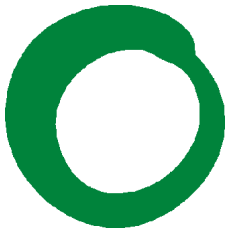
Merseyside local food initiative



Friends of the Earth

Merseyside local food initiative

A report for Friends of the Earth

This report was researched and written by Rachel Ross on behalf of Friends of the Earth

June 2002

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Executive Summary

Background

1. A survey was carried out during May and June 2001 to investigate the Local Foods for Local People project on Merseyside. The purpose was to assess the economic, environmental and social benefits brought to the area by the project.

2. Four schemes making up the project were looked at: two types of box scheme (one delivering to households, one to community groups), farm shops and farmers' markets.

3. Suppliers, customers and administrators of the schemes were interviewed either over the phone or in person, as follows: suppliers, 23; customers, 171; advisers, facilitators and community workers, 12.

Findings

4. The two Farmers' markets at St Helens and Liverpool were working successfully. Satisfaction levels and loyalty amongst customers were very high, and growers selling through the markets considered them a viable part of their business.

   There was demonstrable demand for more regular farmers' markets in the area. Market customers tended to be professional or retired; there were few unemployed and few with children. Most had access to a car. About half said they shopped at the market because the food was fresh/direct from the growers and a third gave supporting local growers as a reason.

5. The two box schemes supplying local households were improving turnover for the growers involved. Two farm shops had successfully expanded under the project.

6. The community box schemes had however failed. They were not viable for suppliers, and customers had been dissatisfied with quality and reliability.

Conclusions

7. **Economic benefits** of successful schemes for growers and suppliers involved were: improved profitability for 11 out of 23, business expansion (five out of 23) and diversification (18 out of 23).

   One third of suppliers at the farmers' markets reported that they sold more than half of their produce through this channel, highlighting the importance of such local food schemes.

8. **Environmental benefits** were significant, including reduced food miles (the maximum distance food travelled from farm to plate was 40 miles); eight out of 23 suppliers reported they had diversified cropping; four had expanded organic areas.

   With regard to waste, over 75 per cent of customers of the schemes reported receiving less packaging compared with their normal shops. Around half the suppliers considered they used more packaging selling direct compared with

wholesale, but this does not take into account supermarket waste streams. Further research is needed to quantify the difference between local food and supermarket packaging.

9. **Social benefits** included: job creation (five suppliers reported taking on new staff, creating the equivalent of around eight full-time jobs). The schemes also provided tangible community benefits: Farmers' market customers enjoyed the markets as a community event ('*My friends come here as well'*) and around a third expressed solidarity with local farmers, giving this as a reason for attendance. Some farmers felt the markets reduced their sense of isolation (mentioned by three out of 15 at the farmers' markets).

   While the community box schemes were working they did provide fresh produce to people who had problems carrying heavy shopping or those who have a paucity of local shops, so clearly they do have potential to address food poverty problems.

10. **Areas for improvement** included advice, grants, promotion and management:

    Producers

    Some farmers felt that more advice was needed to make grant applications and that for smaller farmers a 50 per cent grant which had to be matched would not enable a farmer to start up a new venture.

    Farmers' markets

    Stallholders identified three key areas where more support would make it easier for farmers to participate or would contribute to the success of the markets - more promotion of the markets was vital; assistance for farmers with purchasing equipment; and the need for dedicated on-going support to run the markets.

    Community box schemes

    Freshness, quality and continuity of produce was a problem for customers of the box schemes, as well as the lack of delivery to the door - especially for people who have problems carrying shopping. Suppliers should ensure that produce is fresh and good quality: the schemes should not be put second to their other customers.

    The reliance on volunteers to run the box schemes presented problems.

Recommendations

11. Research into waste arisings and further opportunities for minimising waste from farmers' markets and box schemes in comparison to supermarkets is required.

12. Further research on the benefits of local food schemes on reducing greenhouse gases is needed.

13. Investigation into how to improve feasibility of schemes that aim to deliver local produce to people who have difficulty accessing fresh fruit and vegetables is required. There is a clear desire from the potential customers and clear health benefits, but these schemes must also work for farmers. Investigations may include

consideration of farmer-owned distribution centres - either local or regional. It is important that local food schemes are competitively priced against supermarkets. A co-operative approach to publicity for local food schemes could be beneficial.

14. Methods for promoting box schemes and farmers' markets with lower income households should be trialled and evaluated.

15. Health Authorities should further examine local food schemes as ways to increase the availability of fresh produce for key sectors of the population and fund research as part of Neighbourhood Renewal Strategies. This research should examine all barriers and opportunities including choice, availability and price.

Introduction

Background to the survey

In the throes of the 2001 Foot and Mouth outbreak the UK Government declared itself ready to review current agricultural practices, and began to recognise the adverse power of the supermarkets over food production and distribution. Friends of the Earth's Real Food and Farming Campaign team began to move the local food up the agenda as one of the proposed solutions to the current crises. Regional Development Assemblies and the devolved parliaments were identified as key targets in enlisting support for developing local food economies.

Friends of the Earth considered that a case study of a local food initiative covering both achievements and barriers to success would be a useful tool in its campaign. A report was commissioned in May 2001 into the Local Food for Local People (LFLP) initiative on Merseyside. This project had been led by The Groundwork Trust, an environmental organisation, in partnership with ADAS, the Government agricultural advisory service. The LFLP initiative aimed to improve the supply of locally produced food to local people, bringing benefits to both rural and urban communities.

Purpose of the survey

The purpose of the survey was to investigate the Local Food project on Merseyside and assess the economic, environmental and social benefits brought by the project to the area. Barriers to its development were also to be investigated.

Specifically the survey set out to find out the following information:

- What were the elements or schemes that made up the project?
- How were these various schemes set up and run?
- Who was involved with them (on both supply and customer sides), and what did they think of them?
- How successful have they been ie to what extent did each provide economic, environmental and social benefits?

There were four schemes that made up the project:

- Box schemes (grant-aided)
- Farm shops
- Community box schemes
- Farmers' markets

The report considers each of the four in turn and assesses each individually against the desired benefits.

Method

A survey was carried out, interviewing those people directly involved in the development, running and use of the various schemes that made up the project. These were as follows:

Interviewees	Number
Suppliers	23
Customers	171
Advisers and Facilitators	7
Community Workers	5

Details of these four groups are given below:

Suppliers

The four principal mechanisms employed by the project to deliver local food to local people were box schemes for individual households, farm shops, community box schemes and farmers' markets.

With a box scheme the producer delivers direct to households or community groups, either in individual boxes or in bulk. At a farm shop the customer comes direct to the producer. At a farmers' market the customers come to buy from the producers at a special market set up in a town centre location. A target was set for a total of 12 interviews with suppliers to these types of scheme.

- *Box scheme suppliers (household)* Two growers were interviewed who had received help through the project to set up or expand box schemes to individual households.

- *Farm shops* Although not part of the original brief for this survey, two growers were also interviewed who had received help through the project in developing farm shops.

- *Community box scheme suppliers* Five growers or suppliers involved in supplying community groups, directly or indirectly, were interviewed.

- *Farmers' market suppliers* A total of 15 interviews were conducted with farmers and growers attending the farmers' markets at Liverpool and St Helens. These were carried out either over the telephone or in person at the markets.

Customers

- *Box scheme customers* It was decided that the focus should be on the customers of the innovative community schemes aiming to provide better access to fresh and healthy local food for low-income households living in inner city areas. It was decided not to look at box scheme customer households in more affluent areas.

- *Farm shop customers* As farm shops were not part of the brief for the survey no farm shop customers were interviewed.

- *Community box scheme customers* Because of the difficulties these community schemes encountered (all but one had folded), a target of 20 face-to-face interviews

was set (originally 20 customers were said to be still signed up for one of the community schemes). The number of interviews actually conducted was six, as the scheme was unfortunately about to fold. A picture of how the schemes had operated was obtained from interviews with Community Workers.

- *Farmers' market customers* A target of 130 interviews was set, to be conducted face-to-face with a cross section of customers at the St Helens and Liverpool monthly farmers' markets during May and June. Total interviews conducted: 165 (81 at St Helens and 84 at Liverpool).

The disparity in interviewee numbers between customers of the box schemes and the farmers' markets reflects the success of the latter and the impact they have had on the local community.

Advisers and facilitators

A proposed interview with a current Groundwork officer was not forthcoming. However, a picture of the project was built up through telephone interviews with those persons originally involved in the setting up and running of the project:

- Three former Groundwork staff who had been involved in LFLP
- Two Local Authority LA21 officers
- ADAS adviser
- Health Partnership co-ordinator

Community workers

Community workers involved in setting up and running some of the individual local schemes were interviewed over the telephone:

- Three Housing Action Trust community workers
- Women's Centre community worker
- Food Co-op co-ordinator

Questionnaires were designed for interviewing supplier and customer groups, and copies of these can be found in Appendix I.

Caveat

This survey was carried out against the background of the 2001 Foot and Mouth epidemic. Access to farms for the public, and towns for some farmers, was severely curtailed. Some farm shops were closed; those that remained open experienced dwindling customer numbers. Farmers' markets were suspended for the first half of the year.

It was hard to assess the true impact and potential of schemes such as farm shops, farm direct-delivery services and farmers' markets under these difficult and unrepresentative circumstances.

The Groundwork local food for local people project: background and status

Introduction

The Merseyside Local Foods for Local People project was developed by the environmental organisation Groundwork St Helens, Knowsley, Sefton and Liverpool in partnership with the UK Government agricultural advisory body ADAS. It was funded for an initial two-year period from January 1999 to January 2001 by MAFF (Ministry of Agriculture, Fisheries and Farming) and the European Community (EU Objective 1 EAGGF).

The initiative aimed to improve the supply of locally produced food to local people, bringing benefits to rural and urban communities, and having a positive impact socially, economically and environmentally. The project aimed to tackle the rural issue of falling farm incomes and the need for farmers to find different sources of income and alternative outlets for their produce. In the inner city one of the specific aims was to support health initiatives to improve diet amongst low-income households.

Links were to be made with urban regeneration schemes, Local Authority Local Agenda 21 work, and the Merseyside Health Action Zone.

For more information on the project aims and objectives see Appendix II.

Project targets

Groundwork set itself the targets listed below:

"... To establish the following systems for the direct marketing of local produce over the specified two-year period:

Four box schemes: *where fresh local produce is delivered direct to the consumer or to a designated drop-off point in the community, usually on a weekly basis.*

Eight farm shops: *which form an effective point of contact for producers and consumers and appeal to a wide variety of people. The potential for establishing shops in rural areas will be explored.*

Two farmers' markets*: where local farmers come to a market venue in a built-up area, often a 'food desert' (where local communities have no direct access to fresh produce), and sell directly to the consumer".*

Project achievements

Two farmers' markets were established on a monthly basis in St Helens and Liverpool. Due to the Foot and Mouth outbreak the markets were temporarily suspended during the first part of 2001, but by May both were running again, although the break did have an adverse effect on customer numbers.

