

# Exploring Attitudes to Farmers' Markets

Growing the success of Irish food & horticulture

*Bord Bia*  
Irish Food Board

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## Section 1: Introduction and Background

Many Irish food producers and food businesses start selling their produce in their local area by establishing themselves at a Farmers' Market selling to the local community since it is their closest and most accessible market. It makes perfect sense to sell directly to the local community in terms of marketing and selling their product as well as building key relationships. It also gives the businesses invaluable experience that they can use as the company grows. Therefore the Farmers' Market is arguably one of the most important distribution outlets for small food producers in Ireland today.

Farmers' Markets benefit the producer, the consumer, the environment and the local economy. They are an important route to market for good producers and an integral part of their local communities throughout the country. However, there has been very little research carried out in the area of Farmers' markets in Ireland.

Following on from rapid growth in popularity during the cash-rich days of the Celtic Tiger era, Farmers' Markets can be expected to have been affected by the current slump in consumer spending.

For this reason Bord Bia commissioned research to gain an in depth up to date understanding of the Irish consumer perspective on "Farmers' Markets". There was a need to assess and evaluate the long-term viability of Farmers' Markets as a route to market for small producers and the value that they represent to the Irish Artisan food and drink sector.

The research involved surveying Market Organisers and Traders, as well as understanding consumers and the role that Farmers' Markets play in their lives.

## The Research Approach

Our research partners were Behaviours and Attitudes, who covered the quantitative research, and Ideaction who were responsible for the qualitative.

The quantitative research approach was extensive, including in-depth telephone interviews with 20 market organisers and 204 face to face interviews with traders. Respondents were surveyed in relation to overall market performance, level of consumer footfall, revenue and revenue variations according to season and stall performance.

The objective of the qualitative research was to establish what shoppers look for in a market and whether or not this is currently being achieved by some or all of the markets. A qualitative approach was deemed the best way of capturing the emotional elements of how a market fits into its community and why it is deemed important (or not). 6 focus groups were carried out, 3 with consumers who regularly visit Farmers' Markets and 3 with consumers who do not. During the group discussions, respondents visited the local market and made purchases with a cash sum that was provided to them which helped to achieve the objective of understanding purchase behaviour and buying preferences whilst also understanding attitudes to value for money.



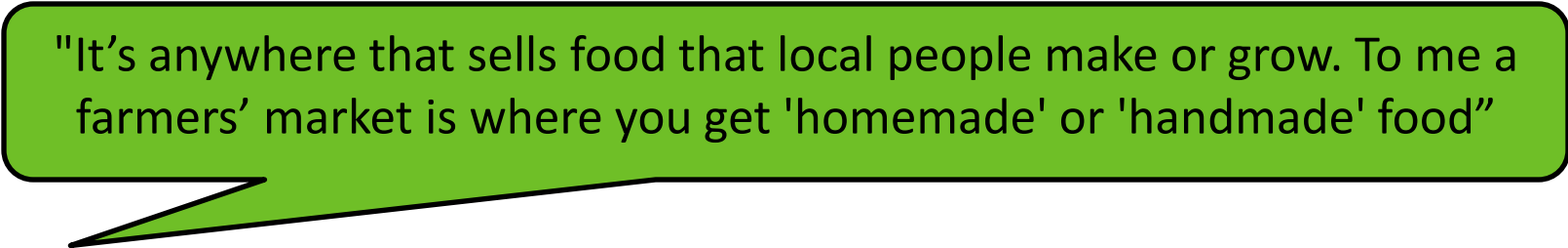
## Section 2: Components of Farmers' Markets

Consumers perceive Farmers' Markets as the best source for local meat, fruit and vegetables and by association the best source for packaged goods such as cakes, jams, cheeses etc. This is because Farmers' Markets subconsciously communicate authenticity, purity and naturalness.

However a Farmers' Market doesn't necessarily have to stock produce that comes direct from Farmers'. In fact the definition of a Farmers' Market has become much looser than that as consumers use the term to describe any marker that sells "local Artisan or craft foods" or any locally produced food.

Food is central to the consumer definition. However the food on-sale can be "raw" food delivered straight from the farm gate or at times quite "processed" albeit from a small producer.

Below is quote that describes the definition of a Farmers' Market by consumers.



"It's anywhere that sells food that local people make or grow. To me a farmers' market is where you get 'homemade' or 'handmade' food"

## Farmers' Markets Components

Below is a list of the five essential components of a Farmers' Market as examined by consumers. Each component means something different to each consumer and affects their perception of Farmers' Markets.

Consumers use these components to evaluate the experience and offerings of a Farmers' Markets thus offering up opportunities and barriers to increase consumer footfall.



## Component 1: Food

### The obvious essential component...

Food is the central component of a Farmers' Market, it is what attracts and restricts consumers to and from a market. Consumers look for things that are 'handmade' and 'homemade'. Food is expected to be 'imperfect' at times since the majority of the food is organic and raw the food is presented in its most natural form thus can be viewed as "imperfect" , however imperfections are to be celebrated.

For example at a Farmers' Market the consumer likes 'seeing the dirt on the carrots'. Why? Because there is a greater sense of the products being fresh directly from the ground.

Ultimately that is what consumers are most interested in here: fresh food. This is the case with respect to both 'raw' foods and packed foods on sale. The consumer wants to believe they are buying freshness and the benefits of freshness such as 'taste' and even 'health'.

Farmers' markets are temples of fresh food and the consumer believes they are accessing a superior product as a result...

**INSIGHT: Consumers want Farmers' market produce for 'freshness'**

## Component 2: Localness

### Localness helps deliver freshness but there are other benefits too...

Although the majority of consumers are concerned with the food being “fresh”, some consumers were interested in the concept of food miles and ensuring food travels as little as possible before its it eaten.

Consumers could see the benefits for the environment by selling to the local community and avoiding food miles but, consumers who are conscious of this trend are more interested in preserving the quality of the food. This idea of localness is reinforced in the role that “shopping local” can have in supporting local business and generating employment within the local economy.

The component of localness is particularly relevant today as a result of Ireland’s difficult economic circumstances – the IMF/EU bail-out occurred during the fieldwork – which has created a strong sense of ‘duty’ to the local economy .

Many consumers expressed a strongly-held desire to support local people and a Farmers' market is an obvious and transparent way of doing so. However, this desire is only followed through on if the consumer feels they have the financial means to do so...

**INSIGHT: Consumers want to support local people and producers – if they can afford it**

## Component 3: Quality

### Farmers' markets should be a destination for top quality food...

Quality is a central component of how consumers define the 'offer' at Farmers' markets; the belief being that food sold at these markets is, or at least should be, 'top quality' and the best quality organic produce on offer. .

Part of this perception is driven by the immediacy of contact between producer and purchaser. In many cases the stall-holder is the producer of the food on sale and so acts as guardian of quality and can interact directly with the consumer.

There is a huge amount of consumer trust built into their relationship with Farmers' markets. The consumer trusts that the producer keeps standards to a high level and 'assumes' that stall-holders at Farmers' markets are subject to the same health and safety regulations as mainstream retailers/producers.

In fact, the belief is that food at a Farmers' market will be of superior quality to food on-sale in supermarkets. The belief being food is more 'pure', more 'organic' and generally more 'cared for'.

**INSIGHT: Quality can be a purchase trigger but also a purchase barrier to 'non-foodies'.**

## Component 4: Value

### Even those seeking top quality seek great value

It is important to make a distinction between price and value when exploring this fourth component of the consumer definition of Farmers' markets as consumers today realize that a cheaper price does not always mean value.

Consumers were keen to point out that the quality of the food they could buy at Farmers' markets – combined with some of the surprisingly good 'deals'- made shopping there great value.

For the regular market-goer the relationships that they build up with stall-holders, is the key to unlocking better value. The personal touch associated with Farmers' markets means it is possible to negotiate and bargain.

However, the converse is true at many 'packed' food stalls such as jams, chutneys or pickles. At these stalls the price is usually non-negotiable and consumers aren't convinced that value will necessarily be on offer.

**INSIGHT: Consumers want 'extra' value at fruit, veg, meat, fish and other 'raw food' stalls**

## Component 5: The Experience

### Farmers' markets are a 'break' from the norm of mainstream shopping

Unlike many typical mainstream grocery shopping experiences, Farmers' markets tend to be more 'relaxed' and a break from the conventions of daily life

Part of this is driven by the more personal nature of interactions between the stall-holder and the customer.

However, the total experience of visiting a Farmers' market may not always be a positive one. Many consumers can find themselves feeling a little 'intimidated' by the experience – particularly if they are concerned about price and not being able to afford products on offer.

The strong 'food quality' dimension of the Farmers' market experience can also create an image of 'food snobs' around many markets and this experience can also be off-putting.

**INSIGHT: Consumers want to 'slow down' when they visit a Farmers' market...**

## Section 3: Perceptions and Sector Imagery

### Farmers' Markets Sector Imagery and Perceptions

The following pages depict six main components of how consumers perceive Farmers' Markets. These six components explain the imagery associated with this sector and what Farmers' Markets mean to the consumer. This also helps to segment different consumer profiles such as the “organic” consumer or the “foodies”.





Not for Me



Word Association

Posh, Snob, Money, Expensive, Pricey, Not for families, Yuppies

Underlying attitude

“Farmers' Markets are not for ordinary people”

Key Driver

Perceived Poor Price Comparison

Issue of Opportunity

Potentially significant issues as it can act as a barrier to adoption for new consumers

The “not for me” group displays the only negative perception of Farmers' Markets. Some consumers think that Farmers' Markets have become a status symbol for the more well off and that they are not targeted at “ordinary people”. The main driver behind this thinking is the perception that prices are high in comparison with other outlets. This poor price perception should be rectified as it can restrict access to new consumers.



