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Corresponding Author:

Michael MacLeod
Land Economy Research Group
Research Division
SAC Edinburgh
EH9 3JG

Tel: 0131-535-4387
E-Mail: michael.macleod@sac.ac.uk

The Origins, Operation and Future of Farmers' Markets in Scotland

Michael MacLeod

Land Economy Group, SAC
Edinburgh EH9 3JG
e-mail: michael.macleod@sac.ac.uk

Phone: 0131-535-4387

Abstract

There have been a number of supply chain adjustments in food and farming in Scotland in recent years, one of which has been the growth in the number of "farmers' markets" (FMs). These are markets in which agricultural produce from a defined local area is sold by stallholders involved in the production process. The first markets in Scotland started in 1999, and the sector now has an estimated annual turnover of around £7m. While their origins can be traced to the crisis in farm incomes in the late 1990's, they have come to be seen as a way of providing a range of market and non-market benefits to producers, consumers and wider society. The findings of a recent SAC project indicate that farmers' markets are complex and display considerable variation, e.g. in terms of their: origins; size; turnover; location; product range; management; strengths and weaknesses; perceived threats. They face a range of challenges, including: retaining critical mass; maintaining their brand; managing costs; improving co-ordination. Despite these, it is argued that farmers' markets can continue to put the "spring back in the step" of Scottish farming, while providing a range of benefits for town centres, communities and consumers.

Background

There have been a number of supply chain adjustments in food and farming in Scotland in recent years, one of which has been the growth in the number of "farmers' markets". The term "Farmers Market" refers to markets in which "farmers, growers or producers from a defined local area are present in person to sell their own produce, direct to the public. All products sold should have been grown, reared, caught, brewed, pickled, baked, smoked or processed by the stallholder" (National Association of Farmers' Markets, 2003, http://www.farmersmarkets.net/). Their popularity has been reflected in the growth of the number of regular markets, which has been influenced by wide range of benefits they can provide to the producer, consumer, the wider community and the environment. The success of farmers' markets was welcomed in the *Forward Strategy for Scottish Agriculture* (Scottish Executive 2001, p14), which noted:

"The 24 regular farmers' markets in Scotland have been an example of where farmers can listen to consumers' needs and gain valuable experience in direct marketing. They also help Scottish consumers understand the reality of today's farming industry – rebuilding links between local producers and consumers which have been lost"

The first farmers' market in Scotland was set up in 1999. The number of markets has grown rapidly, and there are now (July 2006) approximately 65 operating throughout Scotland (see figure 1). These range in location from Shetland in the North to Campbeltown in the South, and from Barra in the west to Peterhead in the East.

The size and frequency of these markets varies from regular markets such as Wick or Edinburgh, which occur every week or fortnight, to occasional markets such as those held in Pollok Country Park in Glasgow, which happen a couple of times each year. For up to date information on markets see the Scottish Association of Farmers' Markets website (http://www.scottishfarmersmarkets.co.uk/), and The List Deli and Good Food Directory to Scotland (see www.list.co.uk for details).

The rapid growth of the farmers' markets sector led, in April 2004, to the commissioning of the Scottish Executive Environment and Rural Affairs Department (SEERAD) project "An Evaluation of the Economic and Social Benefits to Producers of Participating in Farmers' Markets in Rural Scotland". The overall aim of this project was to examine the socioeconomic benefits afforded to producers through their participation in farmers' markets. In order to build up the background picture, it was decided that detailed information on the markets' origins and operation was required. Existing data sources proved inadequate for this purpose, largely due to the *ad hoc* and rapidly changing nature of the sector. It was therefore decided that primary data gathering was required.

Methodology

This paper is based upon the findings of two surveys, a survey of market managers carried out in July 2005 and a survey of stallholders carried out in May 2006. Copies of the questionnaires used can be found in the Appendix.

The Market Managers Questionnaire

A short 15-item questionnaire was designed, in order to collect data on the management of farmers' markets, (i.e. their age, size, location, frequency, producers attending, management structure and policies) and managers' perceptions of their market's strengths and weaknesses. It consisted of a series of close and open-ended questions divided into three sections: "market origin"; "market operation and management"; "the way ahead for farmers' markets". After being reviewed by SAC staff and approved by SEERAD survey control, the questionnaire was sent out (by e-mail and/or by post) to all market managers. Identifying the markets currently operating and a contact involved in the management of the market was complicated by lack of up to date information. Various sources were used, such as: published literature (e.g. The List (2004), Paul (2004)); websites (notably the sites of the Scottish Association of Farmers' Markets, Aberdeenshire Council and The Foody); and direct contact with local authorities and the enterprise network. Overall 28 out the 63 questionnaires sent out were completed and returned, representing a response rate of 44%. Completed questionnaires were returned from a wide geographical spread of markets representing a variety of area types, i.e. urban, accessible rural, remote (mainland) rural and island. However, relatively few responses were received from markets in the north and northwest.

The Stallholders' Questionnaire

A short 16-item questionnaire was designed, in order to collect data on stallholders patterns of participation and perceptions and attitudes towards key issues. It consisted of a series of close and open-ended questions divided into two sections: "Information about your attendance at farmers' markets"; "Your views on farmers' markets". After being reviewed by SAC staff and approved by SEERAD survey control, the questionnaire was sent to 267 stallholders. It has been estimated that there are between 300 and 500 producers selling at farmers' markets in Scotland (Watson 2004a). The sample therefore represents between 53% and 89% of the stallholders attending Scottish farmers' markets). 67 completed questionnaires were returned, equivalent to a response rate of 25%. Most questionnaires were posted (189) or e-mailed (31) direct to stallholders, however 32 were distributed by market managers and 15 were handed out by researchers at Inverness FM. This hybrid approach to distributing the questionnaires was the result of attempts to make the sample more representative. The initial (postal) database contained a small proportion of stallholders in the North West and North East (see table 1). In order to achieve a more even geographical coverage, the e-mail addresses of stallholders in the North East were obtained via an internet search, and questionnaires were distributed at selected markets (Shetland, Orkney, Inverness and Ullapool) in the North West and North East.