Two farmers had received grants enabling them to expand and improve their farm shop facilities. Two had received grants to develop box schemes serving their local areas.

Box schemes set up to supply community groups in low income or 'food desert' areas had been less successful. Only one was still running by June 2001, and this was also about to fold.

Results of the survey

1. Box schemes (local households)

Background

The purpose of box schemes is to enable farmers and growers to find new local customers for their produce, allowing them to receive a higher rate of return on a regular basis by selling and delivering direct to the public. The customer receives fresh local seasonal produce delivered to their door (or nearby drop off point) and has direct contact with the producer. As the produce is delivered direct from farm to door it travels the minimum distance only, thus reducing pollution from transport.

Each week the customer receives a selection of seasonal produce. Normally the selection is decided by the grower according to availability; the customer cannot place an order for specific produce. Payment is normally made on a weekly or monthly basis.

Findings

Two farmers developed box schemes with the assistance of ADAS: one outside Kirkby (north of Liverpool) and one on the Wirral. Both were interviewed for this survey, along with the ADAS adviser.

- One of the farmers was primarily a conventional (ie not organic) arable farmer, who also ran his own milk round, and wished to start delivering vegetable boxes containing home grown seasonal vegetables as part of the round.

  He currently delivers around 50 boxes a week to the Kirkby area, which is within five miles of the farm. He has not taken on staff to help with the scheme. More packaging is required for the scheme than for other customers of the farm's output, most of which is currently sold through the wholesale market. The box scheme as yet represents a very small part of the business. It has, however, meant that he is growing a wider range of produce in order to supply the boxes. After less than a year of the scheme the farmer was unable to say whether it had improved the profitability of the business as a whole. His target is to increase the boxes to 1,000 a week and supply them to other milk rounds.

- The other farmer ran an organic horticultural business with its own farm shop and obtained a grant to expand his existing vegetable box scheme and increase the size of his farm shop (see farm shop section).

  He currently delivers 110 boxes a week in the Wirral area, between 11 and 20 miles from the farm. Boxes cost £5 or £10. The boxes contain vegetables and fruit, and he also delivers bread and juices to order. During the summer months 70-80 per cent of the box contents are grown on his farm. Around two thirds of his produce is sold through the farm shop, with a third through the box scheme, and he also offers 'Pick Your Own' in season. He has taken on two part-time staff to help with the box scheme. He has increased production of all crops to cater for the boxes, and plans to have his own vegetables available all year round. Since he collects the boxes back

and recycles them he considers he uses less packaging for the box scheme, and there is also less wastage as the boxes help him to dispose of seasonal gluts.

During the first six months when he was only doing 50-60 boxes a week he was losing money, but at current levels the scheme has improved his business profitability, and his target is 300-400 boxes a week. The box round helped the business considerably during the Foot and Mouth outbreak when sales from the shop dropped considerably.

Both these schemes deliver to individual households locally; neither are involved in supplying community groups or food co-ops in inner city areas.

Benefits

It can be concluded that there are economic, environmental and social benefits derived from these schemes. These can be summarised as:

Economic

Business growth and expansion

The second and more developed box scheme is proving a success for the grower: he has increased his turnover to between £550 and £1,100 per week, and now has a target turnover of between £2,000 and £4,000 per week.

In the case of the first farmer it was clearly still early days, although expansion was expected with a target turnover of £5,000 per week (assuming a box price of £5).

Boost to local economy

Box schemes can keep more money circulating within the local economy, which is important when it is considered that as much as 95 per cent of the value of supermarket produce can be siphoned off to distant shareholders, suppliers and economies. However, this study did not attempt to quantify the sums involved in the Merseyside project.

Environmental

Reduced Food miles

Both growers were covering a fairly restricted local area for their deliveries, thus reducing food miles.

Crop diversification/organic expansion

Both were growing a wide range of produce to supply the boxes, thus moving away from conventional monoculture farming.

The success of the scheme for the organic grower meant that more land was being used for organic production.

Waste reduction

One grower had reduced the production of waste by recycling the boxes and using the scheme to cope with crop gluts.

Social

Job creation

One grower had taken on two part-time staff.

Social contact

Farmers have increased social contact with their customers, which can help to improve morale. Customers are often invited to visit farms for walks and open days, increasing the potential for beneficial educational links between farms and urban consumers.

2. Farm shops

It was not part of the original brief to look at farm shops, but as this information was obtained during the survey, it has been included here.

Background

Farm shops, located on the farm where the food is produced, enable farmers and growers to get a better return for their investment by selling direct to the public. The customer is able to see where their food is coming from and have direct contact with the producer. This can also reduce food miles (the distance food travels from farm to consumer), as it by-passes distribution channels in the form of wholesaler and retailer.

Findings

Two farmers applied for grants through ADAS and Groundwork to improve existing small farm shops, one at Halewood between Liverpool and Widnes, and one on the Wirral. Both were interviewed for this section of the survey, as well as the ADAS adviser and former Groundwork officers.

- One farm is a smallholding growing vegetables such as cabbages and sprouts, it also has a small flock of sheep and raises turkeys for Christmas. The turkeys are sold direct and through wholesale. The farm used to be involved in beef production, but diversified away from this as it proved unprofitable. It plans to raise free-range chickens. It is involved in the Countryside Stewardship scheme and is converting to organic production and hopes to supply organic vegetable boxes in the future. It also wants to encourage farm visits as part of the new developments.

  The shop is currently being extended. It plans to sell meat and vegetables from other local farms as well as their own produce.

- The other farmer has been enabled through the grant to increase the size of his shop and visitor facilities, as well as providing office space. The new shop opened in November 2000. He sells eggs and organic pork and lamb through the shop, as well as his own produce. He also runs a box scheme (see box scheme section).

The take-up of grants was disappointing for ADAS and Groundwork; the aim had been to set up eight farm shops as part of the project. It was suggested that as the grants were only 50 per cent of the investment required, this left too large a sum to be match-funded by the farmers themselves, some of whom ran relatively small businesses. Funding had not been provided to enable advisers to offer assistance in the completion of grant applications; this may also have reduced the number of applicants. The proposal to look at opening farm shops in inner city areas does not appear to have been developed.

Benefits

It can be concluded that there are both economic and environmental benefits potentially and actually being derived from these shops, and these can be summarised as follows:

Economic

Differentiation

Owners of smallholdings and small-scale horticulturalists are currently finding it hard to survive with the problems besetting agriculture such as BSE, Foot and Mouth and low prices paid for agricultural produce by wholesalers and supermarkets. Grants have enabled the owners to develop their farm shops and have helped to improve the varieties offered to customers, increasing the appeal of a visit to the farm specifically to buy produce.

Improved profit margins

By selling direct to the public growers can command a better price.

Boost to local economy

As in the case of the box schemes, farm shops can keep more money circulating within the local economy.

Environmental

Reduced food miles

Selling direct to customers from the farm cuts out the food miles normally travelled by produce via wholesalers, distribution centres and retailers.

Crop diversification/organic agriculture expansion

As in the case of the box schemes, the growers are extending the range and quantity of foods they produce, in place of conventional monoculture farming.

In both cases the success of their businesses will mean more land converted to organic farming.

Social

Increased social contact

As in the case of the box schemes, farm shops give an opportunity for increased social contact between farmers and customers, raising morale and providing possible beneficial educational links.

Accessibility

There can be problems with accessibility, as farm shops are generally sited in rural areas, and can be inaccessible to most low-income groups. But some communities are already sourcing farm produce from farm retail outlets in the urban fringes.

3. Community box schemes

Background

Part of the aim of the Local Food for Local People (LFLP) project was to support urban regeneration and health initiatives including the Merseyside Health Action Zone (HAZ).

To this end the project sought to address the issue of food deserts: areas where residents did not have easy access to supplies of fresh food, and to encourage healthier eating amongst low-income households by providing a convenient and inexpensive source of locally-grown fresh fruit and vegetables.

A group of around six local farmers from the Knowsley area set up a supply company which was to deliver local produce to various community schemes.

These schemes included two estates of high-rise blocks in Liverpool and one in Knowsley, managed by a local Housing Action Trust. The tenants were elderly people, many of whom had difficulty carrying heavy shopping home. There was also a Food Co-op based at a Primary School in Knowsley supplying parents of children at the school, and a project at a Women's Centre on the Wirral in an area of particularly low-income families, where fresh fruit and vegetables at an affordable price were hard to come by.

Interviews were carried out with suppliers and customers of the community schemes, Community Workers, former Groundwork staff and an ADAS Adviser. As only one of the schemes was still running at the time this research was carried out, only a few customers were available to be interviewed. The findings are therefore qualitative by nature, but a picture of the schemes does emerge, based on these various different voices.

Findings

Suppliers

i) Wholesaler

The schemes hit problems early on when the supply company folded, possibly due to the poor rate of return for the producers. The task of supplying the projects was taken over by a local wholesaler, for whom the supply company Co-ordinator went to work. It was apparently his intention to continue to supply the community schemes via his new employer. The wholesaler obtains *some* supplies from local growers, including at least one of the growers who had been involved in the original supply company. However the original purpose of putting community groups in direct contact with local growers was lost.

ii) Large-scale growers

Three of the local growers now supplying the wholesaler were interviewed. All were large-scale operators, for whom only 1-10 per cent of their produce went to the local wholesaler.

- One grower primarily supplied supermarkets (80 per cent), followed by caterers, national and local (19 per cent) and the local wholesaler (one per cent). He grows primarily salads and vegetables. He stated that he did not have time for direct

involvement with local community projects, as he needed to shift produce in large volumes.

- Another stated that 98 per cent of his produce was sold through national wholesalers and brokers, with only two per cent going through small local wholesalers. He grows primarily carrots and potatoes. When asked about local food projects he also stated that his business requires him to shift large volumes on a daily basis.

- The third grower said that over 90 per cent of his produce goes to large wholesalers, packers and crispers, with less than 10 per cent going through the local wholesaler. His concern too was that local food projects couldn't take up the necessary volume, and that customers wanted continuity of supply whereas he had gluts, then nothing. He considered it essential that wholesalers should be involved in the chain to balance out the supply. He felt that food schemes where the supplier could deliver in bulk had some potential, but was concerned by what he saw as a dependence on volunteers to run the schemes, who could 'cry off'. He did not consider farmers' markets worth his while attending, because of the costs of staff, stall and transport, and the low value of vegetables.

iii) Small scale suppliers

Two other smaller suppliers were involved in the projects: the owner of a farm shop near St Helens who is not a grower, but buys locally from markets and growers, and was involved in supplying the Food Co-op at the Primary School in Knowsley, and a market gardener from the Wirral, who supplied the Women's Centre. The latter was not available for interview.

- The farm shop owner was interviewed for this research, together with the Primary School secretary and ADAS adviser. The project had run for 12 months, with a weekly bulk delivery of fruit and vegetables. At its peak there were 40 customers. Two to three volunteer parents at the school were involved in distributing the produce.

