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MARKETS 4 PEOPLE

Queen's Market: a successful and specialised market serving diverse communities in Newham and beyond

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Queen's Market, Newham, London. (Saif Osmani)

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Executive Summary

This report demonstrates the importance and success of Queen's Market as a specialist, affordable food and textiles market, and a welcoming and supportive community asset serving migrant and ethnically diverse communities in Newham, east London, and beyond.

It is one of three reports documenting evidence from the Markets4People research project¹ about the wide-ranging economic, social and cultural benefits produced by three of the UK's largest and strongest traditional retail markets. Building on previous research, the reports bring a new focus on the importance of markets from the perspective of their existing customers. In each of the three case study markets, the research involved a survey of 500 market users (capturing a representative sample in terms of age, gender and ethnicity), two focus groups with selected user groups and around 10 interviews with key local actors, to contextualise the findings.

Queen's Market was selected for this research as one of three exemplary case studies well-placed to demonstrate the wide-ranging economic, social and cultural benefits of traditional retail markets in the UK. Located in the heart of Newham, east London, Queen's Market is a covered street market including 164 street trading pitches, 65 small shop units and 20 kiosks. Based in one of the UK's most ethnically diverse and low-income communities, it plays an important role in providing access to affordable fresh food, as well as relatively low-cost trading opportunities. It is a listed Asset of Community Value, owned and operated by Newham Council, with a dedicated support group, Friends of Queen's Market, active for over 15 years. Following Rokhsana Fiaz' appointment as Mayor of Newham in 2018, the Council began to address several long-standing issues affecting Queen's Market and to explore redevelopment options for the Market and neighbouring sheltered housing building, Hamara Ghar.

In this context, our research has focused on understanding the *existing* customers' experience of the Market, including economic, social and cultural aspects, as well as wider governance issues.

The key findings from the research include:

Queen's Market is *particularly important to Asian and Black ethnic groups, migrants, people on low incomes and older people*. Thirty-one percent of market users identify as Asian/Asian British (Indian), 25% Asian/Asian British (Pakistani/Bangladeshi) and 27% Black/Black British. The majority of market users were not born in the UK; 46% have lived in the UK more than 25 years. Sixty-nine percent are over 50 years old and 70% are women.

Queen's Market is already a *highly successful shopping destination of choice*, specialising in quality and affordable fresh foods, clothing and textiles. The vast majority of market users do at least half of their food shopping at Queen's Market, with 21% doing all their food shopping at the market. It also drives footfall and spend in the wider town centre: 89% of users said Queen's Market was their main reason for visiting Green Street that day.

Queen's Market is a *social, welcoming and supportive community asset*. Ninety-two percent of market users strongly agree or agree that it is a community hub. Queen's Market is more important to market users than other community facilities (e.g. libraries, parks) and other retail and food outlets.

The current success of Queen's Market suggests that there is *no need for major redevelopment* at Queen's Market. However, it is widely recognised that the Market suffers from a *poor and deteriorating environment*. Our user survey and focus groups found that market users want to see basic improvements to lighting, flooring, cleaning, security and toilets. These problems with the market environment and infrastructure are the product of historic underinvestment at Queen's Market, caused by uncertainty over the future of the Market following previous failed redevelopment plans, as well as complex legislative restrictions, fragmented governance and the Council's current approach to new street trading applications.

In this context, Newham Council's recent efforts to address some of these problems are extremely welcome and long overdue. However, the Council's inclusion of major redevelopment options in a planned 'capacity and viability' study for Queen's Market and Hamara Ghar rekindled fears of demolition, displacement of traders and gentrification of the Market. These fears reflect the *legacy of distrust* which persists between the Council, traders and the community from previous failed redevelopment plans, as well as the experience of traders in other markets undergoing similar projects elsewhere in London, as well as wider research on markets.

However, these issues also contribute to a potentially productive – if challenging – environment for *trailblazing new approaches to managing and improving markets, informed by community wealth building principles*. Queen's Market's status as a community asset, its wide-ranging community value and its long-standing community group, coupled with Newham Council's community wealth building, inclusive economy and Covid-19 recovery policies, make it the ideal test case for developing much-needed alternative approaches to improving and redeveloping markets.

In light of these findings, the report makes the following recommendations, addressed primarily to Newham Council as the Market owner and operator:

- Embed our research across the Council, ensuring that all relevant teams have access to this report and embed it in their work relating to the Market.
- Celebrate the Market's current success and customers, placing them at the heart of the Council's work to manage and improve Queen's Market.

- Identify and mitigate the potential impact of policies on different user groups, in particular equalities groups and other vulnerable groups.
- Continue to address the problem of fragmented governance at Queen's Market.
- Address the historic underinvestment in the Market before progressing any other improvement or redevelopment plans.
- Trailblaze a community wealth building approach to markets at Queen's Market.
- Place the Market at the centre of Newham's recovery from Covid-19.

Beyond the local authority, our findings across the Markets4People research provide a strong rationale to recommend that the national government implement a package of support for market traders and operators, as proposed by the markets' sector lead organisations NABMA and NMTF. This would enable Markets to continue to deliver wide-ranging economic, social and cultural benefits to marginalised, disadvantaged and vulnerable communities as they emerge from the Covid-19 pandemic.

The reports also suggest that the role of traditional retail markets in serving older people, lower-income communities, migrants and ethnic minority groups is something to be celebrated and supported by the sector. The reports challenge the idea that the only future for traditional markets must be to attract new, younger and more affluent customers. Thus, we recommend a joined-up approach by local and national government, which recognises markets' contributions to wide-ranging policy goals relating to economic development, public health and social inclusion. This new community approach can unlock new, much needed investment to reposition markets as community hubs for more sustainable high streets.

Contents

1. Introduction	6
Who is this report for?	7
2. Introducing Queen's Market	8
3. Serving diverse communities in Newham and beyond	10
3.1 A long-standing and active customer base.....	10
3.2 Serving the local community, and beyond	10
3.3 Serving lower-income communities	11
3.4 Serving migrant and ethnic minority communities	12
3.5 Serving older people, women and families	12
3.6 Travelling to the market.....	13
4. A successful and specialised food and textiles market	14
4.1 A unique shopping destination.....	14
4.2 Driving footfall and spending in the Green Street town centre	14
4.3 A specialist food outlet of choice	15
4.4 A quality and affordable fresh food offering.....	16
4.5 A quality and affordable broader offering, in particular in textiles and clothing.....	17
4.6 A unique and highly differentiated offer.....	18
4.7 Limited competition from online retailing	18
5. A social, welcoming and supportive community asset	19
5.1 A convivial social space.....	19
5.2 Facilitating interaction between different ethnic groups	20
5.3 A caring space	21
5.4 An open and welcoming space for all.....	22
5.5 A valued community asset.....	22
6. The future of Queen's Market	23
6.1 Rethinking the current 'balance of trades'/'tenant mix' policy	23
6.2 Historic underinvestment in the market environment	24
6.3 Regeneration hopes and fears.....	26
6.4 A legacy of distrust from previous redevelopment plans.....	27
7. Recommendations	28
7.1 Embed the research across the Council	28
7.2 Celebrate the market's current success and customers	28
7.3 Identify and mitigate negative impacts of policies on different user groups	29
7.4 Address the problem of fragmented governance.....	29
7.5 Address the historic underinvestment in the market environment.....	29
7.6 Trailblaze a community wealth building approach to markets.....	30
7.7 Put Queen's Market at the centre of Newham's recovery from Covid-19	30
Annex 1 - Research Methodology	31
Annex 2 – Research Team	32
Endnotes	33

1. Introduction

This report about Queen's Market, is one of three documenting evidence from the Markets4People research project² about the wide-ranging economic, social and cultural benefits produced by three of the UK's largest and strongest traditional retail markets (TRMs).

TRMs are 'indoor and outdoor markets selling food, household goods, clothing and the like', their broad, diverse and affordable offering distinguishing them from more narrowly-focused and often more expensive farmers' and specialist markets.³ TRMs provide affordable and quality produce, they are inclusive and generally accessible places, sustain employment and livelihoods for traders and generate economic value through customers' purchases, rental income for market operators⁴ and increased footfall in towns and cities through the 'anchor' role they play.⁵ As our research confirms, TRMs are particularly important to low-income communities, older people, migrants and black and minority ethnic groups.



Families shopping for fresh produce in Queen's Market. (Saif Osmani)

Despite their wide-ranging importance, UK TRMs have been marginalised and neglected in recent decades. Compared to supermarkets and the wider retail sector, they have been framed as declining and in need of modernisation. This has contributed, in many cases, to an under-investment in market infrastructure, maintenance and repairs over decades, particularly as local authorities, who tend to manage and own them, suffer from austerity cuts in their budgets. In this context, the national market operators' and traders' organisations, NABMA and NMTF, have supported the professional development of the sector, including adapting to changing consumer habits and expectations. They have also produced evidence and tools to demonstrate the importance and contribution of markets.⁶

Historic underinvestment, coupled with pressures shared by retail and the high street in general, have led to market redevelopment schemes often designed to appeal to new, younger and more affluent customers.⁷ In the process, pre-existing traders and customers can be marginalised as rents become higher and markets change their atmosphere and offer.⁸ This is a particular problem because the customer base of TRMs generally includes groups of people already suffering from isolation or multiple vulnerabilities, who rely on markets for affordable provisioning and opportunities for social interaction. The impact of changing the market offer on these user groups is rarely taken into account, partly because there is a lack of evidence and research about them. While the importance of markets as spaces of social and cultural interaction was firmly-established by Professor Sophie Watson's work in the 2000s,⁹ there has been no large-scale consumer research which has included markets' social and cultural functions as well as their economic functions.

It is in this context that the Markets4People research project brings a focus on the combined economic, social and cultural benefits of TRMs, which we call "community value". Through a rigorous selection process,¹⁰ we identified Queen's Market in Newham, east London, Newcastle upon Tyne's Grainger Market and Bury Market in Greater Manchester. We surveyed a representative sample of 500 customers in each market, to explore how different groups (in terms of age, gender, ethnicity and income, for example) use and value markets as spaces for shopping, eating and socialising, and as local community assets. We also undertook two focus groups with selected customers and approximately 10 interviews with key local actors in each case. This case study research was preceded by around 30 interviews and several workshops with key actors within the markets industry nationally, as well as analysis of documents and participation in key sector events.¹¹

Our community focus on markets makes an important contribution to the current debate about the future of the UK high street. Research from the Institute of Place Management has already established markets' positive impact on footfall in high streets and town centres.¹² This evidence contributed to markets being identified by the High Streets Task Force as one of its 25 'vital and viable' priorities.¹³ In addition, Grimsey's influential report has called to rethink the high street as a 'community hub' away from the more traditional retail uses, highlighting how markets can play a role.¹⁴ Markets can also be at the heart of increasingly-influential inclusive growth and community wealth building policy agendas.¹⁵ The Greater London Authority, for example, has funded a number of market improvement schemes as part of its 'Good Growth' regeneration programme, and developed a toolkit through which operators and others can demonstrate the 'social value' of markets.¹⁶



A customer wearing a medical face covering in Queen's Market. (Saif Osmani)

The community role of TRMs as inclusive spaces has been sharply exposed by the Covid-19 pandemic. Their role in providing access to affordable food has been particularly important at a time when many household budgets have come under pressure, especially because, as our research shows, market users are less likely to shop online. The possibilities markets afford for social interaction between traders and customers have also been particularly precious at a time when other opportunities have been severely restricted. Recognising the importance of markets, over 90% of operators did not charge rents or other payments from traders during the first lockdown of 2020.¹⁷ However, the sector is presently in crisis, with 85% of market operators considering their markets to be at risk as a result of Covid-19 and a number of markets already being forced to close.¹⁸ To ensure the survival of the markets industry, NABMA and NMTF have urged the UK government to put in place a dedicated package of support for market operators and traders.¹⁹

Traditional retail markets are therefore not a lingering feature of a nostalgic high street but very much a key aspect of a future strategy for inclusive, community-focused and sustainable towns and cities.²⁰ However, this future should not be one of standardised and gentrified markets. When markets serve older people, low-income communities, migrants and black and minority ethnic groups, this should be celebrated and strategically supported to bring benefits to economic development, public health and social inclusion. In this context, the evidence contained in these three reports about the wide-ranging economic, social and cultural benefits of TRMs can help not only to make the case for a dedicated support package for markets but also to reposition markets as community hubs for more inclusive economies.

Who is this report for?

This report will be of particular interest to Newham Council, as the owner and operator of Queen's Market. We believe that the findings will be relevant not only for council staff or elected members directly linked with Queen's Market but also for officers and councillors with responsibilities across public health, adult social care, education and skills, employment, community wealth building, inclusive economy and Covid-19 recovery.

More widely, the report is for everyone who cares about Queen's Market: market users, traders, local community groups, local councillors and local business groups, as well as wider regional and national decision makers with an interest in retail, the high street, local economic development and community inclusion.

2. Introducing Queen's Market

Key facts

- Open Tuesday, Thursday, Friday and Saturday, 9am to 6pm, and on Sunday for casual trading only, from 10am to 4pm.
- 164 street trading pitches (occupied by around 96 permanent traders and an average of 30 casual traders a day), 65 small shop units and 20 kiosks.
- Occupancy rates are approximately 77% for street trading pitches and 90% for commercial units and kiosks.
- Fragmented governance of street trading pitches and commercial units/kiosks contributes to a complex organisational and financial situation.
- Listed as an Asset of Community Value and has a long-running 'Friends of Queen's Market' group.

