

SCOTTISH FOOD ADVISORY COMMITTEE
SURVEY OF FARMERS' MARKETS
EXECUTIVE SUMMARY

December , 2001

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RESEARCH BACKGROUND AND OBJECTIVES

This report details the findings of the independent market research conducted by Scotinform Ltd on behalf of the Scottish Food Advisory Committee (SFAC). The research included a survey of stallholders, local authority enforcers and consumers at farmers' markets across Scotland.

The aims of the research were:

- to identify the issues affecting stallholders' and consumers' attendance at farmers markets
- to identify the involvement and role of the local authority enforcement officers
- to assess consumer perceptions of food safety issues

The study was carried out in September – November, 2001 using the following methods:

Stallholders: Stallholders completed self-completion questionnaires distributed at selected markets, by market organisers or mailed direct. These questionnaires were either handed back to Scotinform researchers at the market or posted back to Scotinform using a pre-paid postal envelope. A total of 254 questionnaires were distributed to stallholders, with 87 useable questionnaires completed and analysed.

Consumers: Scotinform researchers completed 209 face-to-face interviews with the consumers present at ten farmers' markets.

Local Authority Enforcers: Scotinform researchers completed 20 telephone interviews with local authority enforcers selected to represent local authorities throughout Scotland.

RESEARCH RESULTS

Consumer Profile and Attendance

The profile of consumers visiting farmers' markets were predominantly female, aged over 45 years old and in full time employment or retired. Indeed, 71% of all consumers were over the age of 45. 69% of consumers had no children living in their household.

Consumers were unlikely to live outside the local authority in which the farmers' market was held. Kelso farmers' market was the only market to record significant numbers of non-Scottish attendance (20%).

Over 50% of consumers stated that they attended the farmers' markets on a monthly basis. This attendance rate reflects the regularity at which the farmers' markets are generally held in a given area. In Edinburgh and Glasgow, however, the consumers' attendance at farmers' markets was more likely than in other areas to be fortnightly. The distance travelled in order to attend farmers' markets by consumers reflected their local profile: it was found that 88% of respondents travelled less than 15 miles to attend the markets.

Stallholders' Attendance

Stallholders were most likely to attend the Edinburgh farmers' market, with 41% of stallholders who responded to the survey saying that they attended this market. The next most popular market for stallholders was Glasgow Byres Road (25%).

39% of stallholders stated that they sold food at markets on a weekly basis, and 15% on a fortnightly basis. Given that there are few, if any, farmers' markets held on a weekly basis, this suggests that the stallholders attend multiple markets, a suggestion that is supported by our research. 53% of stallholders travel a minimum distance of between 3 and 15 miles to sell their produce and 33% travel a maximum distance of over 45 miles.

Reasons for Food Purchasing

94% of consumers stated that they usually bought food or food products at the markets. The largest single reason cited for food purchase at farmers' markets was the quality of the product sold (mentioned by 72% of consumers). The next most popular reason was to support local farmers (31%). These results suggest that the consumers have faith in the quality of the product available at the markets, and that they can identify with and want to support their local farmers.

Other reasons given by consumers for purchasing food from farmers' markets were that the food was organic and contained less pesticide (17%), the known origin of the food (12%), the food was fresher (10%) and the price of the food (9%).

Perceptions of Food Safety

The results showed a positive perception of food safety at farmers' markets, with nearly 60% of consumers saying they were not very or not at all concerned. The positive image was shown by the fact that farmers' markets were ranked second of the locations, with food safety at home the only area with a more positive perception. By comparison, perceptions of food safety in abattoirs and supermarkets were low, with only a fifth saying they were not concerned about food safety in abattoirs and a quarter saying they were not concerned about food safety in supermarkets

Food Labelling at the Farmers' Markets

Local authority enforcers felt that food labelling requirements were being met on produce sold at the markets, with 13 of 20 enforcers stating that requirements were always met, and a further 5 stating that food labelling requirements were being met 'sometimes'.

The monitoring of the food labelling requirements by enforcers were most likely to be undertaken through looking at the labels (11 enforcers).

Foods Sold at the Farmers' Markets

Vegetables, lamb/mutton, home baking and fruit were the most likely food products to be sold. In total, 36% of stallholders (32 respondents) sold meat, compared with 21% selling vegetables.