- Numbers dwindled, however. The supplier suggested that the volunteers had got fed up, but he also had complaints that the produce was going off too quickly. In his opinion this was not a quality issue (he claimed to always supply Grade 1 produce), but because the customers didn't understand that that farm fresh produce had not been irradiated and therefore needed using up quickly. Since he was buying through middlemen, he reckoned his prices were similar to supermarket prices, but didn't consider this an issue for the food co-op.

- The same supplier also supplied another project in Liverpool on an estate managed by the Housing Action Trust; however the community worker for the estate claimed that it had folded after a very short time because of quality problems.

- The supplier was keen to continue his involvement with community projects, and was interested in the potential of supplying elderly people with vegetable boxes in collaboration with Help the Aged, distributed through Meals on Wheels or Day Centres, claiming he could supply 200-300 boxes at competitive prices (£1.99).

Customers

Only one of the projects on the estates of high-rise blocks tenanted by elderly people was still in existence at the time of this survey. Community workers from the Housing Action Trust and remaining customers were interviewed.

The main reasons for the failure of the schemes given by those involved were poor quality and unreliability of deliveries. Some of the quality problems were linked to the transfer of the supply business to the local wholesaler from the farmers' group. It was also suggested that the importance of keeping prices low meant that suppliers bought sub-standard market produce to sell on.

i) Housing estate schemes

- On the Knowsley housing estate the scheme had around 17-18 customers and ran for about five to six weeks: quality and reliability of supply were described as unsatisfactory.

- On one of the Liverpool estates the scheme ran for about two months, but delivery times were unreliable; local volunteers at times waited around all day at the drop off point (community flat), for a delivery that was supposed to arrive in the morning. Some residents were not happy with having to collect from a central point, and wanted a doorstep delivery service. Quality was initially good, but then dropped off. The farmers' group business only supplied them for a couple of weeks before it folded.

- The other Liverpool estate originally had around 20 customers, who collected their boxes from the local community centre at the weekly Lunch Club. The club organiser bought potatoes for the lunches through the scheme. By the time this research was carried out, however, numbers had dwindled to two to three and the supplier had given notice that he was giving up, as it was no longer worth his while. Two of the remaining customers, the club organiser and four former customers were interviewed.

  Existing customers

- Both received fruit and vegetables in their box, which they collected once a week from the estate's Community Centre. The boxes were delivered on the same day as the Lunch Club, so customers picked up their box when they came for lunch. Both had been getting the boxes for between six months and a year, and gave as the reason for this that it saved carrying heavy shopping. One added that it was convenient and the quality was good.

- One did his weekly shopping on foot at local supermarkets (five minutes away): Somerfield and Aldi; the other took the weekly 'Shopping Bus' subsidised by the Community Centre, and therefore was able to shop at shopping centres further away (20 minutes bus ride). The Somerfield supermarket was the nearest source of fruit and vegetables, but for one customer the box quality was better; and for both the problem was carrying heavy shopping back up the hill from there, so neither regularly bought fruit and vegetables from the local shop.

- Only one of the customers felt he was eating more fresh vegetables and fruit because of the box, and said this was because of the quality; both were making

fewer shopping trips because of it; one felt there was less packaging with the box; neither considered it meant more food wasted.

- They had heard about the box scheme on the estate, through the community development worker. One respondent was very satisfied with the scheme, giving it 10/10 marks; the other gave it 6/10; neither felt the scheme could be improved.

- The Lunch Club organiser purchased potatoes in bulk from the box supplier for the club, and was happy to continue with this arrangement. She had previously purchased carrots as well, but had discontinued these, preferring to use frozen carrots, which she considered more convenient.

Former customers

- Four former customers of the scheme were also interviewed. Poor quality was the main reason for their giving up. Two had joined the scheme for convenience; one of these added that it saved carrying heavy shopping. One just wanted to try it, the other started as it was recommended by the Housing Action Trust.

- They used various supermarkets, including Asda, Iceland, Kwik Save and Somerfield, three making use of the weekly Shopping Bus to shop further afield. One walked to the local shops (10 minutes) or took a taxi. Three shopped weekly, and one two to three times a week.

- Two former customers said that while they were getting the box they hadn't needed to buy fruit and vegetables from their regular shops. Only one said that the box had meant they were eating more fruit and vegetables. All felt that there was less packaging with the box, one adding that you gave the box back. All felt there was more food wasted with the box.

- When asked about their satisfaction with the scheme, two gave it 1/10, one 5/10 and one 7/10, giving an average score of only 3.5. The reasons given were '*Poor quality'* (3 customers), *'Too much for a person living alone'* (2), *'Not enough variety/choice'* (2), and *'Not good value'* (1).

- It would seem that for some of these residents, the Community Shopping Bus answered their needs and was preferred to the box scheme. However the Lunch Club organiser was concerned for those who were housebound or less mobile, and was considering approaching local greengrocers to see if they could come around with a van on a regular basis, to enable these residents to continue to have access to fresh fruit and vegetables.

ii) Women's Centre

For information on the scheme at the Women's Centre on the Wirral the community worker at the Centre and ADAS adviser were interviewed. This box scheme was supplied by a local Market Gardener with a farm shop on the Wirral, who was also said to buy in produce from other sources, possibly the local market.

The Women's Centre got involved in the scheme because at the time there was nowhere local to buy fruit and vegetables. Since it catered for a low-income area, price was all-

important. There had been a van which came around the area providing very cheap produce, but this service had ceased.

Around 50 people got involved in the scheme, which was originally subsidised by Wirral Health Links for the first three to five weeks. Boxes at £3.50 were delivered to the Women's Centre for customers to collect. Unfortunately this was not very convenient, as it was located a little too far from people's homes. The quality of the produce was originally good, but then deteriorated. The project was considered to have been successful as an awareness-raising exercise for the benefits of healthy eating.

However, the mobile van service started up again, and numbers dropped for the box scheme until it became uneconomic for the supplier to continue to deliver. The box scheme was unable to compete on price, convenience (the van came three times a week) or the opportunity for customers to pick and choose exactly what they wanted.

iii) Knowsley School Food Co-op

None of the former customers of this scheme could be contacted for interview; instead information was obtained from the supplier and others indicated in the section above: 'Suppliers'.

iv) Other successful schemes: 'Sure Start' Food Co-ops

Examples were found of successful community food schemes. Two food co-ops which were originally set up with funding from the Government's 'Sure Start' initiative were investigated. They were not part of the Groundwork/ADAS LFLP project, but collaborated with it. The Health Development manager responsible for the schemes was interviewed.

The food co-ops were supported by two waged staff and 10 volunteers; the volunteers were given incentives for their involvement in the form of child care, out of pocket expenses, support from the paid workers, and ownership of the project - they were part of the decision-making process. The local people ran the scheme themselves, and it was hoped that in the long run the scheme would become a community business.

The scheme operated differently from the box schemes: Customers were given a price list (with prices fixed for a month at a time) from which they could order what they wanted. The food co-op ordered each week only what was requested, and the volunteers made up the orders on delivery from the supplier.

The scheme built up its numbers very gradually in order to give the people involved confidence in running it. The main food co-op now has over 90 members.

Like some of the LFLP schemes the co-ops originally were supplied by the farmers' group, then had to switch to the same local wholesaler. Quality also became an issue for them and the members of the co-op voted to change supplier. They found a new wholesaler outside Liverpool, but within 10 miles, who also bought from local farmers as well as supplying imported and other UK produce. The co-op was able to insist on quality assurance approvals as well as negotiating keenly on price.

Benefits

The schemes set up under the Local Food for Local People Project have not been successful for the following reasons:

- Failure of local growers to set up an economically viable supply company delivering to local community groups
- Problems of quality and reliability of supply
- Lack of choice with weekly box
- Price of box (one scheme)

Where community schemes have been successful, the following environmental and social benefits may occur:

Environmental

Fewer shopping trips meaning reduced air pollution

Successful community food schemes mean potentially fewer shopping trips by scheme participants, although unless these are made by private car or taxi this will not have a significant effect on pollution.

The failure so far of local growers to play much of a role in the successful community schemes means that the environmental benefit of reduced food miles is not yet in evidence.

Social

Easier access to affordable healthy food

Successful community food schemes clearly meet a significant demand for an easily accessible and affordable source of fresh fruit and vegetables. The elderly and housebound welcome deliveries to a convenient nearby location, avoiding the need to carry heavy shopping home from the shops. Families in areas where fresh fruit and vegetables are difficult to obtain have the opportunity to improve their diet and health.

Job creation

Community businesses provide local employment and skills training.

Building community ties

Schemes run by and for the local community help to strengthen the sense of community and the ties within it, contributing to inner-city regeneration.

Economic?

Because of the general failure of the community schemes set up as part of the LFLP project to establish themselves long-term, no economic benefits are demonstrable.

A possible way forward?

Clearly these schemes must work economically for the suppliers, or be heavily subsidised to have a long-term future. How might they be made viable?

A demand was clearly demonstrated for some kind of direct supply for fruit and vegetables into these communities. Considerable numbers of customers originally signed up for the schemes (between 20 and 50 for each), and 90+ are still involved in the food co-op.

Obviously it is essential that issues of quality and reliability be addressed. Because of the issue of lack of choice with box schemes, it seems that those schemes where customers place weekly orders or buy from a mobile van are more likely to be successful.

How can businesses tap into this demand?

There seems to be potential for new small business start-ups, or expansion of existing small businesses (and thus a contribution to urban regeneration) as follows:

- Local independent greengrocery retailers/wholesalers.

  Delivery in bulk to community groups to a weekly order, or sales through a mobile van visiting a housing estate or particular community on a regular basis. These schemes may well require grants to set them up and subsidies until numbers have built up.

- Community businesses.

  Food co-ops, run initially by short-term funded workers supported by volunteers from the community, have the potential to become fully-fledged community businesses, run by and for the community, improving skills and creating local employment.

What are the implications for growers?

Customers for whom access to fresh fruit and vegetables is difficult, whether through age or infirmity, or because they live in a food desert, would need all their requirements to be met by a delivery scheme to their neighbourhood. Therefore food sourced from local growers needs to be supplemented by other UK and imported produce, to get a reasonable variety of produce (especially fruit) all year round. Hence the need for a wholesaler or retailer to be involved, or for the growers themselves to buy in supplementary produce.

Those growers up and down the country, often organic, who have made a success of box schemes (and two local ones have been already mentioned in this report) supply a rather different market. The premium price attached to organic produce means that their customers tend to be from a higher income bracket. These customers are more likely to have access to other sources of fresh fruit and vegetables to supplement any deficiencies in their weekly box. They are also more likely to be committed to the principle of organic farming and therefore to be tolerant of the absence of choice, lack of variety at certain times of year, and possibly of less than perfect quality.

But the market being addressed in the community projects is different, with different needs, expectations and income level. There is no reason why local growers should not be able to supply local community groups, but a different mechanism is required to make it work for both parties involved.

