocking up' for the next four weeks would be reasonable. Another reason for this assumption is that over half of the customers shopping at the market that day were in full-time employment.

When customers were asked about any additional activities which they would be interested in, alongside or as an addition to the market, tasting sessions and recipes were the most popular.

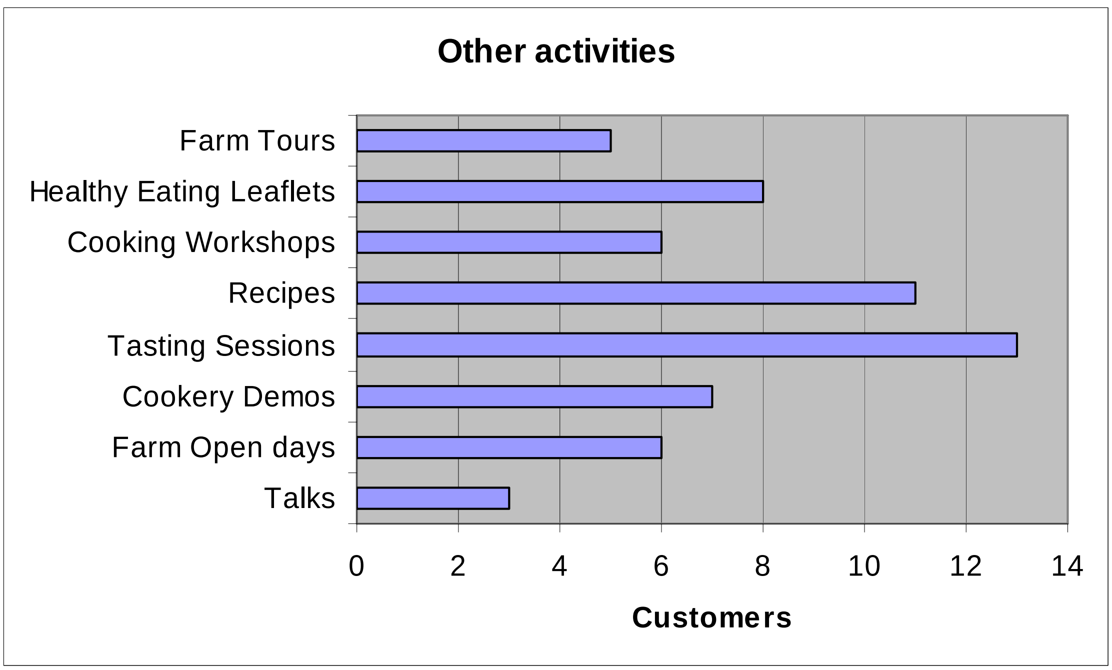

Fig 34: Other activities Bishops Castle (sample size 30)

All the individual producers interviewed at the various AONB markets were asked as to whether they would be interested in attending Bishops Castle farmers' market. As you can see from Fig. 35 there were thirteen producers that would consider attending the market. Some of those interested would like to see the market reorganised with more promotion, producers and customers.

Fig 35: Considered Bishops Castle (sample size 59)

5.2 Craven Arms - Market profile and findings

Craven Arms, population 2,000 (but with catchment area drawing on an additional 5,000 in the parishes surrounding the town), has a quarterly farmers' market throughout the year. It is the newest of all the farmers' markets, operational for only eighteen months (six markets to date). The market grew out of a community food project 'Craven Arms Community Food' (CACF) involving local people keen to make a difference in the town to the availability of local food. The market takes place in the Shropshire Hills Discovery Centre, based on the south side of the town and has, on average, twenty stalls. The charge per stall is £12 for indoors and £10 for outdoors and £6 for just a table outdoors. To help start up the farmers' market CACF received several thousand pounds to induce producers to take part and at the first two markets stalls were entirely free.

Nearly all of the producers at Craven Arms were regulars or regular with regard to season. There were five meat producers, three baking (one bread, two cake), two vegetable producers, for one of which only 40% is local produce, two preserves, one plant, one drink, one olives and antipasti, making fifteen in total. The majority of producers were very local, with all bar two within a 15 mile radius of the market. Ten of the fifteen producers had been attending the farmers' market since it began eighteen months earlier and two were new that day.

The majority of producers' average takings were between £101-150. Only one out of the fifteen felt that their takings were poor, the rest were equally divided between adequate or good. A calculation based on these figures has been made to establish the overall takings at an average market and in Craven Arms the takings are in the region of £2,050.

Producers were asked to rate certain aspects of the market out of a possible five. It included cost of stalls, venue, organisation, promotion and number of customers. The results can be seen in Fig. 36 below. The market seemed generally well regarded by the producers, with a high score of four for organisation and venue. The lowest score was for number of customers at just below three, which was still slightly above the mean of all the markets' ratings in this aspect.

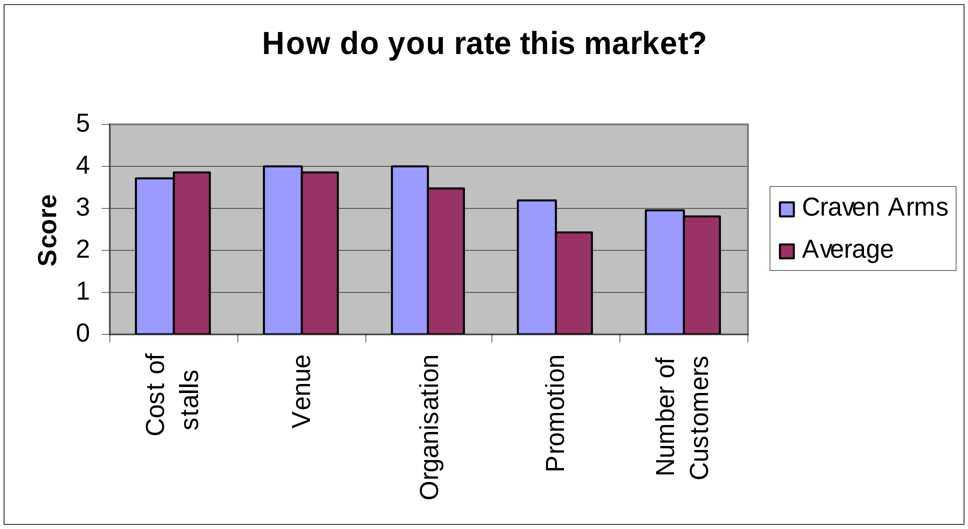

Fig 36: Rate market Craven Arms (sample size 15)
Average: Mean of all individual market ratings

Producers were asked if they could think of any ways in which the markets could be improved. The results of this can be seen in the bar chart below with numbers associated with suggestions.

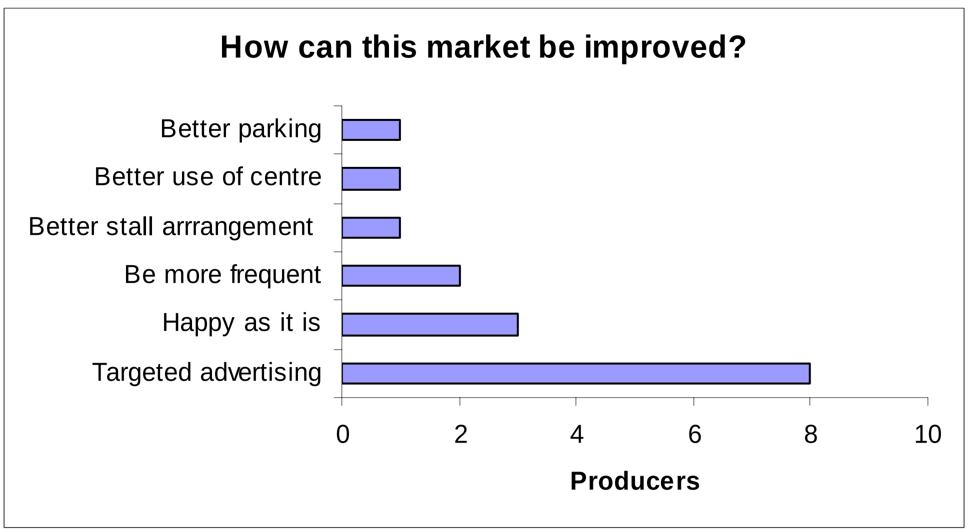

Fig 37: How can this market be improved Craven Arms? (sample size 15)

One of the producers present felt that the customer numbers had fallen since the beginning and they thought that the market would benefit from being more frequent so that a real customer base could be developed. A number of other producers said that better signage off the main road would help, especially if it was put up in a couple of days in advance. There was also a call for better signage within the market, ensuring that everyone knew there were more stalls inside. One stallholder felt that the market would benefit from being more compact rather than spread out. Interestingly a producer suggested that the market could benefit from some additional activities organised by the Discovery Centre, possibly cookery demonstrations or children's' activities.

Of all the customers 65% go to other farmers' markets. In most cases they felt that the Craven Arms market was similar to others and a number commented on how they felt it had more of a community atmosphere than other farmer markets. The average spend per customer was sizeable, between £11-50, this possibly due to the quarterly nature of the market and people 'stocking up.'

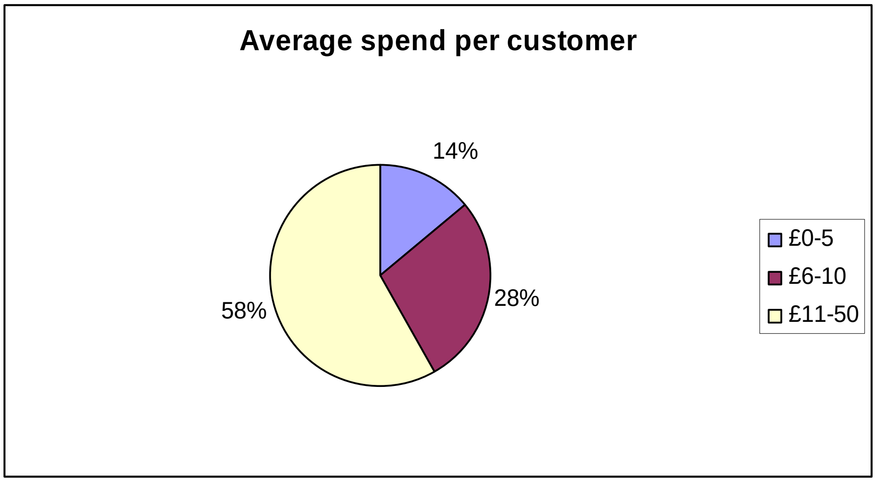

Fig 38: Average spend per customer Craven Arms? (sample size 46)

When prompted about any products which they felt were missing from the market the majority of people said that they were happy with the range. Ones which came up a number of times were cheese and a wider choice of local vegetables as well as wines and juices.

The customers were predominantly in the older age brackets with 51% of respondents over 55.