The resultant rates of producer per 1000 holdings for the total sample and respondents are of the same order of magnitude, although there is still potential over-representation of SE and under-representation of NW. However, given that most stallholders were captured in the sampling frame, this may simply reflect actual geographical variation in farmers' market participation rates, and the large number of smallholdings in the NW.

Results

Market Origins – who and why

While different markets have set up for different reasons, it could be argued that a range of factors created the preconditions for the growth of the sector, notably:

- BSE (no exports '96-99)
- Foot and 2001
- Strong £
- Oversupply of some commodities and consequent low world prices
- Low farm incomes and farm debt

The crisis in farm incomes (see figure 2) and dissatisfaction with other routes to market created the feeling, according to one farmers' market founder, that "We had nothing to lose" Mitchell (2004). Stallholders' responses to the question "What were the main reasons you decided to start selling at farmers' markets?" are shown in figure 3.

Perhaps unsurprisingly, given the recent financial problems of Scottish farming, financial reasons were the most common motivation for starting selling at farmers' markets. However, many respondents also cited a more general desire to promote local food.

The responses to the market managers' survey showed that markets have been set up for a wide variety of reasons (see figure 4). Interestingly, the most commonly cited reason was "to promote the area/regenerate the town centre". This may reflect the fact that local authorities were involved in the establishing of 35% of markets. The results demonstrate the wider social role that farmers' markets can play beyond simple market exchange. They have, or at least are perceived to have, the ability to promote and regenerate areas, benefit the local community and the rural economy and even help meet Agenda 21 objectives. This more complex, multifunctional role means that it can be difficult to balance the competing demands that different stakeholders place on farmers' markets. For example, the managers of Edinburgh Farmers' Market (Edinburgh City Centre Management Company) attempted to move the market to a nearby site in the Grassmarket in 2004 as they believed that this would help to improve the character of the Grassmarket area. However, the move was resisted by many stallholders who considered the new site inferior (e.g. in terms of access and parking) to their existing location.

On the demand side, farmers' markets have successfully responded to consumer demand for a shopping experience that provides, amongst other things:

- Particular product attributes, e.g. freshness, quality, localness, traceability;
- An opportunity to meet producers;
- An opportunity to support rural areas;

Research by the Scottish Food Advisory Council (2002) revealed that while 72% of farmers' market shoppers bought there because of the quality of the products, the second most common reason, cited by 31% of shoppers, was to "support local farmers". Clearly farmers' markets are about more than simply obtaining certain types of product.

Size of the Sector

There are few reliable estimates of the size of the farmers' markets sector in the UK. However, Farma research has suggested that the turnover in the UK in 2003 was £120 million (Derbyshire 2004). The annual turnover in Scotland was estimated to be £20 million in 2004 (Scott, quoted in Buglass 2004). In light of the uncertainty regarding turnover, one of the main aims of the surveys was to provide an empirically-sound estimate of the sector size.

Managers and stallholders were asked to estimate the daily turnover of their market or stall. This data was used to calculate the total annual turnover for all responding markets and the average turnover per stallholder per hour (£90.03 – £99.50). In order to calculate the turnover of non-responding markets, the annual number of stallholder hours for each market was estimated based on a reported data on market frequency of occurrence, duration and number of stalls. The averages from the survey were used where no reported data was available. The annual number of stallholder hours was then multiplied by the average turnover per stallholder per hour (see table 2). Given the dynamic nature of the sector, this estimate is likely to have a short shelf life. However, despite its limitations it provides an evidence-based benchmark with clear assumptions.

Table 3 compares the turnover of farmers' markets with other key sectors. Clearly, in terms of turnover, farmers' markets is a small retail sector. However it is also a rapidly growing sector and the small market share could be seen as an opportunity, instead of a threat or weakness. Most people don't shop at farmers' markets, and most food is bought somewhere other than farmers' markets, which suggests that there a lot of potential customers and scope for growth. Evidence indicates that while up to 1 in 3 people in the UK may have shopped at a farmers' market at some point during the previous 12 months (Farma research reported in Derbyshire 2004) only 7% of the Main Grocery Shoppers in Scotland used a farm shop or farmers' market in a typical month (Market Research UK Ltd 2003). In addition, turnover is a crude measure in that it gives no indication of the wider social costs and benefits of different routes to market.

Management

Good management was commonly cited (by 21% of stallholders) as an important requirement for a successful market. As one respondent put it:

"Good management of a market is paramount whether it be run by stallholders themselves or by somebody employed by them. They need to be able to sort out any disagreements, be fair to all and maintain any rules…the quickest way to bring a market down is disquiet amongst stallholders"

In terms of the type of management, the majority of stallholders (74%) cited management by a producers' cooperative as their preferred form. This is also the most common type of management at present (see table 4). Watson (2004b) has argued that markets managed by producer cooperatives tend to be the strongest as they encourage business development and avoid some of the disadvantages of other forms of management, e.g.: risk of burnout (management by volunteers); lack of producer control (management by a commercial operator); conflicting agendas (management by government body/agency).