A way forward for local growers might be the setting up of a *local distribution centre, owned by the growers themselves*, in order to feed into various community schemes, either supplying directly, or through a local wholesaler or retailer. The centre could supply a wider range of produce, and take orders and handle deliveries, which individual growers would not have the time or staff to do themselves.

The original Knowsley farmers' group was not a success. This may have been because at least some of the farmers involved were large-scale producers, for whom the local market was not large enough to be a viable economic proposition.

Farmers getting involved in such an enterprise should ideally be operating on a similar scale to each other (and on a smaller scale than the original players), and have shared objectives, including supporting the local economy and local food networks. Grant-aid and subsidies would be required to pay for premises and staff to run the distribution business, at least in the start-up phase, and possibly beyond.

4. Farmers' markets

Background

As part of the project two farmers' markets were set up, one in St Helens and one in Liverpool, to be held once a month. They were suspended during the first part of 2001 due to the Foot and Mouth outbreak, but by the end of May were both up and running again.

Groundwork was closely involved in setting up and launching the St Helens market, located on purpose-built outdoor market stalls, behind the new covered market. The stalls are owned and managed by the local council; a group of stallholders has since formed a management group to run the farmers' market itself.

The Liverpool market was set up and is run by a local businessman and is located on a car park next to the council offices in Victoria Street, Liverpool.

The principles behind farmers' markets

- The stallholders are themselves the producers, growers or processors; they have not bought in finished produce from other suppliers; they are therefore able to answer questions about how the food has been grown or processed, and provide customers with a direct link to their food

- The stallholders all come from within a maximum radius from the market (this varies from one market to another); this ensures that the market remains focussed on local produce, supporting the local economy

- Often the organisers will try to limit the numbers of stalls selling the same produce, to avoid them having to compete directly with one another, and to provide an interesting variety of stalls for customers.

The Merseyside markets in the survey

The numbers of stalls at each market can vary. The St Helens market was visited on Friday 25 May 2001, and comprised 13 stalls including meat, fruit and vegetables, home baking, garden plants, herbs, cheese and smoked fish. The Liverpool market was visited on Saturday 16 June 2001, and comprised 20 stalls including meat, fruit and vegetables (one organic), home baking, garden plants, cheese, smoked fish, eggs, wine, fruit juice and ice cream.

Findings

The findings for the farmers' markets are set out in two parts. The stallholder and customer surveys are examined, considering for each the profile of the sample, followed by economic, environmental and social benefits of the markets suggested by the survey results. The stallholders were all either growers or producers, and have been referred to below as stallholders for simplicity.

Stallholders

Profile of the sample:

A total of 15 farmers' market stallholders were interviewed, either over the telephone or in person at the farmers' market. The breakdown of producers by main type of produce on offer was as follows:

- 5 Meat
- 3 Fruit and vegetable
- 2 Home-baking
- 2 Garden plants
- 1 Herbs
- 1 Cheese
- 1 Smoked fish

One of the fruit and vegetable producers had stopped attending the farmers' markets.

Because of the small numbers involved, the survey of stallholders should be seen as qualitative in nature.

- Markets attended by stallholders and distance travelled

Almost all the respondents questioned attended both St Helens and Liverpool farmers' markets on a regular monthly basis, and for over half this involved a journey of less than 20 miles. Virtually all had travelled under 40 miles to attend them.

Two-thirds of them attended other markets in the Merseyside area, Greater Manchester or Cheshire, and a few went into Lancashire or as far as Cumbria, Yorkshire and Derbyshire.

- Produce supplied at the market

Stallholders were asked what produce they sold at the market. The responses are listed in the table below.

Produce	**No of stalls supplying produce**
Meat	6
Vegetables	6
Preserves/Condiments	3
Herbs	3
Garden plants/Flowers	3
Cheese	2
Fruit	2
Baked foods (bread, cakes, pies)	2
Fish	1
Eggs	1

Meat and vegetables were the commonest produce on offer, followed by preserves and condiments, herbs and garden plants. Although meat stalls only sold meat, some stallholders offered a variety of goods on the same stall such as vegetables, preserves and home baking. Others sold different produce according to the season or market attended.

Economic benefits

In order to establish what benefits the farmers' markets might bring to the local economy, it was necessary to establish whether or not they were proving financially viable for the stallholders taking part. Flourishing local businesses mean more money circulating within the local economy and more jobs for local people.

The response from stallholders was positive, although they considered there was room for improvement (largely in publicising the markets better). Stallholders were committed to the markets and considered that they were of financial benefit to their businesses as a whole. Although around half said that the markets represented only around 10 per cent of sales, for a third this was over 50 per cent. As more markets open, become established and the customer numbers increase, the markets have the potential to provide a much greater contribution to grower and producer incomes.

The main problem seemed to be insufficient customers attending the markets, and this was blamed on poor publicity (although the temporary suspension of the markets because of Foot and Mouth was also a contributory factor). The need for better advertising was most frequently mentioned by the majority who said they needed support to enable them to continue at the markets.

Around half had been attending farmers' markets for a year, which coincided with the setting up of the Merseyside markets, and this may have been the catalyst for these producers to diversify into farmers' markets.

There follows an analysis of those questions concerned with the economic aspects of the markets:

- Satisfaction with the markets

Stallholders were asked how they would rate their overall satisfaction level with the Merseyside farmers' markets on a scale of 1-10, where 1 was 'Not at all satisfied' and 10 was 'Very satisfied indeed'.

The majority (9/15) rated the markets positively, scoring them between 6 and 10. The average score amongst the thirteen stallholders who gave a score was 6.0. Details are shown in Table 1, Appendix III.

When asked to comment on their score around half the stallholders complained that the markets were poorly advertised, particularly compared to when they were first opened:

> *"These two* (markets) *are the worst advertised. Liverpool was very good, but they're just not keeping the publicity going, like being on the radio on the day".*
>
> *"First of all they were giving out leaflets telling people about it, then they stopped".*

A third of stallholders complained about the location of the St Helens market:

> *"They've put us at St Helens at the far end of the covered market. People don't go through the market from the multi-storey car park to get to town".*

> *"They could put the market on the square, instead of the back of the town".*

There were also complaints that the markets had tailed off, although it was accepted that the suspension due to Foot and Mouth was part of the problem:

> *"We often sold out, especially at the first few, but it has tailed off, not grown".*

> *"St Helens is now tailing off a bit (advertising is not enough)".*

The stallholder who scored the markets 10 said:

> *"Enjoyment and self-satisfaction are the main part of it, and seeing your produce accepted".*

- Commitment to the markets: intention to continue

When asked whether they intended to continue to supply farmers' markets, the vast majority (12/15) said 'Yes'. When asked why, three of those planning to continue gave business reasons; for two the farmers' market was in fact their main outlet:

> *"It's the major outlet for our eggs".*

> *"It's our main business".*

> *"It's a retail outlet, you come home with the money. With wholesale you get paid four weeks later".*

Three talked about the satisfaction and enjoyment they got from the markets:

> *"I enjoy meeting people and talking to them".*

> *"It's good to get out and about".*

> *"There's satisfaction in selling direct to the public: people trying the cheese; and it gets you out".*

One supplier, a larger-scale supplier of organic fruit and vegetables had stopped attending, mainly because the turnover did not justify staffing costs.

- Attendance at markets

Commitment to the markets is also shown by the stallholders' attendance record. As shown in the stallholder profile section above, those who attend farmers' markets go regularly, and many attend several. Although not entirely within the 'keep it local' spirit, a third were prepared to travel between 20 and 40 miles to attend markets. As more farmers' markets open, however, these distances should decrease, as will the required mileage for stallholders.

- Financial viability: do takings at the markets justify the expense?

When asked if attending the markets justified the expense, on the whole stallholders responded positively, with 12 out of 15 considering it did. Only six of these replied yes *definitely*, however, with the other six saying *Yes sometimes.*

Three commented it was useful publicity for their business. As two put it:

> *"The publicity is useful; we give out leaflets, even though the takings aren't huge".*
>
> *"It's more as advertising; people can try it"* (Meat seller).

Half of those saying 'Yes definitely' went on to say later that they would not need support to continue at the farmers' market. However, the others said they needed help with funding for equipment and advertising.

Of those saying 'Yes sometimes', most said they didn't need support to continue; the others suggested funding for advertising and to pay for staff.

- Business profitability

When asked if attendance at the markets had improved their profitability, two thirds of stallholders (10/15) considered that it had, though for almost all of these (8) this was *Yes a little*, rather than *Yes a lot.*

Positive comments received were:

> *"When they're good* (the markets), *it's better to sell direct".*
>
> *"All profits go to the stallholder. We were doing 1,000 iceberg* (lettuce) *a day to Safeway; then Safeway pulled out. Profits were lower, very low, even though the turnover was colossal. We've had to downsize, but I prefer it".*

Other comments from stallholders for whom profitability had improved a little or not at all, referred to the way the markets had declined since they were first launched, which had affected profitability:

> *"When they first started, they did a vast amount of advertising, then it dwindled. Now* (after Foot and Mouth) *we're having to start up from scratch. Some markets haven't readvertised".*
>
> *"They did* (improve profitability) *when they first started, not now".*

Those who said business profitability had not improved (3) said they needed advertising support, funding for equipment and less competition between similar stalls (ie fewer similar stalls) respectively.

- Importance of farmers' markets as an outlet

In order to establish how important the farmers' markets were to their businesses, the stallholders were asked what, if any, other customers or outlets they had for their produce. The results are shown in the Table 2, Appendix II.

Own shops and wholesalers were the most frequently-mentioned outlets after farmers' markets: almost two-thirds sold through their own shop, with around half using wholesalers.

They were then asked what percentage of their sales was going through the farmers' markets and other channels. The results for farmers' markets are shown in Table 3, Appendix II.

For a third of stallholders the farmers' markets were extremely important, representing over 50 per cent of sales.

There was a smaller group (1 in 5) for whom the markets were significant (between a quarter and half of sales). For these the other significant outlet was their own shop.

For the final group the farmers' markets were not such an important channel (10 per cent or less). For the majority these stallholders (5) wholesalers were the most important outlet.

- Help received with the farmers' market

When asked if they had been given help to get them started at the farmers' markets, most stallholders (10/15) said they had received none. For those who had been given help, four received advice from Groundwork, (one referring to Groundwork's work in getting the St Helens Market established). One had received advice from the National Association of Farmers' Markets, and one from the National Farmers Union (NFU).

None had received financial assistance. Two commented:

> *"Financial help is more trouble than it's worth. You have to put together business plans".*

> *"We were offered a grant, but it could have cost us more than we got, because of the conditions attached to EU funding, so we didn't take it up".*

- Future support required

When asked if they would need support to enable them to continue at the farmers' markets, just over half the stallholders said they would, though the rest said they didn't need support. The majority of those who did said the markets needed better advertising, and two said they would like help with purchasing new refrigeration equipment. One said he needed funding to employ more staff so he could attend more markets.

