

London's Retail Street Markets - Draft Final Report

Draft Final Report by
Regeneris Consulting



London Development Agency

London's Retail Street Markets - Draft Final Report

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Executive Summary

- i. This pre-publication draft report analyses the retail markets sector in London in detail, assessing its contribution to the London economy as well as the wider social benefits markets bring. The final publication will recommend a number of measures to help ensure these benefits are maximised in future.
- ii. There is clear evidence in the wider research on markets of the contribution they make towards a wide range of economic and social policy goals. This includes benefits in the areas not only of regeneration, economic development and culture and tourism, but also food and health, community cohesion and the environment.
- iii. Concern has been raised in a number of different quarters in recent years at the decline of many traditional markets. However, much of the existing evidence on markets in London is partial or anecdotal in nature. While some of the issues identified in this research have been discussed elsewhere, this report breaks new ground by providing a comprehensive quantitative and spatial assessment of sectoral trends across the whole of London.
- iv. London currently has 162 markets, including traditional street markets, specialist markets for goods such as books, antiques or clothes, and farmers' and specialist food markets. Although street markets only account for half of the total number of markets, they tend to be open for longer hours and on more days than other types of markets. In terms of total 'pitch days', a measure which accounts for the amount of time a market is open, street markets account for three quarters of the total.

Economic impact

- v. It is estimated that the current turnover of all markets in London is £430 million per year in total, representing 0.94% of overall retail spend in London. It is estimated that London's retail markets directly support 7,319 Full-Time Equivalent (FTE) jobs.
- vi. These headline impacts illustrate the economic significance of markets in their own right. Nonetheless, there are a number of further areas where it is important to understand the value of markets.
- vii. In particular, markets make a significant contribution to the vitality of London's town centres. It is estimated that customers at markets spend £752 million per year at other shops in town centres. This represents a significant multiplier effect, with market customers spending on average £1.75 in other shops in the town centre for every £1 they spend in the market. While this spend would not necessarily be lost to *town centres as a whole* in London if markets did not exist, it does suggest that a number of individual existing town centres would lose out if their markets were to close. A large minority (42%) of customers surveyed for this research said they would not visit the town centre if the market was not there.
- viii. Markets are particularly important to many of London's deprived communities, and there is a close correlation between the location of street markets and the most deprived areas of the capital. There is evidence to suggest that the existence of these markets supports higher living standards due to their lower prices. It is notable in particular that the food prices in

markets have been consistently lower than those in supermarkets in recent years.

- ix. Several of London's markets also make a very substantial contribution in attracting visitors to London, and play a role in wider efforts to promote London to international visitors in particular.

Characteristics of markets and key trends

- x. There are important distinctions in the trends affecting different types of markets.
- xi. 60% of all markets, and 68% of street markets are located in inner London boroughs. Three quarters of specialist food markets are located in outer London, reflecting the popularity in recent years of establishing occasional food markets in and around town centres to attract footfall. Farmers' markets and non-food specialist markets are relatively evenly split between inner and outer London.
- xii. The fastest growing segment of the markets sector comprises farmers' and specialist food markets. Where markets are declining, this is almost exclusively occurring among traditional street markets managed by local authorities.
- xiii. Although most markets are located in town centres, most (59%) of London's town centres have no market. While some local authorities have supported the establishment of new farmers and specialist food markets in their town centres in recent years, private market operators trying to open new markets often report difficulties in doing so. In the most forward looking boroughs, town centre managers take an active interest in supporting their markets.
- xiv. The decline in traditional street markets in part reflects wider retailing trends, and increasing competition from supermarkets and discount stores. Unlike supermarkets for instance, very few markets have responded to changing working and shopping patterns by opening later in the day. Only a small minority are open after 5.30pm.
- xv. Lack of management and investment are also important issues. The current regulatory framework, as set out in the 1990 London Local Authorities Act, hinders councils' abilities to manage their markets on a commercial basis. An unwillingness by many boroughs to invest in their markets, and an approach which prioritises enforcement rather than commercial management have also contributed to the decline.

Characteristics of traders and customers

- xvi. The characteristics of traders and customers at street markets were reviewed in this research and identified a number of interesting points.
- xvii. Market trading is a career for many traders, with the average trader surveyed for this study having been in the business for 19 years. Correspondingly, market traders tend to be older, with a greater proportion over the age of 40 compared to London's working population as a whole. The large majority of traders (81%) are men. While the majority of traders are also White, (58%), a much greater proportion of traders (42%) are from Black and Minority Ethnic backgrounds than the population as a whole (29%).

- xviii. A significant minority of traders are interested in expanding their business. For some this implies opening other stalls; in other cases traders have plans to move into permanent premises. This underlines the value of markets in providing lower risk opportunities for business start-up and market testing. While only a small minority of traders (11%) indicated an interest in formal training courses, the large number of traders in London means there could be substantial demand for some training courses in London as a whole (perhaps 800 people are currently interested).
- xix. Nearly two thirds of market customers visit a market at least once a week, illustrating the fact that many people rely on markets for shopping. Less than one in ten customers travels to a market by car, with nearly all the rest using some form of public transport. This illustrates the value of markets in providing a form of retail that does not depend on car-use. It is also a likely indicator of the importance of markets to non-car owners, many of whom will be on lower incomes.

The status of current policy on markets

- xx. There have been a number of reviews of markets at national and London level in recent years which have put forward a large number of suggestions for policy. This review found that:
- As yet there is relatively little evidence of engagement of London Boroughs/street market management or traders in policy/strategic change.
 - There is a lack of specific management and business guidance for London market managers and traders.
 - In terms of the involvement of organisations in markets it may be a case of “too many cooks”, leading to a lack of co-ordination of policy and strategy across the City.
 - The review found no evidence of London’s street markets putting in place co-ordinated plans to capitalise on London 2012.

1. Introduction

1.1 This is the draft final report for the retail markets research project commissioned by the LDA in January 2010.

1.2 The headline terms of reference for the study were as follows:

“provide a spatial and economic analysis of the retail street markets in London and identify the area based issues facing these markets. The analysis will also need to consider the contribution street markets can and are making to London’s economy. The final outcome of the study will be to inform the LDA (and the wider GLA group) what role they could have in supporting street markets. The study is to research all types of London retail markets (such as clothing, arts, food etc) but exclude wholesale markets.”

1.3 Research has been carried out through a range of methods including:

- A review of research, policy and academic studies on markets.
- Updating and analysis of data on London markets originally collected by the GLA.
- Interviews with officers responsible for street markets at 19 boroughs, along with a number of other stakeholder organisations.
- Surveys of customers and market traders carried out at nine street markets in different parts of the capital.

1.4 The research has been carried out by Regeneris Consulting and Alan Elder. We are grateful for expert contributions to the report from Krys Zasada and Professor Sophie Watson.

1.5 The report is structured as follows:

- Section 3 sets the wider context for the study by summarising the wider economic and social benefits for markets as revealed by the literature review.
- Section 4 presents an analysis of the spatial characteristics of markets in London and key trends affecting the sector.
- Section 5 assesses the economic value of London’s markets.
- Section 5 presents survey data on the characteristics of market traders and customers.
- Section 7 reviews the findings of recent policy reviews and assesses progress against their recommendations.
- Section 8 provides overall recommendations.
- A set of annexes provide further details on town centres without markets, a summary of issues at markets surveyed for the study, survey questionnaires and

details of study consultees.

- 1.6 A separate Excel database updating and extending the previous GLA research on street markets in London accompanies this report.

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2. The wider context

- 2.1 Markets provide significant economic and wider benefits, which have been the subject of much interest by researchers and policy-makers in the last five years. This section briefly summarises some of the key points from recent research in order to set the context for the spatial and economic analysis and policy recommendations that follow. In doing so we have focused on a brief re-statement of the range of economic and social benefits associated with the existence of markets, and some of the main trends affecting the sector in recent years.

The economic and social benefits of markets

- 2.2 In November 2009 the Retail Markets Alliance (RMA) published a report entitled *Markets 21 A Policy & Research Review of UK Retail and Wholesale Markets*. The report examines the idea of markets performing a 'public good' rather than being solely commercial operations and states:

- 2.3 *"This sense of 'public good' lay behind the development of the Markets Policy Framework 2007, produced by the Retail Markets Alliance, and launched by the All Party Parliamentary Markets Group, which identified that successful markets contribute to the social, environmental and economic well-being of the nation, by:*

- *Remaining an important element of the economy, particularly in relation to independent retailing, local employment and business start-up opportunities.*
- *Providing a sense of place*
- *Being part of the nation's cultural heritage*
- *Offering local access to fresh produce and other commodities*
- *Reducing environmental impacts e.g. by eliminating excessive packaging/waste."*

- 2.4 The Policy Framework also identified five key policy areas that markets can contribute to:

- Regeneration and economic development
- Culture & tourism
- Food & health
- Community cohesion
- Environment

- 2.5 Some of the benefits of markets in each of these policy areas can be summarised as follows.

Regeneration and economic development

- 2.6 Markets provide important sources of employment and income generation for significant

numbers of people. They also create venues in which new business can be launched at lower costs than in other premises, and therefore have a role to play in promoting entrepreneurship and business start-up.

- 2.7 Retail markets remain an important part of the retail offer in towns and cities. Research commissioned by the London Development Agency (LDA) in November 2005 to inform the Mayor's Food Strategy found that customers shopping for food at street markets spend between £3,000 and £15,000 a day on nearby shops, and local retailers were almost universally supportive of markets. This finding has been updated and extended in the assessment of the economic value of markets that follows.
- 2.8 Markets also provide an opportunity to deliver business-led solutions to regeneration problems. Maida Hill, Acton and Borough markets in London provide examples where the development of markets has acted as a catalyst for change (in particular, using food as a mechanism for change). The LDA has funded the successful re-establishment of a street market in Acton, as profiled below. The vibrancy of Farmers' markets and other specialist food markets illustrates a role for these markets in supporting wider regeneration of town centres.

Culture and tourism

- 2.9 Around a fifth of visitors to London say that visiting shops and markets are very important reasons for their visits. While it is the larger markets, such as Portobello, Camden and Borough, that attract the large majority of visitors, other markets still make an important contribution in making London distinctive and therefore contributing to the wider visitor economy. Markets also have an important role in place-making, and can contribute significantly in increasing the appeal of town centres, a key focus for economic development efforts in London.
- 2.10 There has been a clear growth in speciality markets in recent years, which provides evidence that good and relevant markets remain popular with customers. They also bring clear benefits to the wider community. Economic impact studies have been commissioned in relation to Christmas markets in Belfast and Manchester. These showed net additional expenditure of £5.3 million and £22.4 million respectively into the local economy.
- 2.11 As part of the fringe festival of the Bradford Indian International Film Awards in June 2007, Bradford Markets held a three day 'Bollywood Bazaar' market linked to street theatre, music and dance, with the awards ceremony being broadcast live in the City Centre on the final day. The event attracted over 30,000 visitors and generated over £320,000 of economic activity.

Food & Health

- 2.12 Markets are important in providing access to cheaper goods, and their presence therefore helps to increase standards of living for some groups. The 2008 review of street markets by the London Assembly identified that *"street markets are important to people as sources of affordable high quality food. A shopping survey undertaken by the New Economics Foundation in 2005 found that in Lewisham a shopping basket of food cost £4.74 from the market compared to a cost of £7.18 to buy the same food from a supermarket"*. In 2008 the

National Market Traders Federation (NMTF) published a Shopping Basket Survey which showed that, across a range of 13 items, markets were on average 6% cheaper than supermarkets, and in relation to fresh produce, markets were 32% cheaper than supermarkets.

- 2.13 A number of studies have identified potential urban 'food deserts'; removing these presents significant challenges. At a retail level, there is great scope for markets to play a crucial role in ensuring that local communities have access to fresh produce. They can offer ideal locations for providing information and learning/skills opportunities on a wide range of health issues including healthy eating, and food buying/cooking skills. These benefits can also contribute to sustaining a healthy workforce which is important for London's wider competitiveness.
- 2.14 They can also be used to market and promote healthy eating campaigns such as the 5-a-day and Change 4 Life initiatives (although in decline, there are still over 1,600 fruit and vegetable traders operating on traditional retail markets nationally). Manchester's Northenden Community Food Market, and Bolton's Retail Market Demonstration Kitchen show how markets can make a difference.
- 2.15 Markets are increasingly used to promote regional and local food in both urban and rural locations. Examples include Manchester's Food and Drink Festival, Bristol's Slow Food Festival, and Ludlow's Food Festival. Retail markets therefore have a significant role to play in contributing to the aims of the London Food Strategy, which is supported by the LDA and GLA.

Community cohesion

- 2.16 In 2006, the Joseph Rowntree Foundation (Watson, 2006) published research on the value of markets as spaces for social interaction. This concluded that:
- Markets were important sites of social interaction for all groups in the community, but most significantly for older people, especially women. Markets also represent important social spaces for mothers with young children, young people, and families with children, particularly at weekends.
 - Markets had a significant social inclusion role, as places to linger, particularly for older people and young mothers. Some markets also appeared to be inclusive of disabled people, although in other places this was less evident.
 - The social life of traders played a significant role in creating a vibrant atmosphere in markets, and in forging social bonds and links in the trading community as well as with shoppers.
 - For markets to function well as social spaces, various factors are significant. Essential attributes include: a diverse range of products fitting well with local needs and tastes; cafes or food vans on site or nearby; good access to the site, especially by local transport; an active and engaged community of traders; and a sense of the unexpected.
 - Where markets are managed by local authorities, good local management and a strategic vision by the council could help with their development. It was evident

from the research, however, that some markets do not have a high profile or significant resourcing from the councils.

- There is limited national and local policy to encourage and support markets' role as a key social and economic space for the local community. Markets could play a more significant role in national policy agendas such as social inclusion, town centre regeneration and healthy eating.

- 2.17 It is notable that some efforts have been made to capitalise on the potential social benefits of markets, with an example being the redevelopment of Gorton retail market in Manchester where a central square was created, with seating to create a social/community space inside the market hall. As public spaces in which people congregate and linger, markets can also create forums for dissemination of information to the public. During 2009 for example, the NMTF has been supporting the Department for Work and Pensions (DWP) by getting its members to promote the DWP's pension credit awareness campaign in local markets.

Environment

- 2.18 There are also a number of examples of markets contributing to environmental improvement agendas. Examples include the introduction of effective waste management systems in Darlington and Bristol, resulting in Bristol St Nicholas market being awarded the National Market Traders' Federation's 'Greenest Market in the UK' award.
- 2.19 Similarly, in May 2008, the Local Government Association (LGA) published a food packaging study, *War on Waste*, which showed that retail markets produced the lowest weight of waste and the highest proportion of recyclable waste, compared with supermarket and independent high street retailers. It is notable that reducing food waste is also a key aim of the London Food Strategy.
- 2.20 Produce sold at Farmers' markets certified by the National Farmers' Retail & Markets Association (FARMA) is likely to have low levels of 'food miles', as certification requires goods to be sold by the producer themselves. In practice this means most farmers' markets in London are served by farmers in the greater South East region.

Summary of key points

- 2.21 There is clear evidence in the wider research of the contribution that markets can make to a range of economic and social policy goals. However, although some information has been collected on markets in London in recent years, knowledge gaps remain in a number of areas, including an in-depth analysis of trends affecting different types of markets in different parts of the capital, the specific quantitative economic value of London's markets, and the precise measures that would help to realise their full value.
- 2.22 These issues are addressed in the subsequent sections.

3. Spatial analysis and key characteristics of markets in London

Data sources and caveats

- 3.1 The starting point for the spatial analysis of markets in London is the database of London markets published by the GLA in 2008. This identified 179 retail markets in London. While this data has provided a very useful starting point, it contained a number of inaccuracies and also some significant gaps. In order to develop an accurate and up to date assessment the data has been reviewed and revised through a review of secondary data sources and interviews with borough-level officials with knowledge of the markets.
- 3.2 Having completed this review, we have been able to identify 162 markets. It is important to note that the discrepancy between this and the former estimate should not in itself be taken as an indication of the decline of the sector. Most of the difference is in fact due to the removal of duplicates in the original database, or the approach to counting markets. For instance, the original report counted some markets twice, once for weekdays and once for weekends, and also included some markets with fewer than 5 pitches in use, which we have excluded.
- 3.3 It is also important to note that the size of markets can vary from week to week; information on pitch numbers for instance represents a best estimate, and should not be taken as a definitive number. It is also important to note that the markets situation in London is in a state of flux, with some markets closing down and others opening from time to time. Finally, it has not always been possible to check all details for each of the 162 markets.
- 3.4 However, while there may therefore be some minor inaccuracies in the data presented below, the process of reviewing and adding to the original GLA data provides a good basis for understanding key characteristics of London's markets and the main trends affecting them in recent years.

Definitions

- 3.5 There is no single legal definition of a market, as discussed in more detail below. We have for practical purposes therefore defined markets to include those with a minimum of 5 pitches available for use. This definition excludes isolated pitches (which exist in most boroughs) but includes some locations where 5 pitches are available, but not all of these are always in use. We have only included retail markets – excluding London's five wholesale markets.
- 3.6 Table 4-1 defines the market types as used in this report. In practice, markets may take a number of forms and the distinction between different types of markets should be taken as a broad indication rather than a hard definition.

Table 4-1 Definition of market types		
Type	Definition	Examples
Street market	Any regular market taking place outside on a highway (rather than indoor premises, or e.g. a school playground). Around three quarters of these markets in London are regulated by local authorities, with the remainder having private operators. Usually sell a mixture of households goods, clothes & accessories, fruit & vegetables and other food produce.	<ul style="list-style-type: none"> • Queen's Market • Petticoat Lane • East Street
Specialist markets	Other markets specialising in particular goods and not falling into one of the other categories. Goods sold can include arts & crafts, clothes, antiques or second hand goods. Car boot sales have been included in this definition where they are large scale (more than 50 pitches) and regular (i.e. weekly)	<ul style="list-style-type: none"> • Bermondsey Square market (antiques) • South Bank 2nd hand books market • Greenwich and Bromley crafts markets • Large scale and regular car boot sales e.g. Queensmead School Ruislip
Farmers' market	The term Farmers' market is often used quite broadly to describe markets selling high quality food. There is a good case ¹ however for sticking to the strict definition of a farmers' market as one where farmers and other producers sell their produce direct to the consumer. These markets are accredited by FARMA (National Farmers' and Retail Markets Association) which has strict accreditation standards e.g. to ensure that vendors are the actual producers, and on provenance	<ul style="list-style-type: none"> • Wimbledon, Blackheath, Islington farmers markets.
Specialist food	Markets other than farmers' markets selling speciality food. NB the distinction between specialist food markets and farmers' markets may sometimes not be obvious to customers.	<ul style="list-style-type: none"> • Occasional French or Italian markets in Ilford, Harrow, Sutton of Camden (Queen's Crescent)
Covered market	Any market with a dedicated permanent roof-covering. The fact a market is covered does not in itself always reveal much about the type of market. E.g. some covered markets are similar to traditional street markets, others are similar to specialist craft or clothes markets.	<ul style="list-style-type: none"> • Camden Lock (Stables) • Wood Green • Hampstead Community Market • Borough Market

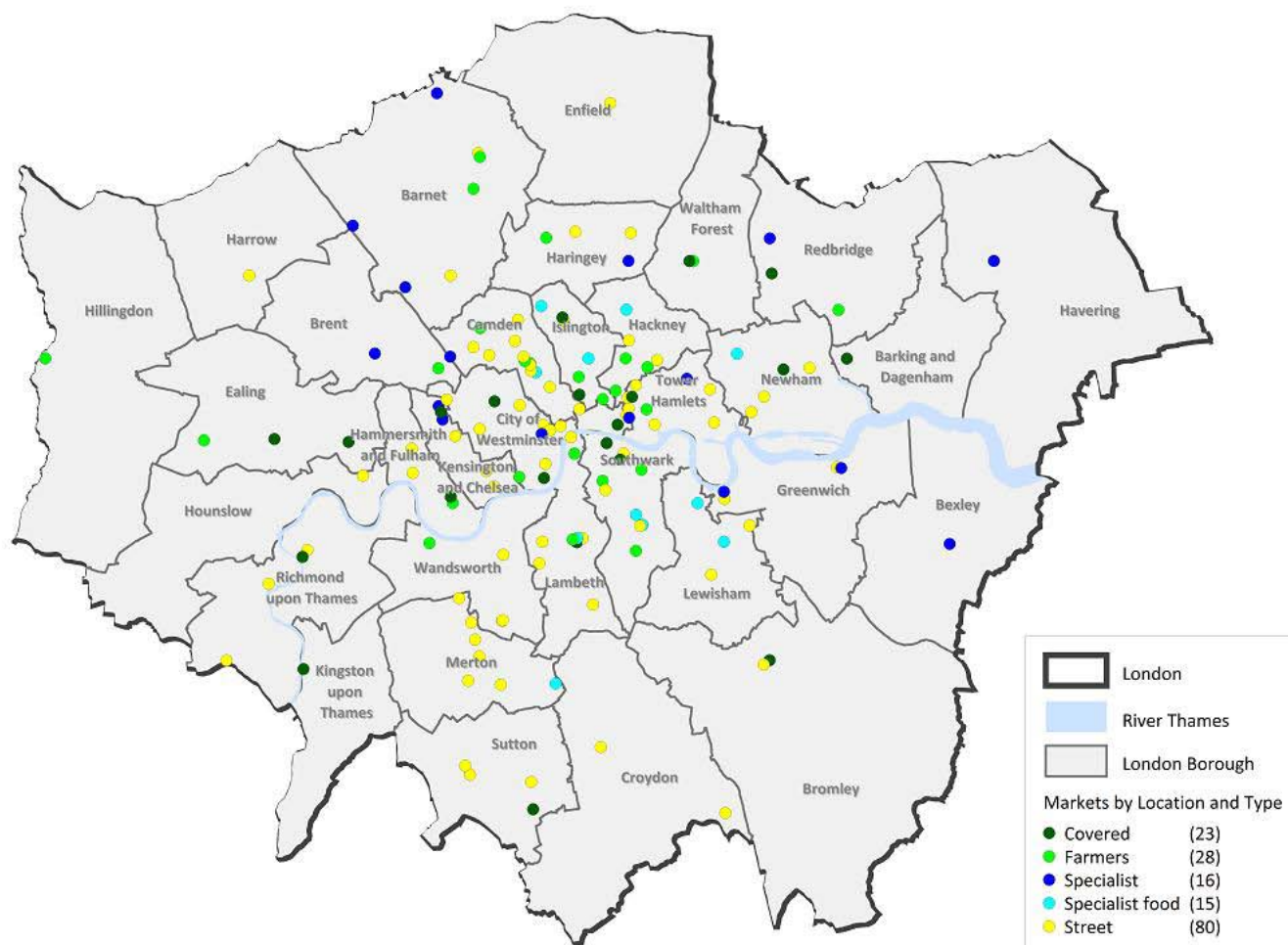
- 3.7 The London Plan also mentions "strategic markets", and while not defining these mentions three examples, Portobello Road, Borough, and Columbia Road, and notes their role as significant attractions for Londoners and visitors alike.