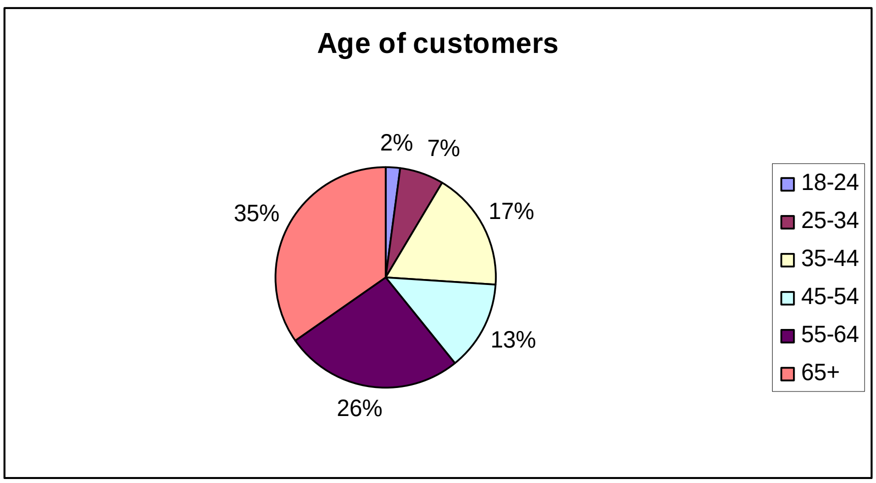

Fig 39: Age Craven Arms (sample size 46)

A fair proportion of customers were in employment, either full-time, part-time of self-employed, with a surprisingly low figure of just one respondent categorising themselves as a home-maker, see fig below.

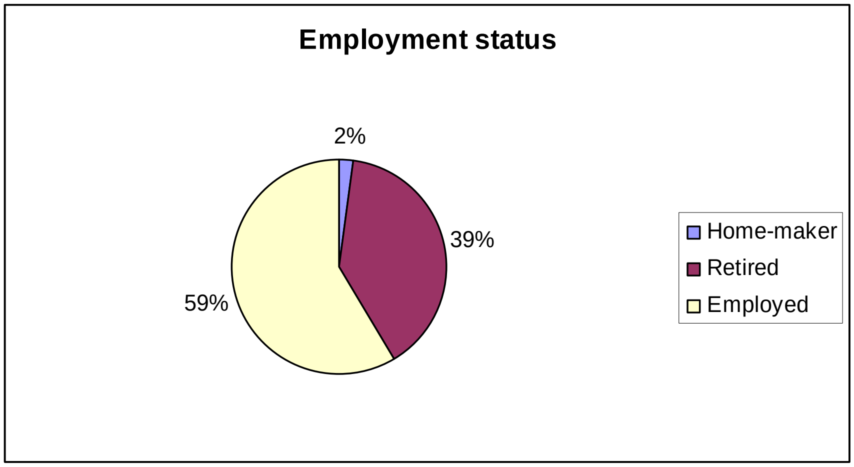

Fig 40: Employment Status Craven Arms (sample size 46)

When customers were asked about any additional activities which they would be interested in, alongside or as an addition to the market, cookery demonstrations, and tasting sessions appeared to be the most popular.

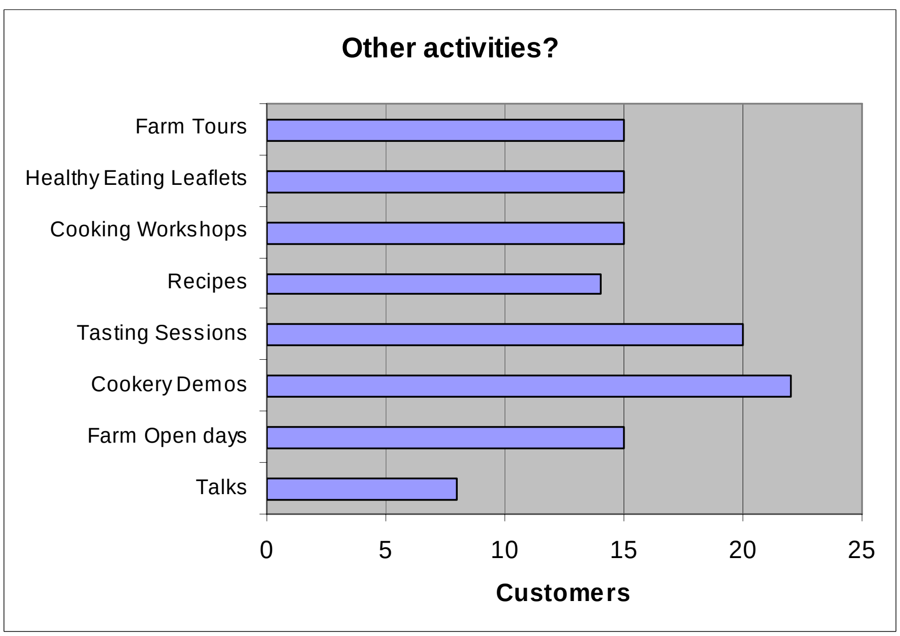

Fig 41: Other activities Craven Arms (sample size 46)

Fig 42: Considered Craven Arms (sample size 59)

All the individual producers interviewed at the various AONB markets were asked as to whether they would be interested in attending Craven Arms farmers' market. As you can see from the graph above there were potentially fourteen producers that would consider attending the market, but there were worries about perceived low customer numbers from some.

5.3 Church Stretton - Market profile and findings

Church Stretton, population 4,500 (38.5% of retirement age), is one of longest standing of all the farmers' markets in the region. It has had a farmers' market on every other Friday all year round for the past six years. It is a town council organised event with the Town Clerk responsible for its general organisation. The market is nicely situated in the centre of the town on the old market place. On average there are eight stall holders although there are often a few unable to attend due to seasonality of produce. The charge for a stall is calculated as £1 per foot giving £6 per stall as an average.

All of the stall holders there are regulars or regular with regard to season. Half of the producers had been attending long term and the other half were new, recruited within the last six months. On the day there were two meat producers, one vegetable producer, one preserves, one plant, and one nest boxes, making six in total. Of the producers two were very local and the rest came from around Telford or North West of Shrewsbury.

The majority of producers' average takings fell between £101 and £150 with an estimated £750 taken by the market in its entirety on the day, based on the average of takings given. None of the market traders felt that there takings were good, three felt that they were adequate and one poor. The one that felt it was poor was a producer that had only attended the market once before. One of the more established traders felt that their takings were beginning to go down.

Producers were asked to rate certain aspects of market out of a possible five. It included cost of stalls, venue, organisation, promotion and number of customers. The results can be seen in Fig. 43 below. The producers generally approved of the market with a highest score of 4.6 for cost of stalls, which recognised the lowest stall prices in the markets surveyed. Venue and organisation were both appreciated, but the lowest scoring was promotion at 2.1 and number of customers which came in at just below 3.

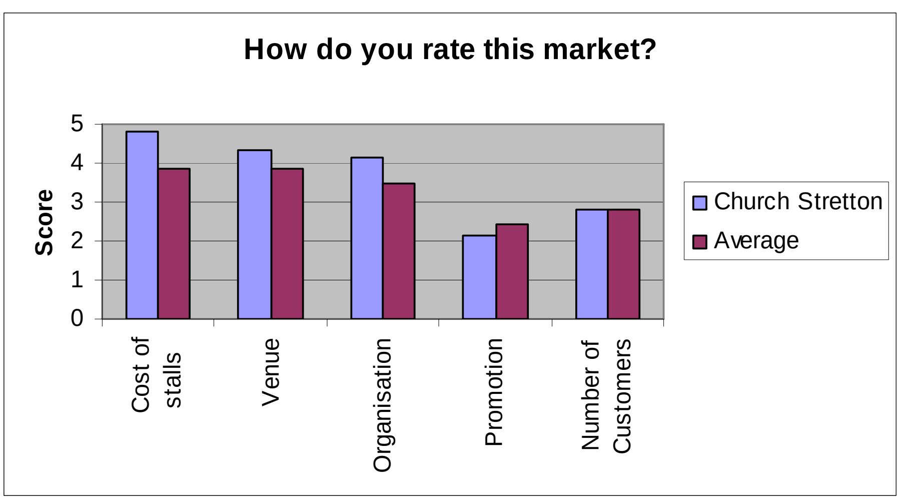

Fig 43: Rate market Church Stretton (sample size 6)
Average: Mean of all individual market ratings

Producers were asked if they could think of any ways in which the markets could be improved. The results of this can be seen in the bar chart below with numbers associated with suggestions.

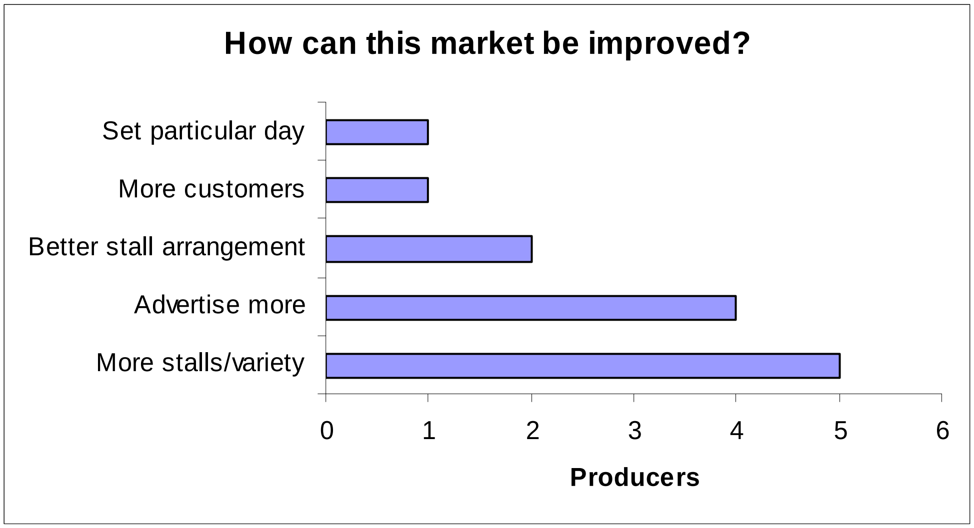

Fig 44: How can this market be improved Church Stretton (sample size 6)

Five of the producers felt that the market would benefit from having more stalls offering a wider variety of produce. The market square itself can take up to 10 stalls if arranged in a different way. There was also a call for a set day of the month, rather than having an alternating Friday. If, for example, the days were fixed as the 1st and 3rd Friday of the month, then this could be publicised and more easily remembered by customers, although at the loss of a couple of markets a year. Another issue regarding number of attending producers is the frequency of the market – it may be that by reducing the frequency, more producers would be able to attend and therefore the market would grow in stature.

The twelve customers interviewed were predominantly very local, with nine from within a five miles radius of the market, two from 6-15 miles and one couple, who were house hunting, from over 100 miles away. Therefore it was interesting to see that only a third were on foot and the rest came by car. On the whole they were regulars, exactly half came every fortnight and there were three customers that were first timers. In terms of knowing when the market was on half read about the market in the paper and a third asked a friend and the rest had seen publicity in the form of a leaflet or notice board.

Half of the customers were buying meat, 5 vegetables, 4 plants and 3 preserves. When prompted about any products which they felt were missing from the market the majority of people suggested homemade cakes. Other popular choices were speciality bread, cheeses, olives and organic chicken. Nearly two thirds of all customers spent between £6 and £50, which was very reasonable, considering there were only six stalls. In detail four spent between £0-5, five spent between £6-10 and three people spent between £11 and 50.

Over half of the respondents attended other farmers' markets, including the likes of Shrewsbury, Bishops Castle, and Ludlow markets and most felt that this was a lot smaller and less varied in choice.
When customers were asked about any additional activities which they would be interested in, alongside or as an addition to the market, recipes, cooking workshops, tasting sessions and farm open days were all popular.