A few seemed to have been disappointed that they had been left by Groundwork and the local council in St Helens to run the market themselves, and felt that the initial support should have been on-going:

> *"At St Helens we have to do all the advertising and recruitment".*
>
> *"Groundwork has just abandoned it, just as it started getting going. The producers haven't the time, and need to agree on things".*

- Other economic impacts: business diversification

Half the stallholders said they had been attending farmers' markets for around a year, which corresponds to around the time the Merseyside farmers' markets were set up, and may therefore indicate the success of these markets in encouraging local producers to diversify, by providing a new outlet for their goods.

As shown in the 'Profile' section above, some stallholders were also selling a range of different types of produce, such as vegetables, preserves and baked goods.

Environmental benefits

There were two areas of environmental benefits identified:

1. Low mileage travelled by stallholders: reduction in traffic-related air pollution
2. Wider range of produce grown: moving away from agricultural monoculture

- Food miles reduction

Almost two-thirds of those attending the St Helens market, and over half those attending Liverpool said they had travelled 20 miles or less to get to the market. This represents a huge cut in food miles travelled, compared to supermarket produce. Although some stallholders had travelled further, only one had travelled over 40 miles. It is to be expected that as more markets start up and more local producers are involved that food miles will drop still further.

- Range of crops grown

Stallholders were asked if there had been any change in their production methods as a result of supplying the farmers' markets. Although for just over a third there had been no change, a third of the stallholders said they were growing/processing *a wider range of produce*. One said he was using fewer "sprays". Two said they were just producing more of everything.

Comments were as follows:

> *"We're growing a few extra veg. like onions and beetroot to have something to sell each month"*
>
> .
>
> *"Less popular herbs with the garden centres go well in smaller quantities at the farmers' markets".*

"Once we have our own preparation room we hope to extend the range further: sausages and burgers".

"We used to only sell two animals a year as meat; now we finish and sell all 100 per cent (of our livestock) *as the end product"* (ie meat).

"We've bought more equipment: pastry roller, packaging machine".

- Packaging

From the stallholders' point of view the farmers' markets did not mean any reduction in packaging. They were asked whether they considered that they were using more or less packaging for the markets than for other customers. Almost half the stallholders said they were using more, with only three considering they were using less. This is in part explained by the fact that bulk sales to wholesalers and retailers require less packaging. In contrast customers (see below) considered they were getting less packaging than usual.

- Wastage of product

When asked whether there was any difference in product wasted between the markets and other customers, over half considered that there was no difference. This did not appear to be a significant issue.

Social benefits

Social benefits identified by the survey can be summarised as follows:

1. Job creation
2. Reduced isolation of farmers

- Job creation

The stallholders were asked whether they had taken on any staff to help with the farmers' markets. Around a quarter of stallholders said they had taken on staff. In total three full-time and seven part-time jobs had been created, though six of these (one full-time and five part-time) were with the same business that produced home baking, and the staff were required for the baking and packing.

Some stallholders who had not taken on staff commented that the takings/costs did not as yet justify the expense; one later in the interview commented that if he could get *funding* to employ more staff he could attend more markets. The view was also expressed by one stallholder, however, that at a farmers' market the producer/grower should be there in person on the stall to answer queries, rather than sending an employee.

- Reduced isolation

As has already been reported above, several stallholders saw as a benefit of the market to themselves, the ability to get out and about and meet customers, particularly after the enforced isolation suffered during the worst days of Foot and Mouth.

Stallholders' concluding remarks on the Farmers' Markets

When asked if they had any further comments they would like to make on the Merseyside farmers' markets, several stallholders again mentioned the importance of good publicity.

One felt that funding was needed for this:

"The best one, an early St Helens one, was advertised on TV. It was a total sell-out. TV came to record during the day and it went out at night on TV. We need funding for advertising."

There was an overall positive commitment to the markets amongst the stallholders, summed up by remarks from two of them:

"It's now down to the stallholders to keep it going. It all takes time. The markets will depend on the stallholders work."

"All the farmers that do the market need it."

Customers

Profile of the sample

A total of 165 farmers' market customers were interviewed in person at the two farmers' markets in St Helens and Liverpool (81 and 84 respectively). The two markets were held on different days of the week: the first a working day, Friday, at St Helens and the second at the weekend, Saturday, at Liverpool. To some extent this is reflected in the customer profiles.

- Age

Well over three-quarters of the customers were over 35, with most of these being either in the 35-54 or 65+groups. At the St Helens market almost half were over 65, while at the Liverpool the biggest group was the 35-54s, and there were also more younger people under 34. See Table 4, Appendix III for details.

- Employment

Around half those interviewed said the main household wage earner was in employment (only two were unemployed); with a little under half saying they were retired. See Table 5, Appendix III for details.

At St Helens around two-thirds were retired, and a third in employment. At the Liverpool market this was reversed, with over two-thirds employed.

Amongst the employed, the biggest group (around half) was those in Managerial/Professional positions. There was a fairly even split at St Helens between Skilled Manual workers, Clerical/Administrative workers and Managerial/ Professional. At Liverpool most were Managerial/Professional. Unskilled manual workers were not represented.

Amongst the retired people well over half said they received pensions from work/private pensions.

- Marital status and children living at home

Over half of our respondents said they were married; but about three-quarters of all respondents had small households with no children living at home. There were more single people or those living with partners at Liverpool compared to St Helens. See Tables 6 & 7, Appendix III for details.

- Address

Most of those attending the markets lived fairly locally: two-thirds of those at the St Helens market came from St Helens, with a few from Liverpool. At the Liverpool market over three quarters were from Liverpool or the Wirral. See Table 8, Appendix III.

- Food shopping habits

Customers were asked where they normally shopped for food. The responses are shown in the Table 9, Appendix III. The majority normally shopped at supermarkets, and the results are broadly in line with the national market share for the major supermarkets (with the exception of Sainsbury's which is somewhat under-represented).

Cross-analysis showed that of the large group who said they shopped at their local shops, the vast majority of these (86 per cent) shopped also at supermarkets.

- Car usage

Around two-thirds said they had the use of a car, and most of those used it once a week or more for shopping. Rather more of the Liverpool customers said they had the use of a car than those at St Helens. See Tables 10 & 11, Appendix III.

Economic benefits

The previous 'Stallholders' section showed that the stallholders considered the farmers' markets were financially viable and were committed to them, but were concerned that not enough people knew about them, and therefore that customer numbers were not high enough.

The purpose of interviewing customers at the markets was to gauge their reaction to them and therefore estimate the markets' potential for growth.

The response from customers was extremely positive. The main findings from the customer survey in terms of potential economic benefits are summarised below:

1. High satisfaction levels amongst customers
2. Requests for more stalls
3. Widespread support for local farmers
4. Regular attendance
5. High spend per head

6. Multiple purchases common
7. Constructive suggestions for improvement

Detailed responses to questions were as follows:

- Satisfaction with the market

Customers were asked to rate their satisfaction with the market on a scale of 1 to 10, where 1 was 'Not at all satisfied' and 10 was 'Very satisfied indeed'. The response was very positive, with a third of all customers giving it 10 and two thirds giving it a score of 8 or over. The average score was calculated as 8.1. Table 12, Appendix III gives the details.

When asked to comment on their score, some of those who gave the market 10/10 said:

> *"The produce is good, not overpriced; the food is different and there's not too much packaging"*
>
> *"You can get everything you want at decent prices and it's nice"*
>
> *"I like organic; my friends come here"*
>
> and even
>
> *"I like to pay a bit more; it's better than the bland supermarkets"*

Amongst those scoring 8 or 9 there were many similar positive comments but also a desire for the market to be bigger, with more stalls. Some said the market had been bigger before it was suspended because of Foot and Mouth. This was also the main complaint from those scoring between 4 and 7: there was just not enough. Some typical comments were:

> *"It should be bigger, more "*
>
> *"There isn't a lot at the moment"*
>
> *"I wish there was more, so I could spend longer here"*

Over all, then, the criticisms were of a positive nature: customers liked the market, and were generally disappointed not to find it larger.

- How could the market be improved?

More stalls. When asked how the market could be improved, it is not surprising in the light of the above, that the suggestion made by the largest group (around half), was that there should be more stalls, and particularly more selling fruit and vegetables.

Other suggestions were:

- more advertising of the market
- more frequent: more often than once a month
- a better location for the market

- refreshments.

Some typical comments were:

> (More stalls):
> *"More veg, more fruit, more soft cheese, more game"*
>
> *"It could have more veg and butter and other homemade products"*
>
> *"More cakes; fresh flowers would be good"*
>
> *"More fresh veg and wider choice"*
>
> (Advertising): "*I only knew it was back on from one of the butchers; it needs a big feature in the* Echo*"*
>
> (Frequency): *"It should be more frequent, to build into the* (shopping)*"*
>
> (Location): "*It should be in the Town Hall square in the centre; it's too far from the bus station"* (St Helens)
>
> *"It should be nearer the shopping precincts like the top of Bold St".* (Liverpool)

Slightly more customers in Liverpool, compared to St Helens, suggested there should be more stalls, despite the fact that this was a bigger market, perhaps because there were fewer stalls than there had been before the market was suspended. A few satisfied customers in St Helens felt that the market could not be improved.

- Reasons for shopping at the farmers' market

When asked why they were shopping at the market, customers demonstrated that they were well aware of the local nature of the businesses represented at the market, and expressed it as their intention to support them:

Around half the customers said they were shopping at the market because the produce was 'fresh/direct from the grower', with around a third saying they wanted to 'support local growers'. Around a quarter said it was because the food was 'produced locally'. There was little difference between customers at the two markets. Further details are given in Table 13, Appendix III.

Some customers' comments highlighted the quality of the produce:

> *"We like it; it's better quality than anywhere else in Liverpool"*
>
> *"The meat and veg have lots of flavour"*
>
> *"The eggs are a lot better; the veg is perfect"*
>
> *"It's real cheese!"*

Others compared the market favourably with supermarkets:

"It's different from the supermarkets, not mass-produced"

"I don't like supermarkets; this has better food, atmosphere"

- Attendance at farmers' markets

Customers showed that they were committed to the farmers' markets. Nearly three-quarters of all customers said they had been to the farmers' market before, and of these two thirds said they attended every time the market was on. Most of those who had attended before had only been to their local farmers' market and had not travelled to farmers' markets in other areas. Details are shown in Tables 14-16, Appendix III.

- Amount spent at the market

Customers were spending a reasonably high sum per head. A range of expenditure levels was evident, with the largest group of customers (around a third) spending £5-10, but a third in total were spending over £10, and some of these were spending over £30.

There were some differences between the markets, with a higher average spend at Liverpool. At St Helens around three-quarters were only spending up to £10; at Liverpool this was less than half; a quarter at Liverpool were spending £11-20, and about 1 in 6 said they were spending over £30 (compared to only around one per cent at St Helens). Details are given in Table 17, Appendix III.