Locations

¹ In particular, because accredited farmers markets have strict rules on provenance of food, which align closely with the aims of the London Food Strategy.

3.8 Figure 4-1 shows the locations of London's 162 retail markets.

Figure 4-1 Locations of London retail markets



Source: GLA and Regeneris Consulting analysis

3.9 The map illustrates clear spatial patterns in the distribution of markets, with the majority of markets being clustered in inner London areas. Street markets tend to be located not just towards the centre of London but also to a greater extent in the northern, eastern and southern parts of inner London. Farmers and specialist markets are more prevalent in outer London, and with a noticeable bias towards the western half of the city. This reflects the demographic characteristics of the key customer groups, as discussed further below.

3.10 Table 4-2 illustrates the numbers and proportions of different types of markets between inner and outer London.

Table 4-2 Distribution of markets between inner and outer London					
Type	Number			%	
	Inner	Outer	Total	Inner	Outer
Street	54	26	80	68%	33%
Covered	14	9	23	61%	39%
Specialist	10	6	16	63%	38%
Farmers	16	12	28	57%	43%
Specialist food	3	12	15	20%	80%
Total	97	65	162	60%	40%

Source: GLA and Regeneris Consulting analysis

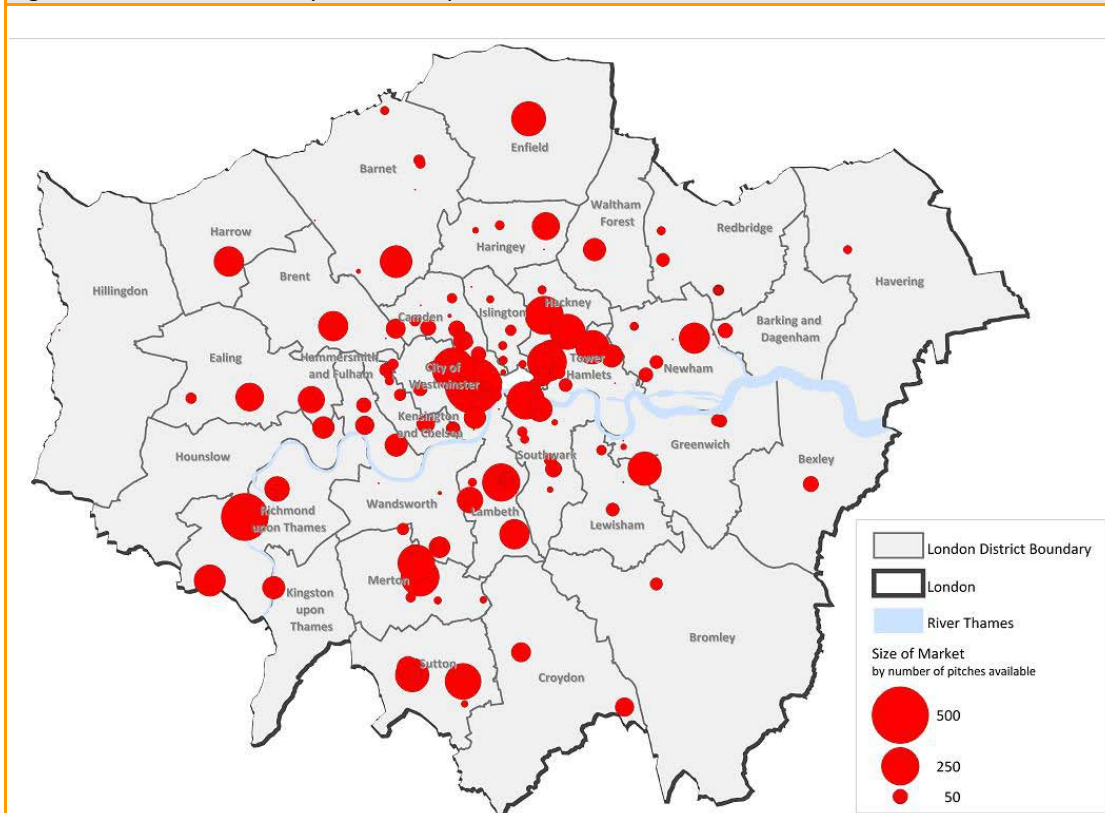
3.11 The table shows that:

- 60% of all markets, and 68% of street markets are in inner London.
- Specialist and farmers markets are relatively evenly split between inner and outer London.
- Three quarters of specialist food markets are in outer London, reflecting the popularity in recent years of establishing occasional food markets in and around town centres to attract footfall.

3.12 Figure 4-2 illustrates the overall size of London markets according to the number of pitches available at the market².

² Some data on actual occupancy of pitches at markets is available and is included in the database that accompanies this report. Information on availability of pitches is more comprehensive however and has therefore been included in this map. A detailed review of which markets are decline (i.e. where there is a significant divergence between pitch availability and pitch use) is provided in the rest of this section.

Figure 4-2 Size of markets by number of pitches

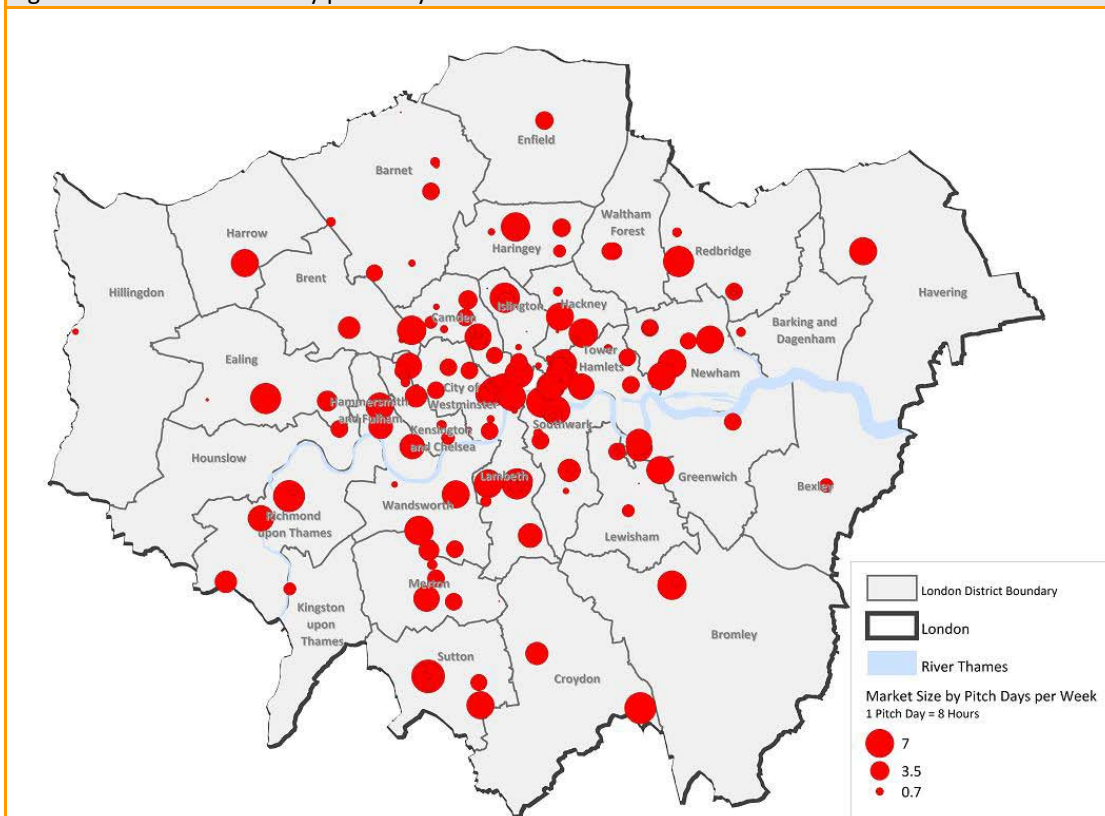


Source: GLA and Regeneris Consulting analysis

- 3.13 The map shows that most of the medium size and large markets are located in the north, centre and southern parts of inner London. There are however some large markets elsewhere including the weekly general market at Wembley, and more regular markets at Romford, Walthamstow and Kingston.
- 3.14 It is important to consider not only the number of pitches but also the number of working days the market is open. Figure 4-3 shows the number of markets by a measure of pitch-days³. Pitch-days for infrequent markets have been calculated by averaging over the course of 12 months.

³ i.e. a market with 10 pitches open for two days a week is counted as opening for 1,040 pitch-days per year (20*2*52).

Figure 4-3 Size of markets by pitch-days



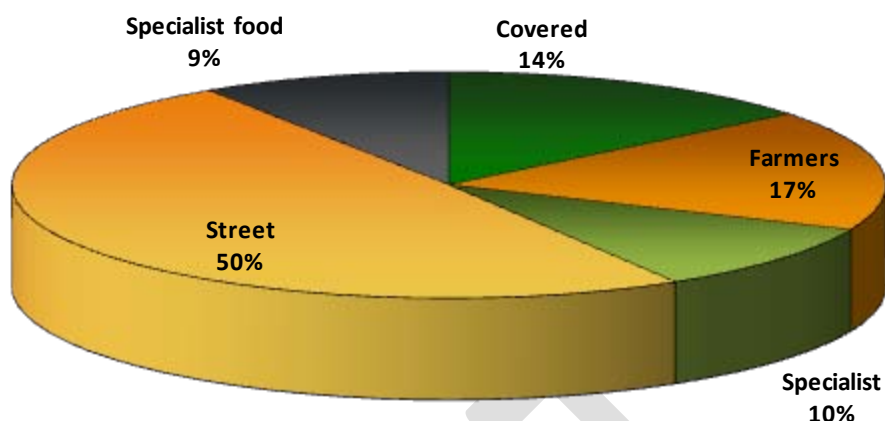
Source: GLA and Regeneris Consulting analysis

- 3.15 Comparison of the two maps highlights some interesting points. Figure 4-3 shows the concentration of larger markets (by the pitch-days indicator) in inner London. In fact, just under 4/5ths of pitch-days are in inner London boroughs. There are nonetheless a number of larger markets in some outer London areas, in particular in the south-west of the city (Kingston, Wandsworth, Merton, Sutton, Croydon), Newham and Haringey.
- 3.16 It is also important to point out that pitch-days are only one indicator of the importance of markets. They do not take into account for instance, the value of sales or employment, or the numbers of vacant stalls at a given time. The existence of smaller or less frequent markets (in both inner and outer London) may also make an important contribution to town centre vitality and footfall.

Types of market

- 3.17 Figure 4-4 shows that in terms of actual numbers of markets, street markets account for 50% of the total, with the remainder divided broadly between the other types. The proportion of farmers' markets in the total is significant because the first farmers' market in London (Islington) was only founded in 1998, and this is the most important growth sector for markets, at least in terms of total numbers.

Figure 4-4 Markets by type - total numbers of markets

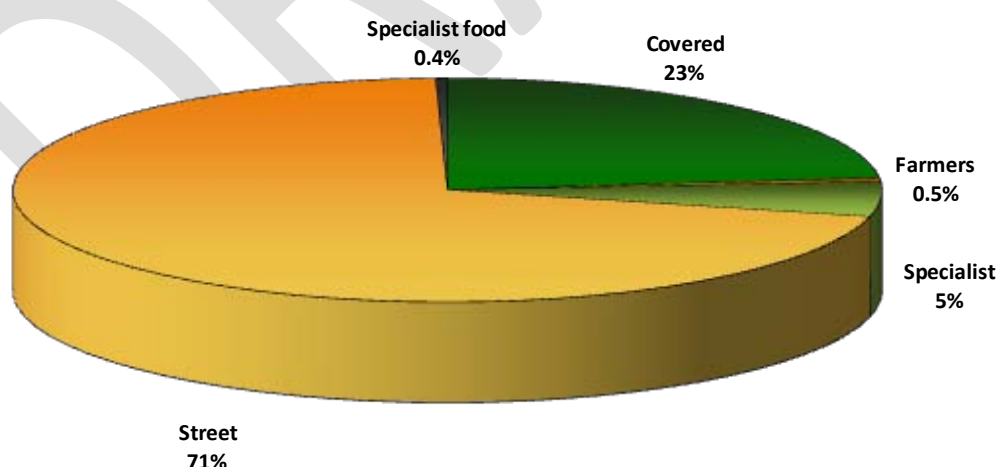


Total: 162

Source: GLA and Regeneris Consulting analysis

- 3.18 When pitch-days are taken into account, the importance of street markets and covered markets becomes much clearer however, as illustrated in Figure 4-5. Although there are a number of covered markets in London selling niche goods, most in fact sell a similar range of fresh produce, household goods, clothes etc. as street markets. Overall this underlines the importance of street and covered markets in providing lower cost goods. It is further notable that despite their substantial growth in numbers, farmers and specialist food markets account for less than 2% of total pitch days.

Figure 4-5 Markets by type – pitch days



Total: 162

Source: GLA and Regeneris Consulting analysis

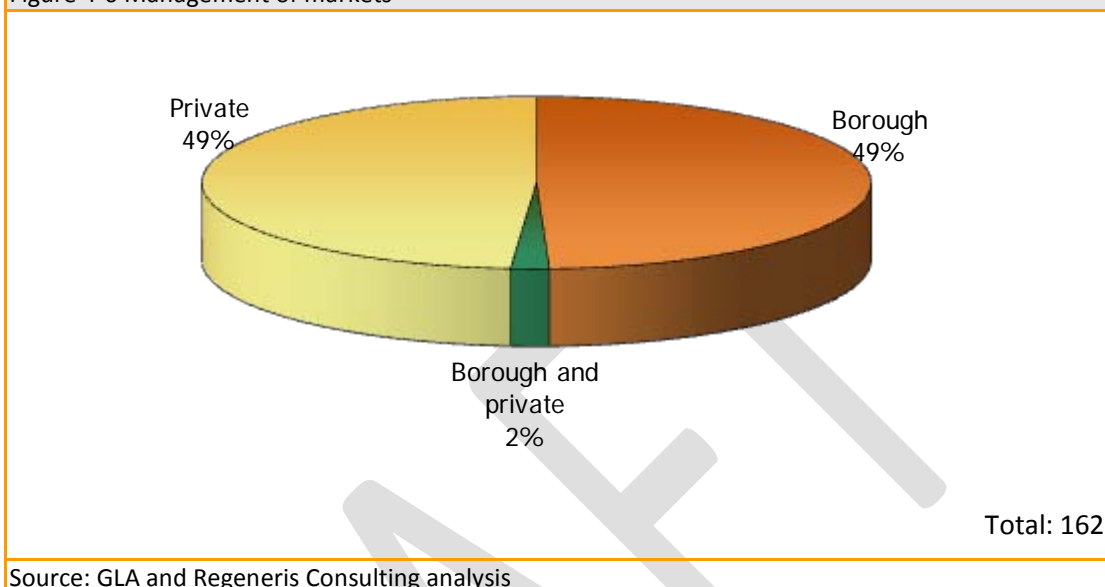
Ownership and management of markets

- 3.19 Markets in London are either managed by local authorities or private owners, each accounting for about half of the city's markets (in a few cases privately-owned and borough-

managed markets co-exist).

- 3.20 Most non-covered markets are located on side streets and pavements owned by the local authority and sometimes in car parks which may be in private ownership. Covered markets are located on land which may be privately or publicly-owned. A number of farmers markets are located in school playgrounds at weekends.

Figure 4-6 Management of markets



- 3.21 The degree to which markets can be managed as businesses (e.g. in the way that shopping centres are) varies, depending on ownership and the complex regulatory framework for markets.

Local authority managed markets

- 3.22 London has ten charter markets⁴ regulated under the terms of their individual charters. The remainder of borough-managed markets are regulated under the terms of the 1990 London Local Authorities Act and subsequent amendments (and by the 1999 Westminster Act in the City of Westminster).
- 3.23 In fact neither the 1990 or 1999 Acts formally recognise markets as such, but instead set out provisions for regulation of street trading. This means that although street trading pitches are generally collected together as markets (or 'licence streets', in the terminology of the 1990 Act), the boroughs in effect have to manage these as collections of individual pitches rather than as an overall single entity. Although it provides some important protections for traders, the 1990 Act restricts the ability of local authorities that wish to actively manage their markets in a number of ways:
- A pitch licence designates a specific numbered pitch, and the council cannot require a trader to move to another spot in the market (e.g. to remove gaps in the market on a particular day by consolidating traders in one area).

⁴ Barking and Dagenham, Brentford, Bromley, Barnet, Surrey Street, Enfield, Kingston, Romford, Uxbridge (now within The Mall, Uxbridge) and Woolwich Markets

- The level of licence fees can only be set to cover certain administrative costs which are specifically defined in the Act. A profit cannot be made from licensing activities. While this provides an important protection for traders it also prevents, for instance, the building up of funds to invest in market infrastructure or promotion, even though these are typically considered legitimate costs in running businesses in general.
- Provisions for recovering licence fee arrears are very time-consuming. For instance, once a trader has been in arrears for four weeks, the local authority can issue a notice of intention to revoke the licence if arrears have not been paid after 21 days. After the licence has been revoked, the trader has a further 21 days to appeal to a magistrates court, and can then have further recourse to a crown court. There is also nothing to prevent defaulters from obtaining casual (i.e. occasional) licences to trade in the meantime, so they cannot in effect be removed from the market.
- Only an individual, and not a business, can be registered on the licence. This harks back to the days when traders were almost always individuals. It makes licensing very complicated when a business wishes to apply (this was cited as a reason for Neal's Yard dairy deciding not to set up a stall in Islington).

- 3.24 Where the market management team 'sits' in the council has very important implications for the level of interest and success of borough-run markets. In some councils markets staff work within a street trading department with a specific remit to manage the borough's markets. In others the staff may sit in other departments including waste management or parking enforcement, in which case their role is more likely to be restricted to enforcement activities with less emphasis on managing the markets.
- 3.25 The capacity to manage a market can be critical in the market's overall success, so this issue is of central importance to boroughs that are considering how they can regenerate their markets.

Case study: good practice in managing markets in Islington

Running effective street markets is a high priority for Islington Council which has a formal long term strategy for its markets. Past work has seen substantial investment in Whitecross Street market (in part using New Deal for Communities funds). Improvements are planned for Chapel Street market, now the borough's only declining market. The markets team also run training sessions for traders 2 – 3 times a year and a range of promotional activities.

The Council's markets team stress the importance of wider support both from officers and members in securing the resources and attention they need. Responsibility for markets falls to the executive member with responsibility for Communities, Skills and Business, with whom team members meet several times a year. They also sit in the same department as other complementary services within the council including town centre management, planning, highways, and environmental health, making it easier to work together and to give markets a 'voice' when other issues (e.g. roadworks) are discussed.

Privately-owned and managed markets

- 3.26 Privately-owned markets which are not permanently enclosed and within seven metres of a public highway are also regulated by boroughs under the 1990 Act. However, because the owner of these markets has a contractual relationship with the stall-holder (in addition to

the local authority-granted licence) the owners have a much greater degree of management control. Other privately-owned markets are regulated only under planning regulation and other relevant laws e.g. on health & safety.

- 3.27 Privately-owners markets are therefore in a much better position to actively manage their markets, for instance, arranging different traders in different parts of the market, or using revenues to invest in infrastructure or promotion. For example, London Farmers Markets Ltd, a private company which runs 18 of London's 26 farmers markets, has specific pitch plans for each of its markets which it can tailor to different circumstances (e.g. seasonal availability of different types of produce). It experiments with different locations, moving markets to areas with the best commercial prospects.
- 3.28 Although some councils say the 1990 Act restricts their ability to outsource the management of markets, others have taken a different view, using the provisions of the 1984 Food Act as the basis for their action. For instance:
- In 2008 Southwark Council appointed Groupe Geraud to manage its markets service on an interim basis, until a final decision on how to manage the markets is taken later in 2010. Groupe Geraud is the largest operator of local authority markets in Europe, including several outside London as well as the new Maida Hill market in Westminster and a Sunday market at New Covent Garden.
 - Lambeth is also currently looking to bring in a private operator for a market on the newly-redeveloped Windrush Square in Brixton. It was suggested by the Council that this could be achieved by charging private operators a fee to use the space. Any surplus would be reinvested into improving other Lambeth markets.
- 3.29 Other councils expressed an interest in understanding how well this arrangement works for traders and the local authority. It is important to note that outsourcing management of the market does not release the contractor from the provisions of the 1990 Act.