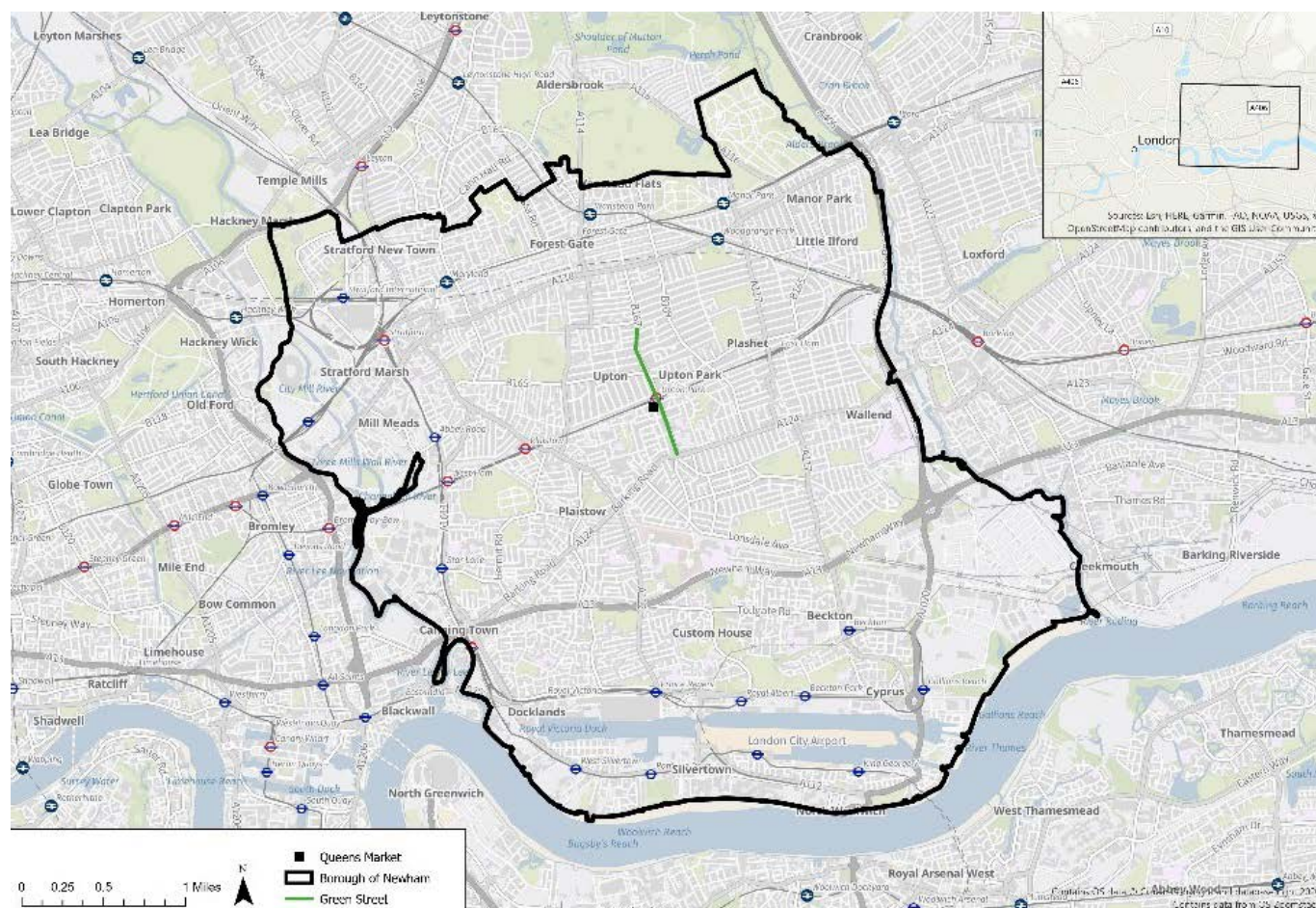


Figure 1: Queen's Market is located next to Upton Park underground station, on Green Street, in the London Borough of Newham, east London. © OpenStreetMap contributors

Queen's Market (Figure 1) is made up of 164 street trading pitches (occupied by around 96 permanent traders and an average of 30 casual traders a day), 65 small shop units²¹ and 20 kiosks. The Market specialises in fresh fruit and vegetables, fish and meat, textiles and clothes, and is particularly well-used by Asian/Asian British and Black/Black British communities in Newham and further afield. Demand for street trading pitches and commercial units and kiosks at the Market is high. Commercial units and kiosks are approximately 90% occupied. Occupancy rates for street trading pitches are lower at 77% (Newham Council data, September 2019), however, as no new applications are accepted from traders wanting to sell fruit and vegetables, fish, meat or general groceries. Previous research has documented aspects of the Market's economic, social and cultural value, in particular in providing access to affordable fresh food, supporting jobs and intercultural interaction.²² Queen's Market is listed by Newham Council as an Asset of Community Value.

The governance of Queen's Market is very fragmented, involving several different council departments and teams. The street trading pitches at Queen's Market (and neighbouring Queen's Square) are managed by Newham Council's Markets Service, along with several markets in Stratford and a small market at Pilgrim's Walk, under the regulations governing street trading within the London Local Authorities Act 1990. The commercial units and kiosks are managed by its shared services provider, OneSource, as part of Newham Council's wider commercial property portfolio. The Regeneration team is responsible for medium and long-term improvement and redevelopment plans at Queen's Market. Other parts of the Council are responsible for the roof and overhead car park. This fragmentation has caused problems for both council officers and for market traders:

[The Market Manager] is on the front line... [but has] no control or management or power over parking charges, the roof leaking, anything to do with the infrastructure, yet he's the face of the Market and he takes the brunt of everything (Assistant Director, Recycling, Refuse and Street Cleansing, Newham Council).

If something happens with the shop or the kiosk and we go to the office, they say this does not belong to us... If something happens and the pitches go to the Docklands, they say this is not us. So for the traders we hope that they have one office for everyone (trader, Queen's Market commercial unit).

If you look at it from my finance role, you tend to have the discipline of the numbers... and I think everyone needs to sit round the room and say, look, we all agree on the future of the Market (Cabinet member for Finance and Corporate Services).

The Council has begun to address these problems of fragmented governance, including by improving communications between the Markets Service and OneSource, regeneration officers attending the Markets Service regular meetings with traders, and instigating regular monthly meetings involving key council teams.

Queen's Market also suffers from a poor and deteriorating environment, the product of historic underinvestment at Queen's Market. This underinvestment is itself the product of uncertainty over the future of the Market, following previous failed redevelopment plans as well as complex legislative restrictions, fragmented governance and the Council's current trades/'tenant mix' policy, discussed in detail later in this report (see Section 6.2). In this context, the continued success of Queen's Market – which goes against wider trends of decline in traditional retail markets - is all the more impressive.

There is no formal traders' association for Queen's Market but street traders and commercial tenants are informally organised and collaborate with one another in various ways. For example, traders have their own WhatsApp group, hold their own meetings and write collective letters to the Council and local MP on specific issues. Many street traders and commercial tenants see themselves as one group and would like to form a cooperative to own and manage the Market themselves.

Many traders are also involved together with customers, residents and supporters in Friends of Queen's Market, a community group which formed in the mid 2000s in response to previous plans involving the demolition of the Market and the development of a new supermarket, housing block and much smaller market.²³ The group ultimately succeeded in its efforts to challenge those plans, which were thrown out by the then Mayor of London, Boris Johnson, in 2009.²⁴ Throughout the subsequent decade, Friends of Queen's Market continued to meet regularly and remains actively engaged in the Market. In 2018, Friends of Queen's Market developed a community charter setting out the improvements they would like to see in the Market. The group is the longest running and most successful community group in the UK markets sector and is also notable for effectively involving a wide range of different faith and ethnic groups.

Like most markets and retail outlets across the UK, Queen's Market has been severely affected by the Covid-19 pandemic. Newham suffered the highest death rate from Covid-19 in England and Wales during 2020.²⁵ Many Queen's Market traders and customers were affected by Covid-19, losing loved family members and respected community leaders to the virus, as well as suffering financial and other impacts. During lockdown periods, traders selling essential goods were able to continue trading, however, playing an important role in enabling the local community to continue to access fresh fruit and vegetables, fish, meat and other groceries safely.²⁶ Traders selling goods deemed inessential were unable to trade, in accordance with government guidance, despite the efforts of NABMA and NMTF to secure parity with supermarkets for market traders.²⁷ Normally open on Sundays for casual traders, the Market was closed entirely on Sundays during lockdown periods, including for essential traders. Throughout the first lockdown, rents were waived for street traders but not for tenants of commercial units and kiosks. The Council policy across its commercial property portfolio was not to waive rents because of the potential negative impact this could have on funding available for other services, instead signposting tenants to available government support schemes.²⁸

3. Serving diverse communities in Newham and beyond

Key facts

- Queen’s Market has a loyal customer base, who have been visiting for many years and who visit very regularly.
- 76% of market users live in Newham, with its customer base extending into Essex, as far as Southend-on-Sea.
- It is particularly well-used by migrant and Asian/Asian British and Black/Black British communities, as well as lower-income communities, older people, women and people with children.
- On Sundays the Market is an important social space for large numbers of Eastern Europeans (particularly Romanian and Bulgarian men).
- The majority of market users travel to the market on foot or by bus.

3.1 A long-standing and active customer base

NABMA has actively encouraged people to support their local markets with a campaign to get shoppers throughout the UK to ‘Love Your Local Market’, in order to rebuild the importance of markets as local sources of fresh food and other goods, employment and job creation, community space and networks. This has been particularly important for markets that have gone into decline. To the envy of many markets, however, Queen’s Market already has a longstanding and active customer base. Forty-four percent of market users have been visiting Queen’s Market for more than 20 years, and a further 25% for 10 to 20 years. Vulnerable market users²⁹ are significantly more likely than non-vulnerable market users to have been visiting the market for more than 20 years.³⁰ Eighty-two percent of all market users - and 89% of those visiting for more than 20 years - visit at least once a week. This longstanding and active customer base is one indication of the importance of Queen’s Market in the lives of market users.

3.2 Serving the local community, and beyond

While 76% of Queen’s Market users live in the London Borough of Newham, its customer base also extends through east London to Essex, as far as Southend-on-Sea. People travel an average of 2.9km to Queen’s Market. Its core catchment area (the area within which 50% of customers live) extends approximately 1.4km from the market, while its secondary catchment area (including the next 25% of users) extends approximately 2.6km from the market (Figure 2).³¹ While, like many markets, Queen’s Market primarily serves the local community, it also attracts customers from further afield.

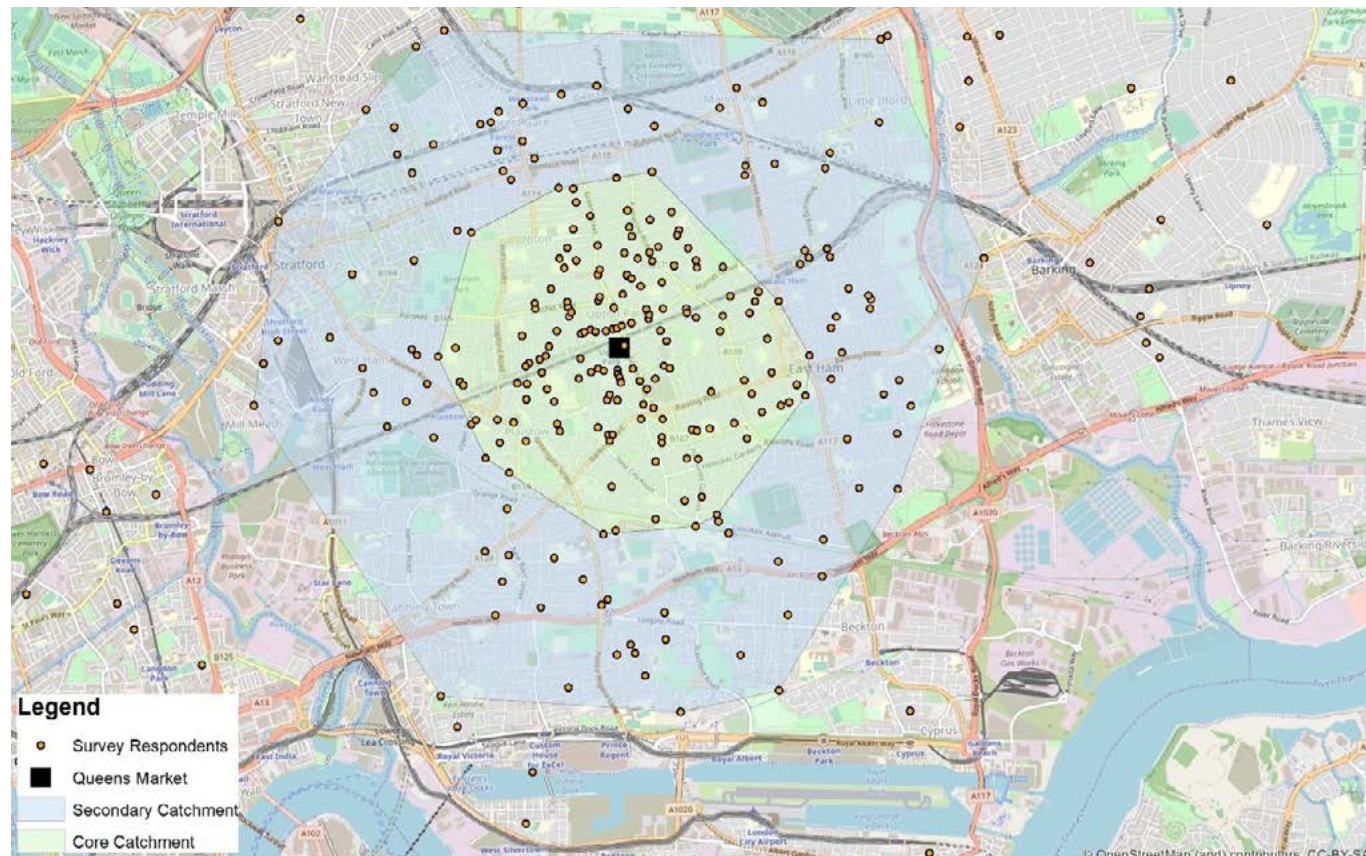


Figure 2: Queen’s Market’s core catchment area (the area within which 50% of customers live; in green), extending approximately 1.4km from the Market, and its secondary catchment area (including the next 25% of users; in blue), extending approximately 2.6km from the Market. © OpenStreetMap (and) contributors CC BY-SA