- Purchases at the market

Many customers were making multiple purchases. Meat and vegetables were the most popular produce amongst customers, with over a half saying they had come to buy one or the other of them. These were followed by cheese (over a third) and baked foods (a quarter). Table 18, Appendix III gives further details.

There were some differences between customers at the two markets, with twice as many saying they were buying meat at Liverpool, compared to St Helens and almost twice as many saying they were buying cheese. This may partly reflect the customer profile (more middle-aged than older customers) but also the fact that customers at Liverpool were on average spending more (see above). Those spending above £11 were almost all buying meat. There were also more stalls and therefore more choice at Liverpool (ie two cheese stalls).

- Reduced shopping at supermarkets

The farmers' markets were successful in keeping money within the local economy. Most customers shopped at supermarkets (see profile above). When asked whether shopping at the farmers' market meant they were buying less fresh food from their regular shops, around two-thirds of customers said 'Yes', with only a quarter saying they were not. There was little difference between the customers at the two markets. See Table 19, Appendix III.

- Publicity for the farmers' markets

In the light of the stallholders' comments on poor advertising of the markets, it is interesting to see how those customers attending the Markets had heard about them. In summary:

- Newspaper publicity seen by over one third
- Word of mouth quoted by almost one quarter

This suggests future advertising work should focus on the local press, in particular Liverpool papers, where coverage could be improved (see below).

When asked how they had heard about the farmers' market, over one third, the largest group, said they had seen it in the local newspaper, and next was 'Word of mouth' (almost a quarter). More details are given in Table 20, Appendix III.

Two-thirds had seen some sort of publicity for the markets, and the local paper had been the most successful medium.

There was a difference between the markets here, in that around three-quarters of customers in St Helens had registered some form of publicity, compared to just over half in Liverpool. Over half the customers in St Helens mentioned the local paper, compared to a quarter in Liverpool, where word of mouth had been more significant (mentioned by a third).

Environmental benefits

A number of environmental benefits accrue from the farmers' markets. These may be summarised as follows:

1. Reduced food miles: customers almost all local residents
2. Promotion of organic farming: one fifth were shopping for organic food
3. Reduced waste: less packaging on market goods

- Reduced food miles

As shown in the profile section above, customers at St Helens and Liverpool markets were primarily from St Helens and Liverpool respectively: they had not travelled far out of their way to attend the Markets. However, if consumers have to travel too far to a farmers' market then some transport savings can be lost. It will be important in the future to ensure that local food is available in as many communities as possible through a variety of different types of scheme.

- Organic farming

As seen under 'Economic benefits' above, after support for local growers, the fourth most important reason given for shopping at the farmers' market was the fact that organic food was available. This was mentioned by almost 20 per cent of customers overall, and almost one quarter in Liverpool.

- Reduced waste

When asked whether shopping at the farmers' market meant they were given more or less packaging with the goods than at their regular shops, almost three-quarters of customers said 'Less' (see Table 21, Appendix III).

This obviously contrasts with the response from stallholders who were using more packaging at the markets, presumably because of selling direct to the public and having to provide individual bags to customers, as well as packaging of individual food items for hygiene reasons. However, customers were comparing the markets with their usual shops (and most shopped at supermarkets). For them the contrast was favourable.

Social benefits

The markets can be seen to strengthen the sense of local community in two ways:

1. Solidarity with local growers
2. Enjoyment of the markets as a local community event

- Solidarity with local growers

This was expressed through the principal reasons given for shopping at the markets (see under 'Economic benefits' above): 'Fresh produce/direct from the grower'; 'I want to support local growers'; 'It's produced locally'.

As one customer put it:

> *"It's good produce, and it's taking business away from the supermarkets"*

- Local community event

Some customers commented:

> *"My friends come here as well"*
>
> *"It's fun"*
>
> *"I prefer a market to indoor shops"*
>
> *"I just love it; I enjoy markets"*
>
> *"It's an enjoyable experience"*

Summary and conclusions

Successes and failures

From the findings covered in the preceding commentary it can be seen that the Merseyside Local Foods for Local People project, has comprised three successes and one failure:

The three notable successes have been:

i. The establishment of two farmers' markets for which a high level of customer satisfaction and loyalty was demonstrated, with an expressed desire that the markets should expand.

   Growers and producers who had stalls at the markets (referred to in this report as 'Stallholders') were also pleased with them, considering them viable financially and contributing to increased business profits. They were committed to continuing at them, but required better publicity in order to increase customer numbers.

ii. The development of two box schemes supplying local households, which were improving turnover for the growers involved.

iii. The expansion of two farm shops, improving the attractiveness of a shopping visit for customers.

The failure was the community box scheme element of the project. It failed for the following reasons:

- It didn't work for the suppliers: there was insufficient volume and turnover for it to be viable.

- It didn't work for the customers: quality and reliability were poor, and there was insufficient choice.

Benefits to the local area from the project

The schemes that had been successful demonstrated the following benefits:

Economic benefits

- Improved profitability for growers and producers at the farmers' markets and those running box schemes in their local area.

- Business expansion for growers and producers at the markets and those running box schemes as above.

- Diversification of farm businesses into direct selling through farmers' markets, box schemes and farm shops.

- More money staying within the local economy as a result of more money being spent at the markets, on boxes and at farm shops.

Environmental benefits

- Reduced food miles: By producers increasingly selling direct to the public at farmers' markets, through home-delivered boxes and at farm shops, the distance normally travelled by food from field to plate was significantly reduced.

- Crop diversification: The necessity of providing as wide a range of produce as possible to customers of farmers' markets, boxes and farm shops meant that growers were expanding the range of crops grown, thus moving away from conventional monoculture.

- Expansion of organic agriculture: The success of the organic box scheme meant more land devoted to organic production. A significant level of demand for organic produce was demonstrated by farmers' market customers. One grower was planning organic conversion.

- Waste reduction: farmers' market customers were receiving less packaging with their purchases; one of the two local box schemes was recycling cardboard boxes.

Social benefits

- Job creation: Three full-time and nine part-time jobs had been created, with a box scheme and with farmers' market stallholders.

- Reducing farmers' isolation (in the wake of Foot and Mouth): farmers were pleased to be meeting the public at the farmers' markets.

- Building community: farmers' market customers enjoyed the 'event' of a truly local market, and expressed strong solidarity with their local farmers.

- Education: These food schemes help to reconnect people with where, how and by whom their food is produced.

Conclusions

In the light of the above it may be concluded that the Merseyside Local Foods for Local People project has been an overall success. The economic, environmental and social benefits it has demonstrated suggest that similar schemes may prove valuable in other parts of the country.

We recommend that Friends of the Earth lobby RDAs and Government to fund further schemes along the lines of the Merseyside project.

We recognise that local food schemes are at present working best for customers who already have greater access to a range of food, and further research is urgently needed in how to make local food supplies work for more disadvantaged members of the public, as well as growers/suppliers

We particularly recommend that the possibility of farmer-owned local distribution centres be investigated, in order to overcome some of the problems identified by this survey in getting local food to certain groups within the community.

Publicity and promotion of local food schemes should be ongoing and opportunities for promotional work seized on, eg harvest festivals and ‘Apple Day’.

Appendix I: Questionnaires

Merseyside farmers' markets

Market _____

Stallholder questionnaire

Name _____
Business Name _____
Address _____
Postcode _____ Tel._____
Fax_____ E mail _____

1. Which Farmers' Market(s) have you attended? *(Use box below)*

2. How far are they from your home? *(Use box below)*

3. How often do/did you attend the markets? *(Use box below)*

Farmers' Market	**Q.1 Attended (Yes/No)**	**Q.2 Distance (miles)**	**Q.3 How often? Weekly**	**Fortnightly**	**Monthly**	**Less often (specify)**
St Helens						
Liverpool						
Farnworth						
Altrincham						
Manchester						
Knutsford						
Widnes						
Chester						
Other(s) (please specify)						

4. What produce do/did you supply? *(Tick more than one box if applicable)*

Produce	**Supplied**
Meat (please state type)	
Fish	
Dairy	
Ice Cream	
Fruit	
Vegetables	
Baked Foods (bread, cakes, pies)	
Preserves/Condiments	

Produce	**Supplied**
Honey	
Juices	
Alcoholic Drinks	
Herbs	
Other Food (please specify)	
Garden Plants/Flowers	
Non-food (please specify)	

5. Who else do you sell your produce to? Please estimate the percentage to each.

Customer	Sold to	Percentage of Sales
Supermarkets		
Wholesaler		
Local Retailers		
Through own shop		
Vegebox scheme		
Farmers' Market		
Other (please specify)		
Don't Know		

6. Have you taken on any staff to help with Farmers' Market work?

Yes ☐ No ☐ Don't know ☐

(If 'Yes') Are they full-time or part-time?

	Full-time	Part-time	Don't Know
Number of new staff			

<u>If only sell through Farmers' Market, skip to Q.10</u>

7. Does supplying the Farmers' Market mean you use more or less packaging than for other customers?

More ☐ Less ☐ Same ☐ Don't know ☐

8. Does supplying the Farmers' Market mean there is more or less wastage of your product than with other customers?

More ☐ Less ☐ Same ☐ Don't know ☐

9. Considering the time spent preparing for and attending the Farmers' Market, together with the cost of packaging and labelling produce and extra staff (if required), do you consider your takings justify the expense?

Yes definitely ☐ Yes sometimes ☐ No ☐ Don't know ☐

10. Has attendance at the Farmers' Market improved your profitability?

Yes a lot ☐ Yes a little ☐ No ☐ Don't know ☐

11. When did you start attending Farmers' Market(s)?

2001 ☐ 2000 ☐ 1999 ☐ Before 1999 ☐ Don't know ☐

12. Have you changed production methods as a result of supplying the Farmers' Market? If so, how? *(Prompt if necessary)*

- ☐ Using fewer pesticides
- ☐ Growing wider range
- ☐ Converting to organic production
- ☐ No change
- ☐ Other (please specify) _____
- ☐ Don't know

Why is this? _____

13. Did you receive any help to get you started at the Farmers' Market?

Yes ☐ No ☐ Don't know ☐

If 'Yes',
From whom? Was this financial assistance, advice, or other help? (please specify) *(Complete box below)*

		Type of Help Received		
	Help received from whom?	**Financial Assistance**	**Advice**	**Other help (specify)**
Local Authority				
Groundwork				
ADAS/MAFF				
National Association of Farmers' Markets				
Other organisation (please specify)				

14. Would you need support to enable you to continue at the Farmers' Market?

☐ Yes ☐ No ☐ Don't know

If 'Yes', What kind of support?

_____

_____

15. How would you rate your overall satisfaction level with the Farmers' Markets on a scale of 1 to 10, where
1 = 'Not at all satisfied' and 10 = 'Very satisfied indeed'?

Not at all satisf'd									**Very satisf'd indeed**
1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**

Why is this?

_____

_____

16. Do you intend to continue to supply Farmers' Markets?

Yes ☐ No ☐ Don't know ☐

Why is this?