Cost of rent for pitches

- 3.30 Rents vary from market to market and are usually cheaper from Monday to Friday than at the weekend or when a licence for several days (rather than just the weekend) are applied for. Prices can also vary for different parts of the market. Table 4-3 presents pitch fees at a sample of markets.

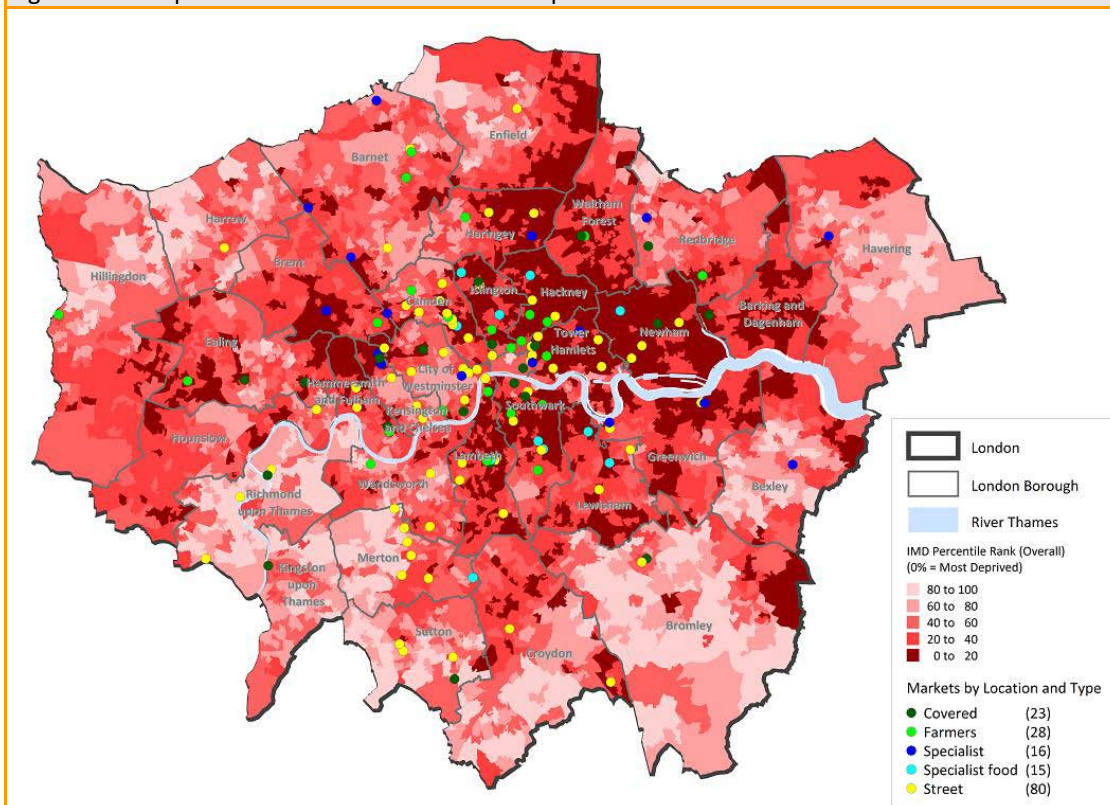
Table 4-3 Pitch fees at a sample of London markets			
Borough	Market	Type	Average daily pitch fee
Islington	Camden Passage *	Specialist	£20
	Whitecross Street	Street	£5 - £13
	Chapel Market	Street	£9 - £11
Camden	Queens Crescent	Street	£15
	Inverness Street	Street	£29
	Camden Lock*	Specialist	£15 - £45
Merton	Mitcham Market	Street	£11 - £13
Tower Hamlets	Colombia Road	Specialist	£45
	Whitechapel	Street	£5 - £30
Kensington & Chelsea	Portobello Road	Street	£6.50 - £17
	Portobello Road (Good Fairy Antique Market)*	Specialist	£50 (Saturday)
Bromley	Charter Market	Street	£25
	Town Centre	Street	£45
* Privately managed markets			

- 3.31 The table illustrates that pitch fees reflect the relative commercial value of different markets. Markets specialising in particular goods (e.g. Colombia Road, Camden Passage or Camden Lock) are able to charge higher fees. Street markets generally charge lower fees, though those that attract high levels of footfall such as Inverness Street (in the heart of Camden's markets area) or Bromley Town Centre are able to charge more.
- 3.32 Although daily fees may appear relatively low, costs are significant on an annual basis. For instance, a four day per week trading licence for Inverness Street market costs £6,000 per year.

Markets and deprivation

- 3.33 Figure 4-7 to Figure 4-10 show the relationship between markets and social deprivation in London as measured by the 2007 Index of Multiple Deprivation (IMD). Figure 4-7 illustrates the IMD's overall deprivation ranking and illustrates a clear relationship between the most deprived parts of the capital in inner city areas and east London (dark red patches), and concentrations of street markets (yellow dots). This is unsurprising given the fact that street markets have typically sold cheaper goods, catering to poorer people. The fact that street markets continue to provide cheaper prices than supermarkets, in particular for fresh produce, highlights their ongoing importance for wider regeneration efforts.

Figure 4-7 Comparison of market locations and deprived areas



Source: GLA and Regeneris Consulting analysis

- 3.34 Figure 4-8, Figure 4-9 and Figure 4-10 map market locations against income, employment and health deprivation. In each case there is a relatively close relationship between areas with each type of deprivation and the location of street markets, reflecting the fact that different aspects of deprivation are closely inter-related, often affecting the same parts of the population. Once again, this highlights the ability of markets to provide employment and income and also to provide a source of fresh and healthy food for deprived communities and therefore the importance of recognising a place to support markets in wider regeneration strategies.

Figure 4-8 Market locations and income deprivation

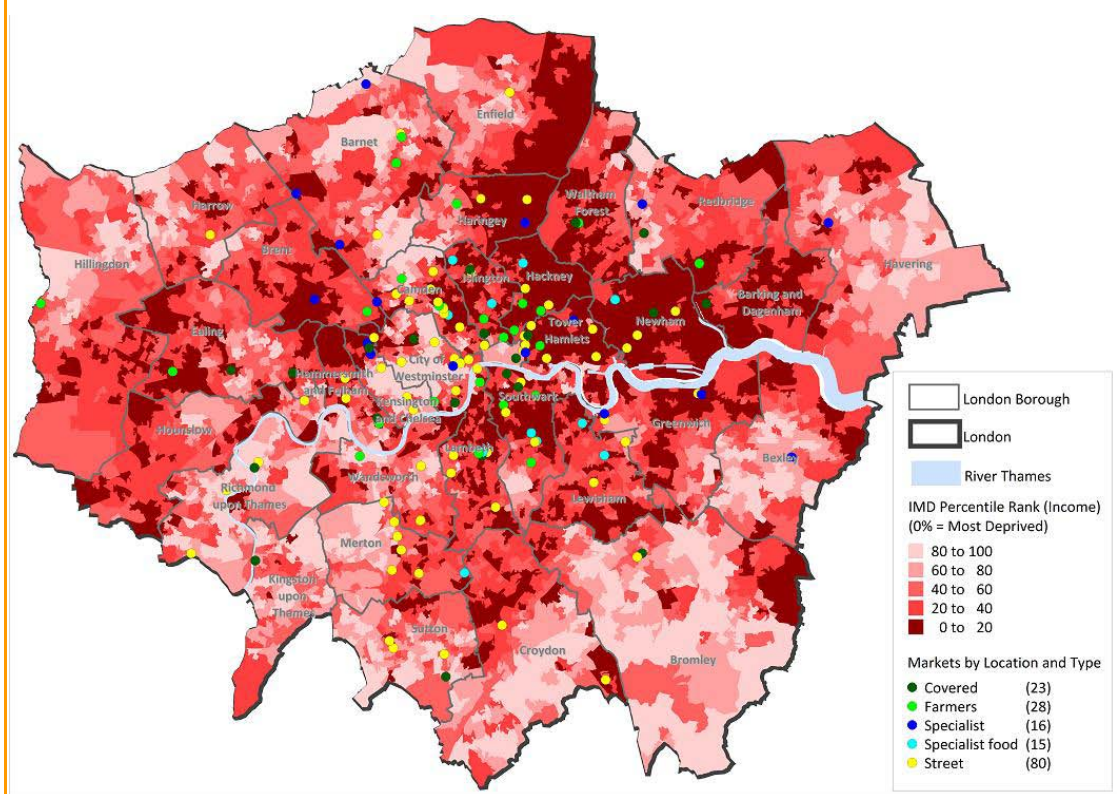


Figure 4-9 Market locations and employment deprivation

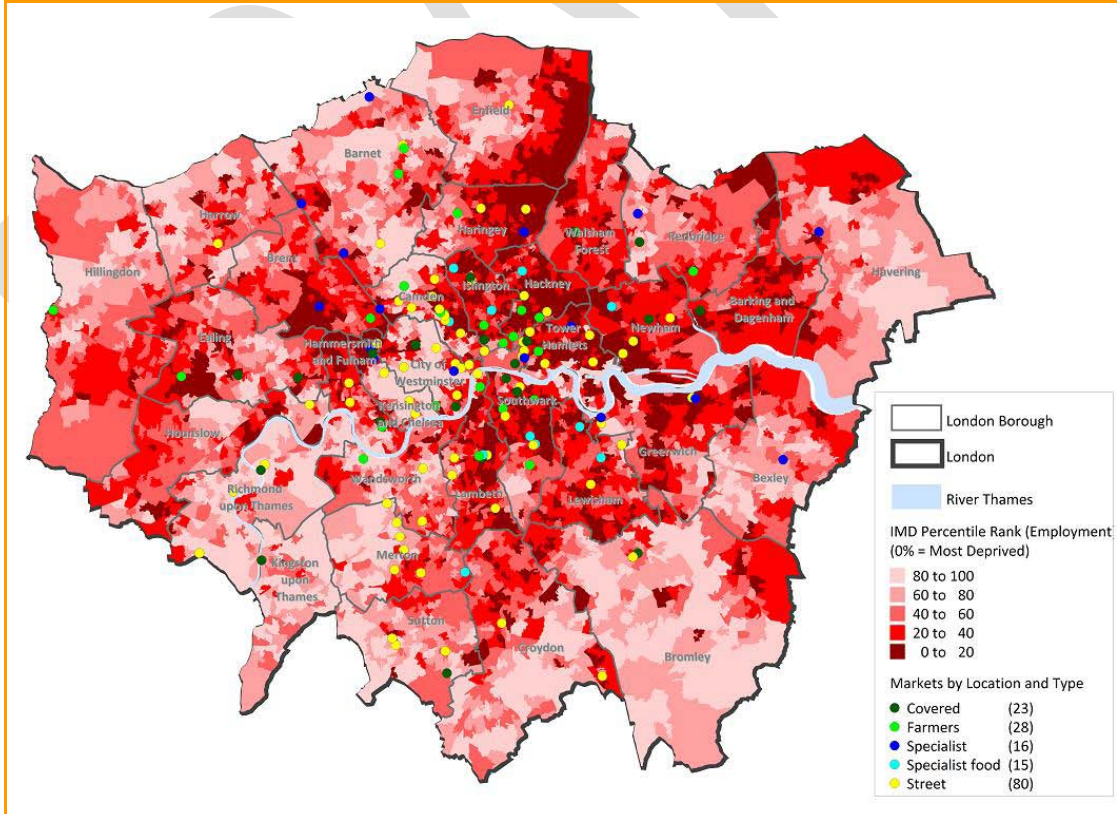
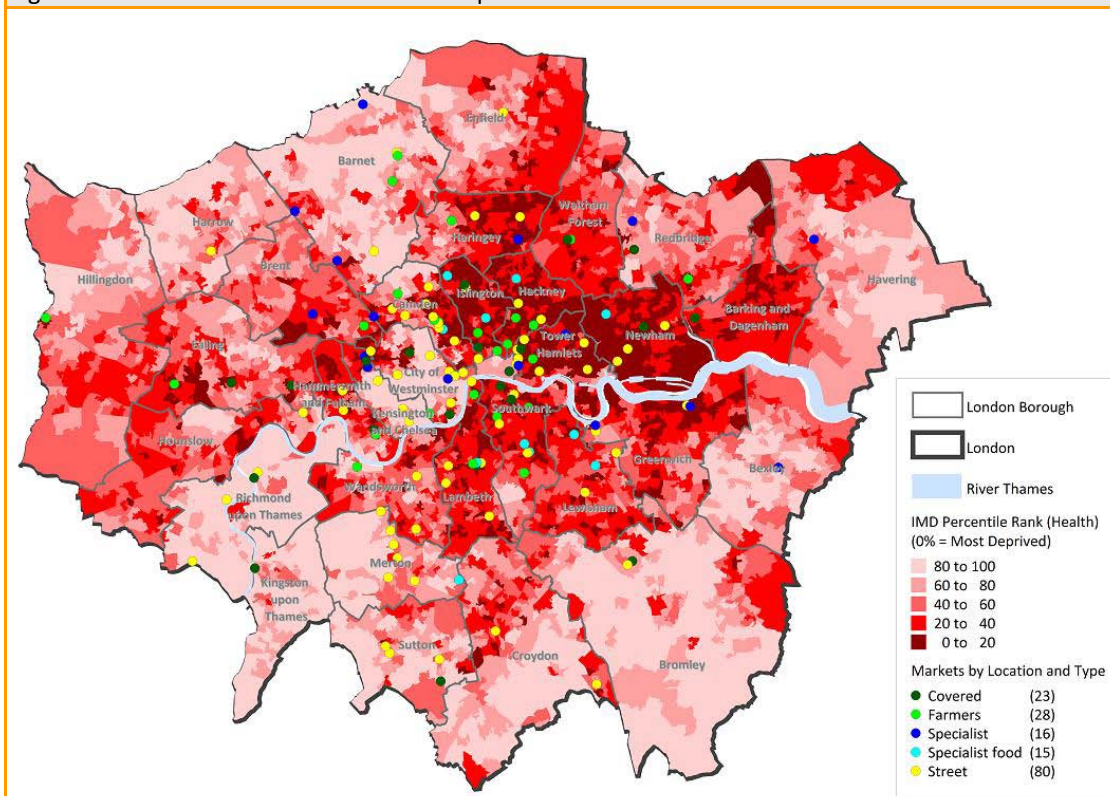


Figure 4-10 Market locations and health deprivation



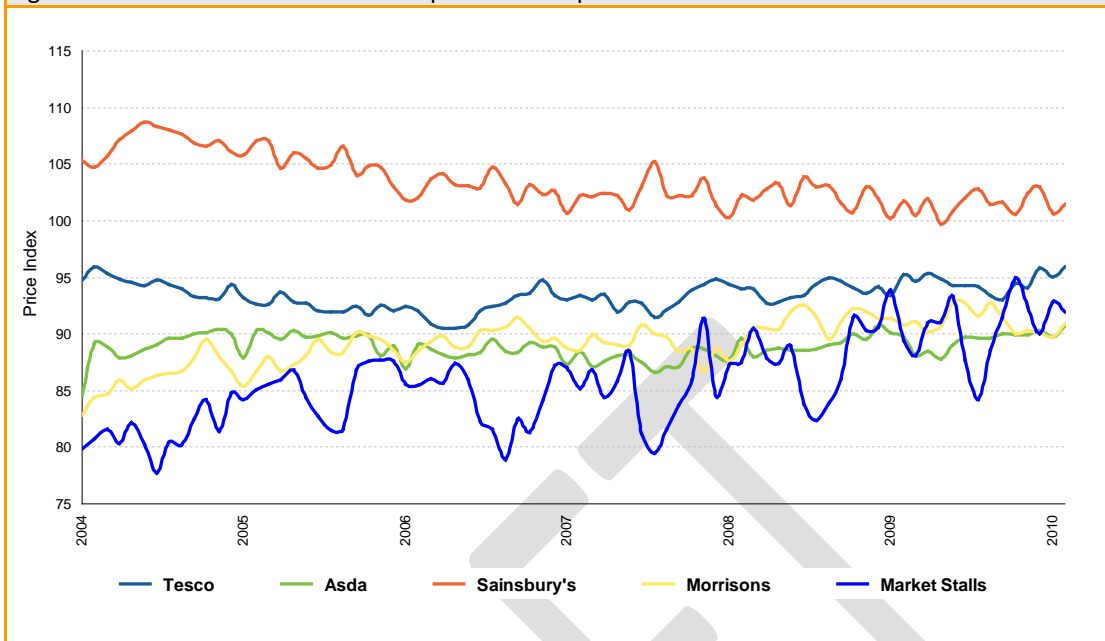
Source: GLA and Regeneris Consulting analysis

Prices in markets

- 3.35 Markets have traditionally provided a source of cheaper goods. While the expansion of discount stores such as Poundland (growing from 60 stores nationally in 2000 to 225 in 2009) has significantly dented this price advantage in recent years, survey evidence suggests they remain cheaper for a basket of common goods:
- A shopping survey undertaken by the New Economics Foundation in 2005 found that in Lewisham a shopping basket of food cost £4.74 from the market compared to a cost of £7.18 to buy the same food from a supermarket.
 - The National Market Trader Federation's Shopping Basket Survey 2008 showed that, across a range of 13 items, markets were on average 6% cheaper than supermarkets, and in relation to fresh produce, markets were 32% cheaper than supermarkets. The same research estimated that shoppers in London would save an estimated £464.88 annually if they were to shop in markets for those products that are cheaper than shops.
- 3.36 Kantar Worldpanel, a marketing agency, collect data comparing average prices for fresh and chilled produce in supermarkets and for fresh produce in markets, as illustrated in Figure 4-11. This data shows that market prices have remained consistently lower than those of the main supermarket chains for many years. This price differential is particularly interesting in underlining the contribution of street markets to overall health, given trends in relative price movements of healthy and unhealthy foods: one recent study has shown how the price

of fruit has risen by 33% relative to the overall food retail price index for instance⁵.

Figure 4-11 Prices for fresh and chilled produce in supermarkets and street markets

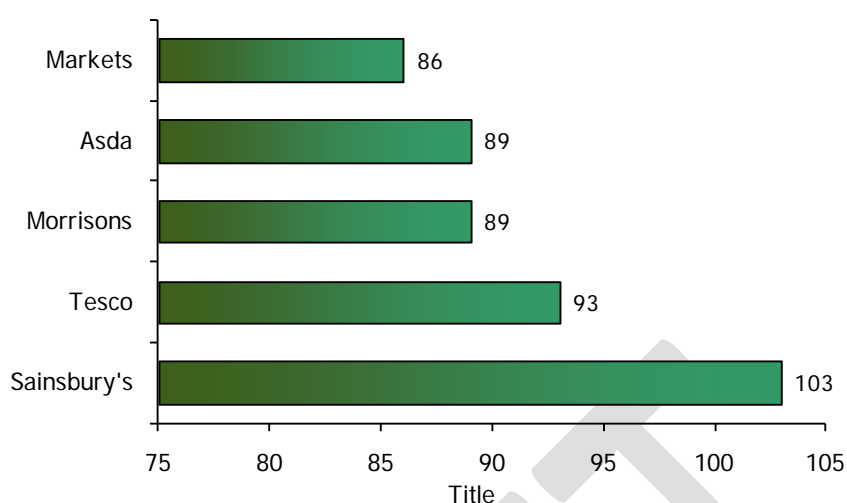


Source: Kantar Worldpanel. Note higher ratings on the price index reflect not only higher average prices for goods but also varying baskets of goods on sale (e.g. A higher rating on the index for Sainsbury's reflects the fact it sells a greater proportion of more expensive goods as well as higher prices for specific goods)

- 3.37 The chart is also notable to the extent to which it illustrates that fresh produce prices at market stalls fluctuate more significantly than those of supermarkets, illustrating seasonal variations and the fact that retail market prices for food produce closely follow those at wholesale markets, with traders passing on the benefit of falling prices to customers.
- 3.38 In this regard it is worth citing a finding of the 2007 London Wholesale Market Review commissioned by the Greater London Authority, which notes "in some situations, particularly for fruit and vegetables, the dynamic pricing available through the wholesale markets means the markets are able to sell products that are too mature or ripe for a typical supermarket specification. By selling competitively priced, ready to eat products wholesale markets, and the outlets they supply, are able to build on existing consumer perceptions that market fresh produce is best."
- 3.39 It is notable also, however, that bad produce can also be off-loaded in markets. Though there is no evidence that the quality of produce in markets is consistently worse than other shops, the issue of lower quality (and counterfeit) produce is an issue of concern requiring ongoing vigilance by trading standards officers.
- 3.40 Figure 4-12 presents an average of the time series data shown in Figure 4-11, showing that street markets have on average been consistently cheaper than supermarkets.