Benefits

It has been argued that FMs can provide a range of benefits to producers, consumers and the wider community and environment. Table 4 gives examples of some of the benefits that have been attributed to FMs.

Stallholders were asked to list what they considered to be the main benefits they received through their attendance at FMs (see figure 5). By far the three most common benefits were:

- Advertising/promotion
- Market research/product feedback
- Financial benefits, e.g. greater margins, lower overheads, increased sales.

A minority of respondents also cited the opportunity for networking and social contact as one of the main benefits. These results are broadly consistent with the findings reported in table 4. Various other less obvious benefits were cited, such as:

- Personal satisfaction
- Control of the entire (food production and marketing) process
- Resisting supermarkets
- Brings the next generation into the business

It should be noted that the actual benefits of FMs (to producers, consumers or society in general) depend on what they are displacing, i.e. the net benefit of £1 spent at a FM instead of a supermarket is likely to be different from the net benefit of £1 spent at a FM instead of a farm shop.

Threats

When asked if they felt that there were any threats to the success of *their* markets (managers) or farmers' markets *in general* (stallholders) the results were virtually identical; 88% of managers and 89% of stallholders said yes. However, the perceived threats were quite different (see table 6). Bureaucracy/legislation was the most commonly cited threat by stallholders. This may reflect the ongoing debate regarding the influence that regulation, and EU-derived legislation in particular, has on the performance of Scottish agriculture. Concern has recently been expressed that the cumulative burden of (EU) legislation in Scotland is "wearing farmers down more than low prices" (Maxwell 2006). Managers also cited bureaucracy/legislation as a threat, but to a lesser extent. Poor product/stallholder integrity (e.g. misuse of terms such as "organic" and inappropriate trading practices) was cited by one in four stallholders. This does not necessarily mean that products lacking integrity are commonplace, rather that product and stallholder integrity are key to the FM brand, and people are therefore sensitive about preserving them.

Interestingly, economic downturn was not cited by many managers or stallholders. This implies that respondents were either relaxed about the effect that a recession would have on demand (i.e. that demand for FM's was income inelastic), or did not think a recession likely. It could be argued that the fact that a food scare was not seen as a threat illustrates why survey results need to be interpreted carefully. Surveys are only snapshots of a particular moment, and could produce quite different results at another time. For example, if these surveys were repeated in the aftermath of an *E.coli* incident or avian flu outbreak it is unlikely that food scare would be mentioned by so few people.

Discussion: Emerging challenges for farmers' markets

The surveys, combined with a longer term study, have highlighted emerging challenges for FMs in Scotland. These are discussed below.

1. Retaining critical mass

Lack of stallholders was frequently cited by market managers and stallholders as a threat to success. If a critical mass of stalls and product types is not achieved, a spiral of dwindling footfall leading to reduced stall turnover and declining stall numbers can be set in motion. The results of the managers' survey revealed that several markets are at, or near, the minimum number of stalls required to remain viable. Most have room for extra stalls, however expansion needs to be handled carefully in order to avoid adverse impacts on the overall stall mix or the turnover per stall. The importance of this issue is highlighted by the fact that having a balanced variety of produce was one of the most commonly cited factors required for a successful markets by both market managers (65%) and stallholders (40%).

2. Maintaining the brand

Maintaining the integrity of the Farmers' Market brand presents problems as there is no copyright on "Farmers' Market". This means that anyone can set up a market and call it a "farmers market" without (unless they are a member of SAFM) any accreditation beyond meeting statutory requirements such as health and safety standards. The brand is also under some pressure in light of the adoption of regional/local branding by supermarkets. In light of this, shopping at a farmers' market needs to be about more than the purchase of local food, and part of the challenge is keeping the farmers' market shopping experience interesting.

3. Costs

Controlling costs is important in order for farmers' markets to remain profitable, and costs were seen as a threat by both managers and stallholders (see table 5). For example, concern has been expressed about the increasing costs of meat processing and preliminary analysis of the costs of selling beef indicate that there is little room for wastage or cost increases (see table 6). These figures indicate that approximately 200kg of beef needs to be sold to make a profit of £400, leaving little room for wastage or increased costs. This is a potential cause for concern as meat sales are seen as crucial to the success of farmers' markets: "We (Perth farmers' market) tried to hold meat-free markets during FMD, but they were shambolic, rubbish" (Fairlie, pers comm., 14/3/2005).

4. Co-ordination and key decisions

The independence and diversity of farmers' markets are important strengths, however, they can also make a co-ordinated approach to the promotion of the sector difficult. The diversity of the markets is reflected in the attitudes of stallholders to some form of accreditation for farmers' markets. When asked if they thought that FMs should be accredited by a body such as Farma or SAFM, many stallholders were undecided (see figure 6)

To date, FMs have grown in a largely bottom-up, *ad hoc* fashion, however, there is evidence that key decisions regarding the development strategy for farmers' markets in Scotland may need to be made in the short to medium term.

Example - produce type and provenance

There is currently a debate amongst farmers' market stakeholders regarding the types of produce that should be eligible for sale. Some have argued that, in order to retain the integrity of the farmers' market brand, the items for sale should be limited to food products produced locally and/or by the vendor. Others have argued that providing a certain amount of non-food and non-local items enables farmers' markets to innovate and meet emerging customer demands, which they see as essential to the survival and growth of farmers' markets. The stallholders' survey asked respondents to indicate their attitudes to key issues. Figure 7 shows that while most stallholders disagree that farmers' markets should be restricted to selling food and drink, they are clearly divided in terms of attitudes towards product provenance. Part of the divergence in views may be because of the different needs of farmers' markets in different areas. For example, while most stallholders may agree that it would be desirable to only sell products of certain types from within a certain radius, this may not be practical in remote areas. As one respondent put it:

"In big cities with a varied hinterland it is easy to have strict rules on e.g. mileage, no crafts. In more rural areas rules have to be flexible in order to have a quota of stalls."