For Foodies



Word Association

Foodies, Cooks, Chefs, Experts, Serious about

Underlying attitude

“Farmers' Markets are for people who are confident with food”

Key Driver

Perceived dominance of “raw” food ingredients in product mix

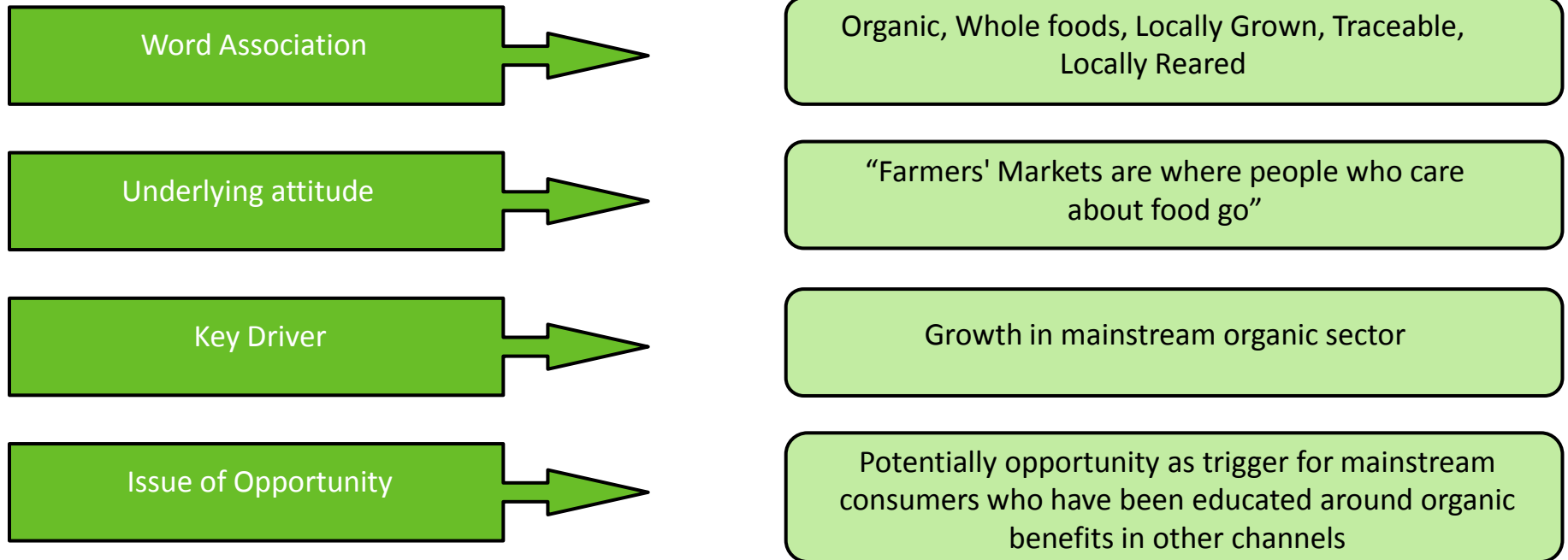
Issue of Opportunity

Potential barrier to adoption for new consumers who are less confident with food preparation

“For Foodies” is a positive perception that Farmers' Markets are for enthusiastic foodies and cooks who are passionate and confident about food. The main driver behind this perception is the dominating availability of raw food in the product mix, however this driver also acts as a potential barrier to those consumers who wouldn't be as confident with food preparation, particularly preparing a meal from scratch.



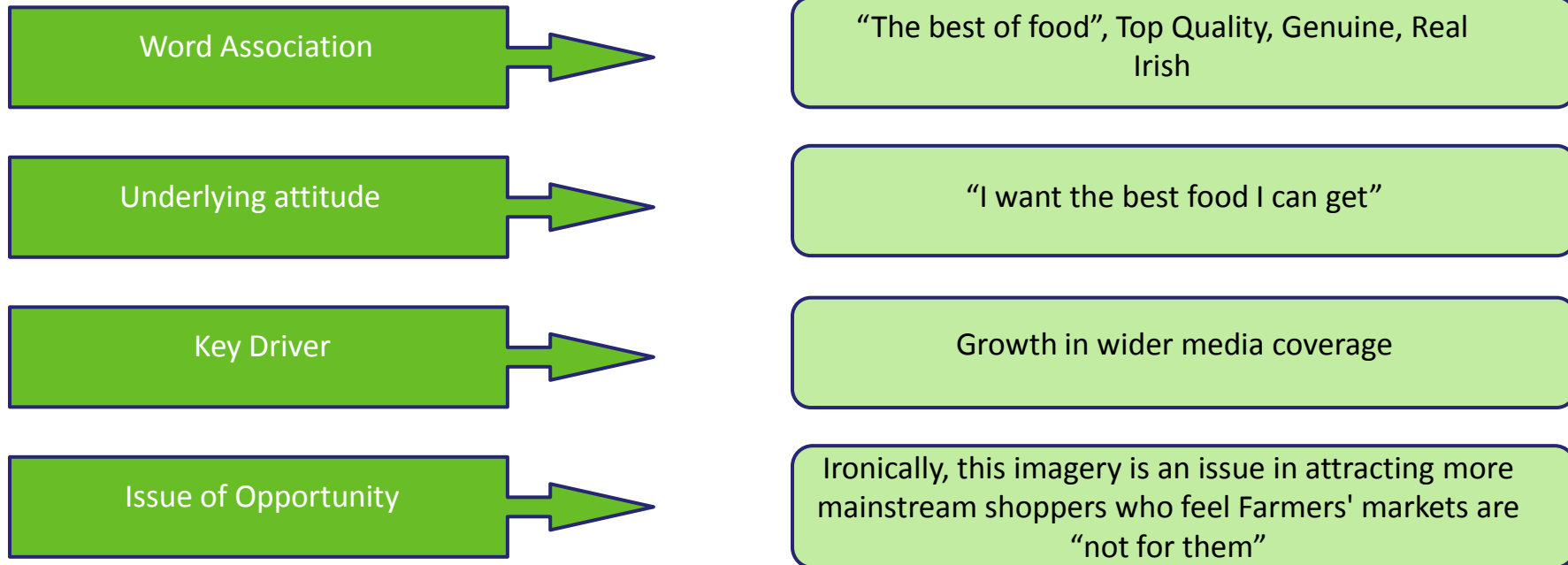
Organic



As one would expect, the perception that Farmers' Markets were strongly “organic” arose following discussions with consumers. The driver of this perception was the increasing awareness and popularity of organic produce in the mainstream sector and multiples. The opportunity arises to attract more consumers from the mainstream organic channels, consumers who have already been educated around the benefits of organic.



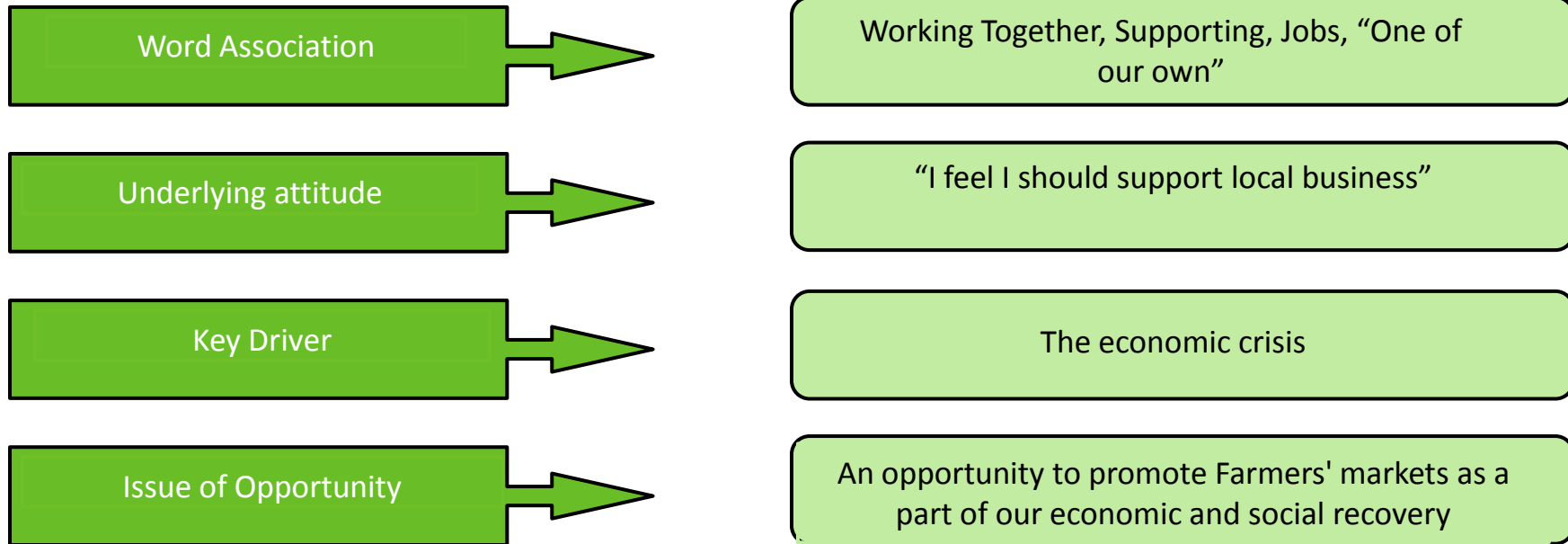
**The Best Quality**



Closely following the perception of “organic” we found respondents to perceive Farmers' Markets as having the “best quality” food and produce. With the increase in growth of Farmers' Markets, they have also experienced growth in a wider media coverage which is driving this perception at the moment. The resulting opportunity is in targeting those “not for me” consumers and attracting them away from their mainstream shopping habits by highlighting the best quality produce available at Farmers' Markets.