⁵ Roberts, S (2010) *Low income and diet* in Health Matters

Figure 4-12 Average prices for fresh and chilled produce 2004 – 2010

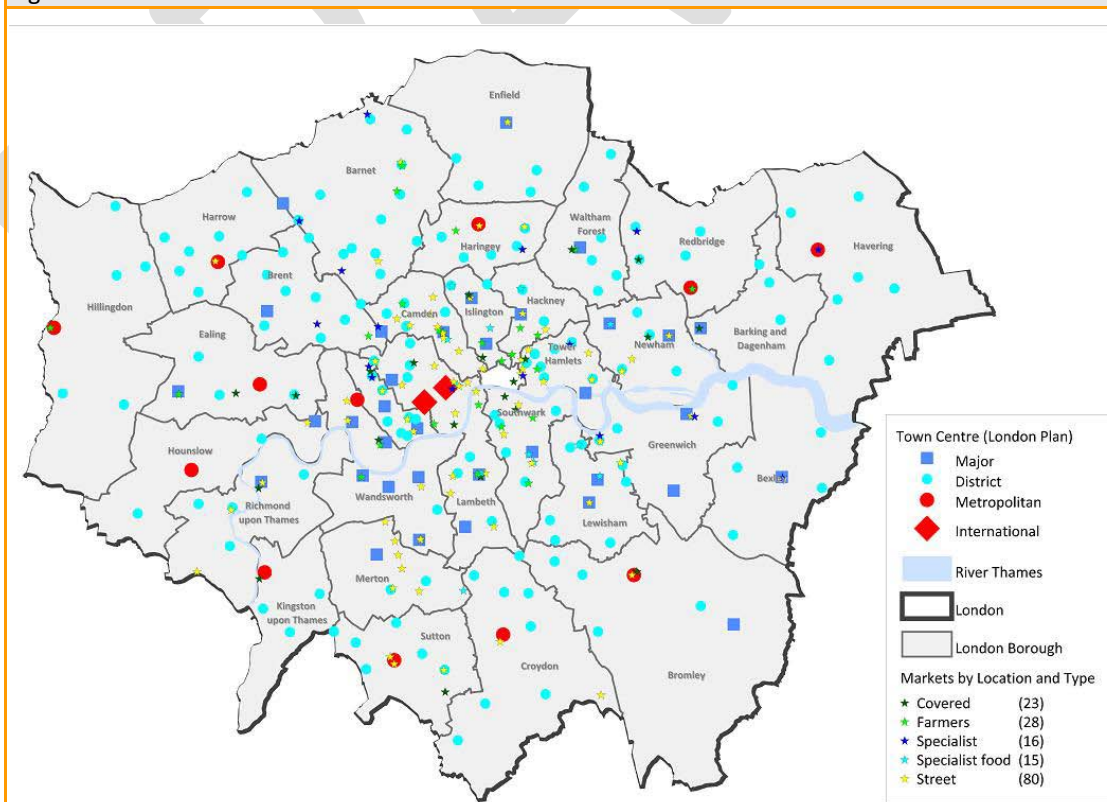


Source: Kantar Worldpanel

Markets and town centres

- 3.41 GLA Town Centre Health checks carried out in 2009 identified 137 markets in town centres, suggesting that around 85% of the current total of 162 markets are located in town centre areas. Figure 4-13 shows the location of town centres (as defined by the London Plan) along with the 162 markets.

Figure 4-13 Market and town centre locations



Source: GLA and Regeneris Consulting analysis

- 3.42 While the figure illustrates in graphical format that most markets are located within town centres, it is also particularly striking in illustrating that 129 out of 220 town centres do not have a market⁶. Figure 4-13 highlights in particular the lack of town centre markets in outer London boroughs.
- 3.43 The reasons for this are not immediately clear, though it is possible that this reflects a number of historical and geographical factors, including the fact that London's outer suburbs were built after many traditional street markets were established in the late 19th and early 20th centuries, and also after the advent of supermarkets and car-based shopping. Lower population densities may also be a factor. It is notable that London Farmers Markets, the company behind the establishment of 8 of the 26 farmers markets in the capital reported limited success in establishing markets in outer London areas.

Case study: the Acton experience - using markets to regenerate an area

An innovative and award-winning project in Acton provides an excellent example of how markets can contribute to wider regeneration of an area. The Acton Town Centre Market Regeneration Project was launched in 2005 by Action Acton, a community and economic regeneration charity, with funding from the London Development Agency Opportunities Fund over three years. The market now breaks even financially (just).

The aim of the project was to use a street market to encourage community entrepreneurship in the area, as well as offering something unique that would help regenerate Acton town centre.

The project introduced a street market with up to 50 stalls in Acton town centre, providing a unique opportunity for local people to start new businesses as market traders. In addition to providing infrastructure for the market, the LDA funding enabled Action Acton to run free Market trader training courses to help those new to the business covering issues such as business planning, advertising, book-keeping and business expansion.

The project has been successful in re-invigorating the town centre and supporting local businesses and promoting the local economy. The market has also provided other benefits, including increasing individuals' sense of safety and creating a greater sense of community in the area. The market has also provided the opportunity to offer wider advice to local communities on health, welfare, social security, training and employment issues through providing space for community stalls including the PCT and Police.

Since the end of LDA funding in March 2009 the Market has continued to be run by Action Acton as a social enterprise and there has been much interest in its role as a of community focussed market. Acton Market receives an average of four enquiries a week from new potential stall holders and provides employment for an average of 50 stallholders each week. There is scope to replicate this model in various locations such as town centres and housing estates.

Contact for further details: Action Acton www.actonmarket.co.uk info@actionacton.com
See 5 minute film at: <http://www.youtube.com/watch?v=RXrHqiVMNM8>

- 3.44 Section 6 uses survey data to estimate how much market customers spend elsewhere in the town centres the markets are located in.

⁶ A list of town centres that do not have a market is presented in Annex A

Growth and decline of markets

- 3.45 While there has been significant interest both in London and for the country as a whole, previous research has identified a number of different trends in the growth and decline of different markets. In its 2008 report on London Street Markets the London Assembly noted that:

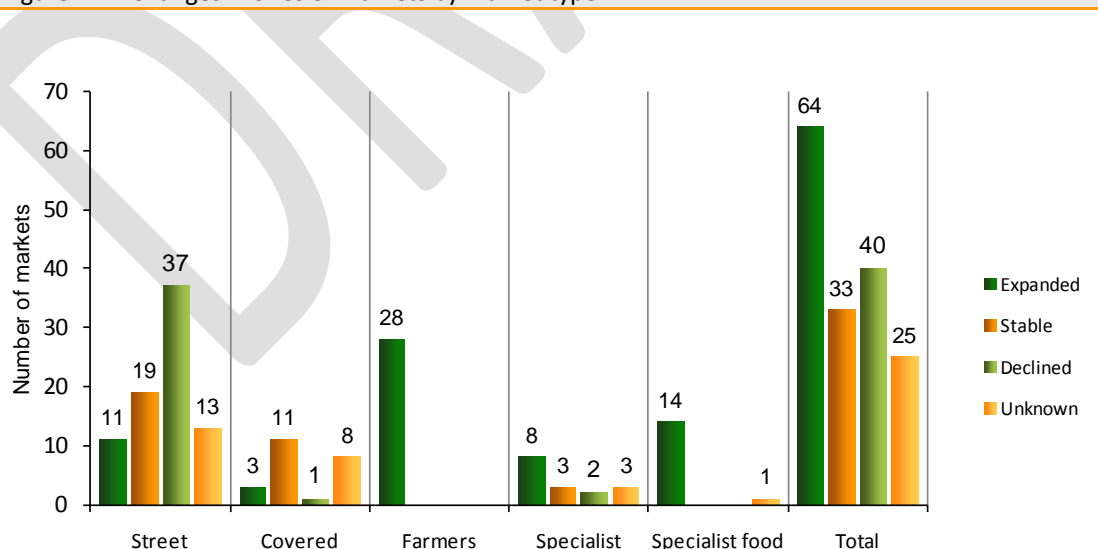
“While some of London’s retail markets are thriving, others are under threat of redevelopment or face the prospect of failure due to dwindling sales, increasing rents and competition from supermarkets... There are around 180 retail markets in London today – at least 63 more than 10 years ago and more than twice as many as had been previously thought.”

- 3.46 The Communities & Local Government (CLG) Select Committee published the report of its inquiry into traditional retail markets in July 2009, and concluded:

- 3.47 *“The situation as regards traditional retail markets in England today is complex. There is evidence of prolonged decline coinciding with the growth of supermarkets. But there is also evidence of continuing success for some in all types of markets.”*

- 3.48 Further refinement of this overall picture has been possible through analysis of the updated GLA markets database and review of responses from local authorities. Figure 4-14 shows changes in markets in terms of whether the number of pitches in use in them have expanded, declined or remained stable. This judgement is based in part on the data in the original GLA database, which recorded changes in pitches in use over the last ten years for a total of 88 markets, and review of secondary sources or local authority interviews for the others. It has not yet been possible to obtain information on trends on growth or decline for 25 of the total number.

Figure 4-14 Changes in sizes of markets by market type



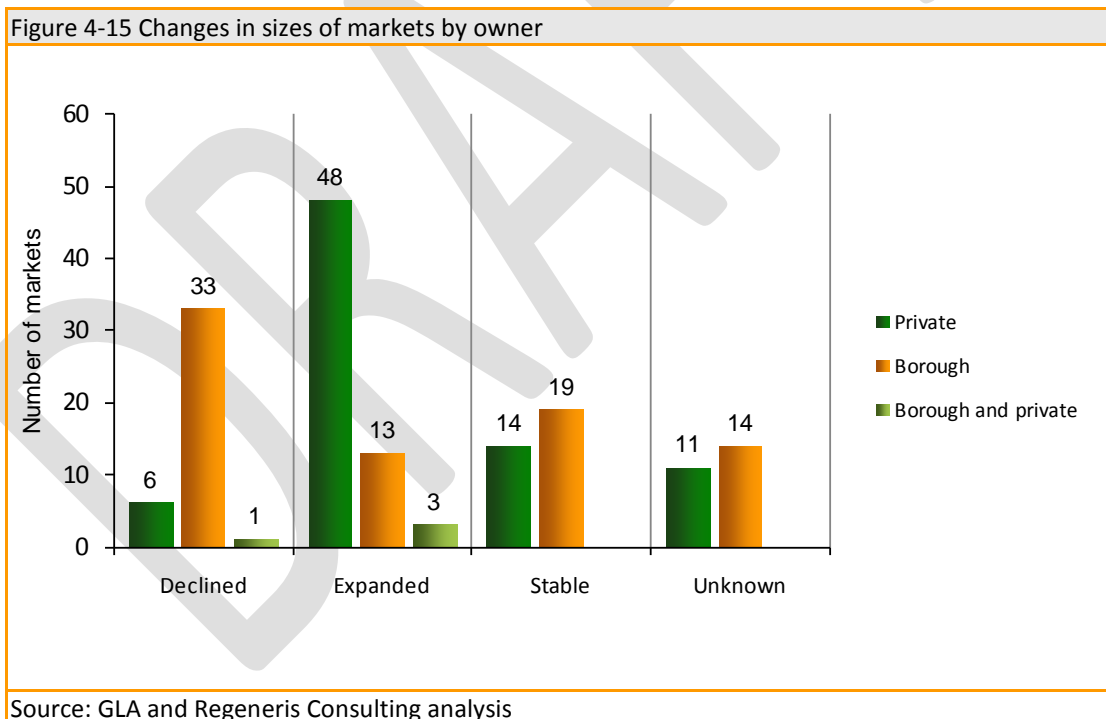
Source: GLA and Regeneris Consulting analysis

3.49 Figure 4-14 is particularly interesting in showing that:

- A majority (97, or 60%) of markets in London have remained stable or have expanded in recent years.
- The 64 markets that have grown are largely made up of farmers markets, specialist food markets and other specialist markets, though a small number of street markets and covered markets have also grown.
- Of the 40 markets that have declined, all but three of these are street markets.

3.50 The figure suggests that to the extent that policy-makers are concerned about the decline or disappearance of markets, this almost entirely relates to the fortunes of traditional street markets, which are predominantly found in the more deprived parts of inner London. However, it is also important to note that pointing this out does not imply that other concerns or policy objectives might not be addressed by focusing on other types of street markets (e.g. promoting occasional markets in town centres to promote their regeneration, or supporting strategic markets which add significantly to London's visitor offer).

3.51 Figure 4-15 shows trends in the growth or decline of markets according to whether they are borough or privately owned.



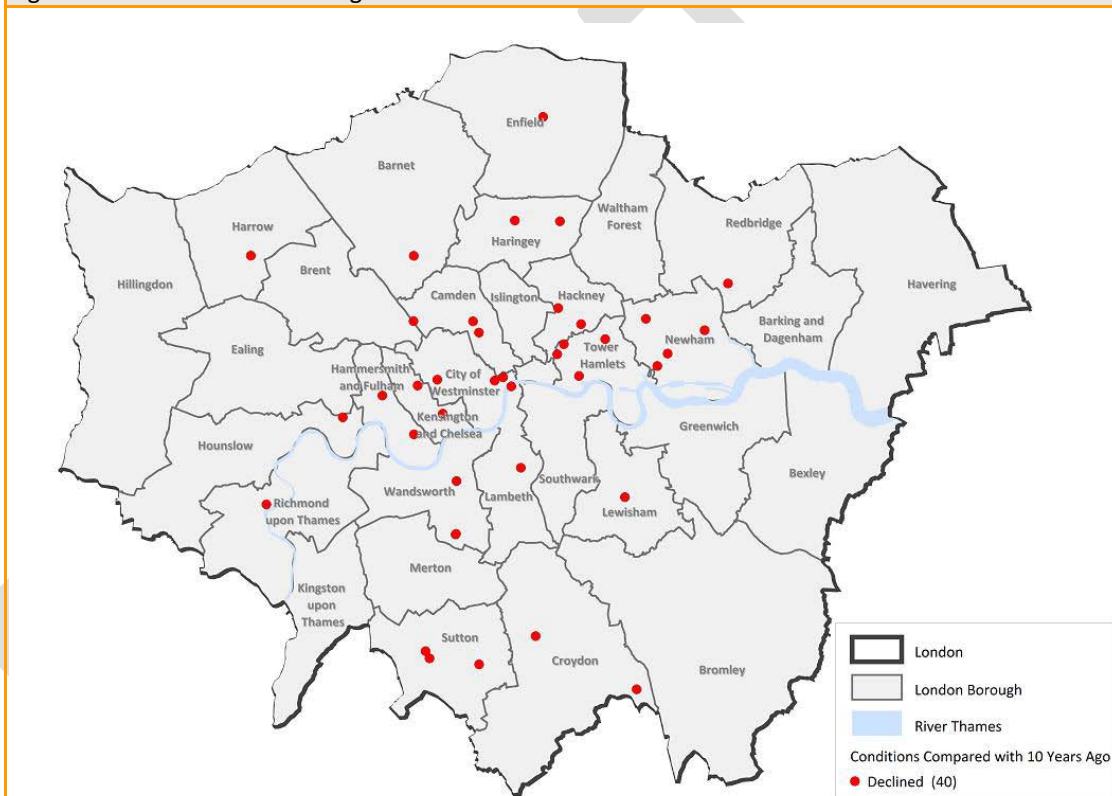
3.52 The chart is striking in illustrating that:

- Nearly all of the declining street markets are borough-owned.
- Most of the markets that have expanded have been privately-owned, though it is important to note that 13 borough-owned markets have also grown.
- The markets that have remained stable are roughly split between public and private

ownership.

- 3.53 It is important to interpret this figure with care. While the decline has largely occurred in local authority markets, at least 32 of these markets have remained stable in recent years, or grown. What the figure does suggest however is that the ability to manage a market, and the interest in investing in it are both important factors. As described in paragraph 4.23, the 1990 Act significantly constrains the ability of local authorities in London to do both of these things compared to the private sector. As recommended by the CLG Inquiry on markets and other studies, this issue needs to be addressed to provide the basis for more effective future management of local authority markets in particular.
- 3.54 Figure 4-16 shows where London's declining markets are located, illustrating that most are in inner London areas, with a number of other markets in outer London areas also in decline.

Figure 4-16 Location of declining markets in London

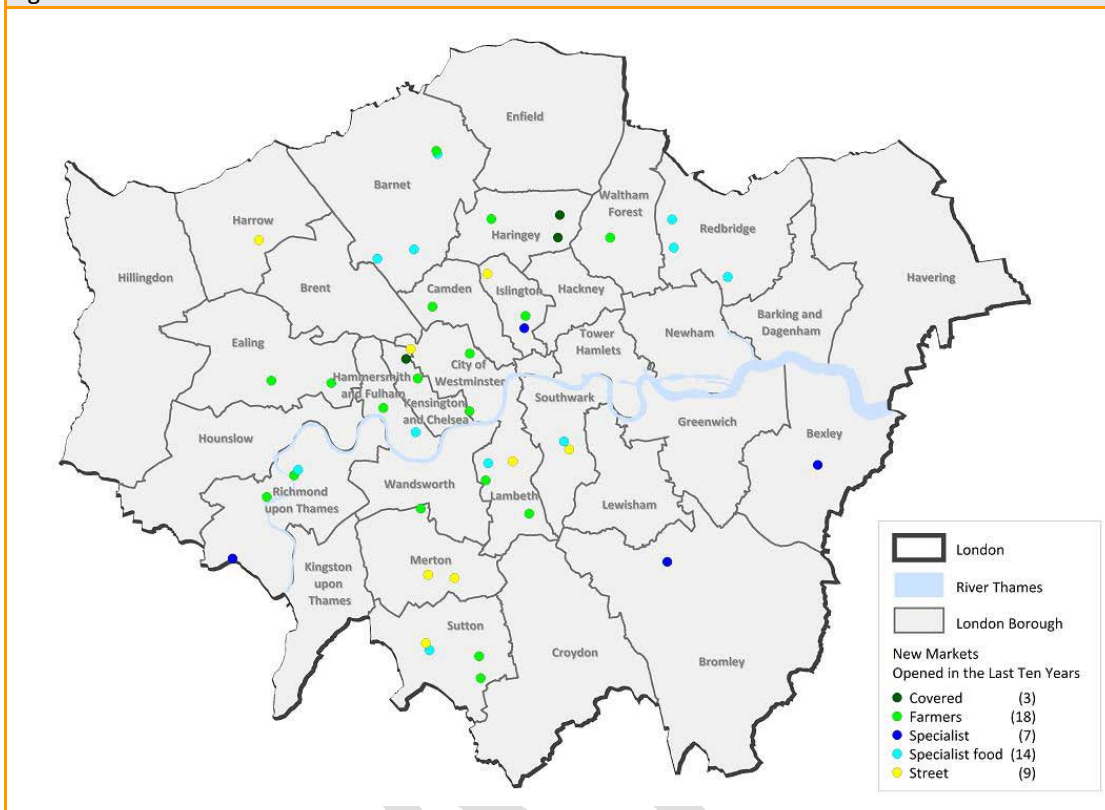


Source: GLA and Regeneris Consulting analysis

- 3.55 Figure 4-17 illustrates the location of new markets in London that have emerged in the last ten years. This shows:
- A clear spatial distribution of new markets in the western half of the city.
 - A broadly even distribution between inner and outer London boroughs.
 - That new markets are predominantly farmers and specialist markets.⁷

⁷ The four new street markets in Haringey are errors in the original data and do not currently exist – map to be updated for final report.

Figure 4-17 Location of new markets in London



Source: GLA and Regeneris Consulting analysis

Correlations between pitch numbers and other town centre health indicators

- 3.56 In December 2009 the Greater London Authority produced its 2009 London Town Centre Health Check Analysis Report which provided a 'snapshot' of the health of over 200 of London's town centres using a selection of strategic health check indicators. We have looked at establishing whether or not there is a relationship between these indicators and the number of pitches available with the town centre (providing an indication of the health of street markets in the area).

Table 4-4: Correlation between size of market and indicators of town centre health	
Correlation Variables – no of pitches (in 2007) correlated with...	Correlation Coefficient
Independent stores as % of total retail floorspace, 2007	-0.0156
Comparison goods (£m) turnover, 2008	0.1236
Zone A rents (£/m ² , per annum) 2008	0.0885
% of weekday trips to town centres made by public transport	0.2083
Vacant retail floorspace 2007	-0.0608
Vacant retail floorspace 2009	0.0407
Vacant retail floorspace CHANGE 07-09	0.0780
Vacant outlets 2007	-0.0481
Vacant outlets 2009	-0.0024
Vacant outlets CHANGE 07-09	0.0205

Source: GLA and Regeneris Consulting analysis

- 3.57 Table 4-4 shows these correlations between the number of pitches within a town centre and

various indicators of town centre health. A positive number indicates a positive relationship between the variables (as one goes up so does the other), a negative number indicates an inverse relationship (as one goes up the other goes down). The numbers range from -1 to 1; An association is judged to be significant where a response is greater than +0.3 or less than -0.3; correlations following within these two points are judged to indicate any significant relationship between the variables.