3.3 Serving lower-income communities

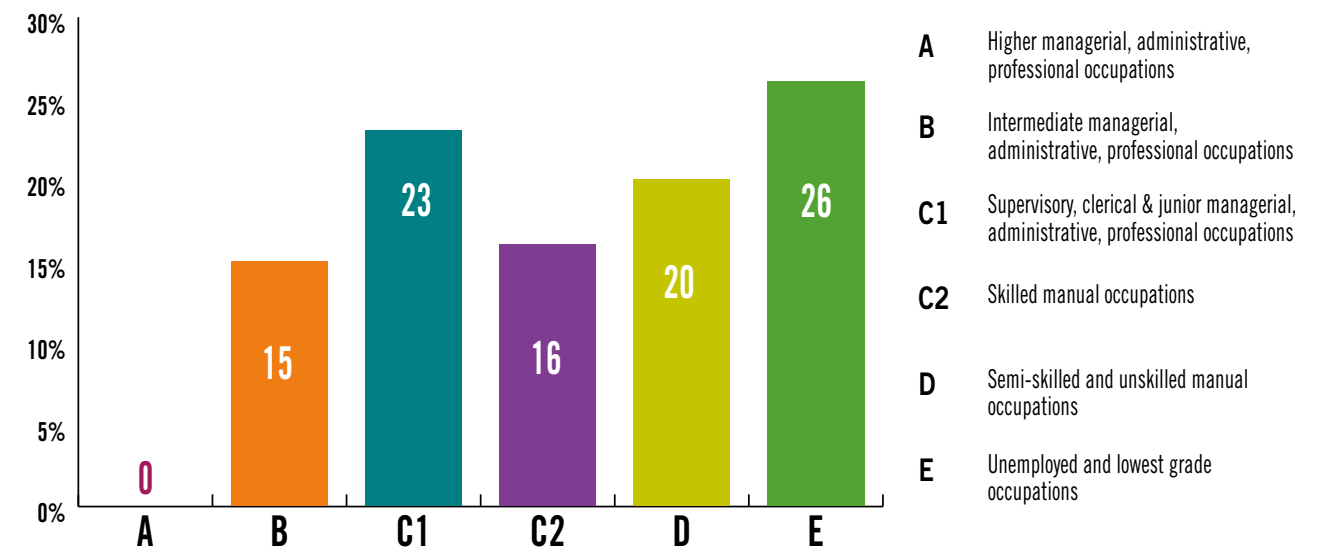


Figure 3: The socio-economic group of the main salary earner in market users’ households.³²

Markets throughout the UK are particularly important to lower-income communities since they provide affordable food and other goods, when compared to the prices in supermarkets and other local stores. Eighty percent of Queen’s Market users live in the 30% most deprived neighbourhoods in England, as measured by the 2019 English indices of deprivation (IMD). This is broadly in line with the levels of deprivation in the core and secondary catchment areas more generally. While market users come from a wide range of socio-economic groups (Figure 3), relatively few are classed as social grades A and B, which are the most affluent socio-economic groups.³³ Market users are more likely to come from the less affluent ‘D’ (semi-skilled and unskilled manual occupations) and ‘E’ (unemployed and lowest grade occupations) socio-economic groups (50% of market users) than people living in the core catchment area more generally (39%). This suggests that Queen’s Market may play a particularly important role for lower-income households within its catchment area. Only 3% of Queen’s Market users are looking for work or unemployed, however; the overwhelming majority are in paid full-time or part-time work or retired (Figure 4).

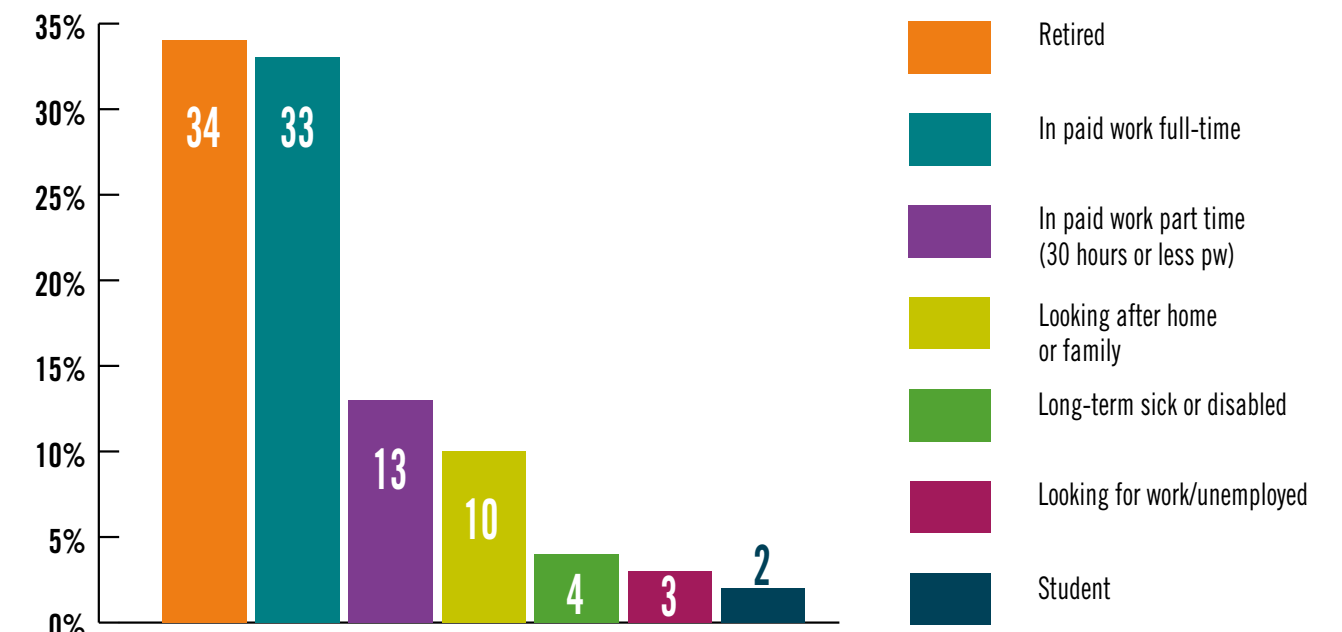


Figure 4: Employment status of Queen’s Market users.

3.4 Serving migrant and ethnic minority communities

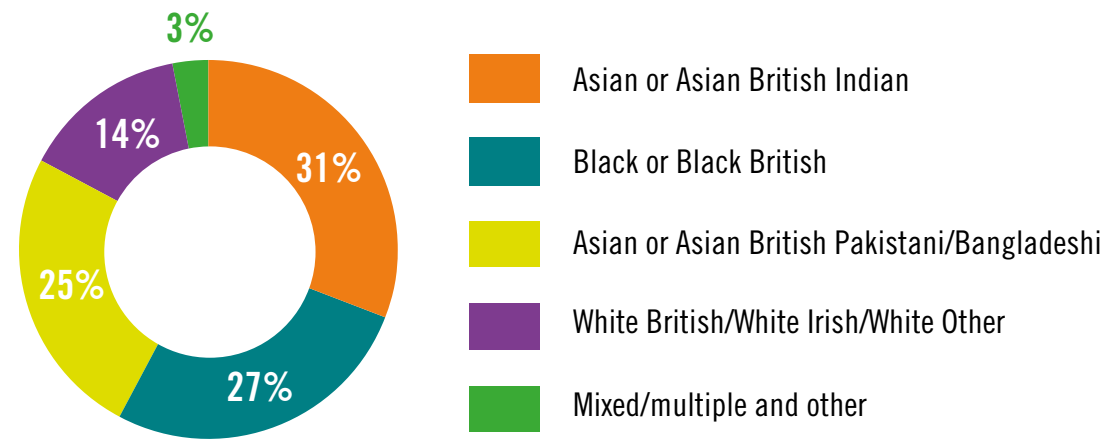


Figure 5: The ethnicity of Queen's Market users.

Queen's Market is particularly important to migrant and ethnic minority communities. Newham is a very ethnically diverse borough, with many of the ethnic minorities having lived there for at least two decades.³⁴ The majority of market users were not born in the UK (82%); 46% have lived in the UK more than 25 years. This latter group are the most regular and longstanding users of Queen's Market: 88% visit at least once a week and 65% have been visiting for more than 20 years.

Thirty-one percent of market users identify as Asian/Asian British (Indian), 25% Asian/Asian British (Pakistani/Bangladeshi) and 27% Black/Black British (Figure 5). Even taking into account the ethnic diversity of the borough, market users are *more likely* to identify as Asian/Asian British (Indian) and Black/Black British ethnic groups than in the core and, in particular, the secondary catchment area as a whole. These groups have also been visiting Queen's Market for a long time, particularly people from the Indian community where 59% of market users have been visiting for more than 20 years. Indian market users are also most likely to visit the Market at least once a week (92%).

Queen's Market is also important to Eastern European communities. On Sundays large numbers of Eastern Europeans - particularly Romanians and Bulgarians - congregate in the Market. Unfortunately, fieldworkers found it more difficult than anticipated to secure interviews with Eastern European Sunday market users without translation of the survey and on-the-spot interpretation. Members of the research team therefore visited the Sunday market in order to develop an understanding of the Market's importance for this group, which is made up largely of men. Many congregate near the café, drinking coffee, or in the centre listening to accordion players.

3.5 Serving older people, women and families

As other studies have found for traditional retail markets across the UK,³⁵ the users of Queen's Market are predominantly older and female: 69% are over 50 years old and 69% are women. Older market users are not only more likely to have been visiting for more than 20 years (70% of those aged 70+; 55% of those aged 50-69 years) but are also more likely to visit the Market at least once a week (92% of those aged 70+; 83% of those aged 50-69 years). While a market which serves older customers is often seen as declining, in the case of Queen's Market older market users are a particularly important part of the customer base because they visit the Market most frequently. In addition, older customers have helped to introduce younger generations to the Market. A significant proportion of users aged 18-29 years have been visiting Queen's Market for 5-20 years (40%) and for more than 20 years (14%), suggesting they may have continued to use the market after visiting as children with their parents.

Many market users live with their children (55%), which in 54% of cases include children under 16 years old. This suggests that Queen's Market plays an important role in supporting families with children. Several focus group participants also told us that they shopped at the Market for several different households, who were unable to travel to the Market themselves for different reasons. Individual market users may, therefore, be helping a number of households with their food shopping.

3.6 Travelling to the market

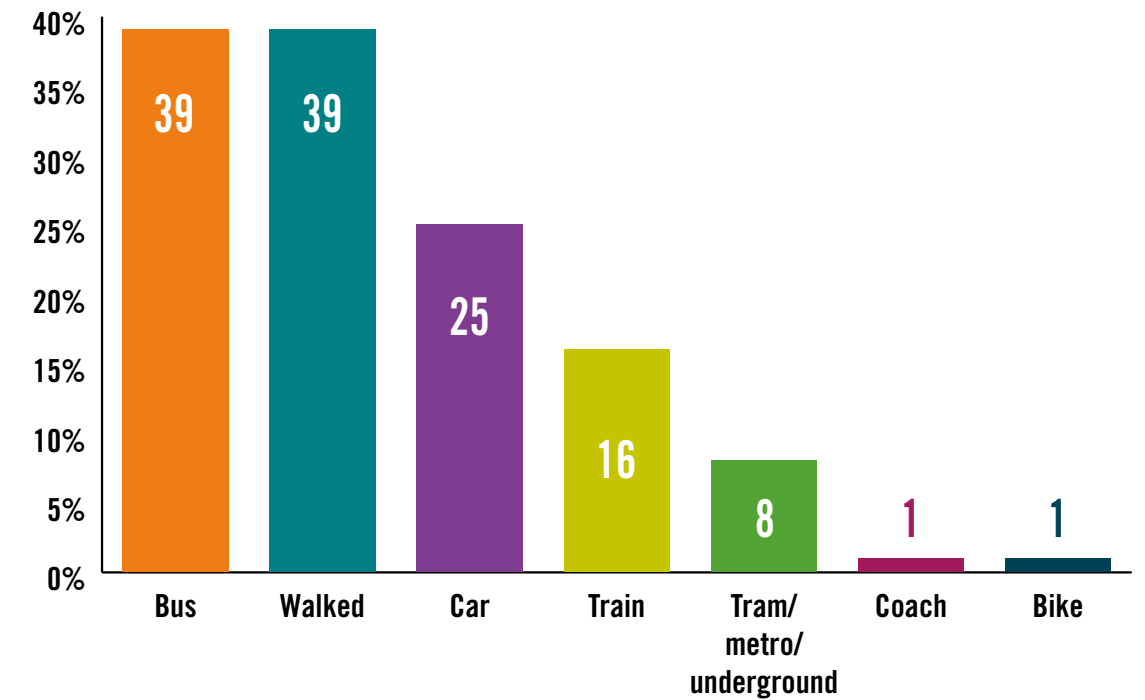


Figure 6: How Queen's Market users travel to the market.