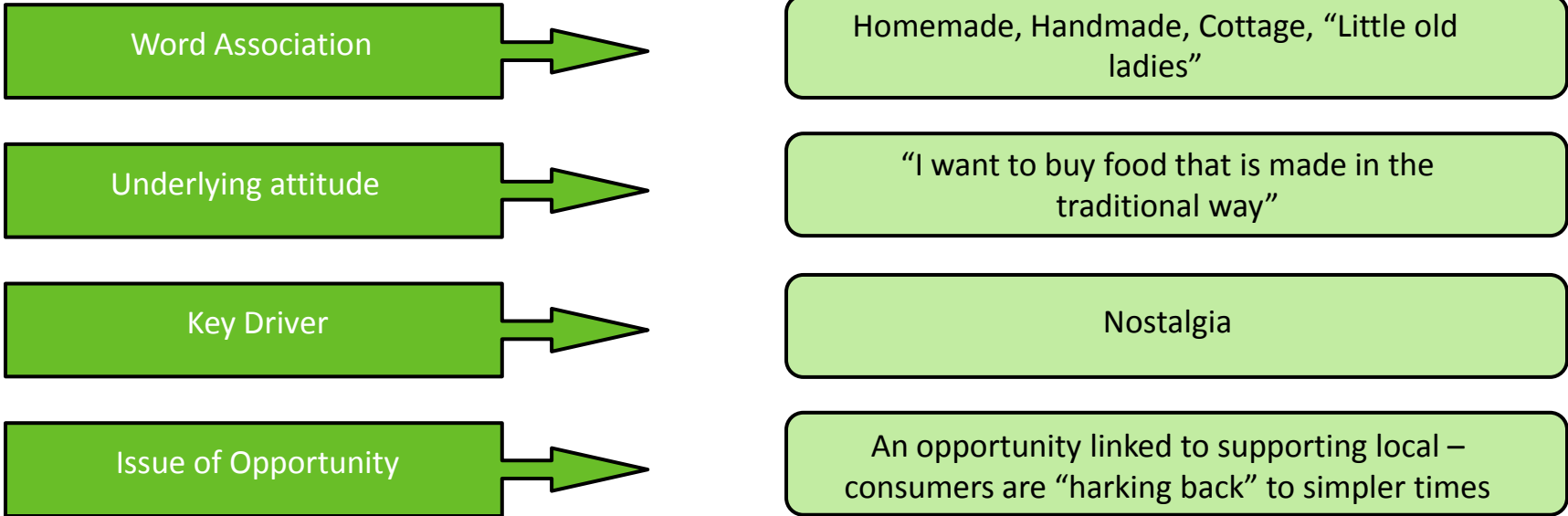
# The Community



Farmers' Markets provoke imagery and sentiments about the local community since it relies on the community to function but also for whose benefit it exists. Consumers have begun to pay more attention to local issues and the community around them due to the current economic climate, which is the key driver. This perception prompts the opportunity of promoting Farmers' Markets as a way of beginning economic and social recovery.

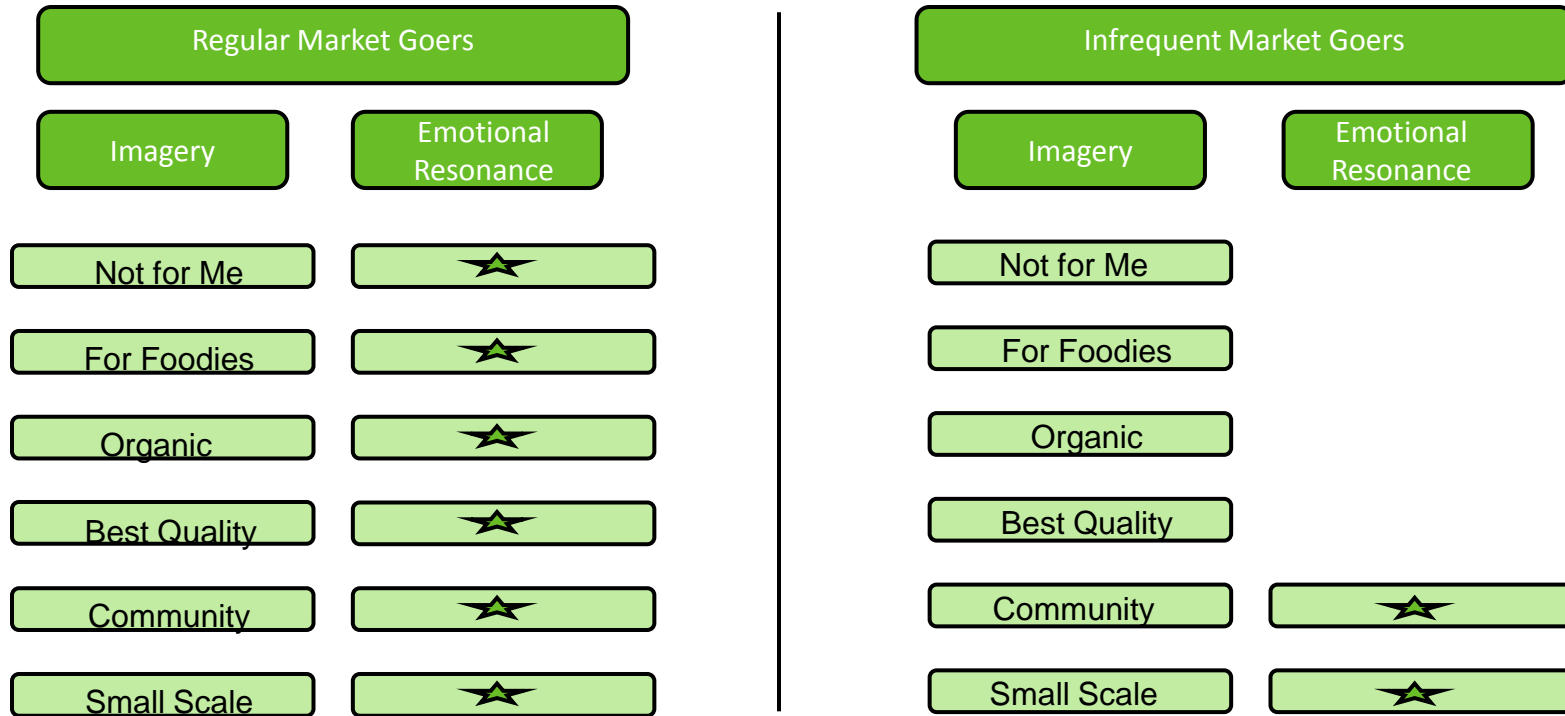


**Small Scale & Homemade**



Farmers' Markets and their produce provoke nostalgic imagery of “little old ladies” cooking and selling homemade and handmade goods. It is this nostalgia that helps to drive the sector as people visit the markets as a reminder of tradition and the simpler more authentic times of the past. This nostalgia also presents the opportunity of attracting more consumers by playing on these nostalgic, traditional themes.

# Impact of Sector imagery to Consumers



Here we can identify the impact of the sector imagery on Farmers' Markets consumers, both regular and infrequent market goers. It is clear that all of the sector imagery discussed has an emotional appeal to the regular market goer. However the sector imagery does not resonate with the infrequent market-goers and it is this challenge that should be tackled in order to encourage more frequent visits and new consumers.

**IMPLICATION: Farmers' Markets need to find more sector imagery that resonates with infrequent market goers**

# Section 4: The Farmers' Market Marketing Mix



In this section we look at consumers reactions and perceptions of the marketing mix under the five variables of Price, Product, Promotion, People and Place. It is necessary to identify how each of the variables of the marketing mix are perceived by consumers in the hope that insights will be generated which will result in improved functionality and best practice at markets.

# PRICE

## Price is a major concern for consumers...

Given some of the sector imagery we have detailed previously, it is hardly surprising to learn that consumers' perceptions of prices at Farmers' markets can be somewhat negative. The focus on 'organic' and 'quality' means that many consumers – particularly those who don't regularly visit markets – assume that prices at Farmers' markets are likely to be prohibitive. Equally, the 'foodie' imagery associated with Farmers' markets creates a sense of 'high cost' around the sector as a whole.

## But cutting out the middle man should mean lower prices

This perceived 'high cost' component of the Farmers' market sector image is actually at odds with what many consumers think could be a potential 'benefit' of shopping at Farmers' markets. Many of the consumers we met suggested that there is 'no reason' why food should be more expensive at a market – particularly fresh food like meat and vegetables. The idea of 'farm gate' selling lends itself to these products being very competitive on price.



**INSIGHT:** Consumers want demonstrable evidence that 'buying direct' from a farmer is saving them money!

# At the market: the role of price signage

## Pricing signage and labelling

We found that amongst both regular market goers and less regular market goers, one issue consistently revealed itself as a 'fundamental' issue, that is the role of price labeling and signage. Many of the market stalls we visited had items on display with no prices. Whilst some consumers are confident enough to enquire about prices and even negotiate with stall-holders – most consumers struggle with this idea. The reasons are pretty deep rooted...

INSIGHT: Consumers want to know prices at market stalls without having to ask.



## Why is price signage so important?

### Farmers' markets are a social setting

Enquiring about prices and, potentially, not being able to afford a purchase is a very embarrassing situation for consumers. Consumers are used to buying food in full knowledge of the price, without having any form of social discourse with the seller or producer. Farmers' markets re-frame the purchase of food for consumers into a more 'socially sensitized' context. The consumer, at a Farmers' market, is exposed to a heightened sense of social pressure. In many ways, this makes the purchase process at a Farmers' market unique. Consumers can read a menu before entering a restaurant, they can read prices on shelf in a supermarket. The potential for social 'inadequacy' at a Farmers' market is much greater and this can be a significant barrier to many consumers visiting.

## Before the market: roadside signage

### Roadside signage tends to announce a market date/time and little else

Many of the consumers we met noted how the roadside signage at Farmers' markets rarely – if ever – advertised prices or 'special offers'. Yet the reality is, Farmers' markets compete with supermarkets who all spend vast sums advertising their 'offers' on meat, veg, fruit and a host of other foods. The consumer doesn't expect Farmers' markets to compete with supermarkets in terms of the advertising budgets available. But if a Farmers' market can offer a 'deal' to consumers on foods then they suggest that it should use its road-side signage to do so.



Regular market goers know they can get 'bargains' at a Farmers' market – and everyone loves a bargain (even those who are driven by 'quality'). But Farmers' markets that don't talk openly about the value for money they offer will remain 'not for me' for the majority of consumers...