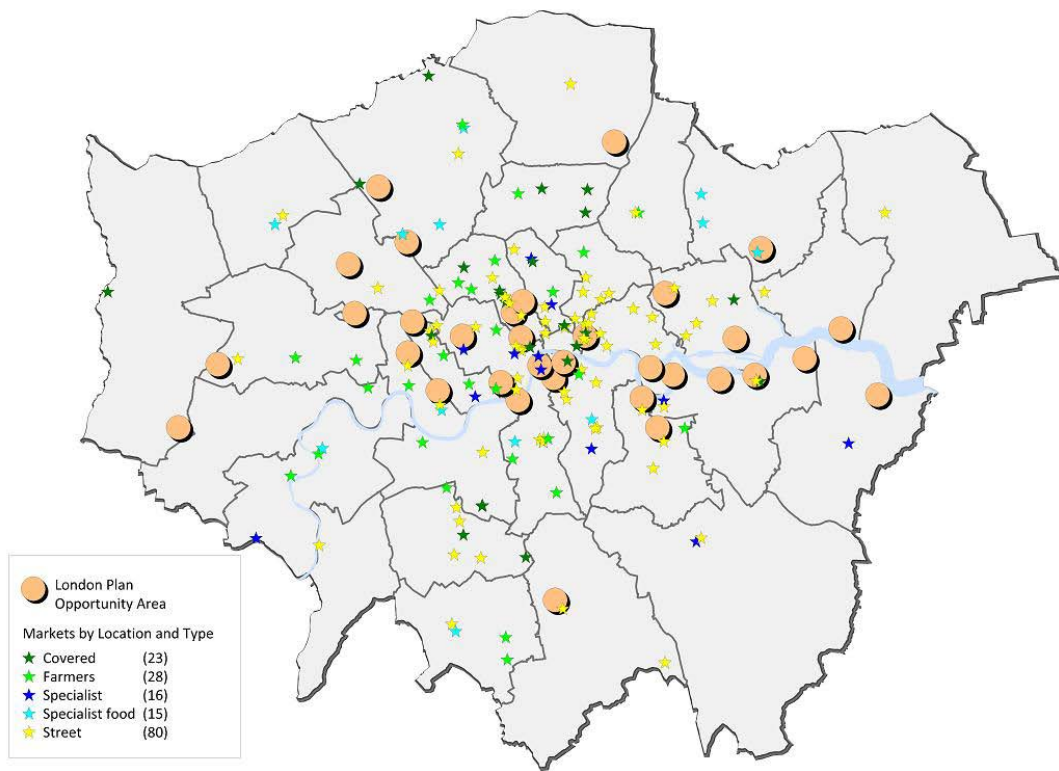
- 3.58 The variables presented in Table 4-4 therefore show little or no association with the number of pitches contained within a town centre. The % of weekday trips made to town centres by public transport is the highest of these weak correlations but is not strong enough to suggest a real association between how people travel to town centres and the level of street market activity within it. This indicates that there is a more complex picture in trying to understand the strength of market activity within a town centre.
- 3.59 This complex picture is consistent with anecdotal observations about the relationship between other forms of retail (in and out of town centres) and markets. For instance, while the expansion and increasing competitiveness of supermarkets is clearly a significant factor in the decline of some street markets, the relationship is not always one-way. At a local level supermarkets may help to sustain markets by attracting footfall, and their disappearance can damage a market's performance. Examples include the negative effect on Roman Road from the closure of a local Morrison's supermarket, and a similar effect on parts of Kingston Market after the recent closure of town centre shops.

Correspondence between markets and priority areas identified in the London Plan

- 3.60 Figure 4-18 and Figure 4-19 illustrate the correspondence between markets in London and Opportunity Areas and Strategic Cultural Areas as defined in the London Plan⁸. Figure 4-18 in particular suggests scope to include support measures for markets in wider plans for the Opportunity Areas.

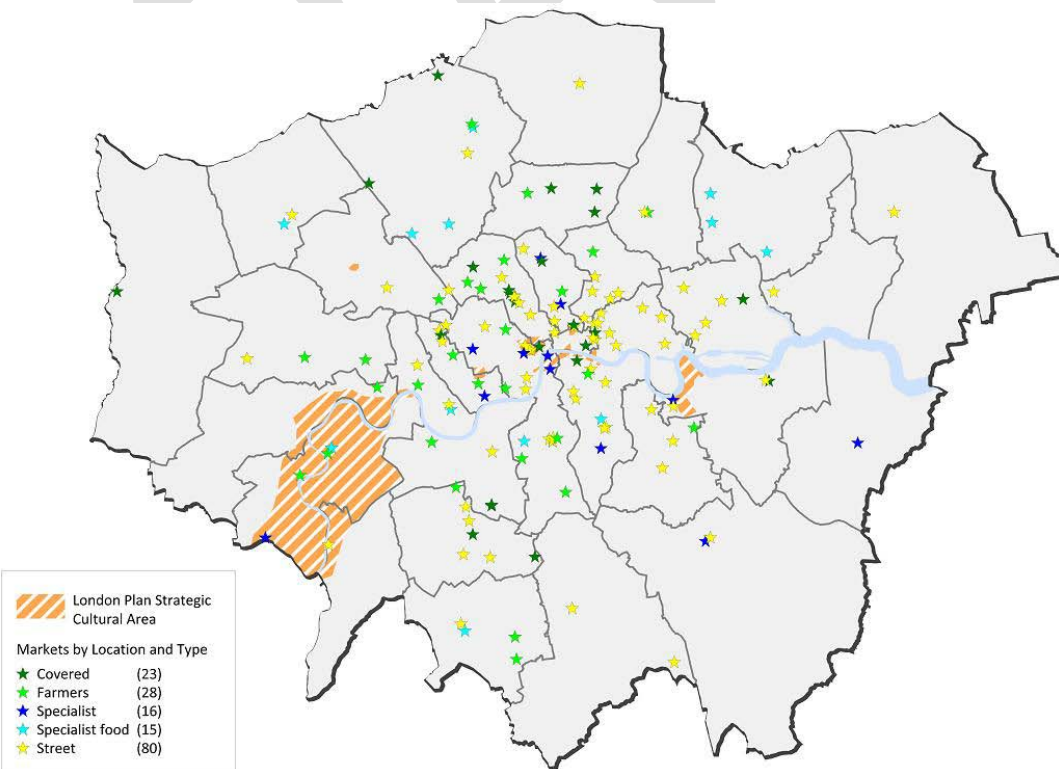
⁸ According to the London Plan, Strategic Cultural Areas are composed of internationally important cultural institutions including museums, galleries, and theatres as well as open space in South West London which are among the Capital's major tourist attractions.

Figure 4-18 Correspondence of markets and London Plan Opportunity Areas



Source: GLA and Regeneris Consulting analysis

Figure 4-19 Correspondence of markets and London Plan Strategic Cultural Areas



Source: GLA and Regeneris Consulting analysis

Summary of key points

3.61 The spatial analysis presents a number of conclusions which are summarised here. In several areas the findings reflect the comments in other research reports; what is new and useful however is the quantitative and spatial analysis, which supports some key trends which had previously been described only with anecdotal evidence. Key points include the following:

- There are currently 162 markets in London; a greater number of these are in inner London areas, though there are a significant number in different parts of outer London.
- Although street markets only account for half of this total, they represent nearly three quarters of pitch-days. Other types of markets may nonetheless have important roles in regeneration and economic development policy, for instance to the extent that they attract footfall and strengthen town centres, or attract visitors.
- The fastest growing segment of the sector are farmers and specialist food markets. These have sprung up in many locations and are slightly more prevalent in outer London than markets as a whole. They are open for many fewer hours than traditional street markets, but nonetheless have become a notable part of the retail landscape and several town centres.
- To the extent to which the sector is declining, this is almost exclusively occurring among traditional street markets managed by local authorities. In part this reflects retailing trends, and increasing competition from supermarkets and discount stores. Restrictions on the ability of local authorities to manage markets, and / or their unwillingness to invest in them have also played a role however.
- There is a close correlation between the location of street markets and the most deprived areas of the capital. Co-location presents important opportunities for regeneration strategies in future. There is scope in particular to include measures to support markets in plans for Opportunity Areas as defined by the London Plan.
- The location of street markets in deprived areas is not surprising given their traditional focus on low price goods. There is evidence to suggest that the existence of these markets supports higher living standards among the communities that surround them, by providing access to cheaper goods and food.
- Although most markets are located in town centres, most (59%) of London's town centres have no market (see Annex A for details). While some local authorities have supported the establishment of new farmers and specialist food markets in their town centres in recent years, private market operators trying to open new markets often report difficulties in doing so. In the most forward looking boroughs town centre managers take an active interest in supporting their markets.

4. Economic value of London's street markets

Introduction

- 4.1 Assessing the economic impact of London's markets presents a number of challenges. In particular, economic impact is produced through the activities of thousands of traders who work almost entirely on a cash basis and who are sensitive about enquiries into the nature of their business activities. Due to the relative small scale of many trader businesses, it is not possible to assess their activities through company accounts, nor through tax records. It is notable that the New Economics Foundation's previous (2005) research for the London Development Agency on markets in London tried to assess economic impact by asking traders questions about their income, though without success.
- 4.2 The National Market Traders Federation has estimated the value of retail market turnover at national level at £3.5 billion in 2009. This figure is based on primary research carried out within the NMTF membership. As a national level estimate however, it does not provide the basis for estimating economic impact of London markets.
- 4.3 In assessing the economic impact of London markets we therefore adopted a method based on field research at a sample of London markets, which avoided asking traders directly about their income. Instead, we interviewed a sample of traders, discussing with them the number of customers they serve on a daily and weekly basis. This has then been compared with responses from a separate set of surveys of customers at the same market. The results for the sample of markets have then been used to assess the economic impact of all London markets based on a process of 'grossing up' the results. Details of the method employed, and the strengths and weaknesses of the approach are presented below.

Methodology

- 4.4 Surveys of market traders and customers were carried out at nine different London Street markets as follows:

Market	No. of Traders Surveyed	No. of Customers Surveyed
Leather Lane	13	15
Tooting Broadway	20	10
Brixton (Electric Avenue + Popes Road)	18	29
Kingston	18	13
Shepherds Bush	15	11
Barking	20	10
Walthamstow	20	10
Lewisham	16	9
Deptford	21	11
TOTAL	161	118

- 4.5 The surveyed traders were asked a broad range of questions around trading conditions, expansion plans, training, suggestions to improve the market, employment at their stall and the number of customers they serve daily and weekly (see Appendix C for details).

- 4.6 Customers were also asked a range of questions about their visit to the market including how often they visited the market, how they travelled to the market, suggestions to improve the market and their main reasons for visiting the market. They were also asked how much they would spend at the market in total and in other nearby shops.

Response rate

- 4.7 The response rates for these two questions are presented below for each market:

	No of Traders Surveyed	No. of responses on customer numbers	Response Rate	No of Customers Surveyed	No. of responses on spend	Response Rate
Leather Lane	13	4	31%	15	15	100%
Tooting Broadway	20	15	75%	10	10	100%
Brixton	18	9	50%	29	24	83%
Kingston	18	5	28%	13	13	100%
Shepherds Bush	15	12	80%	11	11	100%
Barking	20	15	75%	10	10	100%
Walthamstow	20	12	60%	10	8	80%
Lewisham	16	8	50%	9	9	100%
Deptford	21	7	33%	11	11	100%
Total / Average	161	87	54%	118	111	94%

- 4.8 Shepherds Bush and Barking markets provided the highest response rates for questions for traders on customer numbers (80% and 75% respectively). Kingston has the lowest at 28%.
- 4.9 The overall response rate for customers surveyed was high at 94% with 7 out of 9 markets providing response rates of 100%. Walthamstow had the lowest response rate, at 80%.

Average total customer numbers per stall per week

	Pitch days per week ⁹	Average number of customers/week			Average number of customers/day		
		Food	Non Food	Total	Food	Non-food	Total
Average of all trader responses	5.2	836	200	338	161	38	65
Leather Lane	3.1	1,000	332	499	323	107	161
Tooting Broadway	7.9	243	188	203	31	24	26
Brixton	6.9	593	488	533	86	71	77
Kingston	3.2	400	69	135	125	22	42
Shepherds Bush	6.8	467	126	240	69	19	35
Barking	4	200	207	206	50	52	52
Walthamstow	6.1	-	196	196	-	32	32
Lewisham	6	2,300	96	1,198	383	16	200
Deptford	3	100	188	175	33	63	58

⁹ The number of days a week the market is open based on a working day of 9am – 5pm (8 hours). A market open for more than 7 pitch days per week will be open for 7 days a week for more than 8 hours per day on average.

Average customer spend

- 4.10 Based on responses from 111 (out of 118) customer interviewees, average spend per customer for their visit to the market is £17.23. Dividing this by the average number of stalls visited by customers obtained from 49 customers (1.88) give us an average spend per stall figure of £9.18.
- 4.11 Customers were also asked about their spending habits at food stalls. On average, the 72 customers who reported purchasing goods from food stalls spent £11.44 per visit to the market. Dividing this by the average number of food stalls visited by customers obtained from 27 customers (1.72) give us an average spend per stall figure of £6.64.
- 4.12 The 118 customers who reported non-food purchases spent £9.23 per visit to the market. Dividing this by the average number of non-food stalls visited by customers obtained from 27 customers (1.38) give us an average spend per stall figure of £6.70.

Calculations

- 4.13 The results on customer numbers in the trader survey were combined with results on spend from the customer survey using the methodology outlined in the table below:

Table 5-4: Economic impact calculation					
	1.Average number of customers/week	2. No of occupied stalls in market	3. Total customers/week	4.Total spend/week	5. Total spend/year
Calculation:	Average of responses for Q.8. of trader survey for all markets(1)	Sourced from markets database	(1) X (2) = (3)	(3) x average customer spend per stall based on Q.5 of customer survey = (4)	(4) x 52

Alternatively, this table can be explained through a step-by-step process as follows (**calculated separately for food and non-food spend**):

- 1) The **average number of customers per week** for all markets is calculated as the average responses for all traders surveyed.
- 2) The **number of occupied stalls per market** is obtained from the markets database.
- 3) The two values are multiplied to obtain the **total number of customers per week** in each market.
- 4) This value is then multiplied by the average spend per customer per stall¹⁰ figure obtained from the average customer spend figures from the customer survey¹¹ to give the **total spend per week** in each market.
- 5) This value is multiplied by 52 weeks to give a **total customer spend per year**

¹⁰ This equals the average spend per customer per market divided by the average number of stalls visited per customer.

¹¹ NB this average was based on all responses rather than an average of the average for each market.

estimate.

- 4.14 The calculation of total food spend involved using the number of food stalls in the market at stage 2 above (counted for 5 out of 9 of the markets¹²) and the average customer spend on food per stall from the customer survey at stage 4.
- 4.15 In order to calculate the spend in all of London markets we have applied the **total customer spend per year** results calculated at stage (5) above and then grossed up this value by the total number of pitch days in London (the number of pitches in a market multiplied by the number of days a week it is open¹³) to give us the total spend in London's markets per year.

Results

Surveyed markets

Non-food spend

- 4.16 Final results for the non-food spend at the nine street markets surveyed are presented in Table 5-5.

Calculation	1.Average number of non-food customers/week	2. No of occupied non-food stalls in market	3. Total non-food customers / week	4. Total non-food spend/week	5. Total non-food spend/year
	Average of responses for Q.8. of trader survey for all non-food stalls at all markets (1)	Total no. of stalls – no. of food stalls from field work ¹⁴ (2)	(1) X (2) = (3)	(3) x average non-food customer spend per stall based on Q.5 of customer survey = (4)	(4) x 52
Leather Lane	200	21	4,208	£28,171	£1,464,874
Tooting Broadway	200	87	17,431	£116,707	£6,068,765
Brixton	200	51	10,252	£68,637	£3,569,140
Kingston	200	73	14,626	£97,927	£5,092,182
Shepherds Bush	200	155	31,121	£208,363	£10,834,889
Barking	200	124	24,845	£166,341	£8,649,734
Walthamstow	200	256	51,292	£343,414	£17,857,515
Lewisham	200	54	10,801	£72,314	£3,760,344
Deptford	200	182	36,430	£243,908	£12,683,193
Overall average	200		22,334	£149,531	
Total		1,003		£1,345,781	£69,980,635

¹² The missing values were assigned a proportion of 8.6% food stalls to total stalls. This is based on the overall proportion of food stalls to total stalls for the 5 markets we had data for.

¹³ There were 43 markets for which we had missing data. An average number of 150 pitch days was applied to these markets based upon the average pitch days of the markets for which we have data for.

¹⁴ 4 of 9 markets based on assumptions

4.17 For the nine markets we surveyed:

- There was an average of 200 non-food customers per week per stall per market.
- The largest market we surveyed was Walthamstow with 256 non-food stalls; the smallest was Leather Lane with 21 non-food stalls.
- The nine markets we surveyed had an average of 22,334 customers per week, varying from 51,292 in Walthamstow to 4,208 in Leather Lane.
- The total non-food spend per week for all markets was £1.3 million, Walthamstow market accounted for £343,000 of this spend followed by Deptford with £244,000.
- **The total non-food spend per year for all nine London markets surveyed is estimated at £70 million.**

Food spend

4.18 This process was repeated to calculate total food spend in London's markets. Results for the nine street markets surveyed are presented below. The total spend per year on food for all nine London markets surveyed is estimated at **£27 million** or 39% of non-food spend.

Table 5-6: Economic impact of nine surveyed street markets (food-spend only)					
Calculation	1. Average number of food customers/week	2. No of food stalls in market	3. Total food customers/week	4. Total food spend/week	5. Total spend/year
	Average of responses for Q.8. of trader survey for all food stalls at all markets (1) ¹⁵	Sourced from field work (4 of 9 markets based on assumption s)	(1) X (2) = (3)	(3) x average customer food spend based on Q.5 of customer survey = (4)	(4) x 52
Leather Lane	836	9	7,527	£49,989	£2,599,444
Tooting Broadway	836	13	10,872	£72,207	£3,754,753
Brixton	836	5	4,042	£26,849	£1,396,155
Kingston	836	7	5,854	£38,881	£2,021,790
Shepherds Bush	836	15	12,272	£81,506	£4,238,327
Barking	836	8	6,690	£44,435	£2,310,617
Walthamstow	836	16	13,380	£88,870	£4,621,234
Lewisham	836	5	4,259	£28,287	£1,470,949
Deptford	836	17	14,365	£95,410	£4,961,335
Overall average	836		8,807		
Total		95		£526,435	£27,374,604

¹⁵ This was based on an average of all markets because of low numbers of food traders for some markets.

Economic impact of all London retail markets

- 4.19 The results above indicate that the total customer spend per year for the surveyed markets was £70 million on non-food spend and £27 million on food spend. Grossing up these values by the total number of pitch days in London (25,667) gives us the total spend in London's markets per year of **£430 million** of which £309 million is on non-food and £121 million is on food.
- 4.20 The 2009 Experian research on retail spend in London estimates retail spend in 2006 and 2011. We have used these estimates to derive a figure for total retail (comparison + convenience goods spend) spend in 2009 of £45.9 billion (in 2009 prices). Based on the results obtained total spend in retail markets currently accounts for **0.94%** of overall retail spend in London (non-food accounts for 0.67% of spend and food 0.26% of spend).

Comparison of results with alternative data sources

- 4.21 There is value in comparing the results with comparable official statistics both to place them in a broader context and also to check that they appear reasonable given what is known about the retail sector more widely.
- 4.22 We have calculated turnover per employee within the markets by dividing the total spend in London's markets per year (£430m) by the total number of employees (7,319 – see below for this estimate). This gives a turnover per employee estimate of £58,738. Annual Business Inquiry (ABI) data for 2007 (the most recent available data) for the retail sector in London¹⁶ estimates turnover per employee at £143,600.
- 4.23 This suggests that average turnover per employee for street markets businesses is 41% of the comparable figure for the London retail sector as a whole (this percentage would be lower if inflation were taken into account). This provides some plausibility for the overall economic impact estimate, as we would expect street markets to be less productive than conventional retailing, given the advantages of conventional retail (e.g. higher levels of investment and economies of scale), and given the fact that the street markets sector has been declining in recent years.

Spending in other town centre shops

- 4.24 Table 5-7 presents data on whether surveyed customers spent money in other shops in the area of the market, and is of particular interest in illustrating the value of markets in sustaining wider town centre regeneration.
- 4.25 Of all the customers surveyed, 57% spent money in other shops in the area. 43% of all customers surveyed specified how much they had spent (an average of £18.95 per visit). Applying this spend figure to the number of customers at each of the surveyed markets¹⁷ per year and grossing up to the London level gives **£752m total spend at other shops** – a multiplier of 1.75 based on the total spend at markets of £430m.

¹⁶ SIC Code 52 : Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

¹⁷ It is assumed only 57% of customers will spend at nearby shops based on the survey results in Table 5-7

Table 5-7: Spend at other shops by customers at surveyed markets					
	Yes			No	Don't Know
	Amount Unspecified	Amount Specified	All		
% of total customers surveyed	14%	43%	57%	34%	8%
Analysis based on 100% response rate from surveyed customers					

Comment on the method and results

- 4.26 The approach adopted has the benefit of being based on primary research with buyers and sellers in markets, and of covering a reasonably wide range of markets.
- 4.27 The assessment is based on a reasonable large number (161) of trader interviews, with 87 traders providing an estimate of their customer numbers. On the estimate that there are around 7,300 FTE-equivalent traders in London (see below), around 1% of all London's market traders have provided an indication of their customer numbers. Customer spend data, although based on a smaller sample, also appears plausible.
- 4.28 There are nonetheless a number of sources of possible inaccuracy, and it is important to be explicit about these in interpreting the results. These include the following:
- The results rely on both traders and customers providing accurate assessments of their customer numbers and spend.
 - There is likely to be some variation due to the time of year when the surveys were carried out (late February – early March). Traders indicated that their sales are generally higher in the spring, summer and early autumn, so estimates from late winter may under-estimate customer volumes, though it has not been possible to estimate by how much. Customer spend is also likely to be higher in months with better weather.
 - Estimates based on grossing up the results from the sample of nine markets to all London markets rest on the assumption that the economic impacts for different types of markets are similar. It is likely however that some specialist markets (antiques etc.) may have higher turnover per pitch than others. To the extent that this is the case, it would increase the value of overall economic impact from London markets.
 - Given the constraints of the research approach our model assesses economic impact by collecting information on spend on food and non-food items. Clearly this provides a simplified assessment of what is bought and sold at markets.
- 4.29 The economic impact results presented should therefore be taken as an indication of likely market size rather than a precise estimate. However, given that the surveys were carried out in winter, and based on street markets (which we create lower levels of GVA than other markets on the basis that they have been declining faster than other types), we assume that the results presented are more likely to be an under-estimate than an over-estimate of economic impact.