Debates such as these are important in light of the internal and external challenges faced by farmers' markets in adapting to the changing commercial context and rural economy. farmers' markets need to be able to respond to potential external threats such as the increasing use of regional branding by supermarkets. They also need to reach consensus on the best ways of meeting internal challenges such as the lack of stalls selling certain product types or the opportunity cost borne by volunteers involved in the organisation of markets.

Conclusions

Farmers' markets in Scotland have their origins in the financial problems that beset farming in the late 1990's. Since the establishment of the first markets in 1999, the sector has grown steadily to an estimated annual turnover of £6.6 – 7.1m. Although small compared to other food retail sectors, farmers' markets appear to have been successful in "putting the spring back in the step of" Scottish farming, and have also provided wider social benefits, such as the reinvigoration of town centres and an opportunity for urban food consumers to reconnect with the rural.

The farmers' markets sector is complex and markets display considerable variation, e.g. in terms of: their origins; size; turnover; location; product range; management; strengths and weaknesses; perceived threats. A degree of caution should therefore be exercised when drawing general conclusions about "farmers' markets". Despite this, it is argued that the sector as a whole face a series of challenges:

- retaining critical mass
- maintaining the "farmers' markets" brand;
- managing costs;
- improving co-ordination.

There is evidence that key decisions regarding the development strategy for FMs in Scotland may need to be made in the short to medium term. These challenges suggest that there is scope for greater coordination of effort. However, the heterogeneity of farmers' markets - arguably one of their strengths - may present difficulties in terms of co-ordination and competition.

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Figures

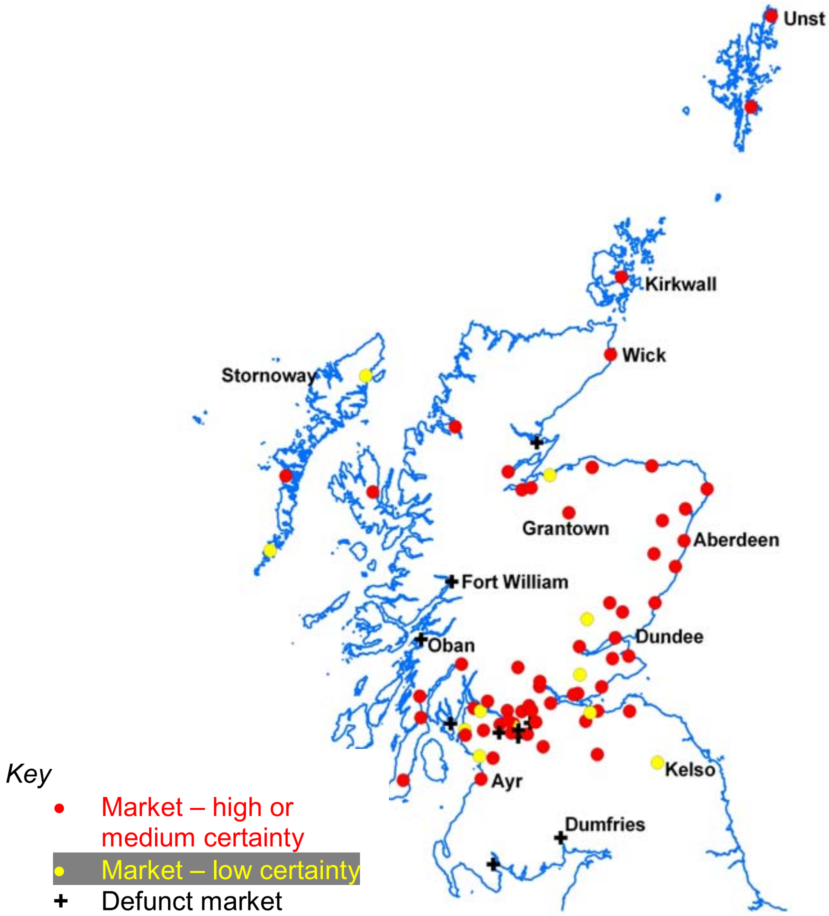


Figure1. Farmers' Markets Currently Operating in Scotland. The symbols indicate the level of certainty that the market is currently operating.