**Product**

### Signage can play a key role here too..

Many of the consumers we met expressed the view that they remained uncertain about the origin of some produce on sale at Farmers' markets. For this reason, signage can play a key role with respect to the 'product mix'. Consumers are on the lookout for 'local' names and even 'national names' – particularly with respect to Fruit and Veg. Irishness is an important issue for some consumers and there is a suspicion that some fruit and veg at Farmers' markets is imported. Whilst many fruits will be accepted as imports, consumers struggle with the idea of imported vegetables on sale at an Irish Farmers' market – because many are buying into the idea of the market 'cutting out the middle man'

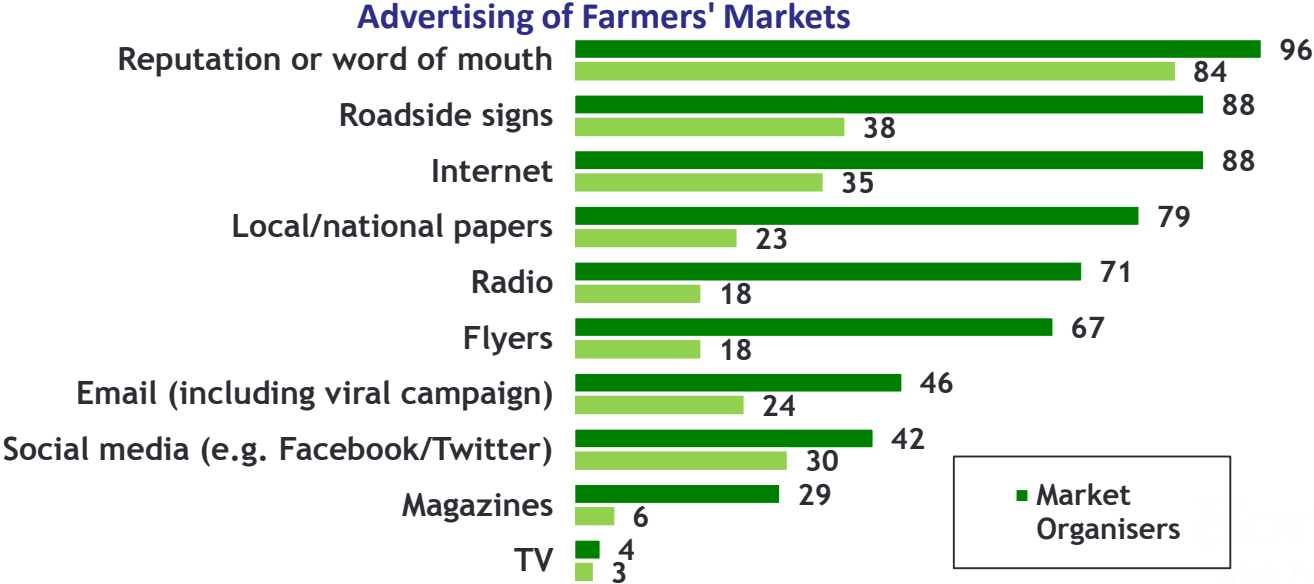
**IMPLICATION: Farmers' markets should 'signal' food origin as much as possible using signage.**

# Promotion

## Signage doesn't have to be sophisticated...

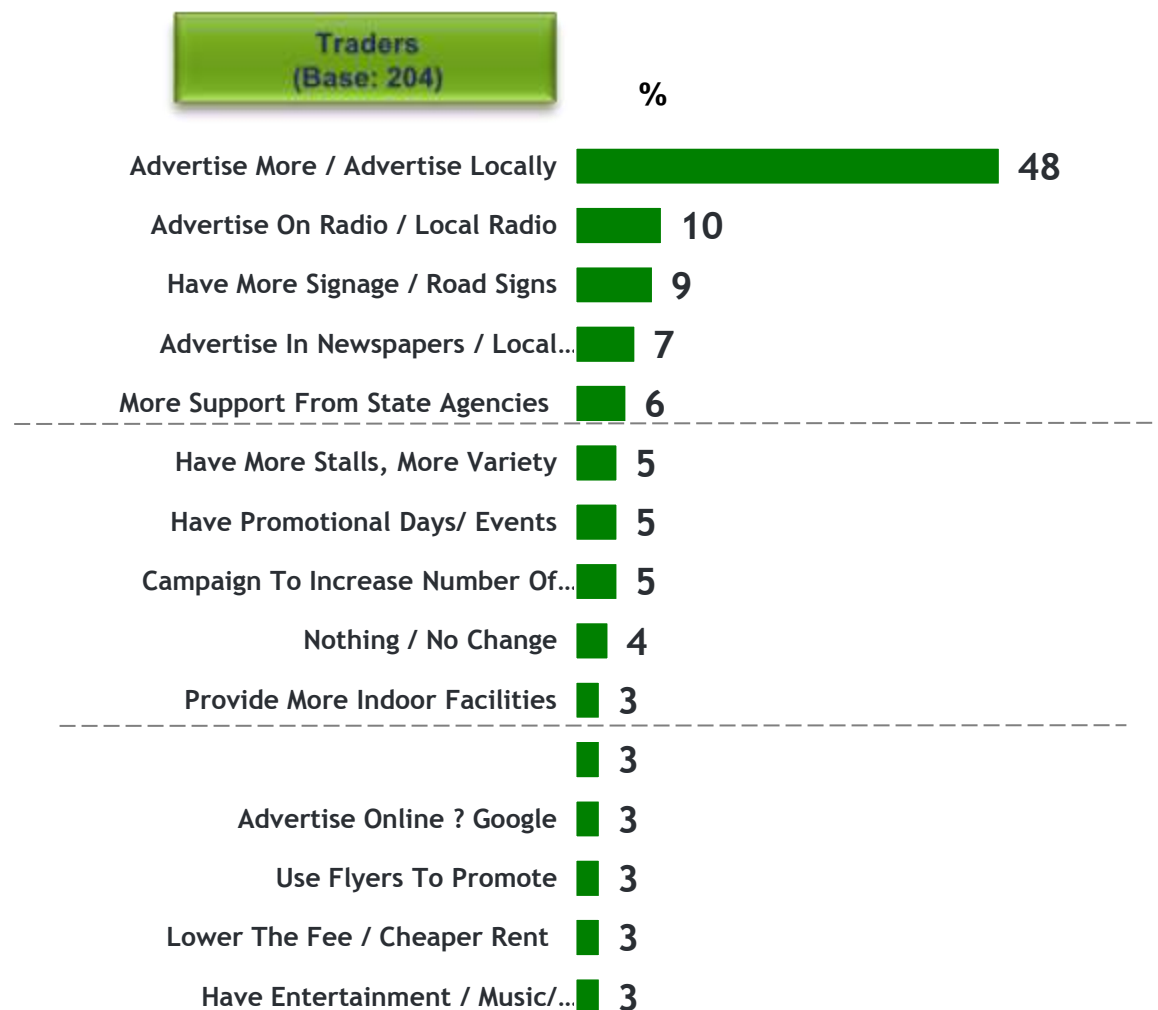
...but it does pay to advertise. Consumers are bombarded by marketing messages almost every minute of every day. So one could be forgiven for thinking Farmers' markets can't compete. Yet some very simple marketing/advertising messages around Farmers' markets can cut through the advertising noise. Farmers' markets have the advantage of appealing to consumers sense of 'local and community spirit'. So flyers or roadside posters that 'dial-up'. Those messages can resonate. Likewise, road-side signage that say 'more' than just the date and time of a market can be effective. For example, road-side signage announcing Price offers could cut through. And local media can also play a role...

When we asked market organisers and traders how they promoted their market/stall and found that word of mouth was the most popular method. Market organisers had the majority of responsibility for promotions as expected, however traders also undertook promotion activities with the usage of road signage and also a substantial amount used social media to advertise their stall.



# Suggestions: Developing the Farmers' Market in Next 12 Months

Base: All market traders



Market traders were asked what kind of promotion methods they would like to see the Market Organisers using in the next 12 months to promote the Farmers' market. Half of traders would like to see an increase in promotional activities with a focus on advertising locally. A quarter of market organisers agree with this however nearly a further quarter believe that there should be an increase in marketing activities on a national level.

# People

## As a highly social environment, stall-holders are critical...

stall-holders are a critical element of the marketing mix at a Farmers' market. They are simultaneously sales people, Farmers', food critics, cooks and confidants to the consumer – not a easy role for one person to pull off. As with any social situation, consumers will differ in their reaction to individual stall-holders but generally consumers are open to 'out-going' and 'friendly' stall-holders. The biggest fear consumers have about stall-holders is of the 'hard sell' – stall-holders that engage consumers without trying to sell can fare better. In fact, the stall-holders that let traditional marketing material like 'signage' do the selling for them seem more approachable.



IMPLICATION: stall-holders can spend more time talking about products and their strengths if they don't have to talk about prices.

## The role of hygiene: Meat hygiene will always be a focus, but its not the only area...

Consumers have become conditioned to expect 'standards' with respect to handling of meat in particular at a retail environment. For example, HACCP standards are referred to by consumers and it is 'assumed' that stall-holders at Farmers' markets have to conform to similar standards. Few of the consumers we spoke to were aware of anyone 'policing' Farmers' markets. So it is assumed that individual markets and stall-holders are responsible for food hygiene standards. In the main, consumers experiences are positive, but two areas are singled out as 'ones to watch':

- Handling Meat
- Open Air Cheese or Bread Displays in Summertime

Consumer expectations are pretty 'common sense' food hygiene concerns that would be expected in any environment. However, the view is some stall-holders could step up their game a little...



IMPLICATION: stall-holders need to be conscious of 'common sense' food hygiene standards that consumers see in mainstream retail.