Employment impacts

Direct employment associated with markets

- 4.30 Traders were also asked to estimate the number of people working at the stall full time and part time (including the actual licensed trader). Using this information we are able to estimate the number of jobs that the nine surveyed markets support, calculated by multiplying the number of stalls in each market by the average number of full time and part time workers per stall in the same market. The results are presented in Table 5-8.

	Av. Full Time employees	Av. Part Time employees	No. of stalls	Total Full Time employees	Total Part Time employees
Leather Lane	1.2	0.2	30	37	7
Tooting Broadway	1.7	0.1	100	165	10
Brixton	1.2	0.2	56	68	9
Kingston	1.4	0.0	80	116	0
Shepherds Bush	1.9	0.2	170	329	34
Barking	1.4	0.5	132	185	59
Walthamstow	1.3	0.2	272	340	54
Lewisham	1.6	0.0	59	92	0
Deptford	1.2	0.1	199	229	20
Overall average	1.4	0.2			
Total			1,098	1,560	194

- 4.31 This methodology provides an estimate of 1,560 full time jobs and 194 part time jobs supported in the nine markets surveyed. Grossing this up to the London level (25,667 pitch days in total) provides an estimate of 6,891 full time and 856 part time jobs. Assuming that 1 part time job is equivalent to 0.5 full time jobs, **it is estimated that London's retail markets directly support 7,319 Full-Time Equivalent (FTE) jobs.** This total is for direct employment only and does not take into account indirect or induced effects.

Summary of key points

- It is estimated that annual spend in London's markets is currently £430 million, of which £309 million is on non-food items and £121 million is on food. This represents 0.94% of overall retail spend in London (non-food items account for 0.67% of spend and food for 0.26% of spend).
- £752m is spent at other shops in the town centres in which the markets are located. This represents a multiplier of 1.75 based on the total spend at markets of £430m.
- It is estimated that London's retail markets directly support 7,319 Full-Time Equivalent (FTE) jobs. This total is for direct employment only and does not take into account indirect or induced effects.

5. Characteristics of market traders and customers

5.1 This section analyses other data collected in the surveys.

Characteristics of traders' businesses

Opening days

5.2 Overall, 41% of stalls surveyed reported that they are open for 6 days a week (100% in Tooting and Shepherds Bush). Few stalls were open once a week apart from Barking, and Kingston, where those working in the Monday market were surveyed.

	1	2-3	4-5	6
Leather Lane	0%	38%	62%	0%
Tooting	0%	0%	0%	100%
Brixton	0%	0%	17%	83%
Kingston	39%	0%	33%	28%
Shepherds Bush	0%	0%	0%	100%
Barking	15%	55%	30%	0%
Walthamstow	0%	25%	70%	5%
Lewisham	0%	13%	25%	63%
Deptford	0%	95%	5%	0%
Grand Total	6%	27%	26%	41%

Analysis based on 100% response rate from surveyed traders

5.3 It is notable that although there has been a trend towards late opening hours for many shops in recent years, most street markets (138 out of 162 in the database) close before 5.30pm.

Do traders operate at other markets or have other businesses?

5.4 Table 6-2 illustrates that 27% of traders said they were directly involved in the running of other stalls or businesses in the London area. Some traders also reported running shops on nearby high streets; one also operated a wholesale and manufacturing businesses.

- Barking had the highest proportion of businesses (60%) with other stalls.
- None of the traders in Shepherds Bush reported running other stalls.

Table 6-2: Other stalls operated by surveyed traders

	Traders surveyed	% with other stalls	Location/type
Leather Lane	13	38%	Market stalls: Church St, Whitecross, Deptford, Hoxton, Dagenham, East St.
Tooting	20	10%	Shops: Tooting High Street, Earlsfield
Brixton	18	11%	Wholesale and manufacturing business; market stall at Vauxhall
Kingston	18	44%	Market stalls: Chelmsford, Braintree, Battersea, Bromley, Dorking, Redhill, Crawley, Orpington, East Grinstead, Kempton, Blackbush, St. Albans, Petersfield
Shepherds Bush	15	0%	
Barking	20	60%	Market stalls: Dagenham, Leather Lane, Romford, Wembley, Northweald, Braintree, Nine Elms, Catford, Walthamstow, Church St.
Walthamstow	20	25%	Market stalls: Aldgate, Wembley, Petticoat Lane, Various, Petticoat Lane
Lewisham	16	25%	Market stalls: Blackbushe, Kent, Kempton, Sutton
Deptford	21	29%	Market stalls: Walthamstow, Catford, Lewisham, Vauxhall
TOTAL	161	27%	

Analysis based on 100% response rate from surveyed traders

Number of years of trading

- 5.5 On average, market traders for the surveyed markets have been trading for 18.9 years. Tooting has the lowest average of 9.7 years trading and Lewisham the highest with 26.1 years.

Table 6-3: No. of years trading by surveyed traders

	Traders surveyed	No. of traders who responded	Response rate	Average number of years trading
Leather Lane	0	0*		
Tooting	20	19	95%	9.7
Brixton	18	18	100%	21.3
Kingston	18	18	100%	25.6
Shepherds Bush	15	14	93%	16.0
Barking	20	17	85%	9.9
Walthamstow	20	14	70%	18.1
Lewisham	16	16	100%	26.1
Deptford	21	21	100%	23.1
TOTAL	148	137	93%	18.9

* This question was added after the survey of Leather Lane was carried out. It has therefore been excluded from the total calculation.

Plans for business expansion

- 5.6 Traders were asked about any plans to expand their business. The aim was to help assess the extent to which market stalls may provide a starting point for larger businesses. In total 125

traders answered this question, with 31 (25%) saying that they were hoping to do so. Plans included opening other stalls, moving into high street shops, opening a superstore and starting an online business. The results provide some hard evidence that market stalls can provide important opportunities for business start-up.

5.7 Responses from individual markets are as follows:

- Leather Lane: This question was added after the survey was piloted at Leather Lane market.
- Tooting Broadway: 16 out of 20 (80%) of traders answered this question. Ten respondents weren't interested in expanding their business with three of these traders citing high costs/overheads of expanding as a reason not to expand. Three traders are considering an expansion (two of which would move if it is affordable). Three traders would definitely like to expand, two of which want to move to Tooting High Street.
- Brixton: 18 out of 18 (100%) of traders answered this question. The majority of respondents (15) weren't interested in expanding their business with two traders reporting they had previously owned shops, one trader being refused a new pitch licence at the market and another citing high costs/overheads of expanding. Three traders would definitely like to expand, one of which is trying for a shop and another waiting for trade to pick up after the effects of the recession.
- Kingston: 18 out of 18 (100%) of traders answered this question. 14 respondents weren't interested in expanding their business with 3 traders reporting they had previously owned shops. One trader wanted to expand online.
- Shepherds Bush: 15 out of 15 (100%) of traders answered this question. Twelve respondents weren't interested in expanding their business (with one thinking about retirement), one is hopeful about expanding sometime in the future and another two would like to move into the high street.
- Barking: 20 out of 20 (100%) of traders answered this question. 14 respondents weren't interested in expanding their business (with one previously having a shop), one is considering expanding sometime in the future and another five would like to expand (one into wholesale, one into a superstore and one into a shop).
- Walthamstow: 19 out of 20 (95%) of traders answered this question. 15 respondents weren't interested in expanding their business (two citing cost barriers), and four would like to expand (one is currently looking, one would like another pitch, and two would like to move into wholesale operations).
- Lewisham: 15 out of 21 (71%) of traders answered this question. 10 respondents weren't interested in expanding their business and five are looking to expand (four into a shop and/or stall, and one would expand if economic recovery quickens pace).

Views on benefit of formal training

- 5.8 Traders at all markets apart from Leather Lane (148 traders) were asked whether formal training that would help their business. 134 traders responded to this question giving a response rate of 91%. The large majority of respondents (119 traders) have no interest in entering any new training programmes. Of the remaining fifteen traders who were interested (11% of respondents), six would be interested in learning accounting/book-keeping skills, six in learning business development/sales/enterprise skills, one in English language skills, one in online business skills and one in animal welfare training.
- 5.9 The apparent low levels of interest in training contrast to successful market trader training schemes and events in Islington and Acton.
- 5.10 Even if the low interest in training is a true reflection of trader preferences, the survey still suggests there could be significant demand for training courses. If the estimate that there are approximately 7,300 people employed on market stalls in London is correct, this would suggest around 800 people would be interested in some form of training.

Market trader demographics

- 5.11 This section provides a brief analysis of the demographic background of the traders surveyed.

Sex

- 5.12 Table 6-4 shows that traders are predominantly male (81% of all traders surveyed) varying from 63% in Lewisham to 95% in Barking.

Table 6-4: Sex of surveyed traders		
	Traders surveyed	% male
Leather Lane	13	77%
Tooting	20	90%
Brixton	18	83%
Kingston	18	72%
Shepherds Bush	15	87%
Barking	20	95%
Walthamstow	20	78%
Lewisham	16	63%
Deptford	21	72%
TOTAL	161	81%

Age

- 5.13 154 out of 161 traders surveyed gave information on their age (giving a response rate of 96%) The results as illustrated in Table 6-5 show that market traders tend to be older than the average for the London workforce as a whole. Specifically:
- Market traders are significantly more likely to be over the age of 40 compared to London's working age population as a whole.
 - There are significantly fewer market traders in age groups under the age of 40 than in the overall working population.

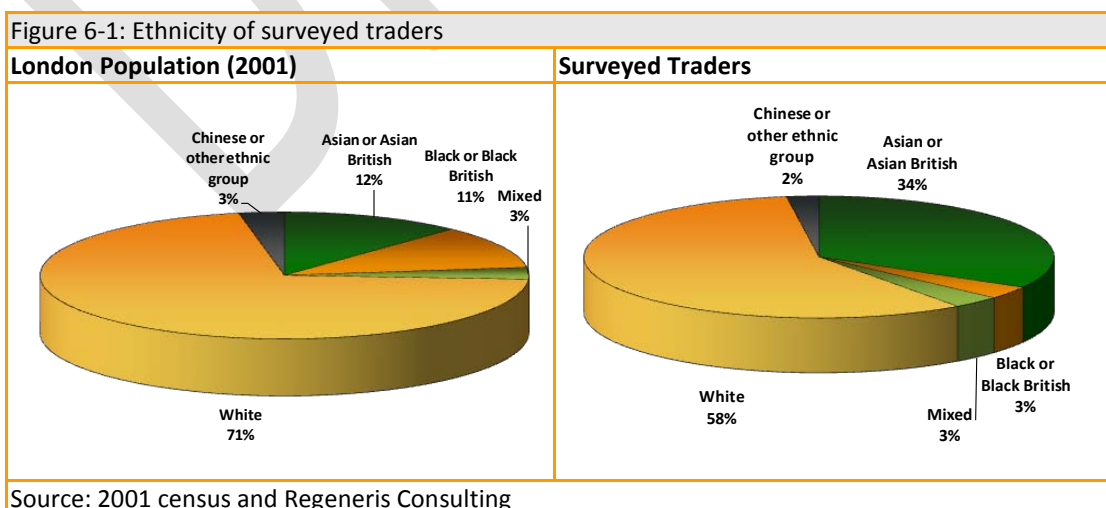
- Age profiles do vary among markets however. For instance, Tooting has the youngest population of traders with 35% being aged between 20-29; in contrast over 65% of Deptford and Kingston's traders surveyed were aged over 50.

	Traders surveyed	No. of traders who responded	Response rate	% 20-29	% 30-39	% 40-49	% 50-59	% 60+
Leather Lane	13	13	100%	8%	15%	46%	31%	0%
Tooting	20	20	100%	35%	5%	45%	15%	0%
Brixton	18	18	100%	22%	17%	33%	17%	11%
Kingston	18	18	100%	0%	11%	33%	28%	28%
Shepherd's Bush	15	15	100%	7%	27%	33%	27%	7%
Barking	20	19	95%	32%	42%	16%	11%	0%
Walthamstow	20	18	90%	17%	22%	22%	28%	11%
Lewisham	16	15	94%	7%	20%	27%	27%	20%
Deptford	21	18	86%	6%	11%	17%	50%	17%
TOTAL	161	154	96%	16%	19%	30%	25%	10%
LONDON TOTAL (% OF WORKING AGE POPULATION)				25%	28%	22%	15%	6%

Ethnicity

5.14 Figure 6-1 compares the ethnic background of traders compared to that for the London population as a whole (as revealed by the 2001 Census). This illustrates that:

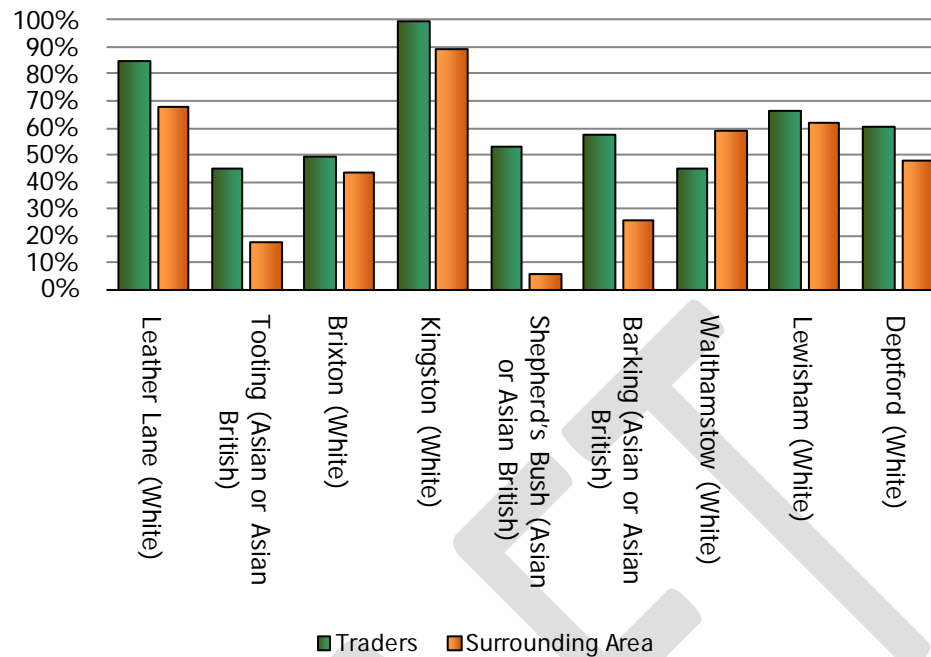
- A greater proportion of market traders are Asian or Asian British compared to the population as a whole. It is interesting that traders of Pakistani origin (14% of the total surveyed) make up the second largest ethnic group of traders, though accounting only for 2% of London's population.
- A smaller proportion of market traders are from the following groups than their representation in the population as a whole: White British, Black or Black British, Chinese or Other Ethnic Group.



5.15 Figure 6-2 makes a comparison between the largest ethnic group of traders at each market and the demographic characteristics of the ward in which the market is located. It illustrates

where the ethnicity of traders matches or contrasts with that of the surrounding population.

Figure 6-2: Majority ethnicity of surveyed traders at individual markets



Source: 2001 census and Regeneris Consulting

5.16 The chart illustrates that:

- There are some disparities between the ethnicity of traders and the surrounding areas at Leather Lane, Tooting, Shepherds Bush, Barking and Walthamstow markets.
- The largest disparity between the ethnicity of traders and the surrounding population was at Shepherds Bush, where 53% of traders were Asian or Asian British and only 6% of the surrounding population belong to this group.
- In other markets the ethnicity of traders broadly matches that of the local area.

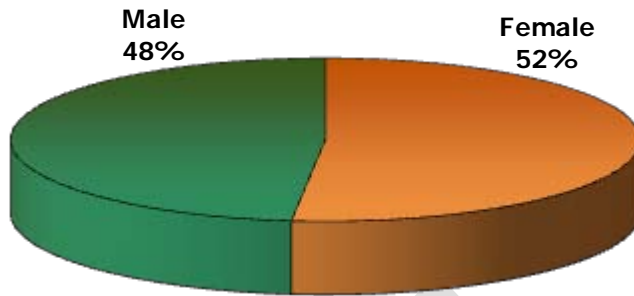
Customer characteristics

5.17 The section analyses trends amongst customers surveyed in the nine markets surveyed.

Sex

5.18 Figure 6-3 shows that the customers surveyed were split roughly equally between men and women.

Figure 6-3 Sex of market customers surveyed

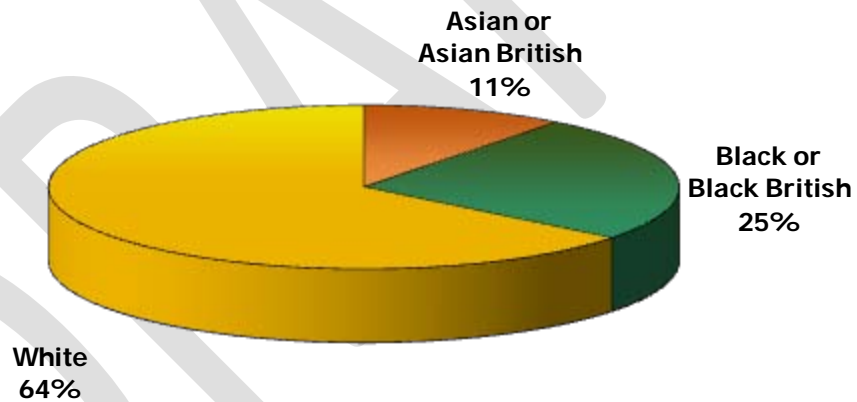


Source: Regeneris Consulting

Ethnicity

- 5.19 Figure 6-4 shows the ethnicity of customers surveyed; if this is indicative of wider trends it would suggest that markets are used to a greater extent by Black and Minority Ethnic communities.

Figure 6-4 Ethnicity of market customers surveyed



Source: Regeneris Consulting

Frequency of Visits

- 5.20 Overall, 64% of customers visit the nine markets we surveyed at least once a week, illustrating the fact that many people rely on street markets for their shopping.

Table 6-6 Frequency of visits by customers at surveyed markets

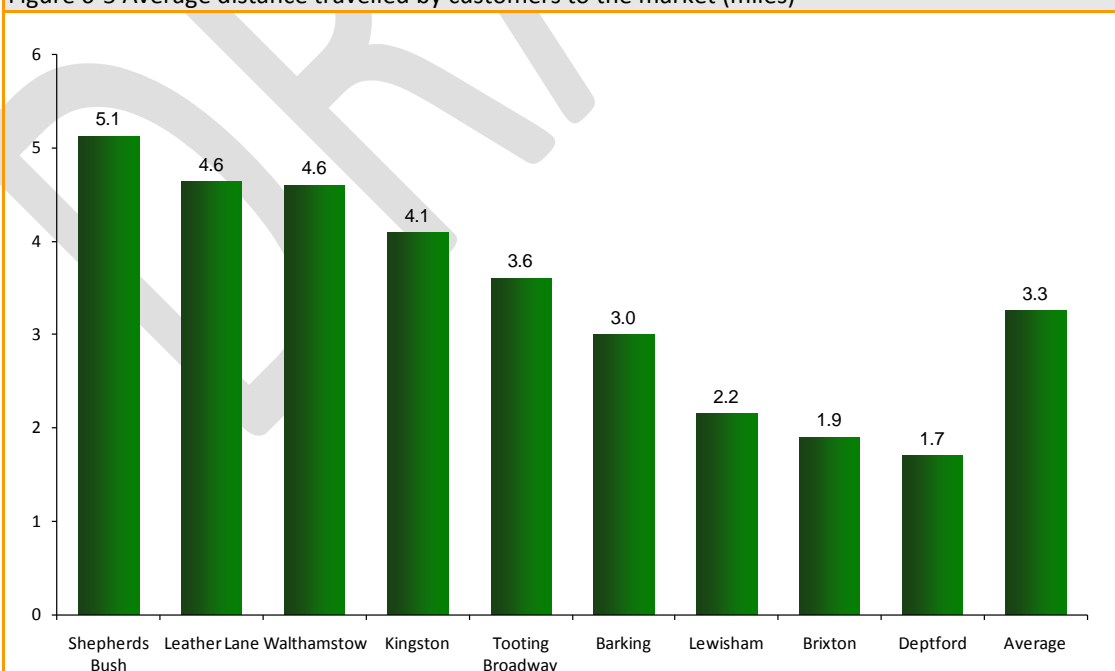
	More than 3 times a week	2-3 times a week	Once a week	Every fortnight	Once a month	Occasionally	This is my first visit
Leather Lane	13%	27%	13%	0%	7%	33%	7%
Tooting	10%	40%	10%	10%	10%	0%	20%
Brixton	17%	24%	28%	14%	0%	3%	14%
Kingston	0%	0%	38%	15%	8%	38%	0%
Shepherds Bush	0%	36%	0%	9%	18%	27%	9%
Barking	30%	30%	40%	0%	0%	0%	0%
Walthamstow	10%	30%	30%	0%	0%	20%	10%
Lewisham	11%	33%	22%	11%	0%	22%	0%
Deptford	0%	55%	27%	9%	0%	9%	0%
Grand Total	11%	29%	24%	8%	4%	16%	8%

Analysis based on 100% response rate from surveyed customers

Distance from customers home to market

- 5.21 Figure 6-5 shows the average distance from the customers home address to the market by customers interviewed by the survey. It provides an indication of how far customers are willing to travel to get to a market, though it is important to note that some customers will have travelled shorter distances e.g. if they were already in the area because they work there. This is certainly the case for Leather Lane for example, which caters predominantly to office workers in the area, and is probably true also for those markets where a large proportion of customers arrived on foot (see Table 6-7 below).