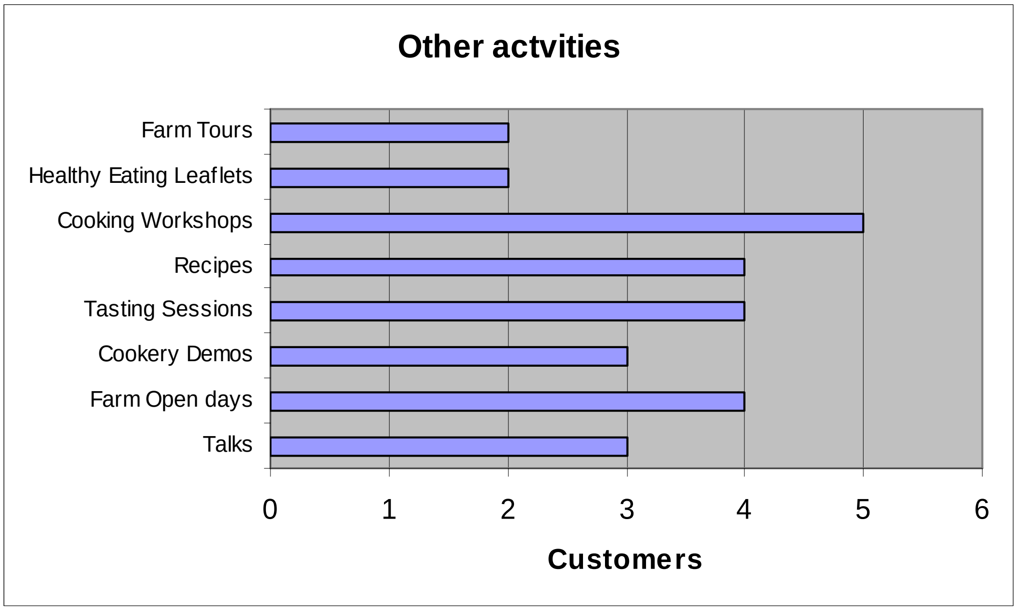

Fig 45: Other activities Church Stretton (sample size 12)

All the individual producers interviewed at the various AONB markets were asked as to whether they would be interested in attending Church Stretton farmers' market. As you can see from the graph below there are potentially eleven producers that would consider attending the market. Some of those interested would like to see the market reorganised with an improved site, more producers and customers.

Fig 46: Considered Church Stretton (sample size 59)

5.4 Knighton- Market profile and findings

Knighton has a population of 3,000 and is regular stop off place for walkers on the Offa's Dyke path. It has had a farmer market for five years although it has been organised by different people during that time. It is normally the fourth Saturday of the month and is held in the community centre situated in the centre of the town. The market is organised by a member of staff at the community centre who is paid to organise the market. The stall rentals have recently been raised from £8 to £10 to cover some additional marketing which the organiser has planned. In general there are thirteen or fourteen stall holders that attend, although on the day we surveyed it was low season and there had been a change of date so a number were unable to attend. Due to this producers were also interviewed at the following month’s market.

All of the stall holders there were either regular attendees or regular with regard to season. On the day of surveying there were two meat producers, one plants, one bread-maker and these were complemented by a Fair-Trade stall, the Country Markets selling preserves and cakes and a stall serving fresh coffee. The majority of the producers are from up to twenty miles into Wales with two or three exceptions. The market benefits from being indoors and having tables and chairs available for a café. The organiser is planning opportunities of combining a craft fair to run alongside the farmers’ markets on occasions to raise additional funds from stall rent. Due to the low turnout of producers on the January market we have included an extra four that were surveyed a month later, which included one meat, two vegetables (one potatoes and one mixed) as well as a reseller of cider, beer and cheese. This gives us a total of nine producers. Due to the café not selling any local produce they were not included in the survey.

All producers were asked for their average takings, the results were mixed with the majority falling somewhere between £51 and £150 although there were two that exceeded this on a regular basis. By taking an average number of bracketed figures there is an estimated £1100 taken by the market in its entirety on the day.

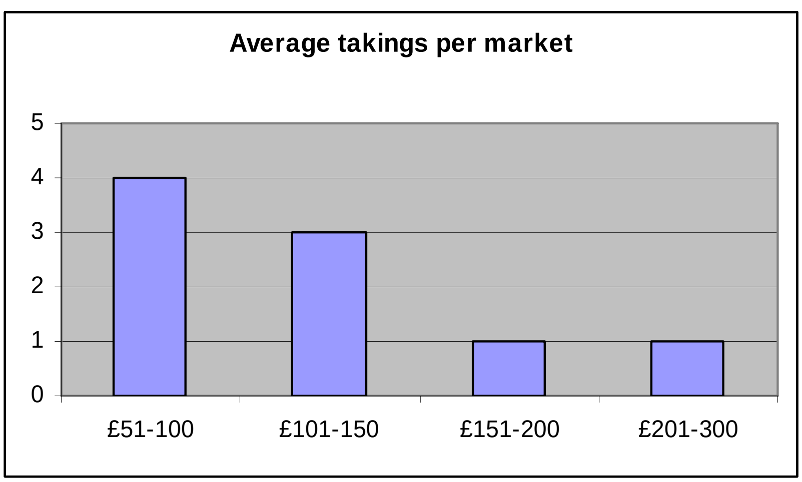

Fig 47: Average takings Knighton (sample size 9)

In all, the majority of market traders (78%) felt that there takings were either adequate or good. A number of traders felt that takings were going down gradually, but weren't sure why this was the case. There were two traders that felt their takings were poor.

Producers were asked to rate certain aspects of the market out of a possible five. It included cost of stalls, venue, organisation, promotion and number of customers. The results can be seen in Fig. 48 below. The highest score was 4.8 for venue and the lowest was for the promotion of the market, although this was still just above average. The number of customers at this market seemed to be fairly good but concern over the recent price increases was shown in the lower than average score for cost of stalls.

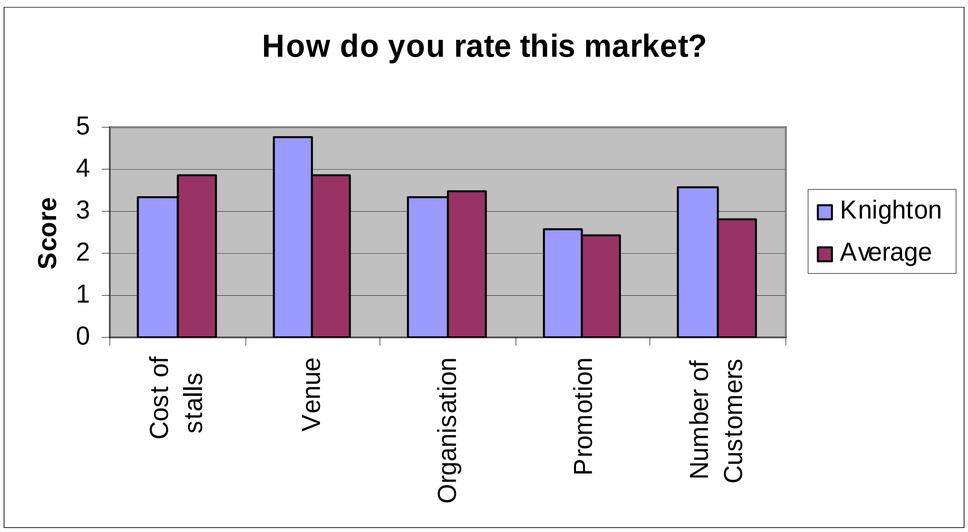

Fig 48 : Rate market Knighton (sample size 9)

Average: Mean of all individual market ratings

Producers were asked if they could think of any ways in which the markets could be improved. The results of this can be seen in the bar chart below with numbers associated with suggestions.

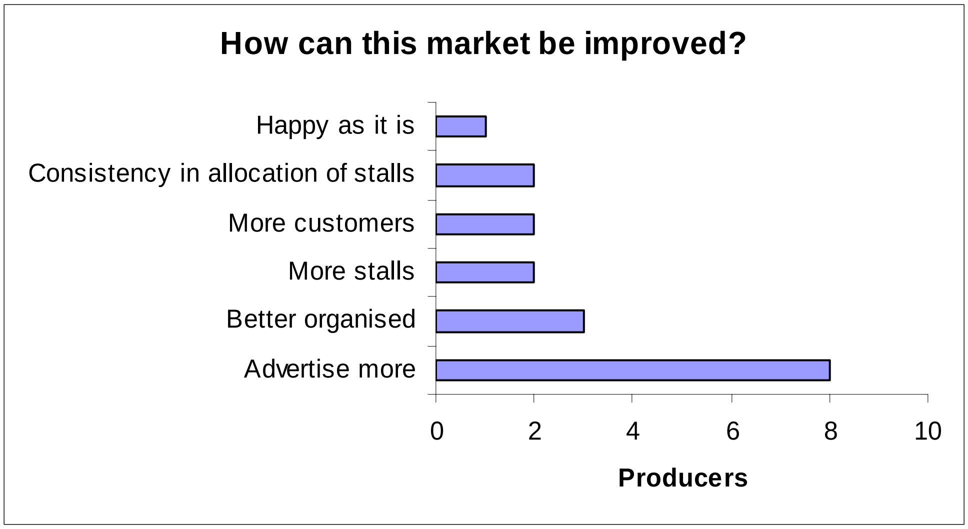

Fig 49: How can this market be improved Knighton (sample size 9)

The emphasis seems to lie on promotion and organisation, which by the second market visited seemed to have improved with more posters, road signs on all major roads and certainly a clearer objective for the market organiser which included increasing numbers of stallholders, and hopefully thereby enticing more customers to attend. With this in hand the more minor issue of consistency in stall allocation should be dealt with.

The twenty customers interviewed were predominantly local and loyal, with 68% coming from the town and 84% coming every month. Of the remainder, 21% came from within 1-5 miles and 11% came from between 6 and 15 miles. There are clearly a number of customers that travel in from outlying villages and it would be worth trying to develop this customer base as well as day and week-end visitors. It was surprising to see that such a number were dependent on their cars (63%), but this may partly be explained by the fact that over half were retired (53%), with almost two thirds of those interviewed over fifty-five.

In terms of knowing when the market is on there was a fair number (37%) that were confused as to when the market is on, perhaps due to the fact that the day had changed at short notice. It normally is the fourth Saturday of the month. Those that did know used a variety of means including leaflet (26%), article in paper (11%), friend (11%) as well as a notice board, church magazine or remembered the day.

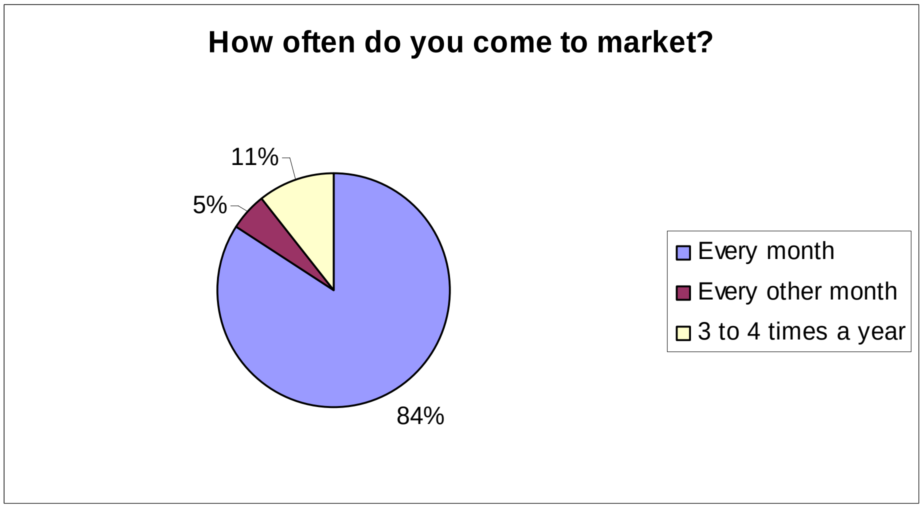

Fig 50: How often to market Knighton (sample size 20)

Of the 20 customers asked, the majority were buying meat and bread with only two buying vegetables (although this was more on our revisit) and Fairtrade was popular as there is nowhere else to buy it in Knighton. When prompted about any products which they felt were missing from the market the majority of people suggested cheeses.