The majority of users walk or travel by bus to Queen's Market (Figure 6). Not surprisingly, older market users and vulnerable market users are significantly more likely to travel by bus than non-vulnerable market users, while younger market users are more likely to walk. Just 25% of market users travel to the Market by car. Market users from higher socio-economic groups are more likely to travel by car and less likely to travel by bus to the Market. Forty-eight percent of market users have no access to a car and market users are considerably less likely to have access to a car than people living in the catchment area as a whole.³⁶

4. A successful and specialised food and textiles market

Key facts

- The vast majority of market users do at least half of their food shopping at Queen's Market, with 21% doing all their food shopping at the Market.
- 95% of market users agree or strongly agree that the Market provides access to affordable, quality fresh food as well as other goods and services.
- 51% say they buy things at the Market that they couldn't buy elsewhere.
- 54% travel further to shop at the Market than the other grocery stores they shop at, on average travelling 3km further.
- The average spend per visit is £27 on food and drink and £33 on other goods and services, a total of £60.
- 89% of users said Queen's Market was the main reason for visiting Green Street that day, 59% said they were also visiting other shops, cafes or amenities in the town centre and 68% said they would be spending money in the town centre that day, spending on average £19.

4.1 A unique shopping destination

I live in Canning Town. I've been coming to the Market about 22 years and we buy, first, vegetable. After, I buy the chicken meat. After, I buy clothes. After, I buy pillow. Everything we need we buy...nearly 45-55 [pounds], my shopping there, every two weeks (F6, FG1).

Ninety-seven percent of users visit Queen's Market primarily in order to shop. While the decline of food shopping at many traditional retail markets has led them to focus on developing their prepared food and entertainment offerings in order to attract customers, Queen's Market has successfully retained its primary role as a unique shopping destination. Fifty-one percent of users say they buy things at the Market that they couldn't buy elsewhere.³⁷

4.2 Driving footfall and spending in the Green Street town centre

Markets are encouraged by many city and town authorities as a means of reviving or regenerating town centres.³⁸ They can increase footfall in town centres by between 15 and 27% on market days.³⁹ While the survey did not explore footfall, it suggests Queen's Market plays an important role in driving footfall and spending in the wider Green Street town centre. Eighty-nine percent of users said Queen's Market was the main reason for visiting Green Street that day. Users who do more of their shopping at the Market are most likely to say Queen's Market is their main reason for visiting the Green Street town centre (Figure 7), suggesting that the Market's food plays a particularly important role in driving footfall in the area. Fifty-nine percent of market users said they were also visiting other shops, cafes or amenities in the town centre and 68% said they would be spending money in the town centre that day, spending on average £19. Given that 82% of market users visit at least once a week, these findings suggest that Queen's Market has a significant impact on the wider Green Street town centre. This is an important issue to note for the importance of the Market to the wider borough.

Is the market the main reason for your visit to Upton Park and Green Street today?	All or most food & drink shopping at the market	Half food & drink shopping at the market	Little or no food & drink shopping at the market
Yes	91%	89%	81%
No	9%	11%	19%

Figure 7: The percentage of users doing different proportions of their food and drink shopping at Queen's Market who say the Market is their main reason for visiting the Green Street town centre.

4.3 A specialist food outlet of choice

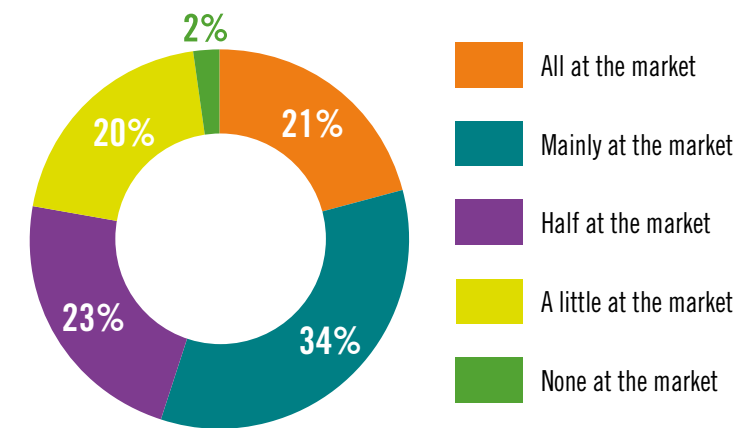


Figure 8: The proportion of food and drink shopping Queen's Market users do at the market.

The success of Queen's Market as a shopping destination rests primarily in its food offering. Ninety-five percent of users spend money on food and drink at the Market. The vast majority of market users do at least half of their food shopping at Queen's Market, with 21% doing all their food shopping at the Market (Figure 8). Some groups are also more likely to do at least half their food and drink shopping at the Market than others; 83% and 85% respectively of Indian and Pakistani/Bangladeshi market users do more than half their food shopping in the Market. Users who do all or most of their food shopping at Queen's Market are significantly more likely to say they buy things at the Market that they couldn't buy elsewhere (Figure 9), pointing to the Market's specialist offering for these user groups.

The average spend on food and drink is £27 per visit, with market users who identify as Black/Black British and Mixed/Multiple/Other ethnic groups spending significantly more at £36 and £34 per visit respectively.

Do you buy anything at the market that you couldn't buy elsewhere?	All or most food & drink shopping at the market	Half food & drink shopping at the market	Little or no food & drink shopping at the market
Yes	59%	45%	35%
No	41%	55%	65%

Figure 9: Proportions of users who do all or most, half, and little or none of their food shopping at Queen's Market who say they buy things at the market they couldn't buy elsewhere.

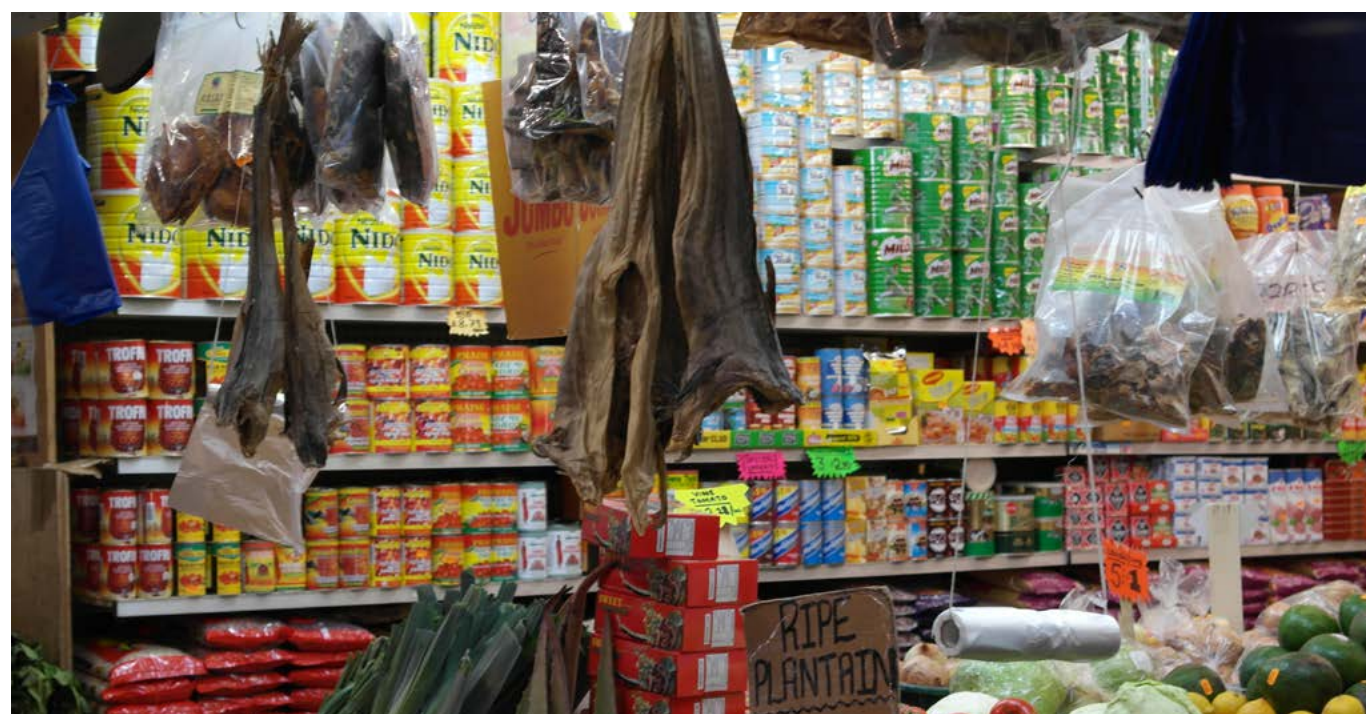
A presentation of the Markets4People research to key stakeholders in February 2020 generated further insight into the uniqueness of Queen's Market to the communities it serves. Responding to the research team's presentation, one market user highlighted the particular importance of the fishmongers to Bengali communities, who used a lot of both fresh and saltwater fish in their cooking. Another market user highlighted several important Bengali fruits difficult to obtain outside of Queen's Market. These fruits include the Bengali lemon, *lebu*, and another similar-looking citrus fruit, which are both popular ingredients to Bengali curries, with the *lebu* additionally used raw, in salads and to help with digestion.



Fresh fish and seafood on sale in Queen's Market. (Saif Osmani)

Market users are shopping for food at Queen's Market out of choice, not because it is the only, the closest or the most easily accessible food outlet. A total of 26 grocery stores are available within the Market's core and secondary catchment areas, operated by seven different retailers. Almost all market users supplement the Market with other sources of food and drink, from a variety of supermarkets and other shops. Sixty percent of market users nominated one or two alternative grocery stores at which they also carry out grocery shopping, with the remainder nominating an average of four additional stores. Fifty-four percent of market users travel further to visit the Market than they do to visit their other specific nominated grocery stores, on average travelling 3km further to visit the Market. This means users are willing to travel further in order to shop at the Market, bypassing more easily accessible alternatives. One focus group participant explained:

When I go to there, I find vegetables, fruits, altogether. If I go Tesco, Sainsbury, any other supermarket, I have to just look for the things, not the vegetables because I'm a vegetarian. I need more vegetables. So for me, it's better I can go to the Queen's Market where I can get the vegetables and fruit together. Not in separate places (F2, FG1).



Specialist produce on sale in Queen's Market. (Saif Osmani)

4.4 A quality and affordable fresh food offering

Because I'm vegetarian, mostly I cook vegetables...lentils, vegetables, so I need vegetables every week... If I go to any other vegetable shops... the thing is sometimes which I want to buy, I didn't find there. The things they have, I don't want to buy... That's why it's very important in the Queens Market. It's very important for me (F3, FG1).

In markets across the world, shoppers choose to buy their food in markets as they see it as being fresh and of good quality.⁴⁰ At Queen's Market, the price and quality of food and drink on sale is rated very highly (at least 8 out of 10 by 72% of users). Ninety-five percent of market users also agree or strongly agree that the Market provides access to affordable, quality fresh food. Fresh food is a particularly important component of market users' shopping, with 96% buying fruit and vegetables and 53% buying meat and/or fish. Interestingly, the fruit and vegetables on sale at Queen's Market seems to appeal equally strongly to all ethnic groups, with the percentage of users buying fruit and vegetables varying little between different ethnic groups. Other foods seem to appeal particularly to certain ethnic groups. Most notably, 79% of Black and Black British market users buy fish and/or meat at the Market, significantly more than other ethnic groups. The continued success of Queen's Market stands in stark contrast to the wider decline in fruit and vegetable traders in the UK traditional retail market sector.⁴¹

4.5 A quality and affordable broader offering, in particular in textiles and clothing

What other goods do you buy at the market and what services do you use? (top 14 responses)	Percentage of respondents
Clothing	52%
Textiles	47%
Bags and accessories	32%
General household goods	31%
Footwear	29%
Jewellery and watches	28%
None	25%
Electrical goods	14%
Flowers and plants	12%
Hairdresser/barber	10%
Healthcare and beauty	9%
Arts, crafts and gifts	7%
Beautician/nail bar	7%
Clothing alteration	5%

Figure 10: Percentage of market users purchasing different categories of (non-food) goods and services.