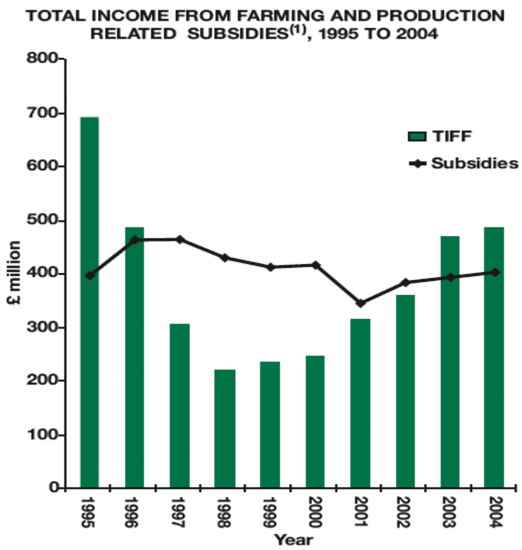
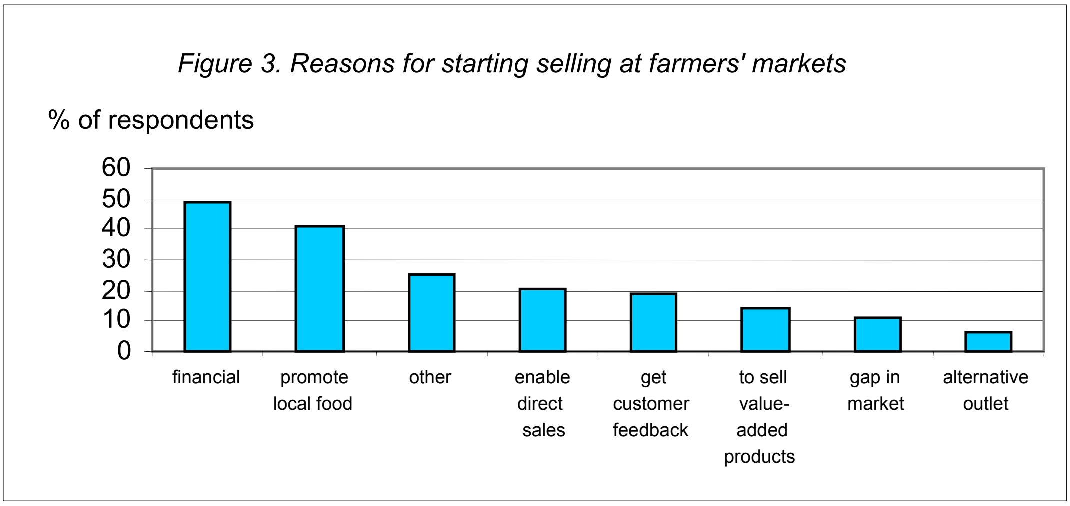


Figure 2. Total Income from Farming in Scotland (Source: SEERAD 2005)



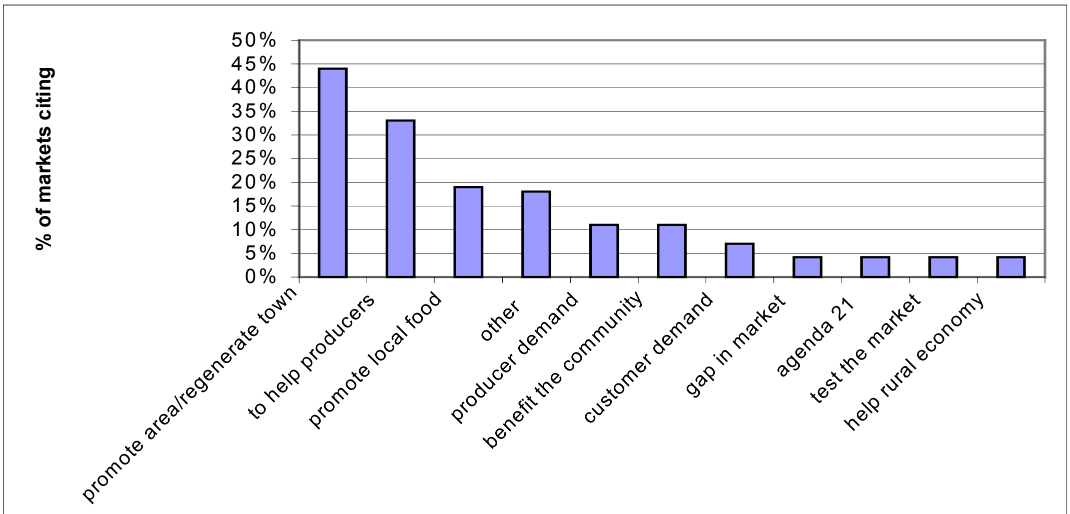
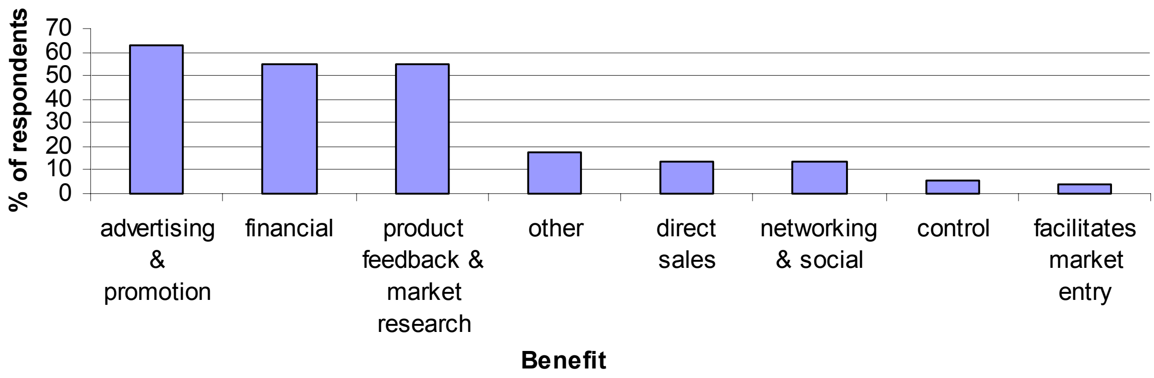