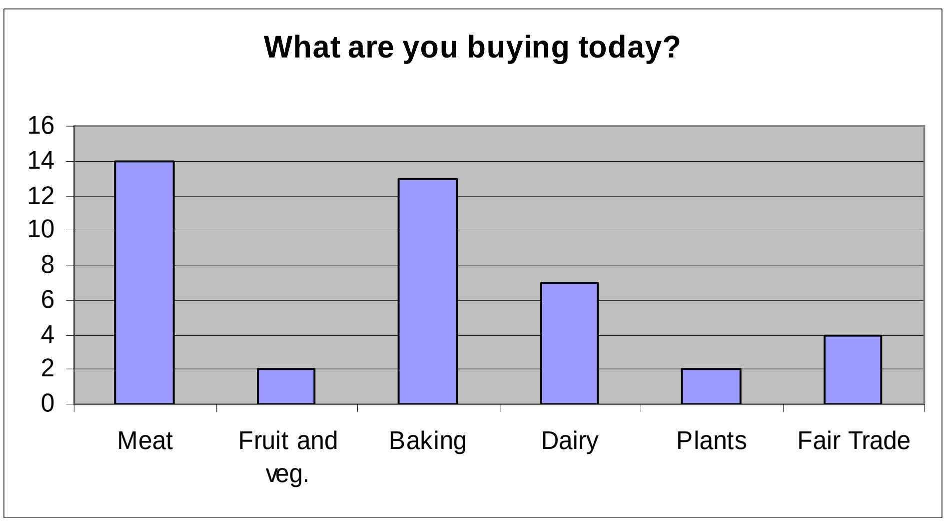

Fig 51: What are you buying Knighton (sample size 20)

In terms of average spend just over half spent between £11 and £50, which represent large purchases and presumably mainly spent on meat. In detail 16% of customers spent under £5, 26% spent between £6 and £10, and 5% spent over £51.

Only a third of the customers went to other markets, the majority of whom had attended Ludlow and on individual citations Welshpool, Landrindod Wells, Leominster and Shrewsbury. Two thirds of the customers felt that other farmers' markets offered more to the customer. They would be interested in a variety of additional events associated with the markets, the most popular being cooking workshops and demos, tasting sessions and recipes.

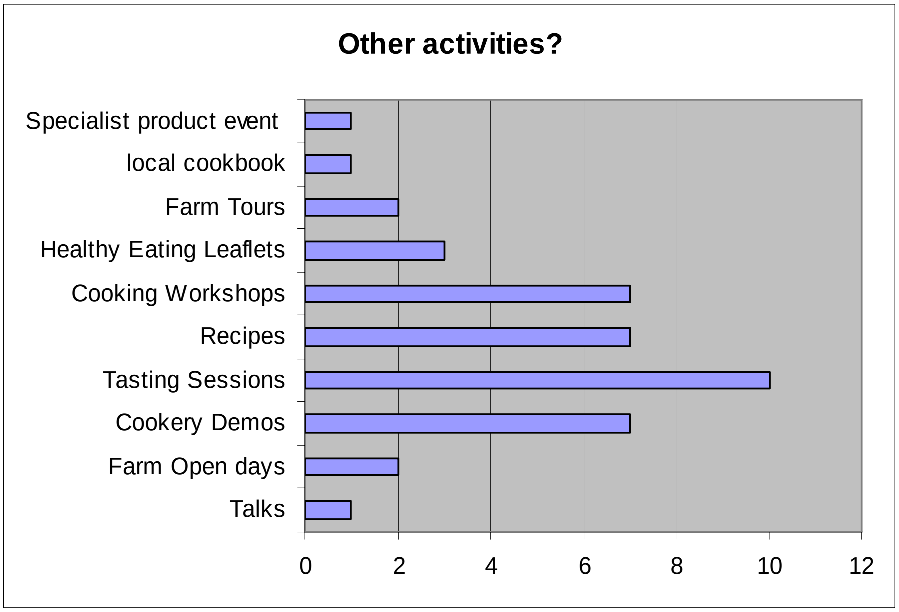

Fig 52: Other activities Knighton (sample size 20)

All the individual producers interviewed at the various AONB markets were asked as to whether they would be interested in attending Knighton farmers' market. As you can see from the graph below there are potentially twelve producers that would consider attending the market. Some of those interested would like to see the market reorganised with more producers and especially increased customer numbers.

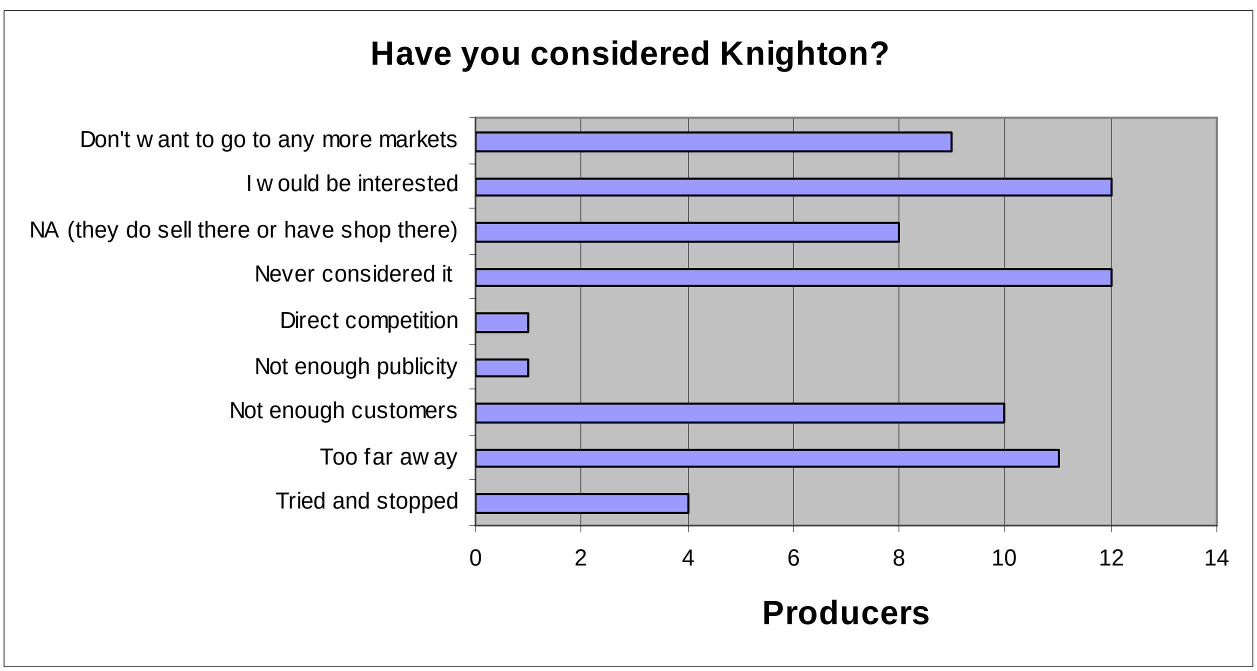

Fig 53: Considered Knighton (sample size 59)

5.5 Ludlow - Market profile and findings

Ludlow has a population of around 10,000 (with an additional 3,000 in parishes just outside the town boundaries) and serves as the main market town to a much wider area. Ludlow's farmers' market has been going for almost six years. It was disrupted briefly by the foot and mouth crisis but is now well established, with a regular core of producers attending on a monthly basis. It is run by volunteers from Ludlow 21 Food and Farming group, which is a sub-group of the environmental pressure group Ludlow 21. The market has been in receipt of approximately eight thousand pounds of grants from various sources to help with its early days. It is now self-sustaining, managing to make a small profit after paying the Town Council £310 per month for the market square. The group also maintains a website which lists market dates and producers.

The market on average has 34 stalls of reasonably regular producers, with 62% of producers interviewed having been with the market for over two years and indeed some serving since its launch. Less frequent attendees may boost the producer numbers on occasions too. The market itself is situated on the market square, right in the centre of Ludlow. Of all the farmers' markets serving the AONB region, Ludlow has the most extensive rules that regulate the producers that may attend (see Appendix F). The cost of a stall to the producer is £18. All producers are from within 30 miles, bar two from within 50 miles who provide products that are otherwise unavailable within that radius. The producers mainly come from the south of the town. There were 16 with Hereford or Worcester postcodes and 11 with South Shropshire postcodes. On the day of surveying there were 28 stall holders on a very cold day in February, and an additional five producers were captured the following month to boost sample sizes.

The chart below gives an indication of the variety of produce available on the first day of surveying, the highest grouping is drinks which can be further sub-divided into liqueurs (1), apple juice (2), cider and perry (1) and beer (2).

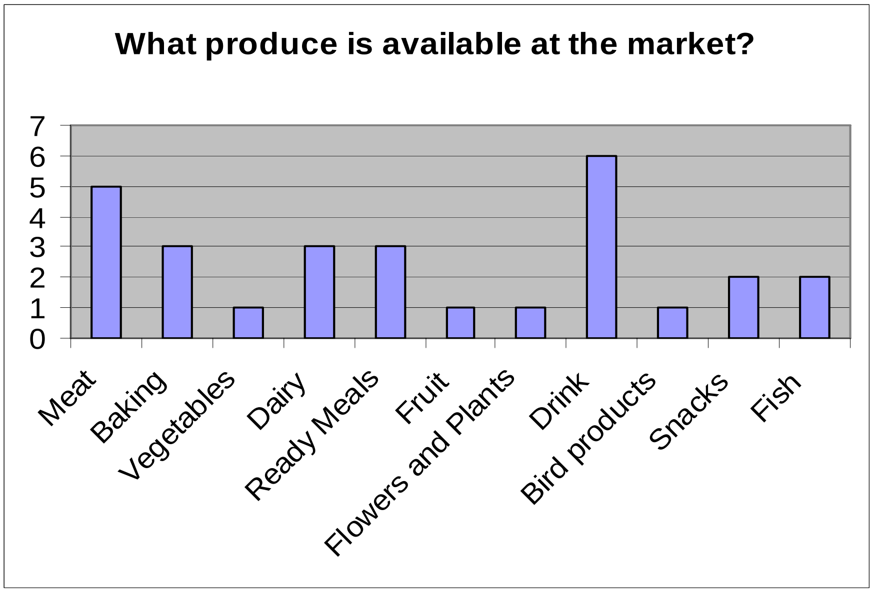

Fig 54: Products sold at Ludlow market (sample size 28)

All producers were asked what their average takings were over the year, as you can see below there is a wide range of takings. The most noteworthy of all is that the majority of producers (66%) make over £151 with 30% taking over £300.