Queen's Market's quality and affordable non-food offering also attracts customers to the Market and the wider town centre. Ninety-eight percent of users spend money on other goods and services at the Market, spending £33 per visit on average. Market users rate the price and quality of other goods and services on sale at the Market very highly (at least 8 out of 10 by 72% of users). Ninety-four percent agree or strongly agree that the market provides access to a range of other affordable, quality goods and services.

While a wide-range of goods and services are on offer (Figure 10), clothing and textiles are particularly popular, purchased by 52% and 47% of market users respectively. Queen's Market has a particularly good reputation for the price and quality of its clothing and textiles, with many people going to the Market specifically for these two commodities. One focus group participant explained:

Yes, my friend, she wants to make a dress and she said when I go to the material shop like textile shops, they said it's expensive like £18 per metre. So I told her can you just go to the Queen's Market and check. I think under £10 you can get it. And she's really shocked when she get from £8 per yard. The same material that is in the shop for £18 or £15 sometimes (F2, FG1).



A fabric stall in Queen's Market. (Myfanwy Taylor)

4.6 A unique and highly differentiated offer

Queen's Market users differentiate between traders in the same commodity; they do not see these traders as the same. They highly value the range and diversity of products available, and stress the unique offerings which different traders provide:

At the back of the Market there is a guy – he's selling most other things like big sacks of onions and potatoes. That guy is very good. In the middle there is one guy – he's an English guy. There's another small one under the stairs. He's a very good guy... (F2, FG1)

Their meat is very fresh. That shop they distribute to big, big companies so they have meat always on the move. And then one British butcher in the middle... He's the best... That's why they're queuing. (F, FG2).

Usually I shop for fresh meat and fish, vegetables and fruit. You have a choice of all sorts of seasonings and stuff. They are also supplying now West Indian bread, buns, where we used to have to go to Brixton to get. That was a journey (F, FG2).

Everybody has their favourites that they go to that they get the service from (F, FG2).

Every business needs a USP, but I'm telling you, every market trader there will be selling something more or less or unique or different enough for you to buy (member, Friends of Queen's Market).

The findings in this section highlight the importance of a customer perspective in bringing to light the specialist roles and functions of a market to the communities it serves. Such specialist roles and functions may not necessarily be immediately 'seen' or understood by non-market users and/or market users from different ethnic or cultural backgrounds, highlighting the specific insights that a customer perspective can offer to market operators and policy makers.

4.7 Limited competition from online retailing

Many traditional retail markets in the UK – like high streets and town centres more generally - have suffered adversely from increasing competition from online retailing in recent years, prompting significant efforts from the sector to support markets and market traders to develop multi-channel retailing. There is little evidence that Queen's Market has been subject to these particular pressures so far. Market users do not tend to engage much with online shopping, in particular for food and drink. Just 12% shop online for food and drink while 35% shop online for other goods and services. The same picture emerges from the postcode data collected: 84% live in neighbourhoods where people are less likely to shop online, especially for food and drink.⁴² As would be expected, however, younger market users and students are more likely to shop online for food and drink than other groups. In addition, market users born in the UK and those living in the UK for 6-25 years are more likely to shop online for food and drink than market users living in the UK for less than five years and for more than 25 years. As the restrictions during the Covid-19 pandemic have prompted more older people to shop online, according to a National YouGov survey,⁴³ it is possible that a delivery or click-and-collect scheme for Queen's Market might enable more older customers to join in.

5. A social, welcoming and supportive community asset

Key facts

- Most market users interact socially with other market users and with market traders at Queen's Market.
- 79% of market users strongly agree or agree that they interact with customers from other ethnic or cultural groups, and 82% with traders from other ethnic or cultural groups.
- Queen's Market is a caring space in which people can give and receive help and assistance, in various ways, and it is an open and welcoming space for all.
- The overwhelming majority of market users feel safe (93%), welcome (92%), less lonely (92%) and like they belong (84%) when they visit Queen's Market.
- 96% strongly agree or agree that it is an important part of the local identity, 92% that it is a community hub.
- Queen's Market is significantly more important to market users than other community facilities (e.g. libraries, parks) and other retail and food outlets.

The good side of all this [social] relationship [at the Market] is that it build a trust in the community... which leads to safety. If I know you very well just by buying from you, you selling to me, then it goes for years, and it happens that you now live closer to me. Definitely that goes again deeper... It gives peace to the community, development to the next generation [who] will [have] a safety net to live in peace... And definitely the economy will thrive (F, FG2).

5.1 A convivial social space

It's just kind of social life. It's not that I go there only for food and clothes (F2, FG1).

I meet in the Market my old [friends]... I am really happy to see them there (F4, FG1).

You do meet a lot of your neighbours [at the Market]... You haven't seen your neighbours say for about three weeks, and the day you happen to go to the Market you've met people from your road (F, FG2).

My rapport is usually with the fruit and veg guy and the fish guy, as you usually see them every couple of weeks when you restock your fish or meat (F, FG2).

Building on other studies that have emphasised the importance of Queen's Market as a social space, the Markets4People survey provides new evidence of the Market's role as a convivial space which facilitates long term friendships as well as wider social interaction. Most market users interact socially with other market users and with market traders at Queen's Market (Figures 11 and 12). Queen's Market is a particularly important social space for market users who do all or most of their food shopping at the market, for older people and for lower socio-economic groups. These market users report significantly higher levels of social interaction with other users and with traders. Social interaction with other market users is particularly high amongst black and minority ethnic groups, as well as long-term migrants to the UK. Social interaction with market traders is highest amongst Black/Black British and white market users.

At the Market	Strongly agree / agree
I bump into people I know	86%
I arrange to meet people I know	62%
I talk to people I don't know	66%
I have received help or advice from other customers (or vice versa)	69%

Figure 11: Measures of social interaction amongst market users.

At the Market	Strongly agree / agree
I tend to visit the same traders	61%
I share news or information with traders	69%
I have received help or assistance from traders, for example storing bags or accepting late payment	69%

Figure 12: Measures of social interaction between market users and traders.

These findings echo wider evidence that markets are important spaces for social interaction, especially for older people, low-income groups, migrants, women and single parents with children.⁴⁴ Markets' role in facilitating social interaction has a positive impact on individuals' well-being as well as broader policy goals relating to social inclusion and community cohesion. This is particularly true for older people whose only interaction on a daily or weekly basis might be with the traders of the market. It is also one of the main reasons people shop at markets.⁴⁵



Markets are important spaces for social interaction. (Saif Osmani)

5.2 Facilitating interaction between different ethnic groups

When you're at the fabric stall, or you're waiting for the person to come by and cut the fabric, sometime it happens we speak to the other [customers]... Once I spoke [to a] lady and she said, I'm from Lithuania and I never heard that country before (F6, FG1).

I just talk to the shop people... Most of these are... eastern European people... but we speak in English. If they can't understand, it's [ok] because we [Asian customers] cannot always understand English anyway... (F1, FG1).

He said, oh, we cook this vegetable with the black aubergine... What do you do in your culture? They said, oh we mix with the fish, we mix with the lamb. It's just like we talk to each other (F2, FG1).

Some of our [African] vegetables like cocoyam they [the Asian traders] sell it, but they don't know what it's used for, and they ask me, "What is this? How is it used?". I tell them this is how it's used and the benefit of it. So they can try it (F, FG2).



Speciality foods from across the world are sold in the Market. (Saif Osmani)

Queen's Market is also a place where people from different ethnic and cultural backgrounds interact. Seventy-nine percent of market users strongly agreed or agreed that they interacted with customers from other ethnic or cultural groups, and 82% with traders from other ethnic or cultural groups. Indian market users and older market users are more likely to interact with traders from other ethnic or cultural groups. Through such interactions, market users gain knowledge about foods and recipes from other cultures, as well as building confidence and skills in communicating in English, where this is not their mother language.

These findings provide further evidence that markets facilitate interaction amongst different ethnic and cultural groups. Research suggests markets enable people to 'rub along' with one another, potentially generating increased understanding, tolerance and civility amongst diverse peoples.⁴⁶ While it was not possible to assess market users' attitudes to different ethnic or cultural groups through the survey, high reported levels of inter-ethnic and inter-cultural interaction at Queen's Market adds to the available evidence that it facilitates social inclusion and community cohesion.⁴⁷

5.3 A caring space

[If] I want to make something, then I speak to the person who's using the material, the fabric... for the knowledge, like what I can make with that fabric (F6, FG1).

One guy especially, when I buy fish and my money's not enough, he say, "No, no don't worry, you can take it". It was £40, and he trust me to give me that thing, that freedom... And it's not just one person, most of them. We've built trust... It's not done in supermarkets... So I think it's not that we are buying and selling, but we are also creating a family, we are creating a friendship and trust. (F, FG2).

When I was pregnant I needed iron so I was looking for vegetables, I said this one I like it but it doesn't have much iron... [The trader] said, "No, a different vegetable, this one has a lot of iron, use it, that is very good" (F, FG2).

Queen's Market is seen as a 'caring' space in which people can give and receive help and assistance in various ways. Sixty-nine percent of market users have received help or advice from other users (or vice versa), and the same percentage have received help or assistance from market traders, for example storing bags or accepting late payment. Market users who do all or most of their food shopping at Queen's Market are more likely to give or receive help than those who do little or none of their food shopping at Queen's Market. Market users from lower socio-economic groups are also more likely to give to or receive help from other market users.

These findings provide further evidence for markets' role in facilitating acts of reciprocity or solidarity amongst traders and customers, in particular the elderly, lonely and those with mental health issues.⁴⁸ Markets and other 'caring spaces' in cities play an important role in enabling low-income, marginalised and vulnerable groups to access support and resources. In this sense, markets such as Queen's Market form part of cities' shared social infrastructure, contributing to economic and social life in cities.⁴⁹

5.4 An open and welcoming space for all

At the Market	Percentage of market users who strongly agree or agree
I feel safe	93%
I feel welcome	93%
I feel less lonely	84%
I feel like I belong	92%

Figure 13: The percentage of users who strongly agree or agree that they feel safe, welcome, less lonely and like they belong at Queen's Market.

The overwhelming majority of market users feel safe, welcome, like they belong and less lonely when they visit Queen's Market (Figure 13). Ninety-six percent strongly agree or agree that Queen's Market is an open and welcoming space for all. Feelings of belonging are particularly strong amongst new and long-term migrants, Asian/Asian British market users and those from lower socio-economic groups. The Market also appears to be playing a particularly important role in countering loneliness amongst older people.

These findings suggest that Queen's Market has a positive impact on market users' well-being, i.e. their experience of life. For low-income, marginalised and vulnerable people, having a place where they feel safe, welcome, like they belong and less lonely is especially important. Particularly strong feelings of belonging amongst new and long-term migrants echo markets' historic role in welcoming migrants to cities, providing access to wide-ranging economic, social and cultural networks and resources.⁵⁰ That almost all market users feel Queen's Market is an open and welcoming space for all suggests that it is an important resource for local well-being and community cohesion.

5.5 A valued community asset



A community event organised by the Friends of Queen's Market. (Saif Osmani)

For market users, Queen's Market is not just a place to shop but also plays an important role in the local community. Ninety-six percent strongly agree or agree that it is an important part of the local identity, while 92% strongly agree or agree that it is a community hub. Queen's Market is more important to market users than other community facilities (e.g. libraries, parks) and other retail and food outlets. The market plays a particularly important role in the community for women, migrants and Asian/Asian British and Black/Black British market users.

Although Queen's Market is already recognised and listed by Newham Council as an Asset of Community Value, these findings provide further evidence for its importance to the local community. They also echo wider evidence for the emblematic role of some markets in the distinct identity of a place.⁵¹ Such local community assets can play an important role in community economic development, including through community ownership and management.

6. The future of Queen's Market

6.1 Rethinking the current 'balance of trades'/'tenant mix' policy

While the Markets4People user survey and focus groups evidenced the specialist role of Queen's Market to the communities it serves, this perspective does not inform the Council's current approach to managing Queen's Market. Interviews with council officers revealed a commonly-held view of the Market as 'oversaturated' in fruit and vegetables, fish, meat and grocery stalls. From this perspective, traders in these commodities are seen as all the same and their number is a problem, producing too much competition which drives down prices and spreads takings too thinly amongst traders, damaging livelihoods. The research team heard directly from one trader who shared this view, and were also told by council staff that they receive a lot of complaints about this issue from traders. Council staff want to see a wider range of goods and services on offer, which they believe will drive up footfall in the Market and attract new customers.

We've got an oversubscription in regards to fruit and veg and fish and things like that... The traders are always complaining that there's too much competition... We could fill Queen's Market up every single pitch with fruit and veg, we could do that but how long before the takings would spread out, everyone's income would drop and then people would start leaving? (Assistant Director, Recycling, Refuse and Street Cleansing, Newham Council).

The comments from the Markets team is that there are far too many competing uses. So we've got loads of people selling fish, vegetables, and there's no proper planned diversity of tenants, that they provide a greater footfall... So ideally you'd probably want more A3 uses... and beverage stuff, and far less competing similar uses... There is an argument, the typical example is Hatton Garden, you know, you want diamonds, that's where you go because there's an agglomeration of those uses so you've got a lot of choice. But I think with something like Queen's Market you want it to be a vibrant hub for the local community and selling the same product is not creating that, it's creating a functional market, where actually what you want is a destination market with lots of different uses (Commercial Manager, Property Services, OneSource).