Figure 4. Reasons for establishing a market

Figure 5. Main benefits to stallholders of attending FMs



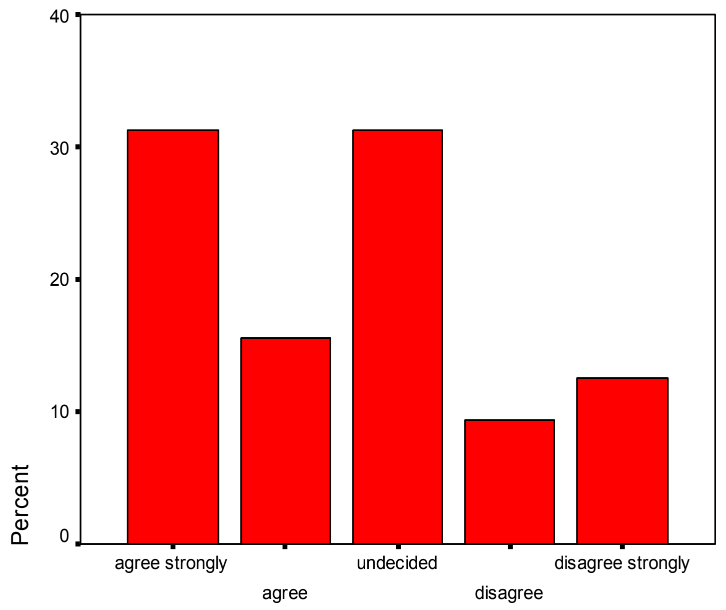


Figure 6. Responses to the statement: "Farmers' markets should be accredited by an organisation such as SAFM or Farma"

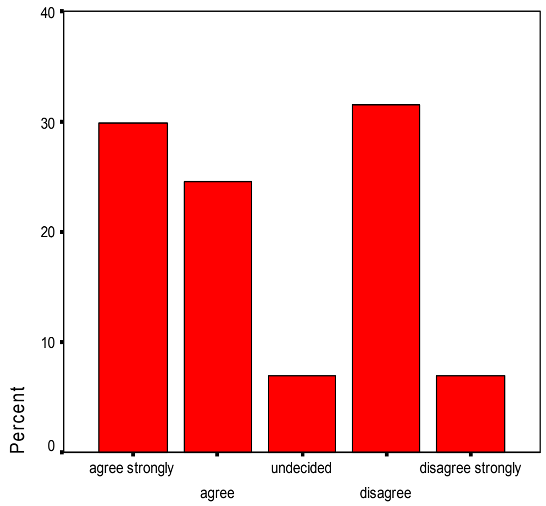


Figure 7a. Responses to the statement: "Farmers' markets should only sell products sourced locally (i.e. within 50 miles)"

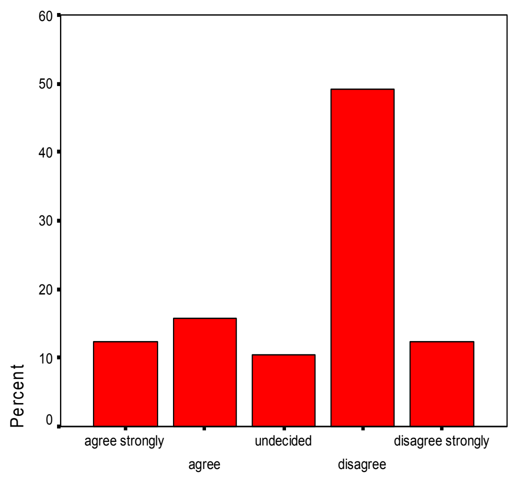


Figure 7b. Responses to the statement: "Farmers' markets should only sell food and drink products"

Tables

Table 1. Producers per 1000 holdings in the stallholders' survey

	Initial database	*Total sample*	*Respondents*
North West	0.20	2.51	0.49
North East	0.35	3.94	1.16
South West	6.02	6.02	1.36
South East	11.49	11.49	2.14

Table 2 Estimated turnover of the farmers' markets sector in Scotland.

	Turnover(£)
Total annual turnover for respondents (22 markets)*	2,404,000
Total annual turnover for non-respondents (40 markets)	4,227,000
Total annual turnover for all markets	6.630,000 – 7,077,000
Mean annual turnover per market	109,000 – 116,000

**note that 62, rather than 65, were known to operating at the time of the survey.*

Table 3 Comparison of the turnover in selected food retail sectors

Sector	*Turnover (£m)*	*Source*
Scottish farmers' markets	6.6 – 7.1	This study
UK farmers' markets	120	Derbyshire 2004
UK farm shops	1500	Derbyshire 2004
UK food and non-alcoholic drink expenditure in large supermarket chains	43,200	National Statistics 2004, p130

Table 4 Actual management and stallholders' preferred forms of management

	Actual management (from managers qn)	*Stallholders' preferred form of management*
Type of market management	% of markets	% of stallholders
Managed by volunteer(s)	29	24
Managed by a commercial operator	18	10
Managed by a govt body/agency*	14	20
Managed by a producers' coop	46	74
Other	7	0