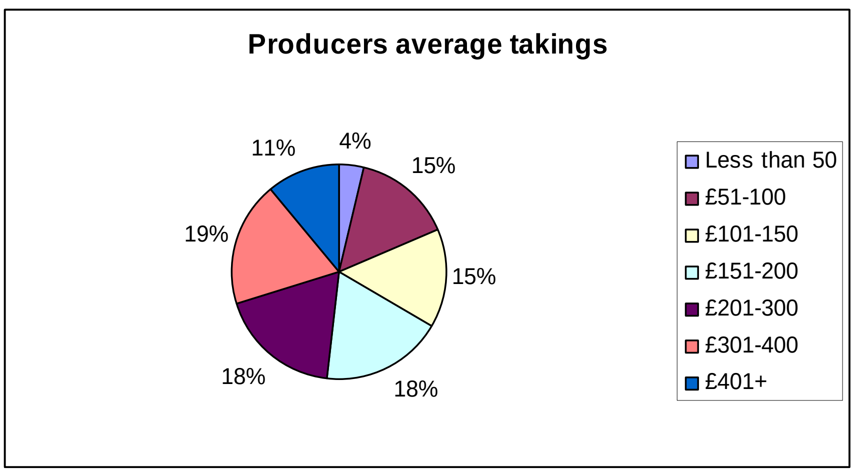

Fig 55: Average taking Ludlow (sample size 33)

Producers were allowed two main opportunities for rating the market, one with an open ended question regarding suggestions for improvements and the other by scoring certain aspects of the market out of five. The open ended questions have been categorised and are available below. The main issues are more customers and more targeted advertising, which mainly included site specific signs around town just before the market takes place. An ongoing problem with the vans that tend to be left on the square unused on market day have been an issue for organisers and producers for some months, although they were removed at the last market.

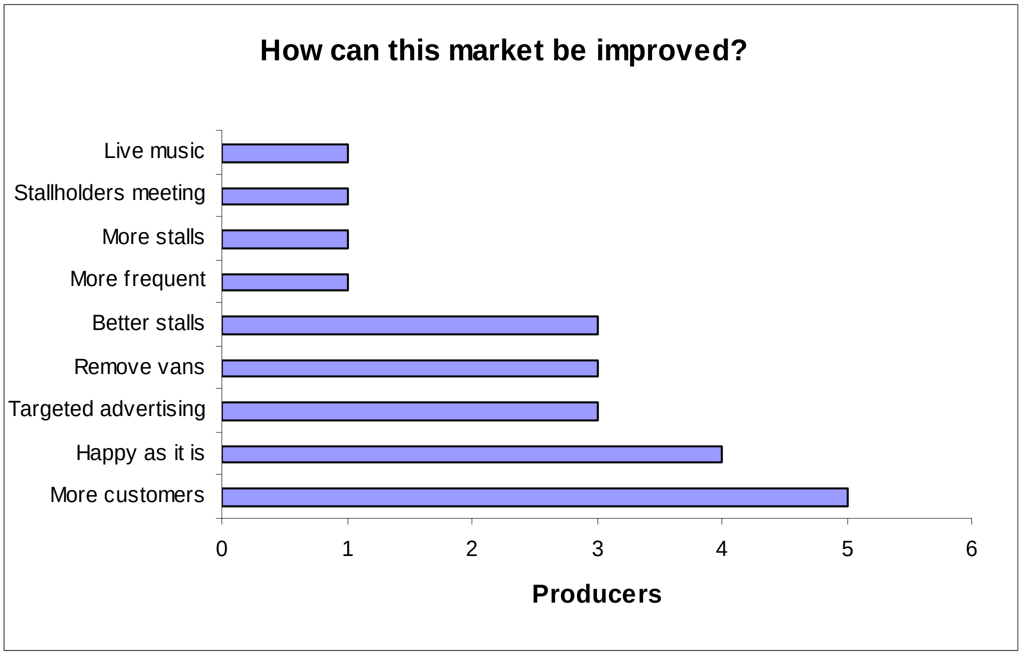

Fig 56: Producers improvements Ludlow (sample size 33)

In terms of specific scoring, Ludlow appears reasonable, with organisation and promotion both scoring markedly better than average, but with cost of stalls (the highest in the area) and venue scoring slightly less than average. Number of customers reappears as a concern (a score of 2.6 against the average of 2.8) which endorses the previous findings in Fig. 56.

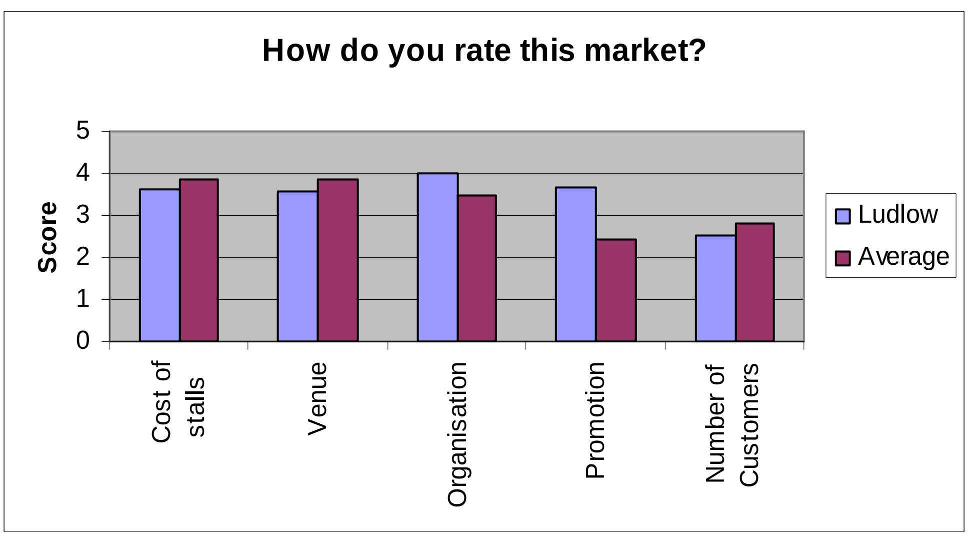

Fig 57: Rate this market Ludlow (sample size 33)
Average: Mean of all individual market ratings

A large proportion of the forty nine customers interviewed were local, with 44% from the town itself and 37% between 5-15 miles, followed by 13% at 16-50 miles and 6% from over 51 miles. The customers are also loyal with 54% coming on a regular basis. Interestingly 22% were first timers in this very low season for tourists, so it was useful to have a look to see where these people where coming from. Of those ten people that were first timers, seven lived within 50 miles (3 of them within 15 miles) so if their experience was a positive one they might easily return.

In terms of travel only 33% walked to the market which is surprising when 44% are from Ludlow, but maybe this is due to the amounts being spent by customers. As you can see below, nearly half are spending over £11.

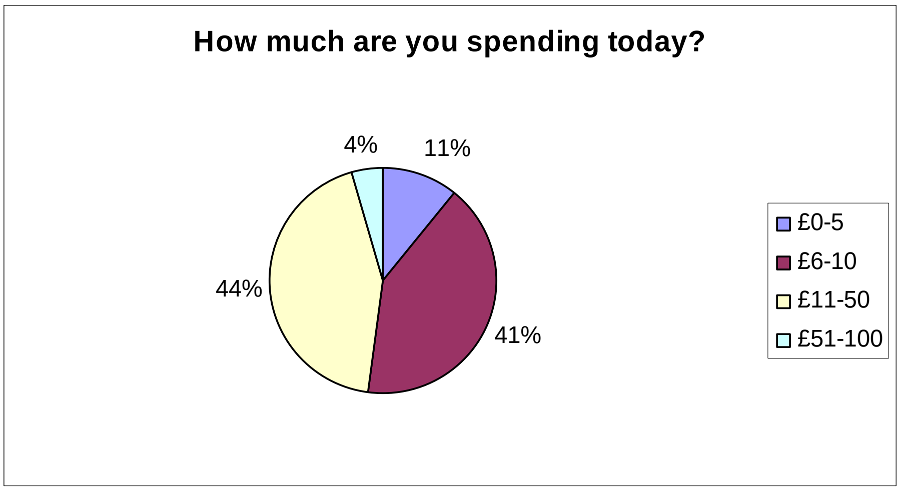

Fig 58: How much spent Ludlow (sample size 46)

In terms of knowing when the market is on the majority use the leaflet which is a well established promotional tool for Ludlow. In addition to this the day ‘Second Thursday’ of the month is also used by a significant number of people.

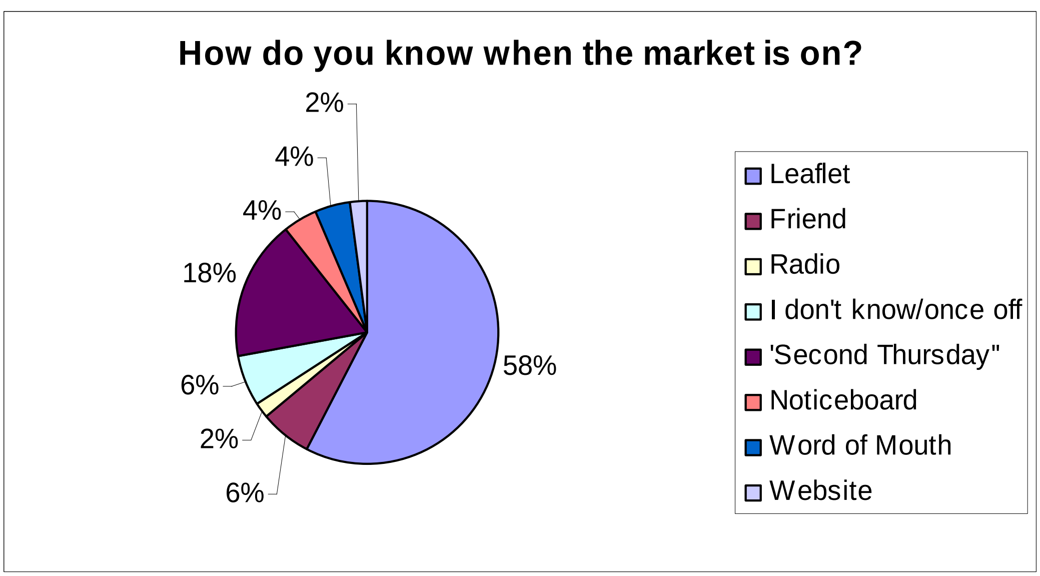

Fig 59: Remember market: Ludlow (sample size 46)

On the day of interviewing there were 28 stallholders selling produce, as seen in Fig 54 above. In terms of what was bought, the majority of customers were buying fruit and vegetables (23%), bread (17%) meat and dairy (13%) and drink (11%) and much more besides showing the broad variety of produce available at Ludlow. In terms of products missing, there weren't many suggestions; the only one of note was fresh fish which three customers mentioned.