This view of the Market as oversaturated informs Newham Council's current approach to management. The Markets Service (responsible for the pitches) does not accept new applications to trade in fruit and veg, fish, meat and groceries, or allow existing traders in these commodities to expand their business by taking on more pitches. Approximately 30% of pitches are, therefore, currently unoccupied because, while demand for pitches is high, it is only so from traders in 'oversaturated' commodities. The Markets Service believes that taking on new traders in these 'oversaturated' commodities will result in the loss of existing traders.⁵² Improved dialogue between the Markets Service and OneSource (the shared services provider responsible for managing Newham Council's commercial property portfolio) – although generally beneficial for the management of the Market⁵³ - has recently resulted in the same restrictions also being applied to the kiosks and commercial units at Queen's Market.⁵⁴

While it is certainly legitimate for Newham Council to consider the potential negative financial impact on individual traders of additional traders in similar commodities, the research team has been unable to unearth any evidence or analysis to justify the Council's current view of the Market as 'oversaturated'. Furthermore, market operators need to balance concerns about excessive competition from too many traders in similar commodities with other issues. The National Association of British Market Authorities (NABMA) highlights the importance of market operators also taking into account the negative impacts associated with leaving units empty, including a loss of income, a less attractive market environment, reduced footfall, lack of opportunities for local businesses as well as the nature of the market and the community it serves.⁵⁵ At Queen's Market, the loss of income is particularly problematic given the lack of investment in the market environment over many years (see Section 6.2).

NABMA advises that specialist markets may be best served by an open policy, 'as their uniqueness and success relies on similar products being made available to the customer'.⁵⁶ In specialised markets, as in other specialised clusters, traders in the same commodity derive benefits from co-locating with one another, despite being in close competition. For example, in the case of the famous historic jewellery cluster located in Hatton Garden, central London,⁵⁷ traders benefit from co-locating because customers like to visit several shops before making a purchase. In the case of the City of London, financial firms benefit from being able to draw on each others' knowledge and networks. In a similar way, at Queen's Market – like other specialised flea markets, record fairs, craft markets or farmers markets – both customers and traders are attracted to and benefit from the concentration of businesses selling similar commodities.

In light of the complexity of the issues, as well as their potential to cause conflict and to generate legal challenge, NABMA recommends that so-called 'balance of trades' or 'tenant mix' policies should be informed by regular customer surveys, set out in writing (including the lettings rationale), provided to traders and reviewed annually. At the time of writing, none of NABMA's recommendations for so-called tenant mix policies were in place at Queen's Market, although the Council intends to begin a review of its approach during 2021.⁵⁸

6.2 Historic underinvestment in the market environment

Despite Queen's Market's strengths as a specialist food and textiles market and a welcoming and supportive community asset for diverse communities in Newham and beyond, it suffers from a poor and deteriorating market environment. The Markets4People survey and focus groups identified various problems with the current market environment, from the perspective of current market users. Of the 68% of market users who want to see changes at Queen's Market, the main responses included improvements to cleaning (mentioned by 51%) and to toilets (23%), refurbishment of the structure (10%), seating and benches (8%) and safety and security (5%). Just 10% of market users surveyed used the toilet facilities and provision of benches and seating is also poor, used by only 29% of market users. Focus group participants also stressed the importance of improving security, cleanliness and toilets at the Market:

Security is very important. Give me one camera! People [are] scared (F5, FG1).

As you are trying to talk with the [traders] selling you, two boys or so are behind you... they will be pretending as if they're trying to talk [to you about] something, and then while you're having a conversation with that one, they try to point [to] something and then they want to get into the pockets (M, FG2).

There was a time my eldest wanted to wee, and we put money in [for the toilet] and we opened the door, two adults, a boy and a girl doing the whole thing... Its not safe. As an adult I can cope with it, but the children... One day they want to pee and they say, "No mummy, we don't want to go there anymore" (F, FG2).

Some [traders] sell without the knowledge of the Council. You know these guys, storing goods in their bag... You don't want to have rapport with them because they are very dangerous (F, FG2).

Similar issues were also highlighted by council representatives, traders and Friends of Queen's Market in interviews. Problems identified include a leaking roof, blocked drains, shabby flooring, poor lighting, unreliable/insufficient CCTV coverage,⁵⁹ unsatisfactory cleaning and refuse collection, and increasing theft, drug use, antisocial behaviour and rough sleeping in the Market, as well as street drinking around the Market on Sundays, which the Council is working to address. The cleanliness and security of the Market's toilet facilities, located in the immediately adjacent public square, was a particular concern. These problems not only cause problems for existing customers; interviewees also believe they are deterring other potential customers from using the Market.



Poor lighting, flooring and maintenance issues contribute to a deteriorating market environment. (Saif Osmani)

Council representatives stated that the Market's poor and deteriorating environment had been caused by historic underinvestment, caused in part by previous failed redevelopment plans and uncertainty over the future of the Market:

I think we were left with an asset, a really important community asset that had been neglected, as many other things in this borough had been neglected, and then that leads to a real pessimism and cynicism on the part of our residents but it also evokes this sense that this is what the Council thinks of its residents and we do not care and you mean this little to us. And residents feel that... I was shocked at the absolute state of the Market in certain parts (Rokhsana Fiaz, Mayor of Newham).

There wasn't a political appetite, previously, to do a huge amount of work in markets, so we never got round to developing a market strategy. We were really left to our own devices to try and improve the look and feel of the Market, increase footfall and increase the number of traders, which was a very difficult thing without any corporate support (Assistant Director, Recycling, Refuse and Street Cleansing, Newham Council).

Because there's been no clear plan... it's been reactive maintenance... It's not had any capital investment for a while, because again, we're deciding what to do with it. So it sort of hasn't been given the love and attention that it should have been over the last couple of years (Commercial Manager, Property Services, OneSource).

Our research revealed several other factors contributing to historic underinvestment at Queen's Market, including the legislation governing street trading in London, the current approach to lettings (discussed in the previous section) and fragmented governance. Firstly, as staff from Newham Council's Markets Service explained, the legislation governing street trading (the London Local Authority Act 1990) makes it difficult to raise pitch fees to fund greater reinvestment. Despite the restrictions of the legislation, however, a report by the Greater London Authority has identified ways in which local authorities can work positively within the confines of the existing legislation, including to generate a surplus for reinvestment in a market.⁶⁰ The London Markets Board is developing a good practice guide to support local authorities in working positively within the confines of the existing legislation, as well as exploring how the legislation might be improved.⁶¹

Secondly, the fragmented governance at Queen's Market (Section 2) negatively impacts the surplus available for reinvestment across Newham's markets. Newham Council receives around £600k per annum from the commercial units and kiosks at Queen's Market. This income is used to finance other council services; none is ringfenced for reinvestment at Queen's Market even though commercial tenants are located in the market environment and both traders and customers see these units and kiosks as part of the Market. This situation leaves the Markets Service responsible for all costs relating to the running of Queen's Market, directly undertaking many tasks which impact on and benefit commercial tenants, in particular cleaning and some maintenance. This uneven allocation of resources and responsibilities contributes to a deficit in the Markets Service accounts for Queen's Market: income from the street trading pitches was £649k in 2018/19, compared to an allocated expenditure of £750k. The deficit at Queen's Market, in turn, reduces the overall surplus produced by the Markets Service (just over £50k in 2018/19), restricting funds available for reinvestment at Queen's Market as well as other markets (see Figure 14).⁶²

2018	Queens Market	Markets Service as a whole
Income	£649,144	£1,057,832
Expenditure	£750,455	£1,007,102
Surplus (+) / Deficit (-)	-£101,311	+£50,729

Figure 14: Income and expenditure for Queen's Market and the Markets Service as a whole, 2018/19. Data: Newham Council.

Finally, the Council's decision not to accept new applications from traders wishing to sell fruit & veg, fish, meat and groceries (Section 6.1) has contributed to occupancy rates averaging 77%, well below the Council's own target of 95% (Newham Council data, 2019). Running the Market at 77% occupancy equates to approximately £190k foregone income each year, reducing the funds available for reinvestment in the market environment.

6.3 Regeneration hopes and fears

In the course of the research, Newham Council's Regeneration team secured £4.1m for a package of improvements to Queen's Market and the wider Green Street town centre, funded jointly by the Mayor of London's Good Growth fund and Newham Council. The programme, due to begin in 2021, aims to deliver short-term improvements through four projects:

1. Improvements to the 'look, feel and function' of Queen's Market, including new lighting, flooring and toilets (£1.3m).
2. Converting part of the car park above Queen's Market into 1,500 sqm affordable workspace (£2m).
3. Converting the vacant retail units and first floor space below the Hamara Ghar sheltered housing block adjacent to Queen's Market into a new, flexible multi-use arts, meeting and workshop space (£760k).
4. Improving the public space around Queen's Market, including new trees, greenery and a pedestrian crossing (£90k).

During 2020, the Council undertook a series of engagement activities to inform the development of the Good Growth programme, several of which were attended by the research team. In November 2020, The Markets4People research team responded to the Council's consultation, to summarise relevant key findings from the research and their implications for the Good Growth programme.⁶³ The consultation response summarised research findings about the need for basic improvements to the market environment, recommending, therefore, that the available funds be focused as much as possible on the first element of the Good Growth programme.

Later in 2020, Newham Council also began to explore options for redeveloping Queen's Market and the neighbouring sheltered housing building, Hamara Ghar. Together, the Market and Hamara Ghar comprise a strategic development site in the local plan for mixed-use redevelopment, including retail, residential and community uses (probably healthcare). The site allocation includes a commitment to retain 'a viable market to provide a central focus for the site's commercial and community role'.⁶⁴ The Council began the process of commissioning a 'capacity and viability study' to explore the possible options further, starting with a consultation on a draft brief to potential consultants. The draft brief identified five potential options for consultants to explore, ranging from maintaining the existing buildings (fulfilling only the Council's statutory and landlord responsibilities) to strategic redevelopment of the entire site.

In February 2021, the Markets4People research team responded to the Council's consultation, to summarise relevant key findings from the research and their implications for the proposed capacity and viability study. The consultation response summarised research findings showing that Queen's Market is already highly successful and that, while basic improvements to the market environment are much-needed, there is no need for significant redevelopment at Queen's Market. On the basis of these findings, the research team's response to the consultation recommended that major redevelopment options were not explored further at this point, especially before long-overdue basic improvements to the market environment were delivered (at least in part) through the Good Growth programme.⁶⁵ In addition, the consultation response made a number of suggestions for how the draft brief for the capacity and viability study could be strengthened, to ensure the wide-ranging economic, social and cultural value of Queen's Market evidenced in this report was fully taken into account. While the Council did not accept the research team's recommendation that no major redevelopment options be progressed further, a number of the team's suggestions for strengthening the draft brief were introduced.

These consultations generated significant concern and anxiety amongst market traders and Friends of Queen's Market about the Council's intentions for the future of Queen's Market. Council consultations were criticised for being too short and poorly publicised.⁶⁶ At the Good Growth consultation events attended by the Markets4People team, participating traders and customers expressed their concerns that proposals to convert part of the market car park to affordable workspace, deliver new art projects and colourful signage, and diversify the Market's retail offer were intended to gentrify or 'artwash' Queen's Market. Responding to the consultation on the draft brief for the capacity and viability study, Friends of Queen's Market raised concerns that partial or full redevelopment of the site would mean the 'end of Queen's Market as we know it'.⁶⁷ Not being sufficiently reassured by the Council's commitment that there would always be a market on the site, the group mobilised their members and supporters to 'vote no' to all redevelopment options in response to the consultation. At the time of writing, the Council is in the process of finalising the brief for the capacity and viability study and is mid-way through a procurement exercise to select the design team to deliver the Good Growth programme.

6.4 A legacy of distrust from previous redevelopment plans

Traders and customers concerns about the Council's intentions for Queen's Market are, in part, a product of the legacy of distrust from previous administrations, in particular related to failed plans to demolish and redevelop the Market in the mid-2000s (see Section 2).⁶⁸ These problems were widely-acknowledged by council representatives, market traders and Friends of Queen's Market in interviews carried out as part of the Markets4People research project:

As with other areas of the Council, legacy issues have included a breakdown of trust between the local community in and around the Market and traders, and that's required time to rebuild (Rokhsana Fiaz, Mayor of Newham).

Friends of Queen's Market obviously are very vocal and very active, they have been kept out of the Council at arm's length and not spoken to for years (Cabinet Member For Finance and Corporate Services, Newham Council). Which is something that we're reversing (Rokhsana Fiaz, Mayor of Newham).

Around 2003, some market traders contacted [local resident] to say that an article had appeared in... Markets Gazette or something... It was a tiny little notice... that the Market was up for redevelopment. And what we read from that was in fact the site was going to be sold off... We did some further investigations and... we realised there was something quite sinister going on (member of Friends of Queen's Market).