Figure 6-5 Average distance travelled by customers to the market (miles)



Mode of travel

- 5.22 Table 6-7 illustrates that on average, only 9% of customers travel to markets by car, with the large majority of the remainder travelling on foot or by public transport. In particular, 69% travel by foot or bus, 10% of customers use the tube, and 5% use trains.
- 5.23 Only 9% of customers travel by car perhaps highlighting issues around shortage of parking facilities at many markets. Leather Lane, a central London market which caters largely to office workers and local residence unsurprisingly has 100% of its customers arrive by foot, bus or tube. Kingston, a more suburban market, had 23% of customers surveyed arrive by car.

	Foot	Bus	Tube	Car	Train	Bus/ Train	Foot/ Bus	Mobility scooter	Bicycle	Bus/ Cab	Disabled transport	Taxi
Leather Lane	67%	20%	13%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Tooting	44%	22%	33%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Brixton	14%	55%	7%	10%	3%	3%	3%	3%	0%	0%	0%	0%
Kingston	15%	46%	0%	23%	0%	8%	0%	0%	0%	0%	0%	8%
Shepherds Bush	27%	9%	27%	0%	27%	0%	0%	0%	0%	0%	9%	0%
Barking	60%	20%	0%	20%	0%	0%	0%	0%	0%	0%	0%	0%
Walthamstow	20%	40%	20%	10%	0%	0%	0%	10%	0%	0%	0%	0%
Lewisham	33%	44%	0%	0%	0%	0%	0%	0%	11%	11%	0%	0%
Deptford	55%	9%	0%	9%	18%	0%	9%	0%	0%	0%	0%	0%
Grand Total	34%	33%	10%	9%	5%	2%	2%	2%	1%	1%	1%	1%

Analysis based on 99% response rate from surveyed customers

Would customers visit the area if the market were not there?

- 5.24 Table 6-8 illustrates that 42% of surveyed customers said they wouldn't visit the area if the market were not located there (48% said they would) indicating a significant proportion of customers who see markets as an important element in deciding where they do their shopping. The highest proportion of those who said they would not visit the area without the market was in Brixton (62%), reflecting the size of the market there compared to the rest of the town centre.

	Yes	No	Don't Know
Leather Lane	47%	47%	7%
Tooting	70%	30%	0%
Brixton	34%	62%	3%
Kingston	31%	23%	46%
Shepherds Bush	45%	55%	0%
Barking	70%	30%	0%
Walthamstow	60%	40%	0%
Lewisham	33%	33%	33%
Deptford	73%	27%	0%
Grand Total	48%	42%	9%

Analysis based on 100% response rate from surveyed customers

Main Reasons for visiting the market

- Leather Lane: 15 out of 15 (100%) of customers answered this question. Customers cited variety of goods available, atmosphere, value, an interesting experience, convenience, a chance to browse and friendly stall holders as reasons to visit the market.
- Tooting Broadway: 9 out of 10 (90%) of customers answered this question. Customers cited variety of goods available, value, quality of service, community spirit, visiting friends, presence of a pet shop, clothes, shoes, food stalls, convenience, and somewhere to spend some time as reasons to visit the market.
- Brixton: 26 out of 29 (90%) of customers answered this question. Customers cited going to lunch, availability of fresh fruit/veg and foods, variety of produce, value, reputation, specialty foods, regular customer perks, community spirit, atmosphere, and convenience as reasons for visiting.
- Kingston: 13 out of 13 (100%) of customers answered this question. Reasons for visiting the market were given as: having the day off work, presence of a butchers, value, availability of fabrics, opportunity to get out of the house, ambience/atmosphere and reputation of the market.
- Shepherds Bush: 9 out of 10 (90%) of customers answered this question. People cited good fabrics, variety, value, halal meat stalls, passing through/exploring, convenience and availability of fresh fruit as reasons for visiting.
- Barking: 10 out of 10 (100%) of customers answered this question. Convenience, variety, presence of other local stores, atmosphere, multiculturalism, and value were all cited as reasons to visit.
- Walthamstow: 10 out of 10 (100%) of customers answered this question. Variety, size of the market, browsing, fresh fruit/veg, being a regular customer, community feel, convenience, quality of produce, and value were cited as reasons to visit.
- Lewisham: 9 out of 9 (89%) of customers answered this question. Atmosphere, value, number of fruit and veg stalls available, quality, reputation were cited as reasons for visiting the market.

Summary of key points

5.25 It is worth summarising some of the key points from this section.

- Market stalls generally open several days a week, and many operate at different locations across London. It is notable however that, unlike supermarkets, very few markets have responded to changing working and shopping patterns by opening later, and that only a small minority are open after 5.30pm.
- Market trading is a career for many traders, with the average trader surveyed for this study having been in the business for 19 years.

- Correspondingly, market traders tend to be older, with a greater proportion over the age of 40 compared to London's working population as a whole.
- The large majority of traders (81%) are men. While the majority of traders are also White, (58%), a much greater proportion of traders (42%) are from Black and Minority Ethnic backgrounds than the population as a whole (29%).
- While the ethnic composition of some markets' trader communities matches that of the local population, in many markets (five out of nine studied in this research) the traders have different backgrounds to people in the surrounding area.
- A significant minority of traders (a quarter of the total surveyed) are interested in expanding their business. For some this implies opening other stalls (perhaps at another market, as many traders work at more than one); in other cases traders have plans to move into permanent premises. This underlines the value of markets in providing lower risk opportunities for business start-up and market testing.
- While only a small minority of traders (11%) indicated an interest in formal training courses, the large number of traders in London means there could be substantial demand for some training courses in London as a whole (perhaps 800 people are currently interested).
- Nearly two thirds of market customers visit a market at least once a week, illustrating the fact that many people rely on markets for shopping.
- Less than one in ten customers travels to a market by car, with nearly all the rest using some form of public transport. This illustrates the value of markets in providing a form of retail that does not depend on car-use. It is also a likely indicator of the importance of markets to non-car owners, many of whom will be on lower incomes.
- Markets are significant attractors of people to the town centres in they are located in. A large minority (42%) of customers would not visit the town centre if the market was not there.
- It is estimated that customers at markets spent £752 million per year at other shops in town centres. This represents a significant multiplier effect, with market customers spending on average £1.75 in other shops in the town centre for every £1 they spend in the market. While this spend would not necessarily be lost to *town centres as a whole* in London if markets did not exist, it does suggest that a number of individual existing town centres would lose out if their markets were to close.
- While the economic functions of markets are of importance to traders and customers, the surveys further underline the importance of other benefits of markets, for instances as places to browse, enjoy the environment, and interact with other people, as described in previous research.

6. Recent policy developments

- 6.1 This section sets out key aspects of the recent policy debate and initiatives which bear on the future markets. It summarises recommendations from recent policy reviews and what, so far, has been about them. In doing so it provides context for the recommendations which follow in the next section.

Recommendations from the 2009 House of Commons Inquiry

- 6.2 The CLG Select Committee published the report of its inquiry into traditional retail markets in July 2009. In relation to local government, the report states: *"We do not underestimate the challenge facing local authorities seeking to sustain their markets in the current austere climate. From the evidence we have received, it seems to us that there are two big challenges: finance and management"*.
- 6.3 The report also reordered and endorsed the role of markets in relation to the five policy areas, which had been submitted as part of the Retail Markets Association written evidence. These are:
- The **economic** benefits of markets
 - The **social** benefits of markets
 - Markets and **regeneration**
 - Markets and **health**
 - Markets and the **environment**
- 6.4 The report makes 32 conclusions and recommendations in relation to the benefits of traditional retail markets, realising the potential of traditional retail markets in metropolitan centres, realising the potential of retail markets in medium and small towns, the industry, and the way ahead for central government. These include the following recommendations (our emphases in bold):
- 'We recommend that local authorities **develop a strategic plan** for the development of their markets...'
 - 'By considering markets as part of the wider town centre management agenda and in terms of their ability to deliver a number of strategic benefits, councils may find it easier both to release their own resources for markets, and to obtain financial support from other agencies (regeneration agenda), primary care trusts (the health agenda) and third sector partners (the social cohesion agenda). We recommend that local authorities **think laterally and innovatively** along these lines.'
 - 'A third area that local authorities should, in our view, explore further is **joint financial sharing with local market trader organisations**, with the proviso that the latter in return gain a more strategic role in the managing of their markets.'

- 'We recommend that local authorities with profitable but 'tired' markets consider **prudential borrowing** as a means of revitalising their markets.'
- 'We commend those councils who have already identified **market champions** and urge other councils with markets to adopt a similar model.'
- 'We recommend that councils review their **market management structure** and give careful consideration to the most appropriate organisation for them that recognises the need to realise the wider economic and non-economic benefits of markets and gives weight to public and private sector alternatives.'
- 'We recommend that London local authorities and CLG, whose support will be necessary to ensure that legislative change comes into effect, work together to **change the relevant provisions of the London Local Authorities Act 1990** and other relevant legislation specific to individual London boroughs...' (so as to be given greater powers in respect of their street markets)
- 'We recommend that the industry look in particular at how they can provide further **best practice guidance and support** to lower tier councils operating smaller, local markets and who are more likely to lack specialist market knowledge.'
- 'We urge the Government to **emphasise the wider non-economic benefits that markets can bring** and to encourage local authorities also to take them into account when making planning decisions, both in the PPS document, and in the future iterations of the accompanying good practice guidance.'
- 'We recommend, therefore, that **CLG takes on responsibility for providing a clear strategic central government focus for markets**, and that this is reflected in the portfolio of a named Minister, in the terms of reference of a senior civil servant in the Department and in active engagement with the market industry.'
- 'We further recommend that **CLG lead an inter-departmental working group** to ensure that best use is made of markets as a vehicle to further wider Government objectives as set out in this report.'

The Government's Response

- 6.5 The Department for Communities & Local Government (DCLG) published its response in October 2009, accepting all the recommendations made by the Select Committee in relation to central government. It has established an inter-departmental working group on retail markets, involving senior officials from CLG, BIS, DH, DEFRA, DWP and DCMS and the Food Standards Agency. Other groups have been invited to attend, including the Retail Markets Alliance and representatives of country and social enterprise markets.
- 6.6 The working group will look at issues affecting street, covered, farmers' and country and social enterprise markets and will meet two to three times a year, subject to issues arising. It does not cover car boots sales. It will report both to the Minister for Local Government at CLG and Minister for Regional Economic Policy at BIS, and to the Minister for Food at DEFRA.
- 6.7 The **aims of the working group** are:

- Raising the profile of street, covered, farmers' and country and social enterprise markets with Government departments and show how markets can contribute to the vitality of our town centres and a range of other policy objectives.
 - Provide a forum to discuss policies that may affect markets.
 - Provide a forum for discussion of how all parties can work together to communicate the benefits of markets to a wider audience, and
 - Share best practice, for example, case studies where markets are prospering and learn lessons where they are not going so well to ensure markets contribute to policy objectives, where possible.
- 6.8 The working group will have the power to appoint ad hoc project groups to take forward specific work strands when necessary. The working group may also invite representatives from other Government Departments, practitioners and other interested parties to attend when necessary.
- 6.9 Three project groups have also been set up to develop:
- A good practice guide for market management
 - A business support model for new and existing market traders
 - Guidance on management models for markets.

Planning policy

- 6.10 Recent developments in planning policy at national level and London level are now highly supportive of markets in the context of retail planning policy and town centre management.
- 6.11 At national level, Planning Policy Statement 4 (PPS4) published in December 2009 supports the role for street markets and states that local planning authorities should actively promote competitive town centre environments and provide consumer choice by: “retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement.” (Policy EC4.1)
- 6.12 At London level, the 2009 Draft Replacement London Plan recommends that Local Development Frameworks should: ‘support the range of street, farmers’ and, where relevant, strategic markets, complementing other measures to improve their management, enhance their offer and contribute to the vitality of town centres’
- 6.13 The supporting statement to this policy, at paragraph 4.47, states that ‘The Mayor recognises that street and farmers’ markets can make valuable and distinctive contributions to meeting Londoners’ varied dietary requirements and extending competitive choice and access to a range of goods, as well as contributing to the vitality and wider offer of town centres. The planning system can help address some of these, but broader actions are often required, especially in terms of management and investment.’

Other policy measures

DEFRA Task Force

- 6.14 In October 2009, the Government announced the setting up of a DEFRA Task Force to find ways of increasing the production of consumption of fruit and vegetables in England. Three sub-groups have been set up looking at production, supply chain and consumption, and link to wider Government policy initiatives such as the DoH 5-a-day and Change 4 Life strategies. The markets industry (NABMA) is represented on the task force in relation to wholesale and retail markets.

London Food Strategy and Local Food Infrastructure project

- 6.15 In 2007, the LDA published the Mayor's Food Strategy Implementation Plan. Although limited, the action plan contains some references to markets and 'street-based stalls'. Firstly, the Local Food Infrastructure Project, involving "activities to help wholesale markets modify their practises in order to meet the demand for and supply of sustainable food." The second related to the Greenwich Co-operative Development Agency project to improve existing and open more street-based stalls to provide access to healthy food.

The London Tourism Action Plan 2009-13

- 6.16 The Plan contains the following action:
- Section 5.3 Co-ordination and support. Objective: Improve co-ordination within the tourism industry to enable improvements in the overall visitor experience in London. Key year one actions:
 - Work with street markets to further develop their appeal as visitor attractions
 - Lead agencies – Local Authorities, ATCM, BIDs, marketing partnerships.

London First Retail Commission

- 6.17 In October 2009, the London First Retail Commission published its report – Reinvigorating the High Street: encouraging retail diversity and supporting town centres in London. Section 2.6 relates to Street Markets and how to better integrate them into the surrounding retail offer. It identified the following actions for town centre managers and the London Boroughs:
- Existing street markets could be better managed
 - Identify a 'markets champion' in each borough
 - Adopt a 'whole street' approach, embracing markets and retail frontages
 - Invest in and 'actively manage' markets
 - Provide Town Centre Managers with market training

- Promote the market through special events such as a 'markets week' and one-off promotions
- Ensure markets fit demographic profile of area e.g. a farmers' market in Peckham was inappropriate and traders moved elsewhere

Progress in implementing policy recommendations

- 6.18 It is clear from the preceding section that the potential role and value of markets in supporting and delivering government policy is being increasingly recognised. It is also clear that many of the actions only commenced towards the end of 2009. This section looks at the progress that is being made to co-ordinate policy/strategy and bring about change within London.

The Association of London Markets (AoLM)

- 6.19 Previously made up of London's wholesale markets, AoLM re-launched itself in October 2008, widening its brief to include the London Boroughs/retail markets. In addition to regular meetings it holds an annual symposium to help disseminate policy/strategy/good practice within London's markets. It is a non-membership organisation that relies on the wholesale markets for its administrative support.

The National Association of British Market Authorities (NABMA)

- 6.20 As a member organisation NABMA includes almost one third of the London Boroughs. In addition it supports the AoLM. In June 2009 it also sponsored a one-day London conference by the World Union of Wholesale Markets (WUWM) focusing on retail market policy/best practice. In 2009 NABMA also published promotional document entitled Valuing Our Markets, which was circulated to all member authorities.

Cross River Partnership

- 6.21 In 2007, in conjunction with the National Market Traders' Federation (NMTF), the Cross River partnership published Success in business: Street market case studies. The aim of this was to share good practice and support new and existing market traders by the use of exemplar case studies.

CLG Retail Markets Group

- 6.22 The three project groups referred to in the previous section are currently seeking to recruit participants representing the London market perspective.

DEFRA Task Force

- 6.23 NABMA is represented on the Task Force, and three members of London Food Board are currently participating on the sub-groups.

Recommendations of 2008 LA review of street markets

- 6.24 The 2009 update report on progress made in delivering the recommendations identified the

challenges that still remain.

Recommendations of CLG Committee Inquiry in relation to London legislation

- 6.25 This review has failed to find evidence that this is being progressed.

Mayor's Food Strategy

- 6.26 Progress has been made with the two actions identified earlier.

London Tourism Action Plan 2009-2013

- 6.27 While a small number of boroughs have started to develop strategic plans for their markets, including visitor attraction, consultation for this study suggests that little progress has yet been made against this action.

London First Retail Commission

- 6.28 This review has failed to find evidence that this is being progressed.

Action by Individual boroughs

- 6.29 A number of London boroughs, including Westminster, Waltham Forest, Southwark and Hackney, have carried out strategic reviews of their street markets in the past 12 months, and are at the early stages of implementing change. Kensington & Chelsea has also recently appointed a markets development officer.

Summary of key points

- 6.30 A number of conclusions can be drawn from this review of policy:
- There are a large number of policy and strategy priorities and recommendations relating to markets at national and London level. By way of example, the 2005 NEF report *Trading places* alone contains 40 recommendations. There is, however, sufficient common ground to prioritise and proceed.
 - There is yet relatively little evidence of engagement of London Boroughs/street market management or traders in policy/strategic change.
 - Equally, there appears to be a lack of connection and engagement between borough (street market) managers and private market operators in London.
 - There is a lack of specific management and business guidance for London market managers and traders.
 - In terms of the involvement of organisations in markets it may be a case of 'too many cooks', leading to a lack of co-ordination of policy and strategy across the City.
 - The review found no evidence of London's street markets putting in place co-ordinated plans to capitalise on London 2012.

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Appendix A Town centres and markets

1. London town centres without a market (Source: GLA (2009) Town Centre Healthchecks Annex)

Town Centre	Borough	Designation
Knightsbridge	K&C/Westminster	International
Hounslow	Hounslow	Metropolitan
Edgware	Barnet	Major
Kensington High Street	Kensington and Chelsea	Major
Kings Road East	Kensington and Chelsea	Major
Streatham	Lambeth	Major
Stratford	Newham	Major
Canary Wharf	Tower Hamlets	Major
Wandsworth	Wandsworth	Major
Chadwell Heath	Barking and Dagenham	District
Dagenham & Heathway	Barking and Dagenham	District
Brent Street	Barnet	District
Church End, Finchley	Barnet	District
Colindale/The Hyde	Barnet/Brent	District
East Finchley	Barnet	District
Golders Green	Barnet	District
Hendon central	Barnet	District
Mill Hill	Barnet	District
New Barnet	Barnet	District
Crayford	Bexley	District
Erith	Bexley	District
Sidcup	Bexley	District
Welling	Bexley	District
Cricklewood	Brent/Barnet	District
Ealing Road	Brent	District
Harlesden	Brent	District
Kenton	Harrow/Brent	District
Kingsbury	Harrow/Brent	District
Neasden	Brent	District
Preston Road	Brent	District
Wembley Park	Brent	District
Willesden Green	Brent	District
Beckenham	Bromley	District
Crystal Palace	Croydon/Lambeth	District
West Wickham	Bromley	District
Hampstead	Camden	District
Kentish Town	Camden	District
Swiss Cottage/Finchley Road	Camden	District
Addiscombe	Croydon	District
Coulsdon	Croydon	District
Norbury	Croydon	District
Purley	Croydon	District
South Norwood	Croydon	District

Thornton Heath	Croydon	District
Upper Norwood	Croydon	District
Greenford	Ealing	District
Hanwell	Ealing	District
Angel Edmonton	Enfield	District
Southgate	Enfield	District
Thamesmead	Greenwich	District
Finsbury Park	Islington/Hackney	District
Mare Street	Hackney	District
Crouch End	Haringey	District
Green Lanes	Haringey	District
Muswell Hill	Haringey	District
West Green Road	Haringey	District
North Harrow	Harrow	District
Rayners Lane	Harrow	District
South Harrow	Harrow	District
Stanmore	Harrow	District
Wealdstone	Harrow	District
Collier Row	Havering	District
Elm Park	Havering	District
Harold Hill	Havering	District
Hornchurch	Havering	District
Rainham	Havering	District
Eastcote	Hillingdon	District
Hayes	Hillingdon	District
Northwood	Hillingdon	District
Ruislip	Hillingdon	District
Yiewsley/West Drayton	Hillingdon	District
Brentford	Hounslow	District
Feltham High Street	Hounslow	District
Earls Court Road	Kensington and Chelsea	District
Fulham Road (east)	Kensington and Chelsea	District
Fulham Road (west)	Kensington and Chelsea	District
Kings Road (west)	Kensington and Chelsea	District
South Kensington	Kensington and Chelsea	District
New Malden	Kingston upon Thames	District
Surbiton	Kingston upon Thames	District
Tolworth	Kingston upon Thames	District
Stockwell	Lambeth	District
Downham	Lewisham	District
Forest Hill	Lewisham	District
Lee Green	Lewisham	District
New Cross	Lewisham	District
Sydenham	Lewisham	District
East Beckton	Newham	District
Forest Gate	Newham	District
Barkingside	Redbridge	District
Gants Hill	Redbridge	District
Wanstead	Redbridge	District
East Sheen	Richmond upon Thames	District

Teddington	Richmond upon Thames	District
Whitton	Richmond Upon Thames	District
Camberwell	Southwark/Lambeth	District
Surrey Quays	Southwark	District
Cheam	Sutton	District
North Cheam	Sutton	District
Rosehill	Sutton	District
Worcester Park	Sutton	District
Crossharbour	Tower Hamlets	District
Poplar	Tower Hamlets	District
Bakers Arms	Waltham Forest	District
Leyton	Waltham Forest	District
Leytonstone	Waltham Forest	District
North Chingford	Waltham Forest	District
South Chingford	Waltham Forest	District
Wood Street	Waltham Forest	District
Balham	Wandsworth	District
Praed Street/Paddington	Westminster	District
St John's Wood	Westminster	District
Euston Road	Camden	CAZ Frontage
High Holborn/Kingsway	Camden	CAZ Frontage
Tottenham Court Road (part)	Camden	CAZ Frontage
Cheapside	City of London	CAZ Frontage
Fleet Street	City of London	CAZ Frontage
Leadenhall Market	City of London	CAZ Frontage
Moorgate	City of London	CAZ Frontage
Baker Street (part)	Westminster	CAZ Frontage
Charring Cross Road (part)	Camden/Westminster	CAZ Frontage
Edgware Road South	Westminster	CAZ Frontage
Marylebone Road	Westminster	CAZ Frontage