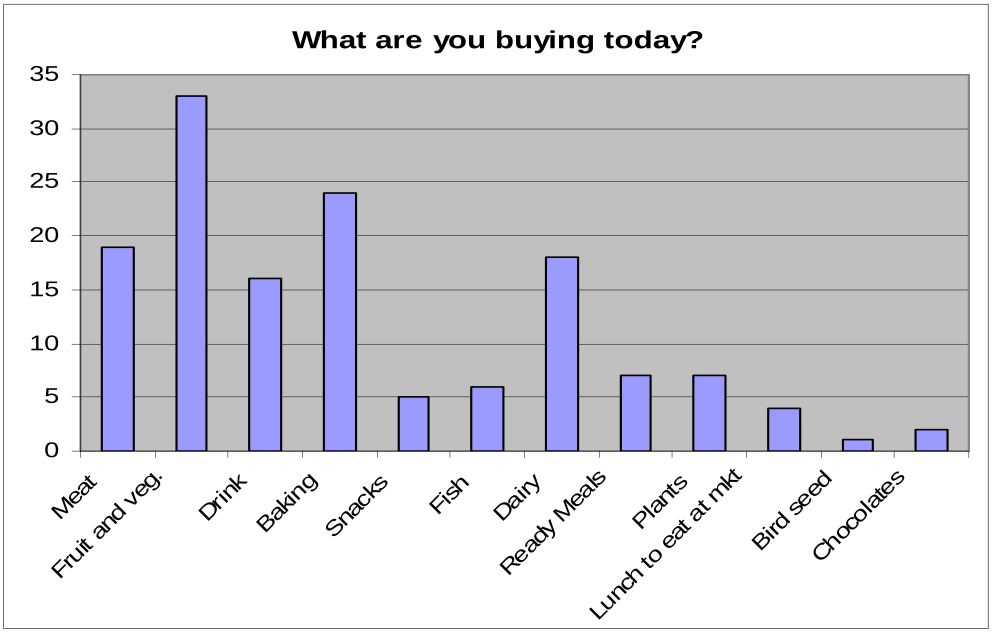

Fig 60: What are you buying Ludlow (sample size 46)

Of all the customers interviewed 39% do attend other farmers' markets, with popular ones cited including Craven Arms and Bishops Castle. Of these customers, 83% of respondents felt that Ludlow was the best market and none felt that Ludlow offered a poorer experience than the other markets that they attended.

The customers were a mix of ages with a predictable 58% over 55, however there was a respectable number of younger people as well with nearly 40% between 25 and 44. This is equally reflected in employment status where 54% are retired and 37% are in employment and only 7% homemakers. This may be due to the fact that the market is on a Thursday; therefore working people would be less able to attend.

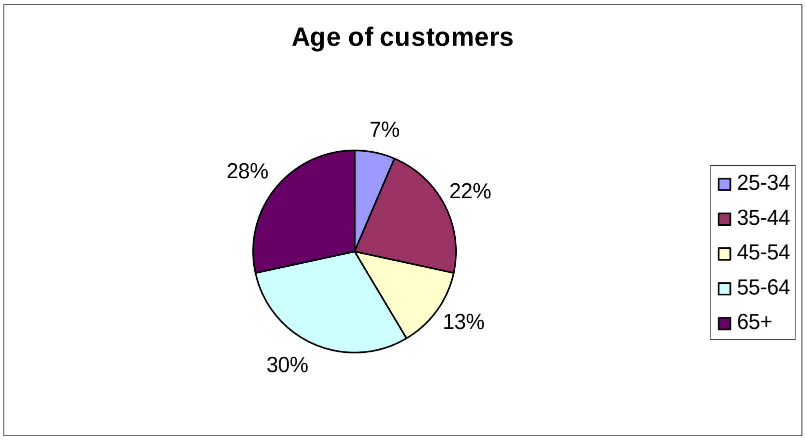

Fig 61: Age of customers Ludlow (sample size 46)

When customers were asked about any additional activities which they would be interested in, alongside or as an addition to the market, tasting session came the highest with farm tours/open days being popular. There is already an annual programme of farm tours organised by Local to Ludlow, and this might need further promotion. As far as market development maybe some tasting sessions and cookery workshops/demos might be an appropriate way forward.

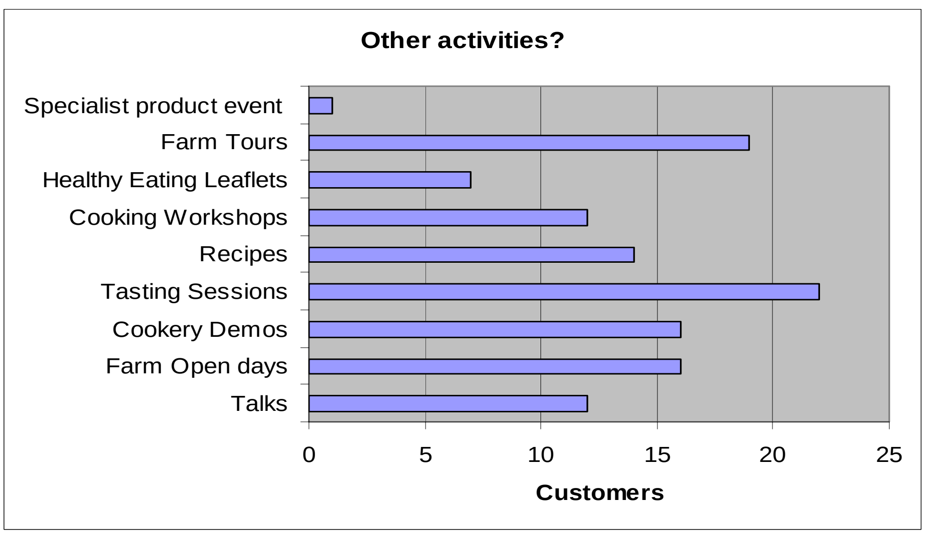

Fig 62: Other activities Ludlow (sample size 46)

All the individual producers interviewed at the various AONB markets were asked as to whether they would be interested in attending Ludlow farmers' market. The graph below shows that on the whole they are already in attendance with only six possibly interested new producers. The size of the current market means that a number of producers are unable to attend due to their range of products being already provided.

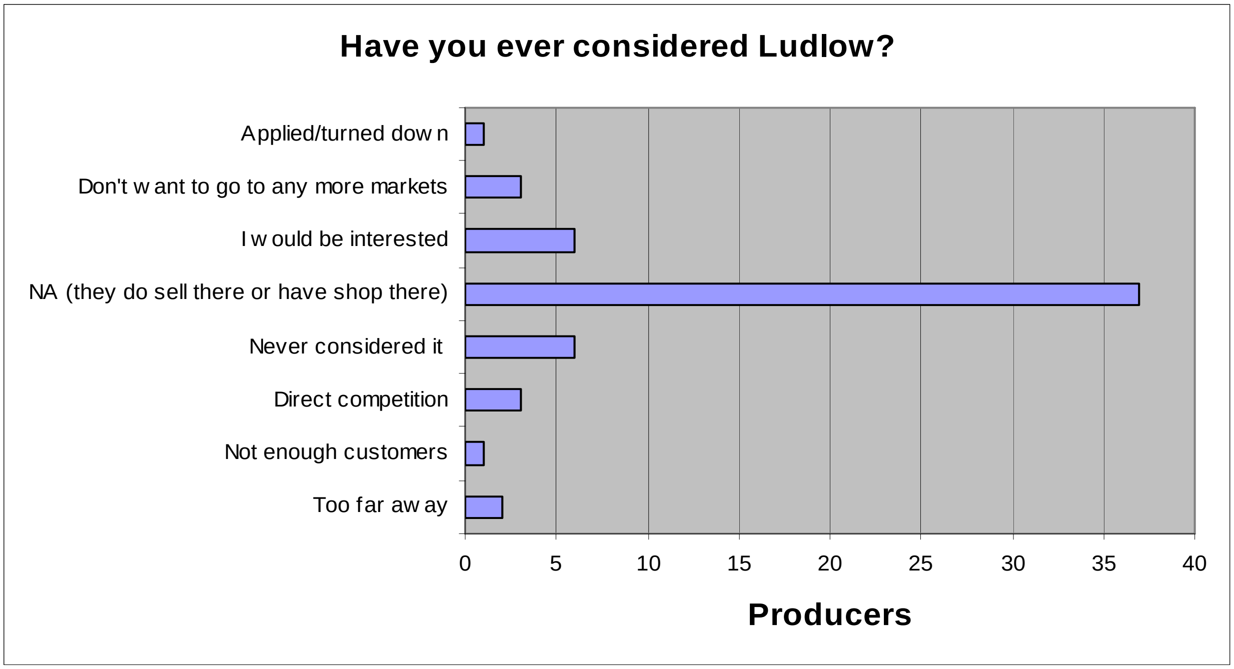

Fig 63: Considered Ludlow (sample size 59)

5.6 Much Wenlock - Market profile and findings

Much Wenlock farmers' market is fortnightly, alternating with Church Stretton. The town has a population of three thousand inhabitants but has a populous potential catchment area as it is within fifteen miles of the Telford and Wrekin conurbation which has a population of 160 000, ten miles from Shrewsbury, (pop. 70 000) and twenty miles from Wolverhampton (pop. 240 000). The market has been operational for three years and is mainly overseen by the Town Clerk and a local farmer who sells at the market. It was originally started by the local farmer who felt as though the town would benefit from a regular source of local produce.

The market operates all year round with an average of four market holders, although this does vary due to season. The charge for the stalls is £8.75 and this will go up to £9 in April. The market is publicised by the stall holders themselves one of whom hangs a banner outside the venue. Its notice is carried in the Wenlock Herald and the 'Town Diary' which is on the notice-board outside the town hall. The market has no particular rules although local produce and craft are what is encouraged. The market itself has an excellent location in the old 'Butter Market' in the centre of town. The Town Clerk felt that the market would benefit from having a few more regular stall holders.

On the day of interview there were four producers comprising of meat (2) nest boxes (1) and antipasti/olives (1). All of the producers came from within 30 miles of the market and described themselves as regulars although two had only done the market once or twice before, whilst the other two had been doing it for five years or more. The weather conditions were unfavourable as it was a very cold day and there had been a fall of snow the night before.

The takings by the producers were relatively low, with two taking less than £50 and the others taking between £151-200. Based on an average for takings it is possible to estimate that the entire market's takings were in the region of £350. Producers were equally split on description of takings poor (2) and adequate (2).

In terms of improving the market all of the stallholders were asked for their views in an open ended question. The results can be seen in Fig. 64 below. The main features are to advertise more and get some additional producers to attend. One other useful suggestion was to set a particular two Fridays in a month such as '2nd and 4th Friday'. This would help customers know when the market is on and allow for production of leaflets and posters to be distributed and kept up indefinitely, although it would mean the loss of a couple of markets a year. Another issue regarding number of attending producers is the frequency of the market – it may be that by reducing the frequency, more producers would be able to attend and therefore the market would grow in stature.

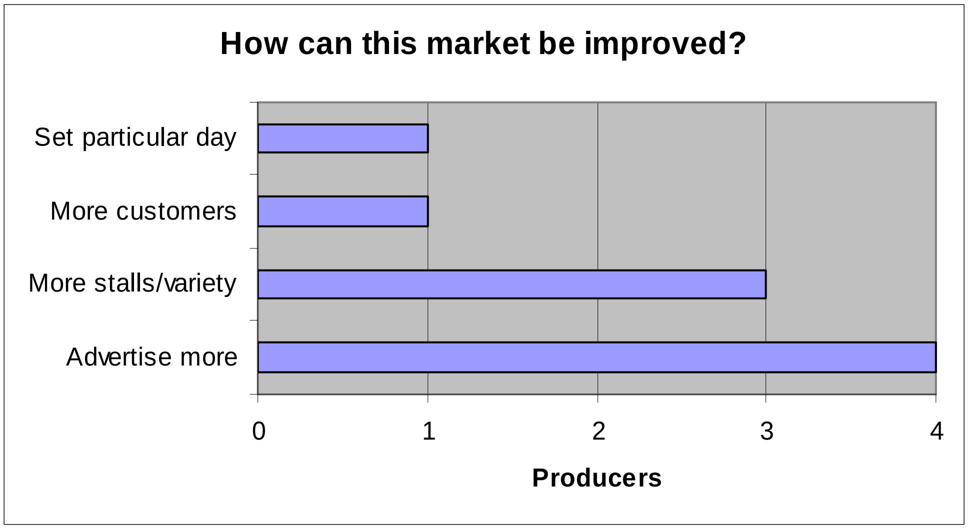

Fig 64: Market improved: Much Wenlock (sample size 4)

Equally the producers were asked to rate the market out of five on certain features including cost of stalls, venue, organisation, promotion and number of customers. The producers seemed to feel that the market was not functioning very well, with the highest score for cost of stalls (indeed one of the lowest in the area) and lowest scores were for promotion (1.5) and number of customers (1.7), both markedly below the average for the markets surveyed.