The table below illustrates the percentage of food products that were sold at the markets. It is clear that a wide variety of food products are sold at farmers' markets.

Food type	%
Vegetables	21
Lamb and Mutton	18
Preserves	18
Home baking	17
Fruit	16
Eggs	15
Beef	14
Meat products, eg burgers, pies	14
Herbs	14
Pork and Bacon	10

Over two thirds of stallholders produced their food on the farm, with a further 24% stating that their food was produced at home/kitchen/garden.

One fifth of stallholders only sold their food produce at farmers' markets. Of the 79% who used other outlets, the most likely outlets were hotels and restaurants, shops (other than their own), or their own farm shop.

The Sale of Meat at Farmer's Markets

In total, 36% of stallholders sold meat, with lamb and mutton being the most frequently sold meat products.

Only a small percentage of stallholders and enforcers claimed to have difficulties with the current regulations regarding the sale of meat at the markets. The main issue of concern was the sourcing of a local abattoir/licensed cutting facility in order to prepare the meat for sale after slaughter. The opinion expressed by both stallholders and local authority enforcers was that the current regulations

regarding the sale of meat at farmers' markets meant that some farmers were spending a relatively large amount of time and money to prepare the meat for sale.

The main solution, suggested by the stallholders, to the issue of preparing meat by cutting and jointing was that local butchers who are currently licensed to cut and joint meat for their own sale should also be allowed to prepare farmers' meat for sale at farmers' markets.

Enforcer's Supervision of Farmer's Markets

Three out of the 20 enforcers interviewed visited the farmer's market every time it was held. Five enforcers visited it almost every time, and 10 inspected occasionally. Only one enforcer did not visit the market at all. In general, enforcers did not feel that their presence was required at every market and 18 out of 20 enforcers were either very or quite satisfied with the management of the markets.

In most cases, the enforcers saw the local authority as having a relatively passive role in the running of farmer's markets. In a few areas, local authorities have become very actively involved, perceiving the successful establishment of farmers' markets as a matter of local economic development.

Although the current inspection of markets by local authority enforcers is variable between different local authorities, individual farmer's markets vary significantly in both size and scope, and therefore can have differing monitoring needs.

Licensing

Nearly one in five stallholders (18%) said they did not have a licence. The licences that stallholders were most likely to have were a Food Premises Licence (30%) or a Street Traders Licence (22%). 13% had a Market Operators Licence and a further 10% said that the farmers' market as a whole was covered by one licence.

Five of the 20 local authority enforcers interviewed stated that they did not issue any form of licence to farmers' markets. The most common licence that the enforcers issued was a Market Operators Licence (issued by 10 enforcers). Only 3 of the 20 enforcers stated that they issued individual street traders licences to every stallholder attending the market.

Stallholders Food Training

53% of stallholders held a Basic Hygiene Certificate, and 15% held an Intermediate Hygiene Certificate. Only 18% of stallholders had no formal food hygiene training experience or qualifications. The likelihood of staff, other than the stallholder, having training or qualifications was low, although this may be a reflection of stallholders not employing staff rather than their staff not receiving training.

Written Advice and Guidance for Stallholders

The most frequent source of advice and guidance for the stallholders was the local authority, with 61% of stallholders getting advice from this source. Stallholders rated the information received from the local authority as very useful. Other useful sources of advice and guidance for stallholders included other stallholders and local enterprise companies.

Overall Satisfaction with Farmers Markets

- 60% of consumers stated that they were very satisfied with their visit to the market and a further 32% stated that they were quite satisfied. This clearly indicates that there is a high level of satisfaction from the consumers with their visit to the farmers' market.
- Stallholders were highly satisfied with the facilities at the farmers' markets, with 45% stating that they were very satisfied, and 47% stating that they were quite satisfied. Only 3% of respondents stated that they were either quite or very dissatisfied with the facilities present at the farmers' markets
- 18 of the 20 enforcers interviewed stated that they were either very or quite satisfied with the way in which the farmers' markets were managed. The main reasons for the enforcers' satisfaction was that they considered the market to be well organised, and that the stall organisers appeared to know what they were doing. Enforcers were generally confident in the food safety standards upheld by the market stallholders.
- Overall, the enforcers were positive about the current state of the farmers' markets and were enthusiastic about their continued growth and development in the future.