_____

_____

17. Do you have any further comments you would like to make on the **Merseyside** Farmers' Markets?

_____

_____

_____

Many thanks for your time.

Merseyside farmers' markets

Market _____

Farmers' market customer questionnaire

Name _____
Address _____
_____ Postcode _____Tel. _____

Sex: ☐ M ☐ F

Marital Status:
☐ Single ☐ Married ☐ Partner ☐ Divorced ☐ Widowed

Age:
☐ 15-24 ☐ 25-34 ☐ 35-54 ☐ 55-64 ☐ 65+

Children living at home:
☐ Under 16 how many: _____ ☐ Over 16 how many: _____
☐ None

Occupation:
Employed (please specify) _____
Interviewer please code:
☐ *Casual worker* ☐ *Unskilled manual* ☐ *Skilled manual*
☐ *Clerical/Admin* ☐ *Manager/Professional*

☐ Self employed (trade) ☐ Self employed (professional)
☐ Unemployed ☐ Retired (private pension) ☐ Retired (state pension)
☐ Student ☐ Housewife ☐ Carer
☐ Voluntary Worker ☐ Other (please state) _____

---

1. Have you been to a Farmers' Market before?

   ☐ Yes
   ☐ No
   ☐ Don't know

2. If 'Yes', how often have you been?

   ☐ Every time
   ☐ Occasionally
   ☐ Don't know

3. Which other Farmers' Markets have you been to?

   ☐ Liverpool ☐ St Helens ☐ Other (please state) _____

4. What are you planning to buy/have you bought today? *(Tick more than one box if applicable)*

Meat (please state type)	
Fish	
Dairy	
Ice Cream	
Fruit	
Vegetables	
Baked Foods (bread, cakes, pies)	
Preserves/Condiments	

Honey	
Juices	
Alcoholic Drinks	
Herbs	
Other food (please specify)	
Garden plants/flowers	
Non-food (please specify)	
Don't know	

5. How much have you spent/are you planning to spend at the Farmers' Market?

☐ Less than £5 ☐ £5 - £10 ☐ £11 - £20 ☐ £11 - £20
☐ Over £30 ☐ Don't know

6. Why are you shopping at the Farmers' Market?

☐ Fresh /Direct from grower
☐ Produced locally
☐ Personal service/Friendly service
☐ Want to support local growers
☐ Other (please state)_____
☐ Don't know
☐ Value for money
☐ Know where it's come from
☐ Organic
☐ Good choice

7. Where do you normally shop for food?

Asda	
Iceland	
Tesco	
Co-op	
Somerfield	
Sainsbury's	
Safeway	
Waitrose	
Morrisons	
Other supermarket (please specify)	

Other Street Market (specify location)	
Local shops (location)	
Home delivery (please specify)	
Other shops (please specify)	
Don't know	

8. Do you have the use of a car for shopping?

☐ Yes ☐ No ☐ Don't know

9. Does shopping at the Farmers' Market mean you are buying less fresh food from your **regular** shops?

☐ Yes ☐ No ☐ Same ☐ Don't know

10. Does shopping at the Farmers' Market mean you are given more or less packaging with the goods than at your regular shops?

☐ More ☐ Less ☐ Same ☐ Don't know

11. How did you hear about the Farmers' Market?

☐ Posters ☐ Newspapers ☐ Local radio ☐ Other (please state)_____

12. On a scale of 1 to 10, please say how satisfied you are with the Farmers' Market,

Where 1 = 'Not at all satisfied' and 10 = 'Very satisfied indeed'

Not at all satisf'd									**Very satisf'd indeed**
1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**

Why do you say that? _____

13. Are there any ways in which the Farmers' Market could be improved? If so, how?

_____

_____

Could I just ask you some personal details? These will of course be confidential.

Interviewer: Return to front page to complete personal data.

Merseyside vegebox schemes

Vegebox suppliers questionnaire

Name _____
Business Name _____
Address _____
Postcode _____ Tel._____
Fax_____ E mail _____

1. Where is/are your Vegebox round(s)?

   Area _____

   Postcode (s) _____

2. How far is it/are they from your farm/business?

   ☐ 0-5 miles ☐ 6-10 ☐ 11-20 ☐ 21-30 ☐ 31+

3. How often do you supply the round?

   ☐ Weekly ☐ Fortnightly ☐ Monthly

   ☐ Less often (please specify) _____

   ☐ More often (please specify) _____

4. How many boxes do you deliver each time? _____

5. What price are they to the customer?_____

6. Does your business do the deliveries?

   ☐ Yes ☐ No ☐ Don't know

   If No, Who do you use? _____

7. What produce do you supply? *(Tick more than one box if applicable)*

   ☐ Vegetables ☐ Fruit ☐ Dairy (please specify) _____

   ☐ Groceries (please specify) _____

   ☐ Other (please specify) _____

8. Do you sell your produce to anyone else apart from through your own Vegebox scheme?

☐ Yes ☐ No

If 'Yes', Who do you sell to? Please estimate the percentage to each.

Customer	**Sell to**	**Percentage of Sales**
Supermarkets		
Wholesaler		
Local Retailers		
Through own shop		
Through Farmers' Market		
Other Vegebox Schemes		
Other (please specify)		
Don't know		

9. Have you taken on any staff to help with the Vegebox scheme?

☐ Yes ☐ No ☐ Don't know

If 'Yes': How many have you taken on.? Are they full-time or part-time?

	Full-time	**Part-time**	**Don't Know**
Number of new staff			

<u>If only sells through Vegebox scheme, skip to Q.13</u>

10. Does supplying the Vegebox scheme mean you use more or less packaging than for other customers?

☐ More ☐ Less ☐ Same ☐ Don't know

11. Does supplying the Vegebox scheme mean there is more or less wastage of your product than with other customers?

☐ More ☐ Less ☐ Same ☐ Don't know

12. Considering the time spent on the Vegebox scheme, together with the cost of packaging and extra staff (if required); do you consider your takings justify the expense?

☐ Yes definitely ☐ Yes sometimes ☐ No ☐ Don't know

13. What would you say is your main business? _____

14. Does the Vegebox scheme represent a diversification for your business?

☐ Yes ☐ No ☐ Don't know

15. Has the Vegebox scheme improved your profitability?

☐ Yes a lot ☐ Yes a little ☐ No ☐ Don't know

16. When did you start supplying Vegeboxes?

☐ 2001 ☐ 2000 ☐ 1999 ☐ Before 1999 ☐ Don't know

17. Have you changed production methods as a result of supplying Vegeboxes? If so, how? (*Prompt if necessary)*

☐ Using fewer pesticides

☐ Growing wider range

☐ Converting to organic production

☐ No change

☐ Other (please specify) _____

☐ Don't know

Why is this? _____

18. Did you receive any help to get you started with the Vegebox scheme?

☐ Yes ☐ No ☐ Don't know

If 'Yes', from whom? Was this financial assistance, advice or other help? (please specify) (*Complete box below)*

		Type of Help Received		
	Help rec'd from whom?	**Financial Assistance**	**Advice**	**Other help (specify)**
Local Authority				
Groundwork				
ADAS/MAFF				
Other organisation (please specify)				

19. Have you had any problems with supplying the Vegeboxes? If so, what?

_____

_____

20. Do you intend to continue to supply Vegeboxes?

☐ Yes ☐ No ☐ Don't know

Why is this? _____

21. Would you need support to enable you to continue with the Vegebox scheme?

☐ Yes ☐ No ☐ Don't know

If Yes, what kind of support?

_____

_____

Many thanks for your time.

Merseyside vegebox schemes

Vegebox customers questionnaire

Name _____
Address _____
_____ Postcode _____Tel. _____

Sex: ☐ M ☐ F

Marital Status:
☐Single ☐ Married ☐ Partner ☐ Divorced ☐ Widowed

Age:
☐15-24 ☐25-34 ☐35-54 ☐55-64 ☐65+

Children living at home:
☐Under 16 how many: _____ Over 16 how many: _____
☐None

Occupation:
Employed (please specify) _____
Interviewer please code:
☐ *Casual worker* ☐*Unskilled manual* ☐*Skilled manual*
☐*Clerical/Admin* ☐*Manager/Professional*

☐ Self employed (trade) ☐Self employed (professional)
☐ Unemployed ☐Retired (private pension) ☐Retired (state pension)
☐ Student ☐Housewife
☐ Carer ☐Voluntary Worker
☐ Other (please state) _____

---

1. What do you buy through the Vegetable box/bag scheme?

   ☐Vegetables
   ☐Fruit
   ☐Groceries (please specify) _____
   ☐Other (please specify) _____

2. How often do you receive a Vegetable box?

   ☐Weekly
   ☐Fortnightly
   ☐Monthly
   ☐Less often (please specify) _____

3. How much does the Vegetable box cost?£_____ ☐Don't know

4. Where is it delivered to?

☐ My home
☐ I collect it from (please specify) _____

5. How long have you been getting a Vegetable box?

☐ Less than 6 months ☐ 6 months - 1year
☐ Over a year ☐ Don't know

6. Why do you get a Vegetable box? *(Tick more than one box if appropriate)*

Convenience	
Saves carrying heavy shopping	
Fresh/direct from grower	
Value for money	
Produced locally	
Organic	
Want to support local growers	
Other (please specify)	
Don't know	

7. Where do you normally do your food shopping?

Asda	
Iceland	
Tesco	
Co-op	
Somerfield	
Sainsbury's	
Safeway	
Waitrose	
Morrisons	
Other supermarket (please specify)	
Street market (specify location)	
Local shops (location)	
Home delivery (please give details)	
Other shops (please specify)	
Don't know	

8. About how often do you shop for food?

☐ Every day ☐ Two or three times a week ☐ Once a week
☐ Once a fortnight ☐ Other (please specify) _____
☐ Don't know

9. Do you have any shops near you that sell fresh fruit and vegetables?

☐ Yes ☐No ☐Don't know

10. How do you get to your regular food shops usually? *(Tick boxes in the table below)*

11. How long does it take you to get to the shops by this means? (In minutes) *(Fill in boxes in the table below)*

	Q10 How do you get there?	**Q11 How long does it take (minutes)**
Walk		
Bus		
Own car		
Lift in someone else's car		
Taxi		
Train		
Bicycle		
Have home deliveries		
Other (please specify)		
Don't know		

12. Do you normally buy fresh fruit and vegetables at your regular shops?

☐Yes ☐No ☐ Don't know

If 'No' Why not?