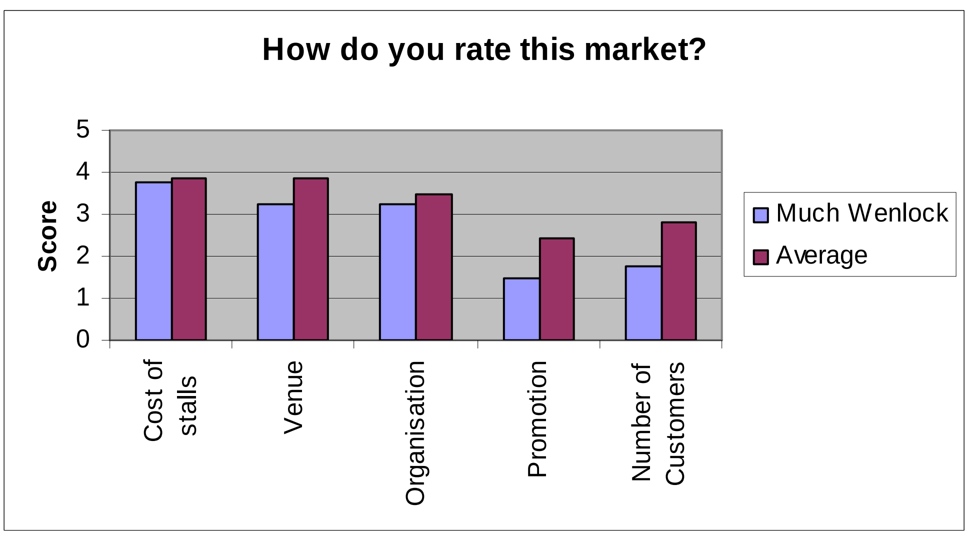

Fig 65: Rate market: Much Wenlock (sample size 4)
Average: Mean of all individual market ratings

In terms of the thirteen customers interviewed the majority were from the town or just outside and three were between 5 and 50 miles. They were mainly regulars with nine attending every fortnight, and two being first timers. In terms of remembering when the market was on, the two most popular ways were marking it on the calendar or seeing it in the local paper. Over half had travelled by car to the market. Of those that attended other farmers' markets they felt that Much Wenlock was not as good as others.

In terms of what was being bought on the day nearly all were buying meat, four olives/antipasti, two dairy and eggs (both provided by one of the meat producers) and one bird seed. Produce that was felt to be missing from the market included a greater variety of fruit and vegetables (7) and cheese (4). The average spends by customers were split with nine people spending less than ten pounds and three spending between £11 and £50 so there are some larger spends taking place.

In terms of the ages of customers it was relatively evenly spread with similar numbers in each of the 35-64 age groups and a couple over 65. This was made up of six retired, six employed and one homemaker.

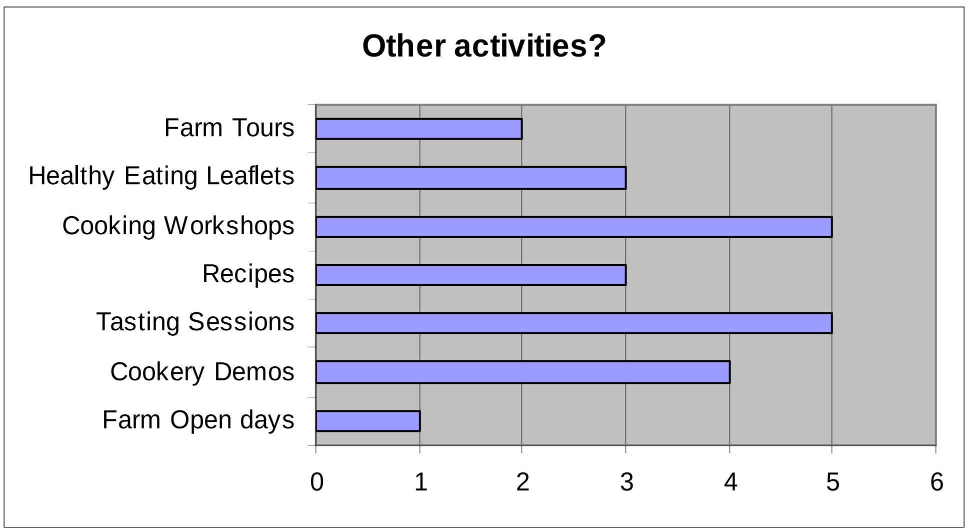

Fig 66: Other activities Much Wenlock (sample size 13)

When customers were asked about any additional activities which they would be interested in, alongside or as an addition to the market, cooking workshops and tasting sessions were both popular.

All the individual producers interviewed at the various AONB markets were asked as to whether they would be interested in attending Much Wenlock farmers' market and there were twelve possibly interested in attending.

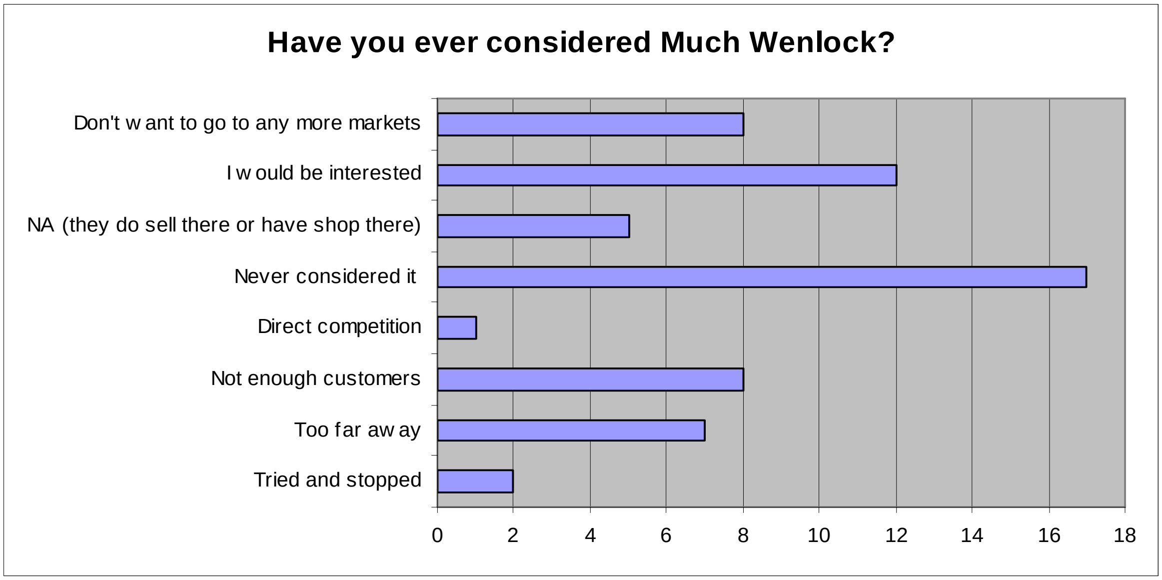

Fig 67: Ever considered Much Wenlock (sample size 59)

6. Conclusion

Some of the principal social, economic and environmental benefits of farmers' markets outlined on pages 6 and 7 are worth reflecting on in light of the study's findings.

For the local economy every pound spent at a farmers' market creates twice as much wealth in the locality as a pound spent at a supermarket where the local 'multiplier effect' is lower than one. The markets provide a valuable outlet for farmers and other food suppliers and an inexpensive entry route for start-up businesses. The study shows that they are also particularly important to producers as a source of feedback and marketing.

Environmentally, food sold at farmers' markets involves less transport and less packaging than the equivalent sold at a supermarket. There is a general understanding and appreciation amongst customers that producers that sell through farmers' markets are less intensive in their farming methods and therefore less harmful to the natural landscape. The emphasis on smaller scale production and, often, traditional varieties is compatible with maintenance of the local farm landscape in a way that large-scale industrial methods are not. The producers themselves show an interest in organic methodologies as well as conserving traditional breeds and varieties. These factors will ensure that producers that adopt this type of approach will reap the benefits from a growing number of conscientious consumers.

Socially, there are health benefits in consumption of fresh, unprocessed foods, and local communities are reinforced by establishing close connections between primary producers and their customers. Networking amongst producers is a much appreciated aspect of farmers' markets, often leading to important commercial links. Well-managed farmers' markets can make money for the town council or association that runs them, increase business for other shops in the town and as an added tourist attraction.

This study demonstrates that there is already significant success in the farmers' market sector in South Shropshire in bringing some of these benefits to the area. Each of the six markets has its loyal customers and regular stallholders doing good business in attractive town centre venues. At least one market is also bringing in significant income to the town and achieving a good reputation beyond the area. Customers show a strong commitment to supporting local producers and many of those producers are finding farmers' markets an important contribution to their survival and growth. These are strengths which can be built on.

However the research also suggests the danger of a downward spiral in some of the smaller markets with producers dropping out because of low customer numbers and consequent inadequate receipts. This leads to a less satisfactory experience for shoppers who, finding only a limited range of products and none of the ‘buzz’ of a busy market, may not return,

All producers interviewed emphasised the importance of better publicity and many customers indicated problems with knowing when markets were on. With the exception of Ludlow and Craven Arms there has been very little expenditure on regular publicity, and a publicity campaign would seem to be a relatively simple but effective first step in promoting the markets. A start has been made this year on a joint publicity leaflet - 2006 Calendar of Food Events - but a lot more could be done in both recruitment and retention of customers.

Because of the low population density and poor transport infrastructure of South Shropshire the local customer base for any market is inevitably relatively small, particularly in the more remote towns. However, the significant proportion of new customers at each market suggests that market penetration is as yet low and there is plenty of scope for expansion, particularly if numbers can be swelled with tourists in season. Without vigorous efforts to maximise the customer base the inherent difficulties of low population density will not be overcome and producers will opt for attending the larger, metropolitan markets where customer numbers and turnover are higher.

There is a perception that food at farmers’ markets is always more expensive than elsewhere. While this has been shown to be true for some produce (disregarding the added value of traceability, high quality and low ‘food miles’) local fruit and vegetables are consistently found to be cheaper and the challenge is to get this message over to potential customers. The preponderance of the elderly among the customers may indicate a need for more publicity targeted at younger age-groups and some markets take place on weekdays thereby also reducing attendance by working people.

For a publicity drive to be successful in the long term, new customers, however well predisposed to support local producers, need to enjoy the shopping experience. This will only be achieved if the number of producers at each market reaches a ‘critical mass’ sufficient to cover all main categories of product and to give the markets themselves a sense of vibrancy. Assembling this critical mass of perhaps 10 or 12 producers committed to regular attendance presents a much bigger challenge to market organisers than generating publicity.

Proportionately not a great deal of the produce sold at farmers’ markets in South Shropshire comes from within the AONB itself. There are notable exceptions such as organic vegetables and smoked fish, but most producers surveyed are based in Herefordshire, with a significant number coming from over the Welsh border. This means that for some products such as cheese and fruit, producers would have to come quite long distances to sell in South Shropshire and the attraction may not compete with the appeal of big markets in the West Midlands conurbation. However smaller local markets can be a cheaper and less risky venue for new producers ‘dipping a toe in the water’ and this could provide an impetus for new products to be developed within the area.