* e.g. local authority, city centre management company, local enterprise company

Table 5 Potential benefits of FMs

Source	*Benefits to producers*	*Benefits to consumers*	*Benefits to the wider community and environment*
Delow, E and Couzens, C. (2003)	1. Encouragement of skills transfer 2. Increasing social contact. 3. Greater co-operation between businesses.	1. Improved access to nutritious food. 2. Increasing social contact.	1. Employment opportunities. 2. Support for local services 3. Retention of money in local economy. 4. Supporting local retailers 5. Increased understanding of food, environment and health. 6. Increased community involvement. 7. Encouraging more environmentally-friendly production systems. 8. Reduction in food miles. 9. Enhancing the viability of traditional farming systems. 10. Conservation.
Whitty (2001)	1. Obtain full retail price. 2. Reduce packaging and transport costs. 3. Product feedback.	1. Product info. 2. Demonstrate support for local producers.	1. Revitalised urban centres. 2. Employment opportunities. 3. Increased local trade. 4. Encourage diversification.
Govindasamy *et al* (1998)	1. Higher prices, lower overheads. 2. Increase customer base. 3. Customer contact		
Abel *et al* (1999)	1. Additional income 2. Establish links between consumers and producers.	1. Obtain fresh produce.	1. Aid community development.
SAC (2000) p10	1. Improved market access 2. Increased profit margins 3. Product feedback	1. Fresh produce 2. Increased knowledge 3. QA and traceability. 4. Health benefits	1. Less packaging 2. Less transportation
Scott (2004)	1. “Helped to develop an entrepreneurial spirit in rural areas”		1. “Helped to develop an entrepreneurial spirit in rural areas”
Martin, N (2004)	1. Cheap marketing 2. Product feedback 3. Networking 4. Social event		1. Trade increases in certain retailers when the FM is on.

Table 6 Percentage of respondents citing threats to the success of FMs

Managers		*Stallholders*	
Threat	*%*	*Threat*	*%*
other	39	bureaucracy/legislation	26
lack of stallholders	30	poor product/stallholder integrity	24
competition from other markets	26	competition	20
(increasing) costs	22	consumer fatigue	16
volunteer fatigue	17	brand dilution	16
lack of customers	17	bad publicity	16
economic downturn	13	other	16
bureaucracy/legislation	9	lack of stallholders/product variety	14
poor pr of farming	9	costs	12
local shops hostility	9	poor management	10
parking	4	oversupply of markets	10
food scare	4	lack of government support	6
		poor marketing	6
		complacency	6
		financial viability	6
		stallholder fatigue	4
		economic downturn	2
		loss of producer control	2
		lack of innovation/freshness	2

Table 7. Typical cost and revenue of selling a beef animal at a Farmers Market

Cost	*Amount (£)*
9 hours labour @ £10/hr	90
Stall hire	30
Transport	10
Cutting and Packing	250
Cost of a beef animal	645
Total cost	1045
Average direct sales revenue from a beef animal	1448
Approximate profit	*~400*
Sources: costs - Booth 2004; revenue Tait 2005	

Appendix: Questionnaire Surveys

Farmers' Markets Organisers' Survey

Supporting the land-based industries for over a century

SAC

Dear Farmers' Market organiser,

This short questionnaire is part of an investigation being undertaken by the Scottish Agricultural College into farmers' markets. The overall aim of the project is to investigate the benefits that farmers' markets provide to producers, consumers and the wider community in Scotland. In order to carry out this investigation properly, some basic information on market operation and management is required - this questionnaire is designed to gather the information, and as such is an important part of the project. We would therefore be very grateful if you could take 10 minutes or so to complete and return it.

The questionnaire does not have to be completed by a market manager – in some cases there will not be a designated manager. Anyone who is involved in the running of the market and is familiar with its operation may fill it in. If you are unable to answer all the questions, please complete it as far as you can and return it or pass it on to someone who may be able to help. When completed, please either e-mail or post the questionnaire to us (contact details are given below).

If you have any queries about this survey, or would like to find out more about the project, please feel free to get in touch.

Michael MacLeod

Land Economy Group
Scottish Agricultural College
King's Buildings
West Mains Rd
Edinburgh
EH9 3JG

Michael.macleod@sac.ac.uk

Phone: 0131-535-4387

Fax: 0131-667-2601

Part 1: Market Origins

1. What is the official name of the market?

2. In which year was the market established?

3. Who established the market?
   (please give the name of the individual and/or organisation)

4. What do you think were the main reasons for setting up the market?

Part 2: Market Operation and Management

5. Where does the market take place? (please give the town name and specific locality, *e.g. Edinburgh, above Castle Terrace car park)*

6. Timing

6a. Does the market operate all year round?

YES (please go on to 6b) NO (please give the months in which the market operates, then go on to 6b)

6b. How often does the market occur? (please tick a box)

Weekly	*Fortnightly*	*Monthly*	*Every 2 months*	*Other (please Specify)*

6c. On which day(s), and at what times does the market take place?

Day(s)		
Time(s)		

7. Stalls

7a. On average, how many stalls are there at the market?		
7b. What is the largest and smallest number of stalls you have had at the market during the last 12 months?		
7c. What would you estimate to be the maximum number of stalls you could accommodate at the market (on the present site)?		
7d. What would you consider to be the minimum number of stalls the market needs to remain viable?		

8. Products

8a. Please tick all the products that are sold at this market

Beef		Soft drinks		Game & venison		Plants & flowers	
Cheese		Eggs		Home baking		Pork and bacon	
Chicken		Fish & seafood		Honey		Preserves	
Confectionery		Craft products		Lamb & mutton		Vegetables	
Alcoholic drinks		Fruit		Ostrich		Organic products	
Ready made meals (vegetarian)				Ready made meals (non-vegetarian)			
Other (please specify):							

8b. Is there a shortage of suppliers for particular types of produce at the market?

YES (please specify which types, then go on to 9) NO (please go on to 9)

9. What would you estimate to be the average turnover of the market in one day? (please tick)

Less than £2000	>£2000 -£4000	>£4000 -£6000	>£6000 -£8000	>£8000 -£10,000	>£10,000 -£12,000	>£12,000 -£14,000	More than £14,000

10. Which of the following categories best describes the way in which the market is managed? (please tick)

Managed privately by local volunteer(s)		
Managed by a commercial operator		
Managed by a government body or agency (please specify)	Local Authority	
	Local Enterprise Company	
	City Centre Management Co.	
	Other	
Managed by a co-operative formed by the producers/stallholders		
Other (please describe)		

Part 3: The Way Ahead for Farmers' Markets

11. What do you consider to be the main strengths of your market?

12. What do you consider to be the main weaknesses of your market?

13. Do you feel there are any threats to the success of your market?

YES (please explain the threats, then go on to 14) NO (please go on to 14)

14. How would you define a "successful farmers' market"?

15. What do you consider to be the most important features required for a successful market?

Other Comments – Please use the space below to add any additional comments.