# Place

## The physical environment and location needs to be considered

As mainstream food retailing has developed, the role of the physical environment and retail space has been identified as a significant factor to manage. Farmers' markets are no exception in this regard. The most obvious issue for stall-holders to manage are their individual displays – again a common sense approach to this is all that is needed. However, as a collective group of stall-holders at a market, it is worth considering the role that layout of stalls can play for the consumer. Consumers visiting Farmers' markets are visiting a space they consider to be a 'hub' for local food producers. They imagine a community of like-minded businesses working together for each others' benefit. This idea of a 'community collective' is quite a powerful one – at an emotional level it appeals to people's sense of duty to 'support local business'. However, consumers experiences on the ground at Farmers' markets can be somewhat more disjointed – often with stalls operating in isolation from one another.

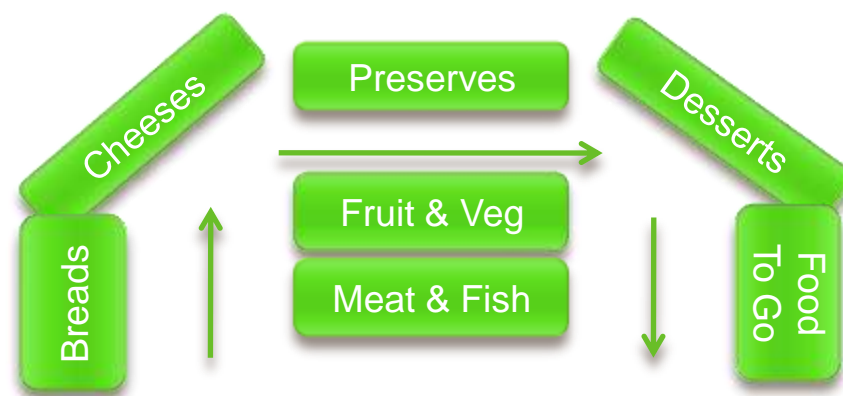
IMPLICATION: An opportunity exists for stall-holders to manage layout and create greater synergies between one another.

## The role of layout

### Markets can benefit from thinking about how consumers 'navigate' the market

It is easier to create a sense of 'community' at a market if neighbouring stall-holders are selling complimentary products. For example, Bread sellers can combine with Cheeses and Preserves or Meat sellers can establish working relationships with Vegetable sellers. The key is to ensure the stalls are laid out so that consumers don't 'miss' anything. There is little point having stalls in isolation from one another – or breaking up the flow by having non-food stalls in between food stalls. Almost instinctively, consumers combine food categories mentally into pairs and combinations. The layout of stalls should reflect this natural order...

What should the market floor plan look like?



## The role of food-to-go

### Food-to-go can play an important social role

Consumers talk about Farmers' markets are a kind of 'break from the mainstream' for many of them – shopping is more social, it is an opportunity to converse, in many respects the social side of a visit to a Farmers' market is as important as the products themselves. In this context, the role of take-away food and drinks that are consumed then and there at the market is important. Some consumers talk about visiting their local market and treating it as a 'coffee morning'. Obviously weather is a factor on this front but certainly in the summer months the "al fresco" nature of eating at a Farmers' market can be attractive to some consumers. Those same consumers may not necessarily treat the market as a destination for food shopping. Instead, its is a social arena in which they can meet friends and relax.

**IMPLICATION:** Farmers' markets can design their environment to facilitate social interaction through food to go offerings



# Summary: Key purchase Triggers & Barriers

## Triggers

**1. Product:**  
Value/Great Quality

**2. Promotion:**  
(Road side signage etc.)

**3. People:**  
Supporting Locals

**4. Place:**  
Location & Passing Trade

**5. Place:**  
Break from mainstream

## Barriers

**1. Price:**  
Perceptions & Realities

**2. Price:**  
No price signage

**3. Promotion:**  
Poor awareness  
Sector imagery  
Perceived consumers

**4. Place:**  
Layout

IMPLICATION: Farmers' markets can overcome these barriers with simple changes to the marketing mix.

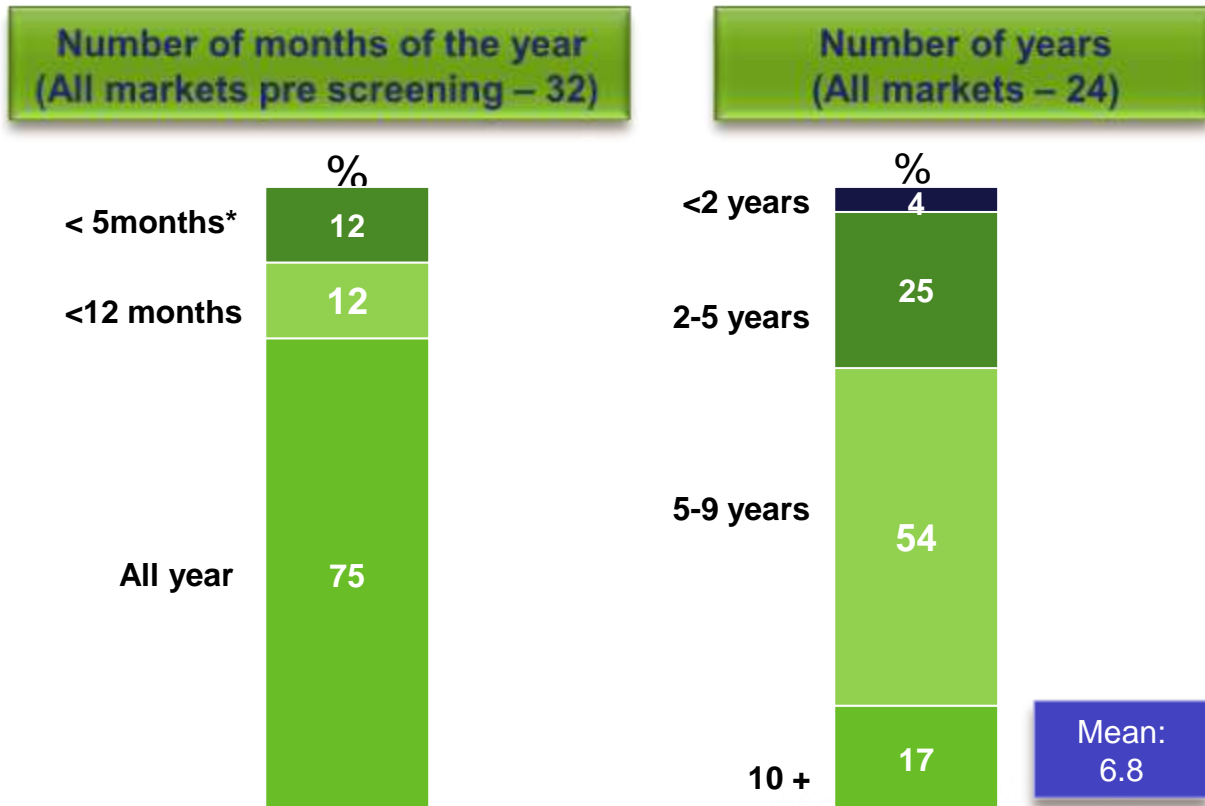
## Section 5: Sample Profile of Market Organisers and Market Categories

- ❖ The 24 markets have been running for 6.8 years on average
- ❖ 30% of markets are based in Leinster with 44% based in Munster
- ❖ 21 stall-holders/staff are employed on average at each market
- ❖ 46% of markets are best described as “shopping markets” with 42% best described as “food and crafts markets”
- ❖ Half of the markets are described as co-operatively run or community based markets

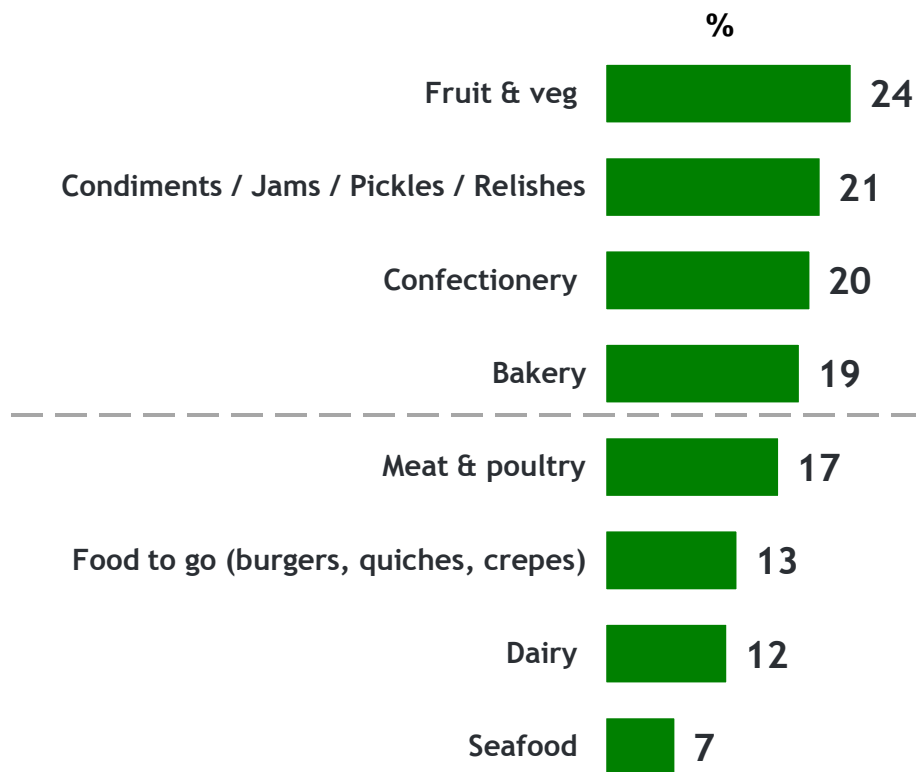
### Market Duration – Months/Years

The concept of Farmers' markets are by no means a recent phenomenon and to understand the history behind them we asked market organisers how long their markets run for during the year and for how many years they had been operating.

Three quarters of those markets are found to run all year round with only 12% operating for less than 5 months a year. Over half of the responding Farmers' markets have been operating for over 5 years and 17% have been running for over ten years.



## Categories of Food Being Sold



LOCATION	
Dublin	Outside Dublin
17	26
19	21
19	20
19	19
11	19
17	12
11	12
4	9

**63% of stalls selling 'food to go' were only selling such items**

Having identified the categories in which the Farmers' Markets are operating in, market traders were asked which food categories they sold. A quarter of all traders responded that they sold fruit and veg.