☐Too expensive ☐Too heavy to carry ☐Too far to walk
☐Poor quality ☐Not enough choice
☐Other (please specify) _____

13. To what extent would you agree or disagree with the following statements people have made about the Vegetable box scheme?
Please rank how you feel on a scale of 1 to 5, where:

1 = 'Agree strongly' and 5 = 'Disagree strongly'

Enter answers by ticking boxes in Table below

13a). 'I am eating more fresh vegetables/fruit because of getting the Vegetable box'
13b). 'I am making fewer shopping trips because of the Veg. box'
13c). 'There is less packaging to throw away with the Veg. box'
13d). 'There is more food wasted with the Veg. box'

	1. Agree strongly	**2. Agree**	**3. Neither agree nor disagree**	**4. Disagree**	**5. Disagree strongly**
13a) Eat more veg.					
13b) Fewer trips to shops					
13c) Less packaging					
13d) More waste					

If answered 'Agree strongly' or 'Agree' to Q.13a): Go to Q.14

14. Why are you eating more fresh vegetables/fruit because of getting the Vegetable box?

☐ Cheaper ☐ Don't have to carry it home
☐ Convenient ☐ Good quality
☐ Good choice ☐ Don't know
☐ Other (please specify)_____

15. How did you hear about the Vegetable box scheme? _____

16. On a scale of 1 to 10, please say how satisfied you are with the Vegetable box scheme,
where 1 = 'Not at all satisfied' and 10 = 'Very satisfied indeed'

Not at all satisf'd									**Very satisf'd indeed**
1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**

If score is between 1 and 5:

Why are you **not** satisfied with the Vegetable box? _____
_____
_____

17. Do you think the Vegetable box scheme could be improved? If so, how?

_____

_____

_____

Finally, could I just ask you some personal details? These will of course remain confidential, and will not be passed to any other organisation.

Interviewer : Return to front page to complete personal details

Appendix II

List of additional materials available from Pete Riley at Friends of the Earth Leeds office:

i) Groundwork publications

ii) Farmers' Market stallholders leaflets

iii) Merseyside maps and guides

Appendix III

Table 1: Stallholder satisfaction with farmers' markets

	Not at all safisf'd									**Very satisf'd indeed**
Score	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
No. of stallholders	0	1	2	0	1	3	3	2	0	1

Base: 13

Table 2: Farmers' market stallholders' customers and outlets

Customer/Outlet	**No. of stallholders selling to**
Farmers' markets	15
Own shop/other direct sales	9
Wholesaler	7
Local retailers	6
Pick your own	2
Supermarkets	0
Box scheme	0

Base: 15

Table 3: Percentage of Stallholders' sales going through farmers' markets

	Percentage of Sales					
Channel	**% 0-10%**	**% 11-25%**	**% 26-50%**	**% 51-75%**	**% 76-100%**	**(Base)**
Farmers' Markets	7	-	3	2	3	(15)

Table 4 Age of farmers' market customers

Age Group	**Total %**	**St Helens %**	**Liverpool %**	***(Merseyside%*)***
15-24	1.2	0	2.4	*(17)*
25-34	13.9	3.7	23.8	*(18)*
35-54	30.3	23.5	36.9	*(30)*
55-64	23.6	25.9	20.2	*(14)*
65+	29.7	45.7	14.3	*(20)*
Wouldn't say	1.2	1.2	2.4	-
(Base)	(165)	(81)	(84)	*(1,124,217) (persons over 15)*

* All Merseyside figures taken from 1991 Census

Table 5: Employment status of farmers' market customers

Employment status	Total %	St Helens %	Liverpool %	*(Merseyside %*)*
Skilled Manual	6.7	9.9	3.6	
Clerical/Admin	12.7	9.9	15.5	
Manager/Professional	26.1	11.1	40.5	
Self-employed Trade	2.4	1.2	3.6	
Self-employed Profession	4.2	0	7.1	
Total in Employment	**(52.1)**	**(32.1)**	**(70.3)**	***(48)***
Unemployed	1.2	1.2	1.2	*(9)*
Retired (work/private pension)	25.5	37.0	14.3	
Retired (state pension)	19.4	28.4	10.7	
Total Retired	**(44.9)**	**(65.4)**	**(25.0)**	***(20)***
Wouldn't say	1.8	1.2	3.6	*(23) (other)*
(Base)	(165)	(81)	(84)	*(1,106, 839) (persons over 16)*

*All Merseyside figures taken from 1991 Census

Table 6: Marital status of farmers' market customers

Marital status	Total %	St Helens %	Liverpool %	*(Merseyside %*)*
Single	18.8	12.3	25.0	*(46) (single/widowed/divorced)*
Married	59.4	67.9	50.0	*(54)*
Partner	7.9	1.2	14.3	*(above)*
Divorced	3.0	2.5	3.6	*(above)*
Widowed	9.1	14.8	3.6	*(above)*
Wouldn't say	1.8	1.2	3.6	-
(Base)	(165)	(81)	(84)	*(1,124,217)*

Table 7: Farmers' market customers with children living at home

Children living at home	Total %	St Helens %	Liverpool %	*(Merseyside %*)*
None	72.1	79.0	64.3	*(70) (none 0-15 yrs)*
Under 16's living at home (households)	15.8	6.2	25.0	*(30)*
Over 16's living at home (households)	12.7	7.9	9.5	*(above)*
Wouldn't say	1.2	1.2	2.4	-
(Base)	(165)	(81)	(84)	*(551,374) (households)*

N.B. A small number of respondents had children both under and over 16 at home

Table 8: Addresses of farmers' market customers

Address	Total %	St Helens %	Liverpool %
St Helens	31.0	61.7	1.2
Prescot	2.0	6.2	0
Liverpool	43.6	11.1	73.8
Wirral	4.2	0	8.3
Other (less than 3% for each)	17.0	19.8	15.5
Wouldn't say	1.2	1.2	1.2
(Base)	(165)	(81)	(84)

Table 9: Food shopping habits of farmers' market customers

Normal shopping done at:	Customers using (%)
Tesco	35.1
Asda	23.0
Sainsbury's	17.6
Safeway	17.6
Morrisons	15.2
Marks & Spencer	11.5
Iceland	7.9
Kwik Save	7.3
Somerfield	3.0
Aldi	1.8
Local shops	33.9
Other street market	7.9
(Base)	(165)

Table 10: Car usage of farmers' market customers

Use of a car?	Total %	St Helens %	Liverpool %	*(Merseyside %*)*
Yes	67.3	60.5	73.8	*(63)*
No	30.3	37.0	23.8	*(37)*
Don't know/ didn't say	2.4	2.5	2.4	-
(Base)	(165)	(81)	(84)	*(1,067,745) (persons over 17)*

Table 11: Frequency of car use for shopping of farmers' market customers

Use of a car?	Total %	St Helens %	Liverpool %
Less than once a week	17.3	21.2	14.3
Once a week	30.7	24.2	35.7
More than once a week	52.0	54.5	50.0
(Base)	(75)	(33)	(42)

Table 12: Farmers' market customer satisfaction

Score	Total %	St Helens %	Liverpool %
1. (Not at all satisfied)	0	0	0
2	0	0	0
3	0	0	0
4	1.8	1.2	2.4
5	9.7	11.1	8.3
6	8.5	11.1	6.0
7	10.9	9.9	11.9
8	23.6	14.8	32.1
9	7.9	6.2	8.3
10. (Very satisfied indeed)	34.5	40.7	28.6
Don't know	3.0	4.9	2.4
(Base)	(165)	(81)	(84)

Average score out of 10	**8.1**	**8.2**	**8.1**

Table 13: Customer reasons for shopping at the farmers' market

Reasons for shopping	Total customers %	St Helens %	Liverpool %
Fresh/direct from grower	49.1	48.1	48.8
Want to support local growers	32.1	30.9	33.3
Produced locally	22.4	21.0	23.8
Organic	19.4	14.8	23.8
Value for money	17.6	16.0	19.0
Know where it's come from	12.7	12.3	13.1
Personal service/friendly	11.5	7.4	15.5
Quality	11.5	6.2	15.5
Different	9.7	9.9	9.5
Good choice	7.9	4.9	10.7
Curious	6.1	8.6	3.6
Tasty food	3.0	0	6.0
(Base)	(165)	(81)	(84)

Table 14: Attendance of farmers' market customers

Attended before?	Total%	St Helens%	Liverpool%
Yes	72.7	72.8	71.4
No	27.3	27.2	28.6
(Base)	(165)	(81)	(84)

Table 15: Frequency of attendance of farmers' market customers

How often?	Total%	St Helens%	Liverpool%
Every time	67.5	67.8	66.7
Occasionally	31.7	30.5	33.3
Don't know	0.8	1.7	-
(Base)	(120)	(59)	(60)

Table 16: Attendance at other markets by Merseyside farmers' market customers

Other markets?	Total%	St Helens%	Liverpool%
None	93.3	93.3	88.5
Yes/On holiday	6.7	6.7	11.5
(Base)	(120)	(59)	(60)

Table 17: Amount spent by farmers' market customers

Amount spent	Total customers spending%	St Helens%	Liverpool%
Less than £5	24.2	34.6	14.3
£5-10	34.5	39.5	29.8
£11-20	20.6	13.6	26.2
£21-30	4.2	1.2	7.1
Over £30	9.1	1.2	16.7
Don't know	7.3	9.9	4.8
(Base)	(165)	(81)	(84)

Table 18: Purchases made by farmers' market customers

Produce	Total buying%	St Helens%	Liverpool%
Meat	60.0	39.5	72.6
Vegetables	55.8	55.6	54.8
Cheese	36.4	25.9	44.0
Baked foods (bread, cakes, pies)	24.9	21.0	28.6
Fish	18.8	18.5	19.0
Eggs	14.5	4.9	22.6
Garden plants/flowers	9.7	13.6	6.0
Fruit	8.5	8.6	8.3
Herbs	7.9	7.4	8.3
Ice cream	6.7	0	13.1
Preserves/condiments	6.7	6.2	7.1
Juices	4.9	1.2	8.3
Alcoholic drinks	1.9	0	3.6
(Base)	(165)	(81)	(84)

Table 19: Reduction in supermarket shopping of farmers' market customers

Buying less from your regular shops?	Total%	St Helens%	Liverpool%
Yes	63.6	59.3	66.7
No	25.5	28.4	22.6
Same	2.4	3.7	1.2
Don't know	8.5	8.6	9.5
(Base)	(165)	(81)	(84)

Table 20: Publicity seen/heard by farmers' markets customers

Type of publicity	Total seeing/hearing%	St Helens%	Liverpool%
Local paper	38.8	53.1	23.8
Posters	8.5	9.9	7.1
Local radio	6.7	6.2	6.0
Leaflets	5.5	1.2	10.7
Internet	1.8	1.2	2.4
Council	1.2	1.2	2.4
Other	2.4	1.2	2.4
Total registering some publicity	**64.3**	**74.0**	**54.8**
Word of mouth	21.8	14.8	33.3
Just walking past	12.7	9.9	9.5
Don't know	0.6	1.2	0
(Base)	(165)	(81)	(84)

Table 21: Perception of waste by farmers' markets customers

How much packaging?	Total%	St Helens%	Liverpool%
More	1.2	1.2	1.2
Less	70.9	59.3	81.0
Same	21.2	28.4	14.3
Don't know	6.7	11.1	3.6
(Base)	(165)	(81)	(84)

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