Following her election, Mayor Fiaz began to address this legacy of distrust, both at Queen's Market and more generally. This new approach has included meeting more regularly and responding to queries from market traders and Friends of Queen's Market about the management of the Market. Efforts were also made to involve market traders and customers in the Council's emerging improvement and redevelopment plans through an online co-design platform, as well as workshops and events.⁶⁹ While this engagement represented a significant improvement, challenges resurfaced through the consultation on the Good Growth fund improvements and the draft brief for the capacity and viability study. Most importantly, the Council's inclusion of major redevelopment options for the future of the Market and Hamara Ghar rekindled fears of demolition, displacement of traders and gentrification of the Market.⁷⁰

Market traders and customers' concerns about the potential negative impact of improvement and redevelopment schemes also reflect the experience of traders in other markets undergoing similar projects, elsewhere in London, as well as wider research on markets. This shows that improvement and redevelopment schemes based on attracting new, younger and more affluent customers often end up displacing existing traders and alienating existing customers.⁷¹ While Newham Council are committed to retaining a market on the site, the experience of many local authorities suggests that further commitments will be needed if the existing roles and functions of Queen's Market are not to be damaged or destroyed, even unintentionally. At the time of writing, there are encouraging signs that Newham Council may be writing further commitments into the final brief for the capacity and viability study.⁷²

7. Recommendations

The following recommendations are addressed primarily to Newham Council as the owner and operator of Queen's Market and draw on findings from the Markets4People research project.

7.1 Embed the research across the Council

We recommend that the Council ensures all relevant teams have access to this report and embed it in their work relating to the Market. As the first large-scale, representative user survey ever undertaken, the research offers a new understanding of Queen's Market from the perspective of market users. It reveals Queen's Market's role as a specialist affordable food and textiles market and a welcoming and supportive community asset serving migrant and ethnically diverse communities in Newham and beyond. This understanding will be of benefit to the various teams within Newham Council with responsibilities over the Market. Firstly, it is essential that council officers working within the Markets Service, OneSource's commercial property team and the Regeneration team understand the community value of Queen's Market, so that it can be embedded in their work to manage and improve the Market. Importantly, for example, the evidence contained in this report should be taken into account in the Markets Service' upcoming review of its 'balance of trades'/tenant mix' policy (see Section 6.1 and 6.2). Given the benefits the research evidences in terms of well-being, combating loneliness, feelings of belonging and care, other teams across the Council that have statutory duties to promote individuals' health and well-being, such as Public Health Service or Adult Care Services, would also benefit from understanding the community value of Queen's Market. In light of the potential for Queen's Market to act as an anchor for Newham Council's Community Wealth Building, Inclusive Economy and Covid-19 recovery strategies, it is important for these teams to have access to this report. We therefore recommend that the Council ensures all relevant teams have access to this report and embed it in their work relating to the Market. We would be happy to offer further workshops and briefings to council officers and representatives, as well as any other interested parties.

7.2 Celebrate the market's current success and customers



Queen's Market is a key shopping destination for haberdashery, fabrics and fresh produce. (Saif Osmani)

We recommend that Newham Council celebrates the Market's current success and customers, placing them at the heart of its work to manage and improve Queen's Market. The research has shown that Queen's Market is a highly successful shopping destination of choice, specialising in quality and affordable fresh foods, clothing and textiles, and driving footfall and spend in the wider Green Street town centre. It is very highly rated by users across a wide-range of economic, social and cultural indicators and is a social, welcoming and supportive community asset. Although these strengths were not well-recognised by Newham Council in the past, this research provides firm evidence to support a change in approach which celebrates Queen's Market as major asset. Significantly, the research has also established the particular importance of Queen's Market to Asian and Black market users, migrants, people on low incomes and older people. They are variously more likely to be longstanding and frequent users of the Market, to do the majority of their food shopping at the Market, spend more money per visit and to say the Market is more important to them than other community facilities and retail outlets. They are also variously more likely to feel like they belong and to feel less lonely when they visit the Market. Although market improvement and redevelopment schemes tend to focus on attracting younger and more affluent customers, this research provides firm evidence to suggest that, in this case, Asian and Black market users, migrants, people on low incomes and older people are central to the Market's success.

7.3 Identify and mitigate negative impacts of policies on different user groups

We recommend that Newham Council identifies and mitigates the potential impact of any future policy options on different user groups, in particular equalities groups and other vulnerable groups. This should include any proposals to raise rents or alter the specialist role of the Market evidenced in this report, as well as any improvement or redevelopment plans relating to the Market. Care should be taken to understand and mitigate any negative impacts, and/or to explore other options. As discussed in this report and as evidenced in further literature, strategies to shift the customer base of markets towards a wealthier clientele risk displacing and pricing out some traders and leaving less affluent and vulnerable customers without a place to go for affordable goods and company. As the Council progresses their plans for the future of the Market, the demographic information provided by the Markets4People survey about the existing customer base should be used to assess – and minimise or mitigate - the impact of its policies on key user groups, including ethnic minority groups, migrants, lower-income communities, older people and women. Information about how different user groups are using the Market will be particularly relevant to equalities impact assessments.

7.4 Address the problem of fragmented governance

We recommend that the Council continues to address the problem of fragmented governance at Queen's Market. Building on improvements so far, we recommend that the Council brings together the operational and financial management of the street trading pitches and commercial units/kiosks at Queen's Market. At present, the Markets Service is responsible for all costs relating to the running of Queen's Market, and directly undertakes many tasks which impact on and benefit commercial tenants, in particular cleaning and some maintenance. Establishing a single team, responsible for both street trading and commercial lettings, would not only enable a more joined-up approach to operations but could also facilitate a more appropriate allocation of resources to support expenditure. A holistic business case could be made to ringfence a portion of the rents received from commercial tenants for reinvestment in the Market, drawing on economic, social and cultural value of the Market revealed through this research.

7.5 Address the historic underinvestment in the market environment

We recommend that Newham Council addresses the historic underinvestment in the Market before progressing any other improvement or redevelopment plans. The Markets4People research does not evidence a need for significant redevelopment at Queen's Market. It shows that the Market is *already* a highly successful shopping destination of choice, driving footfall and spend in the wider Green Street town centre, and it is a social, welcoming and supportive community asset. Users rate the Market very highly across a wide range of economic, social and cultural indicators but want to see basic improvements to the market environment, including lighting, flooring, cleaning, security and toilets. Interviewees also felt that problems with the market environment were deterring new customers from using Queen's Market. Simply addressing these problems would make the Market more attractive for existing and new customers without significantly changing the nature of the market offer or the communities it serves. We recommend that the need for basic improvements to the market environment is prioritised in any further work on the Council's planned capacity and viability study.



The Market drives footfall and spending in the wider Green Street town centre. (Myfanwy Taylor)

7.6 Trailblaze a community wealth building approach to markets

We recommend that Newham Council trailblazes a community wealth building approach to managing and improving markets at Queen's Market. Community wealth building aims to retain and circulate wealth locally, in order to drive more inclusive, socially just and environmentally sustainable local, urban and regional economic development.⁷³ Learning from the experiences of cities such as Cleveland in the United States, community wealth building was successfully developed and applied in Preston in the early 2010s⁷⁴ and has since taken off throughout the United Kingdom. Newham Council was one of the first in London to develop its own community wealth building strategy, which Mayor Fiaz sees as a route to addressing the borough's high levels of poverty and social exclusion.⁷⁵ The existing economic, social and cultural value of Queen's Market makes it ideally suited to a community wealth building approach, with the potential to become a best practice example for other markets in the UK to learn from.

A community wealth building approach to markets has yet to be developed. However, findings from the wider Markets4People research project suggest that a key element will involve making upfront commitments to existing traders and customers, to ensure markets retain their roles and functions for existing user groups as they undergoes improvement or redevelopment. Other elements of a community wealth building approach could include improving the market environment; low-key interventions to support social interaction (e.g. benches; meeting points; community events and activities); incentives and support to develop local supply chains; and working in partnership with traders, users and community groups, including exploring the potential to run markets as cooperatives where relevant. Introducing these elements could place Newham Council on a path to developing new much needed approaches to improving markets informed by community wealth building ideas, something that has not yet been achieved. It could also help Newham Council address the legacy of distrust which persists from previous failed redevelopment plans for Queen's Market.

7.7 Put Queen's Market at the centre of Newham's recovery from Covid-19

We recommend that Queen's Market should become a strategic site for realising the ambitions of Newham Council's Covid-19 Recovery Strategy, *Towards a Better Newham*.⁷⁶ Our research findings demonstrate the crucial role of Queen's Market – and other local markets⁷⁷ – during the ongoing coronavirus pandemic and its strategic potential to contribute to the Council's plans to embed health, well-being and race equality at the heart of an inclusive recovery. As household budgets come under continued pressure, Queen's Market's specialist food offering is as important as ever. The community role of Queen's Market in facilitating social interaction and as a space where users feel safe, less lonely, welcome and like they belong is even more relevant now that traditional retail uses are struggling in high streets and town centres.⁷⁸ Markets are also accessible places for people who have lost jobs to start new businesses.⁷⁹ Critically, the importance and value of Queen's Market to Asian/Asian British and Black/Black British communities, migrants, people on low incomes and older people makes it a key asset for realising the Council's goal to create an inclusive economy which addresses inequalities.

Our findings also support NABMA and NMTF's proposal that markets should be given parity with supermarkets to allow them to remain fully open during national lockdowns.⁸⁰ The community value of Queen's Market evidenced in this report also provides a strong rationale for further government support for market traders and operators, as proposed by NABMA and NMTF, to enable markets to continue to deliver wide-ranging economic, social and cultural benefits to marginalised communities as they emerge from the Covid-19 pandemic.

Annex 1 - Research Methodology

This report on Queens Market is part of a wider research project called Markets4People,⁸¹ funded by the Economic and Social Research Council since 2018, which has progressed in several phases.

The first phase of the Markets4People research project sought to identify key actors shaping the debate in the markets industry and to explore their perspectives on the economic, social and cultural value of markets, including how markets are changing, how their value or performance can be measured and how it can be enhanced. This phase involved 30 interviews with key national, regional and local stakeholders in the markets sector⁸² as well as workshops with market operators, traders and market community groups.⁸³ As a result, we published a report with the New Economics Foundation⁸⁴ which was launched at the All Party Parliamentary Group on Markets.⁸⁵

The second phase of the project – the focus of this report – has explored the views and experiences of markets users themselves, in order to gain an understanding of community value from their perspective. This is an understudied area with little pre-existing data. The research team firstly developed a set of criteria through which to select three case study markets. These criteria included that these three markets should be large enough to support a 500-customer survey, have strong economic, social and cultural roles and serve a diversity of customers. In light of the project's aims to influence policy and practice, the team also selected markets in which both the operator and traders were interested in and broadly supportive of the research. Following a rigorous selection process, involving informal interviews with market operators and trader/community representatives, as well as visits,⁸⁶ the research team selected Bury Market, Newcastle upon Tyne's Grainger Market and Queen's Market in Newham, East London. This report is one of three reports summarising research findings from each case study market for key stakeholders.

Queen's Market was selected as a case study as one of London's most ethnically diverse markets, providing food and a range of goods to Asian/Asian British and Black/Black British communities. The Market is listed as an Asset of Community Value and supported by a long-standing community group, the 'Friends of Queen's Market'. Aspects of its economic and social value – particularly in providing access to affordable fresh food, supporting jobs and inter-cultural interaction – have already been documented in various reports and studies⁸⁷ but no systematic user survey has been undertaken. The Markets4People research is therefore the first in this area, offering new perspectives on the current use and value of the Market which are highly relevant to ongoing discussions about the future of Queen's Market.

The Markets4People team designed a 10-15 minute survey to explore the economic, social and cultural value of each case study market from a user perspective. The survey covers key demographic information, shopping and eating at the market, socialising at the market, and feelings and views about the market.⁸⁸ It was carried out in early 2019, with 500 customers at each of the three case study markets being interviewed on our behalf by a fieldwork company expert in conducting research in markets, Fieldwork Assistance. At Queen's Market, the survey was conducted over 15 days during March and April 2019. A pilot survey demonstrated the need to translate and interpret the survey into Bengali, Gujarati and Urdu in order to secure the participation of Asian women who either did not speak English and/or would not otherwise have spoken in public to an unknown fieldworker. Survey materials were therefore professionally translated into these languages, and lay interpreters were recruited to provide on-the-spot interpretation as required, working alongside fieldworkers.⁸⁹ Survey data were analysed by Dr Lisa Buckner and Dr Andy Newing.

Two 90-minute focus groups were organised at each case study market, with survey respondents from selected typically marginalised or vulnerable user groups, which wider academic research tells us benefit most from the community value of markets. For Queen's Market, the research team ran one focus group with female market users who described their ethnic group as Asian or Asian British and a second with market users who described their ethnic group as Black or Black British on the 29th and 30th of July 2019 at the Katherine Road Community Centre.

The research team interviewed key local figures at each case study market in order to contextualise the survey data. At Queen's Market, interviews were undertaken with 13 key local actors during 2019. From Newham Council: the Mayor of Newham, Cabinet member for Environment, Highways and Sustainable Transport, Cabinet member for Finance and Corporate Services, a local Ward Councillor, Assistant Director for Recycling, Refuse and Street Cleansing, the Manager of the Markets Service, a Regeneration and Development Advisor, and two officers responsible for commercial property at Newham's shared services provider, OneSource. We also interviewed the MP for East Ham, one informal trader leader and two members of Friends of Queen's Market. Focus groups and interviews were recorded and transcribed (with participants' permission) and analysed by Dr Myfanwy Taylor and Professor Sophie Watson.

This primary research has been complemented by further analysis of policy, media and academic documents and papers that relate to Queen's Market and its geographic, social and economic context.