Appendix B Ethnicity of traders and market areas

Table B 1 Comparison of traders ethnicity and ethnic composition of surrounding ward (2001 Census data)

	traders surveyed	no. of traders who responded	response rate	Asian or Asian British				Black or Black British			Mixed			White		Chinese or other ethnic group	
				Bangladeshi	Ind-ian	Paki-stani	Other Asian	African	Carib-bean	Other Black	White + Black African	White + Black Carrib-ean	Other Mixed	White British	Other White	Chinese	Any other group
Leather Lane	13	13	100%	0%	0%	0%	8%	0%	0%	0%	0%	0%	0%	85%	0%	0%	0%
Surrounding Ward (2001)				14%	2%	1%	1%	5%	1%	0%	1%	0%	2%	50%	18%	2%	3%
Tooting	20	20	100%	5%	5%	15%	20%	0%	5%	0%	5%	5%	0%	10%	5%	0%	5%
Surrounding Ward				1%	7%	4%	6%	4%	7%	1%	0%	1%	2%	51%	12%	2%	1%
Brixton	18	18	100%	0%	0%	6%	22%	0%	0%	6%	0%	6%	0%	50%	0%	0%	0%
Surrounding Ward (2001)				2%	1%	1%	0%	19%	21%	4%	1%	3%	2%	33%	11%	1%	1%
Kingston	18	18	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%
Surrounding Ward				0%	3%	1%	1%	0%	1%	0%	0%	0%	1%	78%	12%	1%	1%
Shepherd's Bush	15	15	100%	0%	13%	13%	27%	0%	0%	0%	0%	0%	7%	27%	0%	0%	0%
Surrounding Ward (2001)				1%	2%	2%	1%	6%	8%	2%	1%	2%	2%	50%	20%	1%	2%
Barking	20	19	95%	0%	0%	37%	21%	0%	0%	0%	0%	0%	0%	37%	0%	0%	0%
Surrounding Ward (2001)				2%	9%	13%	2%	9%	4%	1%	1%	1%	2%	46%	8%	1%	1%
Walthamstow	20	18	90%	0%	0%	33%	6%	6%	0%	0%	0%	0%	0%	39%	6%	6%	0%
Surrounding Ward (2001)				1%	3%	14%	4%	5%	7%	1%	0%	1%	2%	48%	11%	1%	2%
Lewisham	16	15	94%	0%	7%	7%	0%	0%	0%	0%	0%	0%	0%	67%	0%	0%	0%
Surrounding Ward (2001)				1%	2%	1%	2%	8%	15%	3%	1%	2%	2%	52%	10%	1%	1%
Deptford	21	18	86%	0%	0%	11%	0%	0%	0%	0%	0%	0%	0%	61%	0%	0%	0%
Surrounding Ward (2001)				1%	1%	1%	1%	19%	14%	3%	1%	2%	2%	38%	10%	4%	4%
TOTAL	161	154	96%	1%	3%	14%	12%	1%	1%	1%	1%	1%	1%	51%	1%	1%	1%
LONDON BREAKDOWN (2001)				2%	6%	2%	2%	5%	5%	1%	0%	1%	2%	60%	11%	1%	2%

Appendix C Summary of issues at surveyed markets

Overview

2. A range of issues were discussed with traders at the nine markets surveyed for this research, in part because it was necessary to have a broad discussion with them before addressing some of the more sensitive issues about customers and other aspects of their business. This section provides a brief profile of each market and records some of the common issues raised by traders in each market.
3. We have not made any attempt to verify any of the complaints or criticisms made, or to judge whether they are reasonable or not, but have included them here for interest.

Leather Lane

4. Leather Lane market is sandwiched between Holborn and Clerkenwell Road, and its customer base is largely the lunchtime business trade.
5. The most cited was the lack of advertising and promotion that the market receives. Located in the heart of London, the market should be able to take advantage of the hundreds of surrounding businesses, yet finds that even this crowd is declining. One trader suggested that posters in the foyers of the larger office buildings would be beneficial to penetrate the transient workforce employed on short-term or temporary bases. It is clear, though, that the market is largely unknown on a wider scale. Even one trader admitted she had not known about the market until she began research into becoming a trader.
6. A number of traders also complained about the way Camden Council managed the market, saying that lack of council interest in recent years had contributed to its decline. The recent cold months have dented trading figures further. A suggestion of reduced pitch rents during these quieter months might allow more stalls to continue to function. Equally, by allowing existing stalls to spread out when neighbouring pitches are empty would seem to benefit the market two-fold; allowing traders to make their stock more presentable, and it would give the impression that the market is more densely occupied. This, currently, incurs the full cost of a second pitch.
7. Another prominent issue was the congestion charge. On quiet market days, this is a significant drain on takings, and, when the weather is poor, the total costs of travel prevent many from setting up stall due to the reduced number of customers.
8. Leather Lane is open to traffic throughout the day which creates safety issues for traders and customers.

Tooting

9. Tooting market is a covered market located just off Tooting High Street, and is served by a large number of bus routes and the Northern Line.
10. The prominent theme to emerge from traders was that of maintenance and upkeep. The market, on first appearance is considerably run-down and uninviting for customers. The two entrance arcades leading from the high street are occupied by tired looking stalls. Traders were keen to see improvements to the market frontage.

11. A large proportion of those surveyed had occupied stalls within the market for a number of years, and were keen to comment on what a noticeable decline in the condition of the market. The traders were also critical of a new management company that had taken over the running of the market, increasing rents/rates. Several traders said they were looking to leave the market as soon as their lease expires.
12. Another issue raised was the lack of advertising for the market; increasing footfall would increase takings. One respondent was independently advertising his business in an attempt to increase trade. A number of traders relied on an established customer base and their reputation rather than a casual passing trade.
13. Tooting has also seen the recent introduction of a Primark and TK Maxx to the town centre that has hurt the market. Also, the lack of customer parking was identified as an issue that deterred customers.
14. All respondents occupied their stalls in the market for 6 days each week.

Brixton

15. Brixton Market spans five distinct locations; the street markets of Electric Avenue, Pope's Road, Station Road, and the two covered markets of 'The Village' and 'Market Row'. The market is well known for its specialist Afro-Caribbean produce.
16. The locale has expansive transport links including London Underground, London Overground, and high bus frequency towards central London and Croydon.
17. The over-arching problem identified by traders was the issue of car parking. Brixton market has, for many years, had access to a large multi-storey car park attached to the local Leisure Centre. This was closed in December 2009 due to health and safety concerns with the structure. The initial proposal was closure for 2 months, but work has only recently begun. All traders said that this had notably damaged takings, with one claiming trade had been halved.
18. Although other responses varied, a number criticised the management of the market. Rents were said to be continually rising, reducing profits further. One commented that there was no 'overall plan' for the market, which had led to disorganisation of stalls in terms of positioning and commodities sold, and that communicating issues to the management was difficult.
19. Some mentioned that policing of the area had improved conditions where drug dealing and crime had been an issue in the past.
20. A large proportion of the traders surveyed had traded at the market for a notable number of years and operated solely in Brixton. Because of this, they appeared to have a considerable interest in the market's future. Traders acknowledged that times were difficult, but most appeared to be getting by, with the hope that the warmer months would improve takings.

Kingston

21. Two markets function in Kingston. The charter market in the market square is open 6 days a week, and a much larger market operates in the bus station car park on a Monday morning.
22. The charter market consists of approximately 25 permanent stalls.
23. Poor trade in the market was blamed by traders on the way the council runs the market, and several traders described friction between traders and officials. They claimed the council

wants to sell the market to a private management company, but has not consulted traders about these plans.

24. One trader mentioned that removing the restrictions on Sunday trading would have a significant positive impact on takings.
25. A second issue identified at the charter market was the loss of local shops: Woolworths, Borders and a branch of Nationwide. These large stores attracted significant footfall to the market locality, and now many shoppers have no reason to visit the market square which is beyond the main shopping street.
26. The Monday morning market has upward of 100 stalls, selling a wide range of goods.
27. The main issue identified here was a need for advertising. The opening hours of the market, however, defined the type of customer the market attracts; generally the elderly and unemployed, with traders acknowledging that takings were generally small.
28. The location of this market slightly out of the town centre is also detrimental to attracting passing trade.

Shepherd's Bush

29. Shepherd's Bush market has a long successful history, though what was argued by traders to be poor management has led the market to become run-down and cluttered.
30. The management has allowed, according to the Chairman of the Tenants Association, stalls to increase in size, which in turn has created problems with drainage, congestion and security in the market.
31. A lack of security was mentioned by several traders, but improvements were being made, with CCTV installed in recent weeks.
32. Parking was identified as the key problem. The Westfield shopping centre has been provided with significant parking capacity whilst the market has seen local restrictions change to price out those who would commonly use the market. Making the surrounding parking significantly cheaper or free would increase the number of shoppers, and could also attract the footfall of Westfield shoppers to the market as they look for cheaper parking.
33. The market has been neglected, with thoroughfares and frontages allowed to deteriorate. Several traders mentioned the lack of facilities put customers off.
34. An increase in advertising was mentioned; according to one trader the name of Shepherd's Bush Market tube station (named in 2008) is the only form of advertising the market receives. The large placards bearing the market's name are also relatively new and were a result of efforts by the traders association.
35. Two traders requested that opening hours be enforced, as the sporadic opening of various stalls damages the reputation of the market because of unreliable trading.

Barking

36. Barking town centre is witnessing significant investment as part of the 'Urban Renaissance in East London'.
37. Barking market is situated along the main shopping street in the centre of town; a short walk from the overground, underground and bus station.

- 38. The traders at the end of the market furthest from Barking Station appeared happy with conditions and occupied large pitches.
- 39. In the section of the market towards the station, the main issue to arise was that of high rents. Traders did not feel as though they were seeing any investment in the market from their rents, with a lack of facilities such as bins, seating, lighting and toilets. It appeared as though rents/rates were graded downwards the further traders were away from the station, however. This gave reason to those at the far end of the market finding the trading conditions more agreeable.
- 40. A prominent issue that many made reference to was the detrimental effect a change in traffic permissions had had on the market's arrangement. This modification had permitted buses to run down a previously pedestrianised high street where the market had used to exist. The stalls at the far end of the market now see far less passing trade.
- 41. The market, however, was busy with both traders and customers. One trader commented that Charfleets – the management company – were squeezing too many traders into the market, which was adversely affecting trade for established traders.

Walthamstow

- 42. Walthamstow market is located on Walthamstow High Street. It is split into two halves by a road crossing the High Street almost exactly in the middle of the mile long site. Walthamstow central underground and bus station is located just off the upper end of the high street.
- 43. The upper half of the market is densely populated with stalls, whereas the lower half has only a handful of occupied pitches during the week. Some respondents argued that the market should be “compressed”. Also, by reducing rents, respondents thought the market would attract new traders.
- 44. The prominent issue raised by traders was the lack of customer parking, particularly for such a large site.
- 45. A second issue was the lack of advertising the market receives; the Sunday farmers market, which occupies the square near the transport terminal, was promoted by signs and posters and traders didn't know why the same wasn't happening for the daily market.
- 46. Crime and anti-social behaviour was also cited as a problem in the market, with traders requesting an increased security presence.
- 47. Amongst the other issues raised were the existence of a poor reputation, improving the surrounding landscape, and reducing restrictions to allow a wider variety of stalls/goods.

Lewisham

- 48. Lewisham market is located in the pedestrianised town centre, alongside a row of high street shops and an indoor shopping mall, and the town centre bus stops are located at the top end of the market. There is, therefore, a large footfall in passing trade.
- 49. The market began as a fruit and vegetable market, but has since evolved to incorporate a number of other commodities, including clothing, hardware and a bakery. The majority of stalls remain as fruit and vegetable, however. One respondent said a wider variety of commodities would attract more trade.
- 50. Despite the large passing trade, the lack of advertising was the most commonly cited issue.

- 51. A number also mentioned anti-social behaviour as a significant problem, particularly as children from the local schools make their way home. Some policing existed, but traders were still finding it an issue as it made customers feel unsafe..
- 52. A controversial issue that many made mention of was the plan to build a canopy over the market. According to traders, the footings for the canopy were installed in 2000, but the roof never materialised and the money raised could not be accounted for.
- 53. Two respondents made reference to inadequate street lighting that hurt trade in the early evenings of winter.

Deptford

- 54. Deptford market consists of two sites; the daily market that occupies the high street, and a second-hand market that occupies the small market square on Douglas Way.
- 55. Almost every respondent attributed the decline of trade in the market to the loss of local parking to the development of a new school. This has also adversely affected traders as they no longer had a yard to keep their vans in.
- 56. A second issue to emerge was safety and security, with a handful of respondents requesting a higher police presence to deter thieves and increase the sense of safety for customers.
- 57. An increase in advertising and signage was also requested to help improve footfall.
- 58. Two respondents also made reference to the lack of facilities in the area, including street lighting and toilets for customers.

Appendix D Questionnaires

Market traders

1. **Type of goods sold:**
2. **How often do you have a stall at this market?**

<input type="checkbox"/> 6 days a week	<input type="checkbox"/> Every two weeks
<input type="checkbox"/> 4-5 days a week	<input type="checkbox"/> Once a month
<input type="checkbox"/> 2-3 days a week	<input type="checkbox"/> Less than once a month
<input type="checkbox"/> Once a week	
3. **Do you operate stalls at any other London market? If so, which and how often?**
4. **Including yourself, how many people work on this stall:**

<input type="checkbox"/> Full-time
<input type="checkbox"/> Part-time
5. **How long have you been a market trader?**
6. **What three things would most help to improve this market?**
 - i.
 - ii.
 - iii.
7. **Roughly how many customers do you expect to serve today?**
8. **On average, how many customers do you serve per week?**
9. **Do you have more customers in the warmer months of the year? If so – how many more customers would you expect to serve then?**
10. **Do you have aspirations for the expansion of your business (e.g. to progress into more formal business premises)?**
11. **Can you think of any training that would help you?**
12. **About the interviewee**

Sex:

<input type="checkbox"/> Male
<input type="checkbox"/> Female
13. **Age**

<input type="checkbox"/> Under 16	<input type="checkbox"/> 40 – 49
<input type="checkbox"/> 16 – 19	<input type="checkbox"/> 50 – 59

- | | |
|----------------------------------|---------------------------------------|
| <input type="checkbox"/> 20 – 29 | <input type="checkbox"/> 60 – 74 |
| <input type="checkbox"/> 30 – 39 | <input type="checkbox"/> 75 and above |

14. **Do you consider that you belong to any ethnic minority?**

White

- ☐ British
- ☐ Other White background
- ☐ Bangladeshi

Mixed

- ☐ White and Black Caribbean
- ☐ Any other mixed background

Black or Black British

- ☐ Caribbean
- ☐ African
- ☐ Any other Black background

Asian or Asian British

- ☐ Indian
- ☐ Pakistani
- ☐ Other Asian background

Chinese or other ethnic group

- ☐ White and Black African
- ☐ Chinese
- ☐ Any other group

Customers

1. **Have you or are you going to shop today at the market?**

If no, end the interview

2. **How often do you visit the market?**

- | | |
|---|---|
| <input type="checkbox"/> More than 3 times a week | <input type="checkbox"/> Once a month |
| <input type="checkbox"/> 2-3 times a week | <input type="checkbox"/> Occasionally |
| <input type="checkbox"/> Once a week | <input type="checkbox"/> This is my first visit |
| <input type="checkbox"/> Every fortnight | |

3. **How did you travel to the market today?**

- | | |
|----------------------------------|-------------------------------------|
| <input type="checkbox"/> On foot | <input type="checkbox"/> By train |
| <input type="checkbox"/> By car | <input type="checkbox"/> By bicycle |
| <input type="checkbox"/> By Bus | Other: |
| <input type="checkbox"/> By tube | |

4. **What three things would most help to improve this market?**

i.

- ii.
- iii.
5. **How much will you spend today at the market in total?**
6. **How much will you spend today at the market on food?**
7. **Will you spend money in any other shops in this area today?**
- ☐ Yes
- If yes, how much? £ _____
- ☐ No
- ☐ Don't know
8. **If the market wasn't here – would you come to the shops in this area anyway?**
- ☐ Yes
- ☐ No
- ☐ Don't know
9. **What are the main reasons you shop at this market?**
10. **About the interviewee**
- Could we ask the first digits of the postcode you live at?**
11. **Sex:**
- ☐ Male
- ☐ Female
12. **Age**
- | | |
|-----------------------------------|---------------------------------------|
| <input type="checkbox"/> Under 16 | <input type="checkbox"/> 40 – 49 |
| <input type="checkbox"/> 16 – 19 | <input type="checkbox"/> 50 – 59 |
| <input type="checkbox"/> 20 – 29 | <input type="checkbox"/> 60 – 74 |
| <input type="checkbox"/> 30 – 39 | <input type="checkbox"/> 75 and above |
13. **Do you consider that you belong to any ethnic minority?**
- | | |
|---|--|
| White | Asian or Asian British |
| <input type="checkbox"/> British | <input type="checkbox"/> Indian |
| <input type="checkbox"/> Other White background | <input type="checkbox"/> Pakistani |
| <input type="checkbox"/> Bangladeshi | <input type="checkbox"/> Other Asian background |
| Mixed | Chinese or other ethnic group |
| <input type="checkbox"/> White and Black Caribbean | <input type="checkbox"/> White and Black African |
| <input type="checkbox"/> Any other mixed background | <input type="checkbox"/> Chinese |

☐ Any other group

Black or Black British

- ☐ Caribbean
- ☐ African
- ☐ Any other Black background

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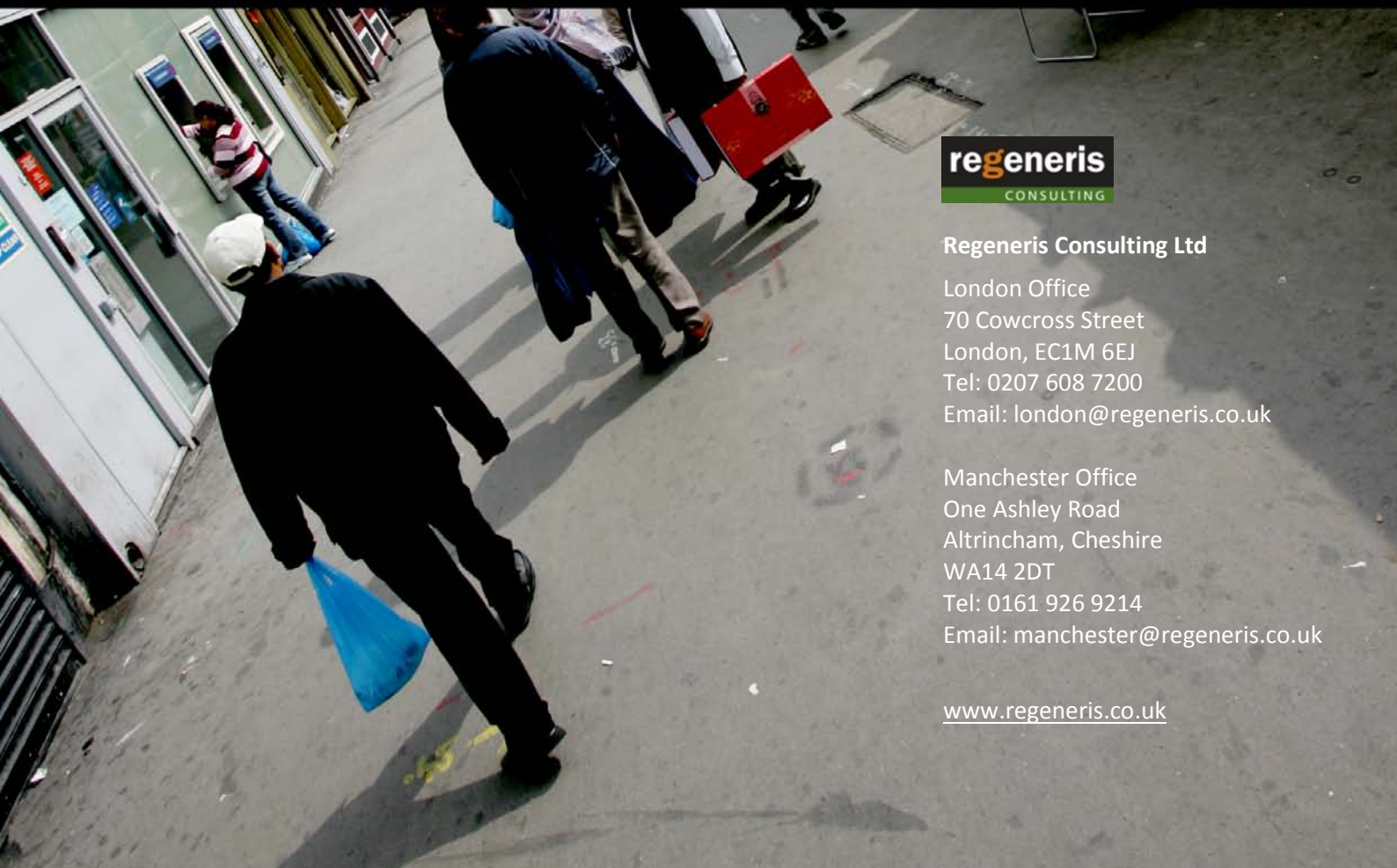
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Appendix F Consultees

We are grateful to the following for their input into the research:

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