This popular category was closely followed by packaged condiments/jams/pickles/relishes and also confectionery and baked goods.

## Source of Products and Ingredients

	Total	Where are your products and ingredients sourced from			
		I grow/produce my own produce	Local Irish food producers	Other Irish food producers.	Non-Irish and imported
<i>Base</i>	<b>204</b>	<b>117</b>	<b>108</b>	<b>39</b>	<b>63</b>
	%	%	%	%	%
I grow/produce my own produce	57	100	40	44	40
Local Irish food producers	53	37	100	62	68
Other Irish food producers.	19	15	22	100	35
Non-Irish and imported	31	21	40	56	100

**Those who use non-Irish and imported sources are also likely to use local and other Irish producers**

When asked “Where are your products and ingredients sourced from?” 6 in 10 traders reported that they grow their own produce and half reported that if they used local Irish food producers for any ingredients needed.

The focus still remains with “local” food and Irish producers, however 3 in 10 stated that they used non- Irish and imported produce.

## Section 6: Sample Profile of Market Traders and Trading Frequency

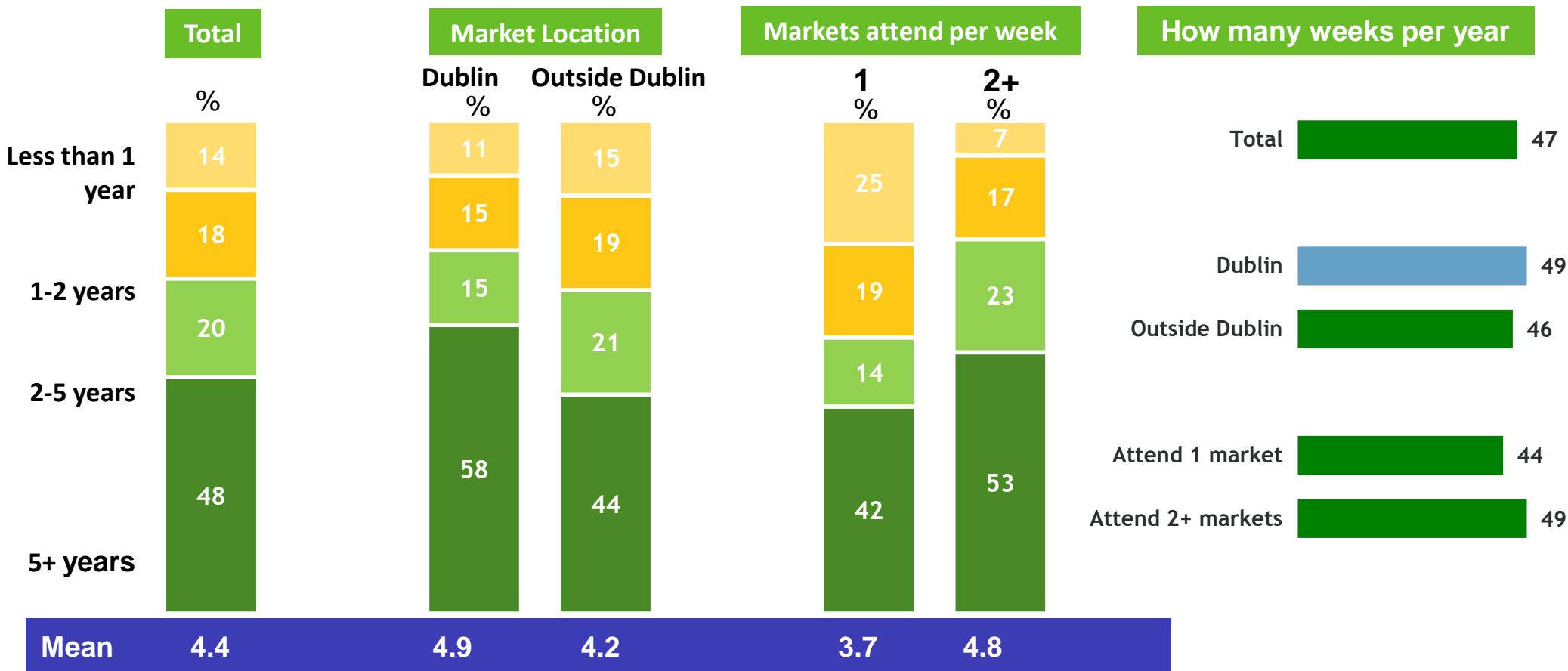
- ❖ 21 stalls are trading on average at the markets – the vast majority of these are food and drink related (71%).
- ❖ Traders attend 2.3 markets per week on average and have been trading at markets for over 4 years.
- ❖ Traders operate a stall for an average of 47 weeks per year, 2.2 days per week.
- ❖ 57% produce their own produce.
- ❖ Farmers' markets are the key sales channel for 80% of traders.

### Traders: Demographic Profile

Base: All Traders - 204

	TOTAL	MARKET LOCATION	
		Dublin	Outside Dublin
<b>Base:</b>	<b>204</b>	<b>53</b>	<b>151</b>
	%	%	%
<b><u>GENDER</u></b>			
Male	52	60	50
Female	48	40	50
<b><u>AGE</u></b>			
-34	23	32	20
35-49	48	51	47
50+	29	17	33
<b><u>NATIONALITY</u></b>			
Irish	74	83	70
Other	26	17	30

# Years, weeks and days Trading at Markets

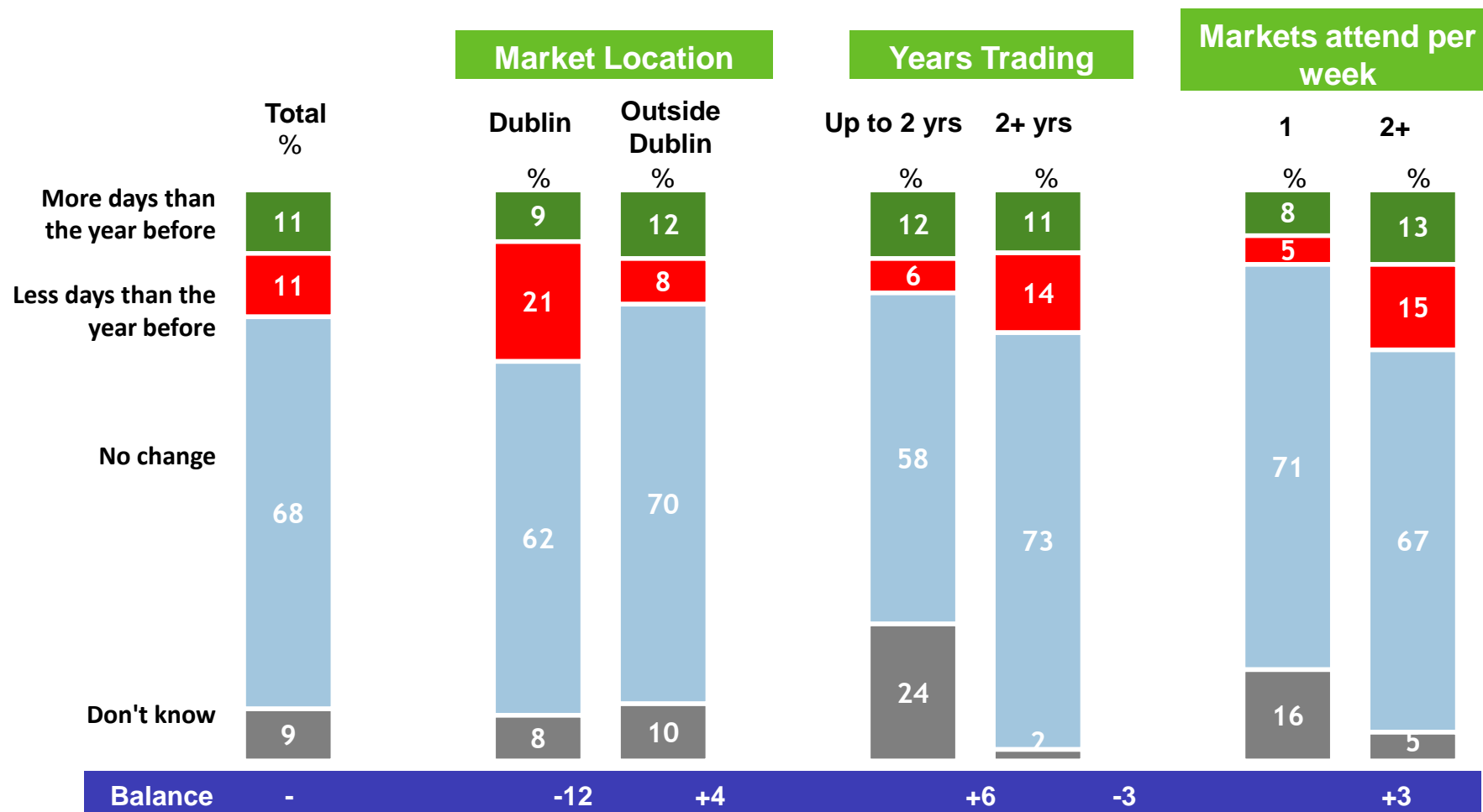


The majority of market traders have been trading for over 5 years and just over 1 in 10 have only been operating for less than a year. This is encouraging as it is evident that new traders are making their place at Farmers' markets still.

Of the traders who have been operating for over 5 years, they are nearly evenly split between Dublin and outside of Dublin with the majority attending two or markets per week. Those traders who have only been operating for less than a year are more likely to attend one market per week whereas the more established trader would attend two or more.

Market Traders tend to operate for 47 weeks of the year, with Dublin Farmers' Markets operating the most frequently at 49 weeks of the year. The frequency of Farmers' Markets is very high and is all year round, often leaving 2-3 weeks to account for Christmas and holidays.