-----Thank you for your help with this research-----

Farmers' Markets Stallholders' Survey

Supporting the
land-based industries
for over a century

SAC

Dear Farmers' Market stallholder,

This short questionnaire is part of an investigation being undertaken by the Scottish Agricultural College into farmers' markets. The overall aim of the project is to investigate the benefits that farmers' markets provide to producers, consumers and the wider community in Scotland. An important part of this investigation is obtaining some insight into market stallholders' views and behaviour - this questionnaire is designed to gather this information, and as such is an important part of the project. We would therefore be very grateful if you could take a few minutes to complete and return it. *Note that you do not need to identify yourself or your business and the responses will be treated anonymously.*

When completed, please return the questionnaire to us (using the freepost envelope provided or the contact details given below). If you have any queries about this survey, or would like to find out more about the project, please feel free to contact me.

Michael MacLeod

Land Economy Group
Scottish Agricultural College
King's Buildings
West Mains Rd
Edinburgh
EH9 3JG

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Information about your attendance at farmers' markets

1. *In which year did your business start selling at farmers markets?*

2. What were the main reasons you decided to start selling at farmers' markets?

3. In which region is your business based?

Aberdeen City	East Ayrshire	Glasgow City	Orkney Islands	South Lanarkshire
Aberdeenshire	East Dunbartonshire	Highland	Perth and Kinross	Stirling
Angus	East Lothian	Inverclyde	Renfrewshire	West Dunbartonshire
Argyll and Bute	East Renfrewshire	Midlothian	Scottish Borders	West Lothian
Clackmannanshire	Edinburgh City	Moray	Shetland Islands	
Dumfries and Galloway	Falkirk	North Ayrshire	South Ayrshire	
Dundee City	Fife	North Lanarkshire		

Other (please specify):

4a. How often does your business attend farmers' markets?

Weekly	Fortnightly	Monthly	Occasionally	Other (please specify)

4b. Which farmers' market(s) do you regularly sell at?

5. Which products do you sell at farmers' markets?

Beef		Soft drinks		Game & venison		Plants & flowers	
Cheese		Eggs		Home baking		Pork and bacon	
Chicken		Fish & seafood		Honey		Preserves	
Confectionery		Craft products		Lamb & mutton		Vegetables	
Alcoholic drinks		Fruit		Ostrich		Organic products	
Ready made meals (vegetarian)				Ready made meals (non-vegetarian)			
Other *(please specify):*							

6. What would you estimate your average turnover from a typical day at a farmers' market to be?

£200 or less	>£200 -£400	>£400 -£600	>£600 -£800	>£800 -£1000	>£1000 -£1200	More than £1200

7. Approximately what percentage of your total turnover do sales at farmers' markets represent?

< 5%	5% - 10%	11% - 20%	21% - 30%	31% - 40%	41% - 50%	51% - 60%	61% - 70%	71% - 80%	81% - 90%	> 90%

8. Approximately how far is your round trip to and from the farmers' market, and how long does the journey take?

	e.g. Market: Dingwall	Market:	Market:
Total distance travelled to *and* from the market on a market day	*80 miles (40 miles each way)*		
Total time spent travelling to *and*	*2 hours (1 hr*		

from the market on a market day	*each way)*		

9. If you were not attending farmers' markets, to whom would you sell the produce you presently sell at farmers' markets?

a supermarket	
an independent retailer	
a foodservice company (including catering)	
a food processor or manufacturer	
a wholesaler	
a producer marketing group	
private sale to another farmer	
a farm shop	
via home delivery (e.g. internet sales, box schemes)	
via a pick your own scheme	
Other *(please specify)*	

Your views on farmers' markets

10. Which category or categories best describes your preferred form of market management?

Managed privately by local volunteer(s)	
Managed by a commercial operator	
Managed by a government body or agency *(e.g. a Local Authority or Town Centre Management Company)*	
Managed by a co-operative formed by the producers/stallholders	
Other (please describe)	
Don't know	

11. What do you consider to be the main benefits you receive through your attendance at farmers' markets?

12. What do you consider to be the main strengths of farmers' markets for stallholders?

13. What do you consider to be the main weaknesses of farmers' markets for stallholders?

14. Do you feel there are any threats to the success of farmers' markets?

YES *(please explain the threats, then go on to 15)* NO *(please go on to 15)*

15. What do you consider to be the most important features required for a successful farmers' market?

16. Please indicate the extent to which you agree or disagree with following statements by circling the appropriate response.

	Agree strongly	*Agree*	*Undecided*	*Disagree*	*Disagree strongly*
Farmer's markets should only sell products sourced locally (i.e. within 50 miles)	*1*	*2*	*3*	*4*	*5*
Farmers' markets should only sell food and drink products	*1*	*2*	*3*	*4*	*5*
Farmers' markets should be accredited by an industry body (such as Farma or SAFM)	*1*	*2*	*3*	*4*	*5*
Stalls should be staffed by people directly involved in production	*1*	*2*	*3*	*4*	*5*

Other comments –please use the space below to add any additional comments.

-----Thank you for your help with this research-----