The research team attended several consultation workshops and public meetings organised by Newham Council, to inform its work on the future of Queen's Market. We met several times with regeneration officers and submitted formal responses to Council consultations, summarising relevant research findings and their policy implications. This dialogue has already contributed to a number of positive changes at Queen's Market. We also attended several meetings of Friends of Queen's Market to learn about their work and to discuss the research.

On the 13th of February 2020 the team presented a draft of this report to key local stakeholders, including relevant council officers, traders and members of Friends of Queen's Market. Feedback from participants at this meeting, as well as from additional discussions on further drafts, has been taken into account and incorporated as much as possible. The report has also been reviewed by members of our research team and Steering Group, who also provided very useful feedback.

We would like to thank to all survey respondents, focus group participants, interviewees and administrative staff at the Council and the Market for participating in the research. Ultimately, the authors of this report are solely responsible for its comments.

Annex 2 – Research Team

This report is written by members of the Markets4People project, led from the University of Leeds;⁹⁰ an interdisciplinary team of internationally renowned academics with expertise on retail markets, cities and retail change. As well as the authors of this report, whose short biographies can be read on the inside front cover, the team also includes other academic experts with complementary expertise:

- **Dr Paul Waley**, Senior Research Fellow at the School of Geography, University of Leeds with expertise on cities and urban restructuring, particularly in Asia but also in respect to traditional retail markets in the UK.
- **Professor Graham Clarke** at the School of Geography, University of Leeds with expertise on the geography of retail change and retail location models and urban service analysis.

The research team is also made up of two non-academic co-investigators:

- **NMTF**, the only national trade association for market and street traders. Founded in 1899, it has around 20,000 members. It supports market traders and the markets sector in general. At NMTF, Chris Savage was co-investigator in the Markets4People project until November 2020 when he left the organisation, later replaced by Shanaaz Carroll.
- **New Economics Foundation**, a think tank that promotes a people-oriented economy with research expertise on markets. At NEF, Frances Northrop is co-investigator in the Markets4People project. She has expertise on communities and place-based stakeholders, and regularly works with community economic practitioners and local and regional policy makers.

This team is supported by a Steering Group made up of academics, experts and key actors in the markets sector and related areas.

Dr Suzanne Hall (London School of Economics and Political Science) is an urban ethnographer and has practised as an architect in South Africa. She is Co-director of the Cities Programme and Associate Professor in Sociology at the LSE.

Professor Alan Hallsworth (University of Portsmouth) has a 30-year research record in retailing. His studies have frequently helped to underpin aspects of planning policy guidance and inform UK policy makers.

Sasha Laurel Jagroo (Friends of Queen's Market). The Friends of Queen's Market is a dynamic, grassroots community group which formed in 2009 to campaign successfully against the proposed demolition of Queen's Market and continues to meet regularly to campaign to protect and promote it.

Richard Lee, Just Space. Just Space is an informal alliance of community groups, campaigns and concerned independent organisations. Its aim is to improve public participation in planning, to ensure that policy is fairer towards communities.

Ailbhe McNabola, Power to Change. Power to Change is an independent charitable trust that supports and develops community businesses in England and also works with community businesses to revive local assets, protect the services people rely on, and address local needs.

Jonathan Pauling, Alexandra Rose Charity. The Rose Vouchers for Fruit & Veg Project, set up by Alexandra Rose Charity, helps families on low incomes to buy fresh fruit and vegetables at local markets. The project also benefits markets, fostering economic vibrancy through regular trade.

David Preston, NABMA. The National Association of British Market Authorities (NABMA) promotes markets on the national stage and also provides a wide portfolio of services for market operators.

Gary Warnaby, Institute of Place Management. IPM is the international professional body that supports people committed to developing, managing and making places better. The Institute works with policy makers, practitioners and providers to identify the core skills required for the effective management, development and marketing of places.

Endnotes

1. The full name of the research project is 'Understanding and Enhancing the Community Value of Traditional Retail Markets in UK Cities' (ESRC grant number ES/P010547/1, Principal Investigator Dr Sara González, University of Leeds). See Annex 1 and Annex 2 for more details on our research team and research methodology, and our website and blog for further information and updates: <https://trmcommunityvalue.leeds.ac.uk/>; <https://gtr.ukri.org/projects?ref=ES%2FP010547%2F1#tabOverview>.
2. See Endnote 1.
3. González, S. and Waley, P. (2013) Traditional Retail Markets: The New Gentrification Frontier? *Antipode* 45 (4). 965 - 983. ISSN 0066-4812, p965. <http://eprints.whiterose.ac.uk/77209/>.
4. London local authorities operating street markets under the London Local Authority Act 1990 are unable to use rental income from street trading to subsidise other services. The legislation requires that rent is charged only to cover the cost of operating markets.
5. Bua, A., Taylor, M. and González, S. (2018) Measuring the Value of Traditional Retail Markets: Towards a Holistic Approach <https://neweconomics.org/uploads/files/retail-markets.pdf>; Hallsworth, A. et al (2015) *Markets Matter: Reviewing the evidence & detecting the market effect*. London: Manchester Metropolitan University, IPM and NABMA; NMTF and NABMA. (2018) *Mission for Markets*. <https://www.mission4markets.uk/about/industry.html>; Mayor of London and the Local Enterprise Partnership for London (2017). *Understanding London's Markets*. https://www.london.gov.uk/sites/default/files/gla_markets_report_web.pdf; Rubin, G. Jatana, N. and Potts, R. (2006) *The World on a Plate: Queens Market*, London: NEF. https://b3cdn.net/nefoundation/31f21886832eb6ba1a_15m6ba8x3.pdf; Watson, S. and Studdert, D. (2006) *Markets as sites for social interaction: spaces of diversity*, Joseph Rowntree Trust, <https://www.jrf.org.uk/sites/default/files/jrf/migrated/files/1940-markets-social-interaction.pdf>.
6. Bua, Taylor and González (2018); NMTF and NABMA (2018); NABMA and ROI Team (2015) Measure Economic Performance, <https://www.mission4markets.uk/get-involved/measure-economic-performance.html>.
7. González and Waley (2013); González, S. and Dawson, G. (2015) *Traditional Markets under threat: why it's happening and what traders and customers can do*. <http://eprints.whiterose.ac.uk/102291/>; González, S. (2018). *Contested Markets, Contested Cities: Gentrification and Urban Justice in Retail Spaces*. London, Routledge; Seale, K. (2016). *Markets, Places, Cities*. London, Routledge.
8. Blytham, J. (2020) Millennial shopping habits are putting grassroots grocery at risk. *The Grocer* [paywall] 30 March 2020. <https://www.thegrocer.co.uk/high-street/millennial-shopping-habits-are-putting-grassroots-grocery-at-risk/602509.article>; Hancox, D. (2020) The 'street food' swindle: fake diversity, privatised space – and such small portions! *The Guardian*. 23 February. <https://www.theguardian.com/commentisfree/2020/feb/23/street-food-swindle-fake-diversity-privatised-space-small-portions>; Perry, F. (2015) London's local markets under threat from gentrification – readers' stories. *The Guardian*. 19 May 2015. <https://www.theguardian.com/cities/2015/may/19/london-local-markets-threat-gentrification-stories-brixton>; Taylor, M. González, S. and Northrop, F. (2019) Building community markets, *STIR to Action magazine*, Issue 26. Summer 2019. <https://www.stirtoaction.com/magazine-issues/issue-26>.
9. Watson and Studdert (2006).
10. For more details about the process of case study selection see here <https://trmcommunityvalue.leeds.ac.uk/announcing-our-case-study-markets/>
11. More details of the methodology and research design of the Markets4People project are available in Annex 1. Our blog also provides information and updates about our research activities: <https://trmcommunityvalue.leeds.ac.uk/blog/>.
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28. Personal communication, Newham Council officer. 30 March 2021.
29. 'Vulnerable' refers here to a group made up of the following characteristics: people aged 80 and over; long term sick / disabled; retired; looking for work / unemployed; less than one year living in UK; lone parent living with young children aged under 16; and living alone in a household where the main earner is in SEG group E. The Markets4People team analysed the responses of 'vulnerable' market users compared to 'non-vulnerable' market users in order to identify whether they were significantly different.
30. Only statistically significant differences ($p < 0.05$) in response by demographic characteristics or other variables are included in this report.
31. Identifying core and secondary catchment areas allows us to compare market users with all households living in the catchment areas using neighbourhood level data based on postcodes (at unit postcode level).
32. Please note that the percentages in some charts presented in this report may not sum to 100% as they are presented to the nearest whole number.
33. As respondents were unwilling to provide information about their approximate incomes during the pilot survey, the survey was revised to collect information about the main salary earner in the household as a proxy for income levels. This information was then coded into the widely used "social grade" classification (A, B, C1, C2, D) based on occupation. In the report, we refer to these "social grades" as "socio-economic groups". The postcode information provided by survey respondents was used to identify the deprivation level of the neighbourhoods market users live in.
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36. Although not key to the Markets4People research project, car parking is a contentious issue at Queen's Market. Further details about our research findings on this topic can be found on our website at <https://trmcommunityvalue.leeds.ac.uk/good-growth-programme-for-queens-market-m4p-response/>.
37. In this report, FG1 stands for 'Focus Group 1' (Asian/Asian British female market users) and FG2 stands for 'Focus Group 2' (Black/Black British market users). Focus group participants are referred to by gender and, where the recording allowed, number (e.g. 'M1' for the first male participant; 'F3' for the third female participant).
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42. 50% of Queen's Market users live in neighbourhoods classified as 'Passive and Uncommitted Users' and 34% in neighbourhoods classified as 'Youthful Urban Fringe' group, both of which are less likely to shop online, especially for food and drink, based on the Internet User Classification: <https://data.cdrc.ac.uk/dataset/internet-user-classification>.
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52. Personal communication, Newham Council officer, 31 March 2021.
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54. This new approach does not seem to be having a negative impact on commercial lettings; rather, the already low vacancy rates appear to be falling further (from approximately 10% at the time of the research to 6% in 2020 and 5% in 2021).
55. NABMA (2015) Tenant Mix Policy For Markets. <https://www.nabma.com/wp-content/uploads/2015/08/BALANCE-OF-TRADE-POLICY.pdf>.
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57. The Hatton Garden jewellery cluster dates back to medieval times and remains the largest cluster of jewellers in the UK, attracting international visitors. See <https://www.hatton-garden.london/visit/guides/a-brief-history-of-hatton-garden-jewellers>. It is often referenced in economic geography and local economic development as an example of a successful business cluster, demonstrating the benefits of co-location for individual firms.
58. Personal communication, Newham Council officer, 9 December 2020.
59. While focus group participants reported problems with insufficient and unreliable CCTV coverage, the Council's view is that CCTV coverage at Queen's Market is comprehensive and fully operational (personal communication, Newham Council officer, 30 March 2021).
60. Mayor of London and the Local Enterprise Partnership for London (2017).
61. Mayor of London and the Local Enterprise Partnership for London (2017, Recommendations 2 and 3).
62. It should be noted, of course, that the calculation of a surplus/deficit at Queen's Market depends very much on how the Markets Service allocates expenditure across Newham's markets in its accounts. The Markets Service received 61% of its income from Queen's Market, but allocated 75% of expenditure including 80% of wages to Queen's Market in 2018/19. A different allocation of expenditure would result in a different surplus/deficit at Queen's Market. These calculations have been challenged by Friends of Queen's Market, who are of the view that income from the pitches at Queen's Market is subsidising the Markets Service as a whole, resulting in an insufficient proportion of the income from Queen's Market pitches being reinvested in the market environment.
63. See the Markets4People response to the consultation on the Good Growth programme for more detail <https://trmcommunityvalue.leeds.ac.uk/good-growth-programme-for-queens-market-m4p-response/>.
64. See https://drive.google.com/file/d/1cz8heuGgo8QAI8bPMctmPDNP_1HMp8Dy/view.
65. See the Markets4People response to the consultation on the capacity and viability study, and letter to the Mayor of Newham, for more detail <https://trmcommunityvalue.leeds.ac.uk/capacity-and-viability-study-for-queens-market-m4p-response/>.
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81. See Endnote 1.
82. See the following blog post for more information: <https://trmcommunityvalue.leeds.ac.uk/debating-the-value-of-traditional-retail-markets/>
83. See the following blog posts for summaries of the discussion at these workshops: <https://trmcommunityvalue.leeds.ac.uk/traders-perspectives-on-the-community-value-of-markets/>; <https://trmcommunityvalue.leeds.ac.uk/campaigners-perspectives-on-the-community-value-of-markets/>; <https://trmcommunityvalue.leeds.ac.uk/market-managers-perspectives/>.
84. Bua, Taylor and González (2018).
85. More details of this launch here: <https://trmcommunityvalue.leeds.ac.uk/report-launch/>.
86. See more details about this process here: <https://trmcommunityvalue.leeds.ac.uk/announcing-our-case-study-markets/>.
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88. Available online at: <https://trmcommunityvalue.leeds.ac.uk/surveytemplate/>.
89. Lay interpreters were recruited from the local community via the networks of the community group, Friends of Queen's Market, and included local residents, market users and members of Friends of Queen's Market. Lay interpreters worked alongside trained field officers at all times, using the professionally-translated survey materials and providing on-the-spot interpretation between participants and fieldworkers. Lay interpreters received training and instruction from the Markets4People research team.
90. More information about our research team, with links to their CVs and publications, can be found here: https://trmcommunityvalue.leeds.ac.uk/profile_type/researchteam/.



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