The research shows that there are a significant number of current producers who would at least consider attending other South Shropshire farmers’ markets. But recruiting enough stallholders with the right mix of produce to provide a good variety and persuading them to commit to regular attendance will certainly involve convincing them that there will be an extensive publicity campaign and possibly other incentives. It will also involve a proactive engagement by market organisers to identify gaps in the range of products and to actively canvass producers who could fill them. Maximising the attractiveness of the market for producers and customers alike - for example by ensuring cheap and easy parking or by providing additional attractions such as the cookery demonstrations or tasting sessions which appear popular with customers – will also offer significant benefit.

In order to take the next step in ensuring a healthy future for the farmers’ markets in the AONB region it is imperative that an assessment is made of the resources and the time and energy available to the organisations running the markets to ensure that they are up to the job. Possible sources of external funding should be researched and appropriate financing accessed to support any effort to make the markets more sustainable for the future.

The following recommendations address some of these challenges.

6.1 Recommendations for Action

- Present and discuss findings with producers and organisers;
- Involve producers and organisers in a planning process, looking at:
    - Identifying key resources e.g. people, assets;
    - Identifying gaps in provision and targeting specific producers to fill them;
    - Developing ‘discount offer packages’ for producers to encourage them to commit to attending a number of different towns’ markets;
    - Coordinating dates – consider monthly markets as a way forward;
    - Investigate possibilities of organising bus transport from outlying villages to markets;
    - Consideration of additional activities as a ‘crowd puller’ to enhance visitor experience;
    - Developing mini-marketing plans to identify customer bases for each; market and promoting the markets to these potential customers;
    - Agreeing on a way of co-ordinating work effort.

- Identify and apply for financial assistance that would help establish markets;
    - Plan to re-brand markets both individually and collectively;
    - Consider marketing effort both jointly and individually;
    - Consider devising a website that will take bookings and keep producers abreast of developments.

Appendix A: Producers Questionnaire

MKT:							**No.**						
Producers' Survey													
1. Name?													
2. Post Code?													
3. Main product you sell?													
4. How long have you had a stall here?													
5. Frequency at this market?													
Regular		Regular Seasonal		Occasional		New		Other……………………					
6. Could you indicate your average takings at this market?													
Less than 50		£51-£100		£101-£150		£151-£200		£201-£300		£301-£400		£401 plus	
7. How would you describe your average takings at this market?													
Good		Adequate		Poor									
8. How important are sales at FMs to your business's overall profitability?													
Crucial		Important		Not very Important		Insignificant							
9. How do you rate this market? (Scale of 1-5, 5= very good)													
Cost of Stalls		Venue		Organisation		Promotion							
Numbers of customers													
10. How could this market be improved? (please specify) ……… ……………………………………………………… ……… ………													
11. Other than financial are there any other benefits of selling at ? (please specify)…… ……… ………													
Other markets													
12a. Do you sell at other Farmers' markets? yes/no													
12b. If so, which one(s)?													
12c. Out of all the FMs you attend, which do you think is the best?													
12d. Why? .... …… ……… ………													
13. Which of the following factors are important in deciding whether to attend an additional market?													

Low rental		Good venue		Good publicity		Staff availability	
Absence of direct competition				Close to home		No. of customers	

14. Why do you not attend the following markets?

	B. C	**C. S**	**C. A**	**K**	**L**	**M.W**
Tried and stopped	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a
Too far away	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a
Stall rental too much	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a.	yes/no/n.a
Not enough customers	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a
Not enough publicity	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a
Direct competition	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a	yes/no/n.a

14a. Do you have any additional comments? ....
……
……
……………………………………………………………………………………………………

15. Do markets that manage the number of producers and their products in relation to competition make a significant difference to your attendance at a market?

Yes, definitely	Yes, helpful	No, not bothered	Other…………………………

16. Do you sell products by any other means?

'farm gate'		Own farm shop		A farm shop		Box scheme	
Mail Order (post/phone/email)				Supermarkets		Independent shops	
Online (secure credit card payments)				Markets (not FMs)			
Other……… ……………………………………………….							

16a. Any comments about these? ....
……
……

17. Are you interested in having a website that accepts credit card payment? yes/no/already have one

18. Thinking about your relationship with the local landscape, which of the following statements describes your business?

Conserves		Enhances		No effect		Detrimental	

19. Please explain your answer ………………………...
……
……

20. Are you interested in learning more about conserving the landscape? yes/no

21. Is there any training or support you would benefit form? yes/no

21a. If so what? ....
……………………………………………………………………………………………………
……………………………………………………………………………………………………

All information given will be used in a report about the sustainability of farmers' markets, there will be no disclosure of personal details with regard to answers given.

Appendix B: Customers Questionnaire

						No.					
Customers' Survey											
1. What is your postcode?											
2. Gender	M		F								
3. How often do you come to this market?											
Every month		Every other month		3 to 4 times a year		Once off					
4. How did you first find out about this market?											
Leaflet		Article in paper		Friend		Other…………………………………. ………………………………………..					
Just saw market was on				Radio							
5. How do you know when the markets are on?											
Leaflet		Article in paper		Ask a friend		Radio		Other………………….			
6. What was the main form of transport you took to get here today?											
On foot		By car		Bus		Train		Private Coach		Other………………	
7. Would you find a bus service to the market useful? yes/no											
8a. Do you go to other Farmers' markets? yes/no *(if 'no' skip to 9)*											
8b. If 'yes' which one(s)? .... ……… ………………………………………………………………………………											
8c. How does this market compare?											
Better		Same		Worse		Comments…………………………………………………………… …………………………………………………………………………… ………………………………………					
9. What are you buying today?											
Meat		Fruit and veg.		Drink		Baking		Snacks		Fish	
Dairy		Ready meals		Plants		Lunch to eat at mkt		Other……………………………… ………………………….			
10. How important is it that products are organic?											
Very important		Quite important		Not very important		Not at all important					
11. How much do you expect to spend at the market?											
0-£5		£6-£10		£11-£50		£51-£100		£101+			
12. What are your three main reasons for shopping here? *(Please tick **three** only)*											
Quality		Good value		Range of produce		Nice experience		Taste			
Support local producers		Traceability(known origin)		Reduce food miles							

13. Are there any products you feel are missing from the market? *(please specify)*…………….
………
………
………………………………………………………………….
……….

14a. Do you buy local produce from any other source other than a FM? yes/no

14b. If 'yes' where?

'farm gate'		Farm shop		Box scheme		Independent shops	
Mail Order (post/phone/email)				Supermarkets			
Online (secure credit card payments)				Other…………………………………………………			

14c. Any comments with regard to these?
....
………
………
………
…………………………………………

15. Thinking about local producers and the landscape, do you agree, disagree or not sure about the following statement?

'Buying local produce helps to conserve the landscape'	agree	disagree	not sure

15a. Please explain your answer ……….………………………………………………………………
………
………
………
………
……………………

16. Are any of the following of interest to you?

Talks		Farm Open Days		Cookery Demos		Tasting Sessions		Recipes	
Cooking Workshops		Healthy Eating Leaflets		Farm Tours		Other…………..			

17. Can you tell us your age?

Under 18		18-24		25-34		35-44		45-54		55-64		65 +	

18. Which of the following would you use to describe yourself?

Student		Home-maker		Unemployed		Retired	
Employed Part-time		Employed Full-time		Self-Employed			

19. Would you be interested in receiving an email reminder when the market is on?
If 'yes' please write address:
……

Appendix C: Confidence Intervals

Sample Sizes	**95% confidence interval for the following percentages**				
	10%	**30%**	**50%**	**70%**	**90%**
170	+/- 4.51%	+/- 6.89%	+/- 7.52%	+/-6.89%	+/-4.51%
72	+/- 6.93%	+/- 10.59%	+/-11.55%	+/-10.56%	+/-6.93%
59	+/- 7.66%	+/- 11.69%	+/-12.76%	+/-11.69%	+/-7.66%
46	+/- 8.67%	+/- 13.24%	+/-14.45%	+/-13.24%	+/-8.67%
30	+/- 10.74%	+/- 16.4%	+/-17.89%	+/-16.4%	+/-10.74%
13	+/- 16.31%	+/- 24.91%	+/-27.18%	+/-24.91%	+/-16.31%

Appendix D: List of all farmers' markets attended by producers interviewed

Aberlees
Abergavenny
Aberystwyth
Albrighton
Alderley Edge
Bearwood
Bishops Castle
Brecon
Bridgnorth
Cardiff
Cheltenham
Chester
Chipping Sodbury
Church Stretton
Craven Arms
Droitwich Spa
Dudley
Gloucester
Halesowen
Hay-on-Wye
Hereford
Kelsall
Kings Norton
Knighton
Leek
Leominster
Lichfield
Llandovery
Llandrindod Wells
Ludlow
Malvern
Moseley
Mould
Much Wenlock
Mumble
Nantwich
Oswestry
Penkridge
Rhayader
Ross-on-Wye
Shrewsbury
Shipley
Stafford
Stone
Stourbridge
Stroud
Teme Valley
Tenbury Wells
Usk
Wellington
Welshpool
Wolverhampton
Worcester

Appendix E: National Association of Criteria

1. Locally produced
Only produce from the defined area shall be eligible for sale at a farmers' market. Producers from the area defined as **local** must be given preference.

2. Principal producer
The principal producer or a representative directly involved in the production process must attend the stall.

3. Primary, own produce
All produce sold must be grown, reared, caught by the stall holder within the defined local area.

4. Secondary, own produce
All produce must be brewed, pickled, baked, smoked or processed by the stall holder using at least one ingredient of origin from within the defined local area.

5. Policy and information
Information should be available to customers at each market about the rules of the market and the production methods of the producers. The Market should also publicise the availability of this information.

6. Other rules
Markets may establish other criteria in addition to the above provided they do not conflict with them.

Appendix F: Ludlow Local Produce Market – Producer criteria

All goods must be produced within 30 miles of Ludlow. The steering committee may extend this to 50 miles in exceptional circumstances e.g. for produce unavailable within the 30-mile radius. As vacancies arise for a particular type of product priority will be given to producers who are closer to Ludlow.

All food or drink offered for sale must be grown, reared, caught, brewed, pickled, baked, smoked or processed by the stall holder. No ‘bought-in’ produce is allowed.
Primary produce, including livestock, must have been grown or finished on the producers’ land.
Processed foods must have been made in the defined area and use local ingredients wherever possible. In case of competition, priority will be given to those processed products which contain the higher proportion of local ingredients.

Produce which is not eatable or drinkable may be allowed at the discretion of the steering committee. It should be derived from the land and meet the other criteria.

The stall must be attended by someone directly involved in the production process. Producer co-operatives and community groups may take stalls at the discretion of the steering group but must ensure that the stall is attended by representative producers. Each producer represented on the stall must make a separate application and satisfy the other criteria.

All goods offered for sale must be wholesome and of good quality. No genetically modified produce, or goods containing GM ingredients may be sold.

Stall holders must provide written information for customers about their production methods and ingredients.

Stall holders must comply with current Trading Standards, Environmental Health, alcohol licensing and any other relevant requirements.

Producers must maintain public, employee and products liability insurance. Copies of these should be sent to the organisers. The Town Council requires stallholders to carry public liability insurance for £2m.