## Trading at Markets More or Less Days Past 12 Months

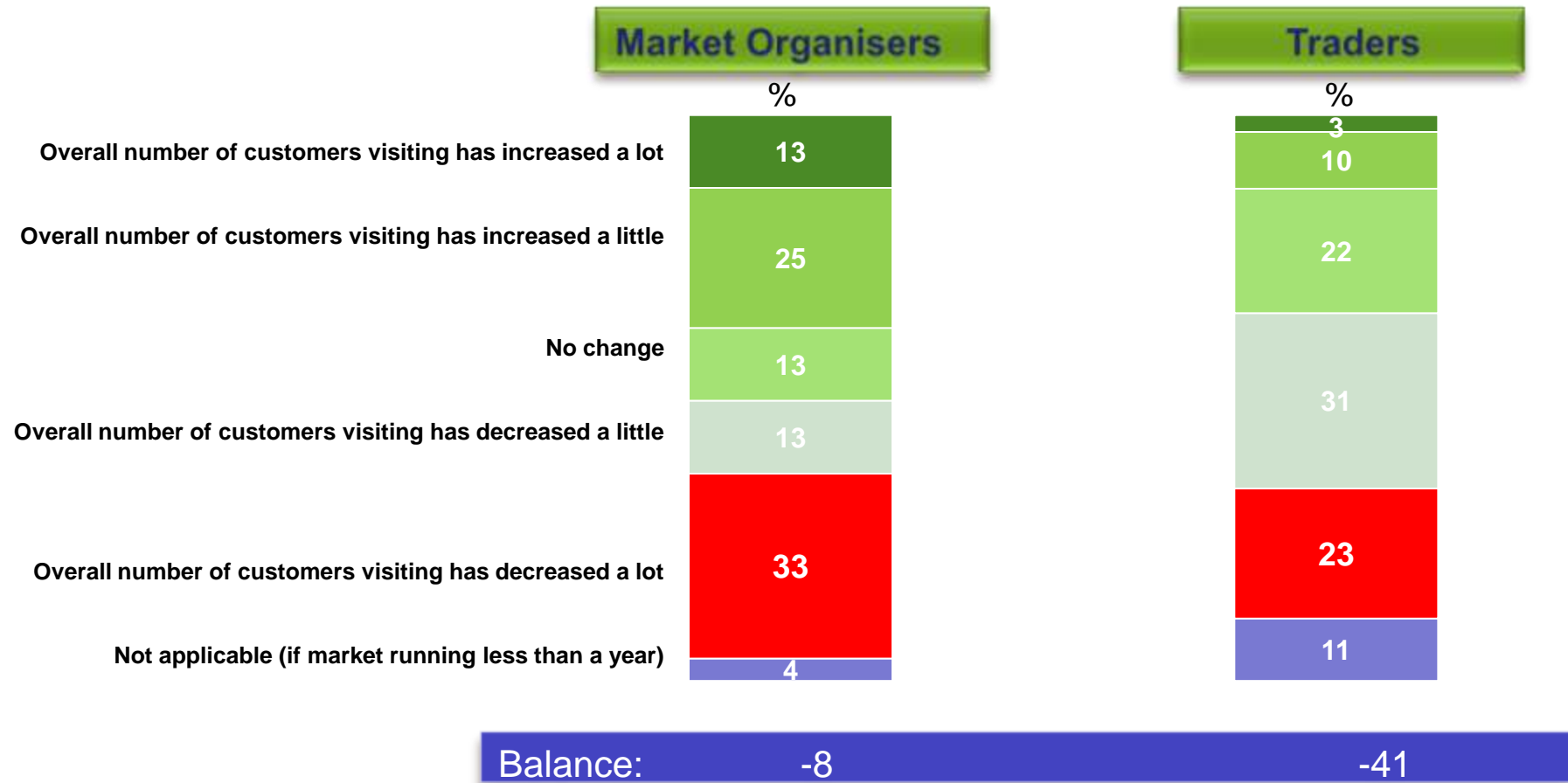


The majority of market traders feel that they have seen no change in the frequency of trading over the past year with just under 7 in 10 reporting that there was no change. Trading frequency has only experienced a very minor level of growth with just 1 in 10 traders stating that they are trading more days than before. Just under 1 in 10 reported that they hadn't noticed a change in frequency as they did not know whether they had been trading more or less frequently.

# Section 7: Market Performance

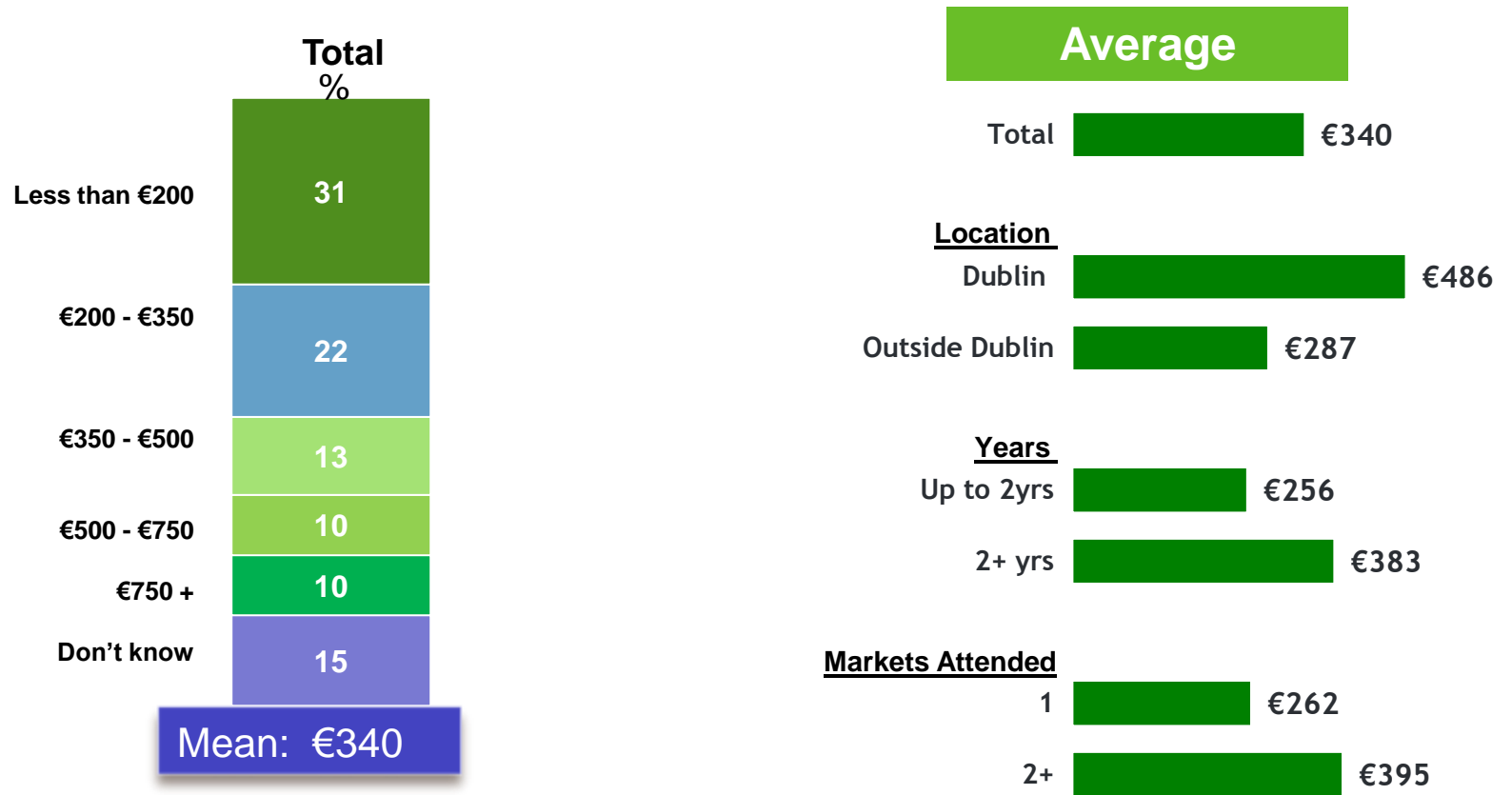


## Number of Customers Visiting Past Year



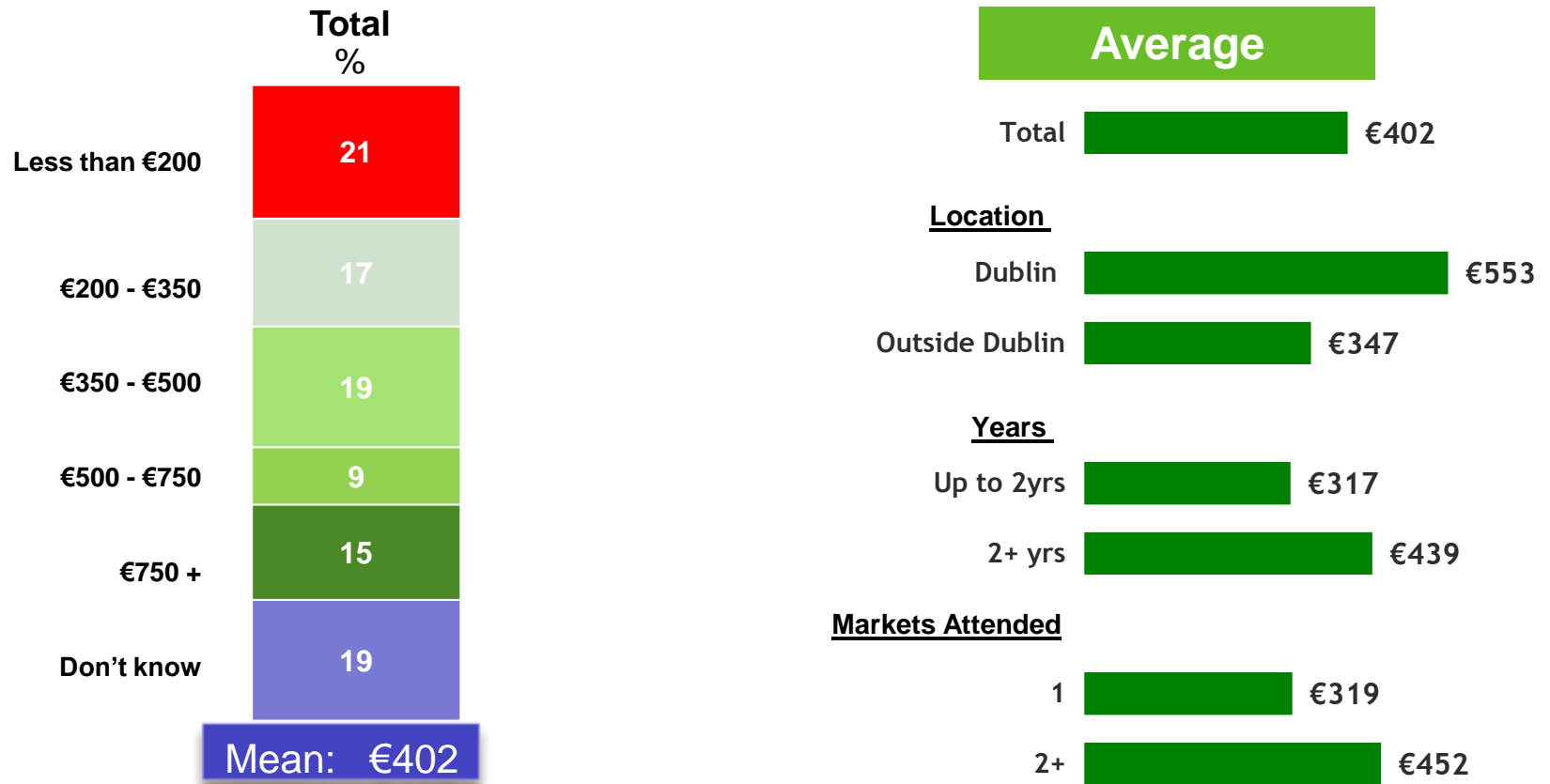
Opinions of the number of customers visiting Farmers' Markets is the past 12 months vary between organisers and traders. 38% of organisers reported an increase in visiting customer numbers and a similar number of traders reported the same increase. However 54% of traders stated that customer numbers had decreased a little/ a lot whereas only 46% of organisers reported this same decrease. The difference is evident as more organisers feel that customer numbers have decreased a lot whereas more traders feel that the numbers have only decreased a little.

## Traders: Average Sales Figure Per Day – Per Individual (Winter Months Oct/Feb)



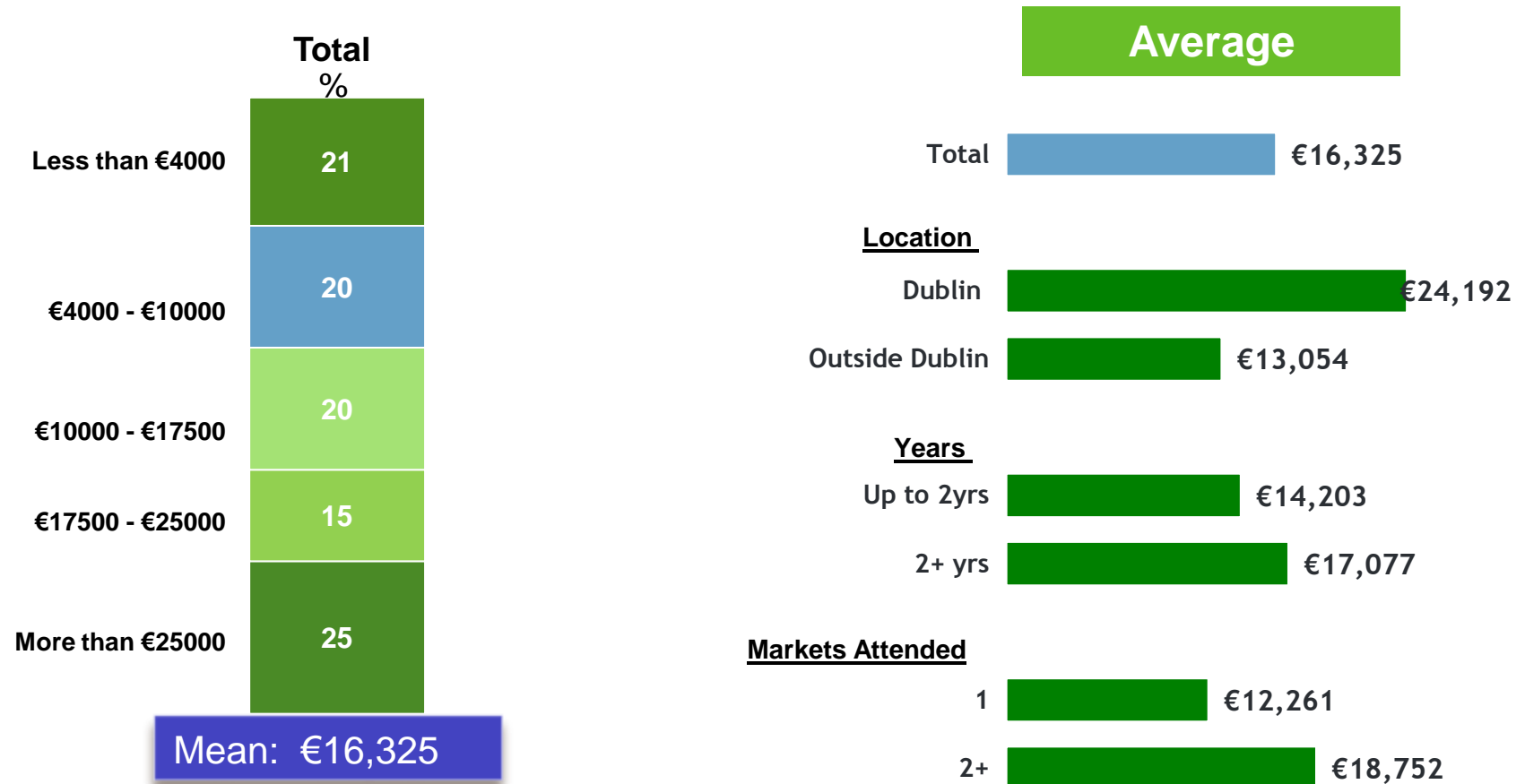
When surveying the market traders as to their sales figure per day per stall-holder we did so on the basis of winter sales versus summer sales. As you can see here, the average total sales figure is €340. Just under half of traders achieve less than this and 1 in 10 traders record sales figures of more than €750 in one day. Average sales figures also vary according to locations as Farmers' markets operating within Dublin report a figure of €486, some €200 more than those traders operating outside of Dublin. Those traders who have been trading for more than two years record higher sales figures, over €100 more than those who have only been trading for less than 2 years.

## Traders: Average Sales Figure Per Day – Per Individual (Summer Months Mar/Sept)



As you can see here, the average total sales figure during the summer months has increase by €62. Perhaps one would expect a higher figure during summer however this is not the case. Just over 40% of traders achieve less than this and 15% of traders record sales figures of more than €750 in one day. Average sales figures again also vary according to locations in the summer months as Farmers' markets operating within Dublin report a figure of €553, some €200 more than those traders operating outside of Dublin. Those traders who have been trading for more than two years record higher sales figures, over €120 more than those who have only been trading for less than 2 years.

## Traders: Average Sales Figure This Year (This Market) – Per Individual



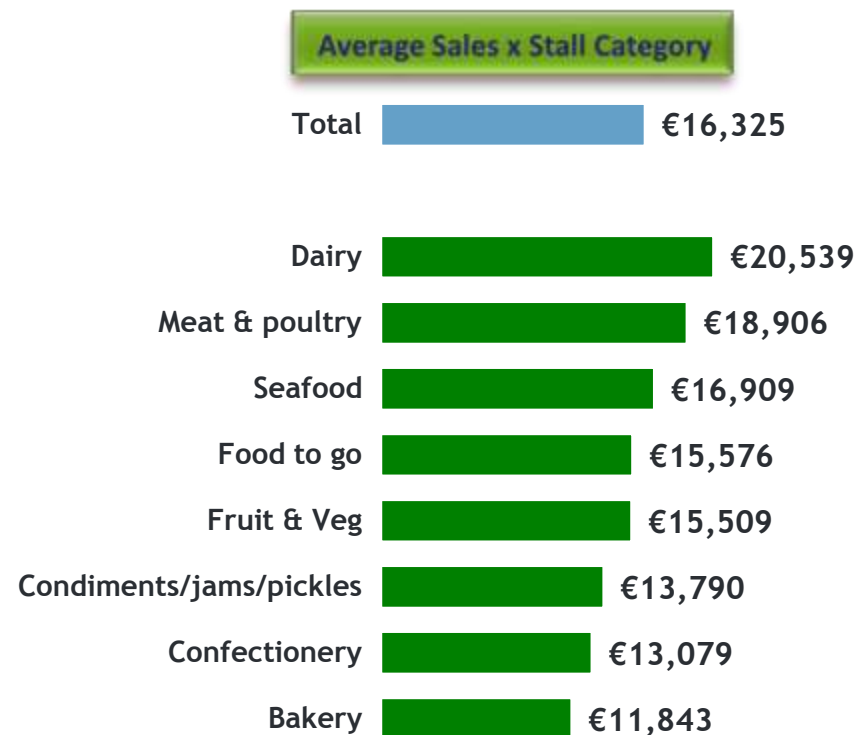
Following on from the average daily sales figure for each stall-holder is the yearly figure, which stands at a total of €16,325 per individual. This figure increases substantially when we identify those markets in Dublin with stall-holders recording an average of €24,192. Dublin traders experience an increase in sales of just over €10,000 compared to those stall-holders trading outside of Dublin. It is again clear that those stall-holders operating for more than two years will experience a greater amount of sales than those traders who have been trading for less than two years. One quarter of stall-holders recorded a sales figure of over €25,000 for one trading year.

## Estimate of Annual Farmers' Market Sales

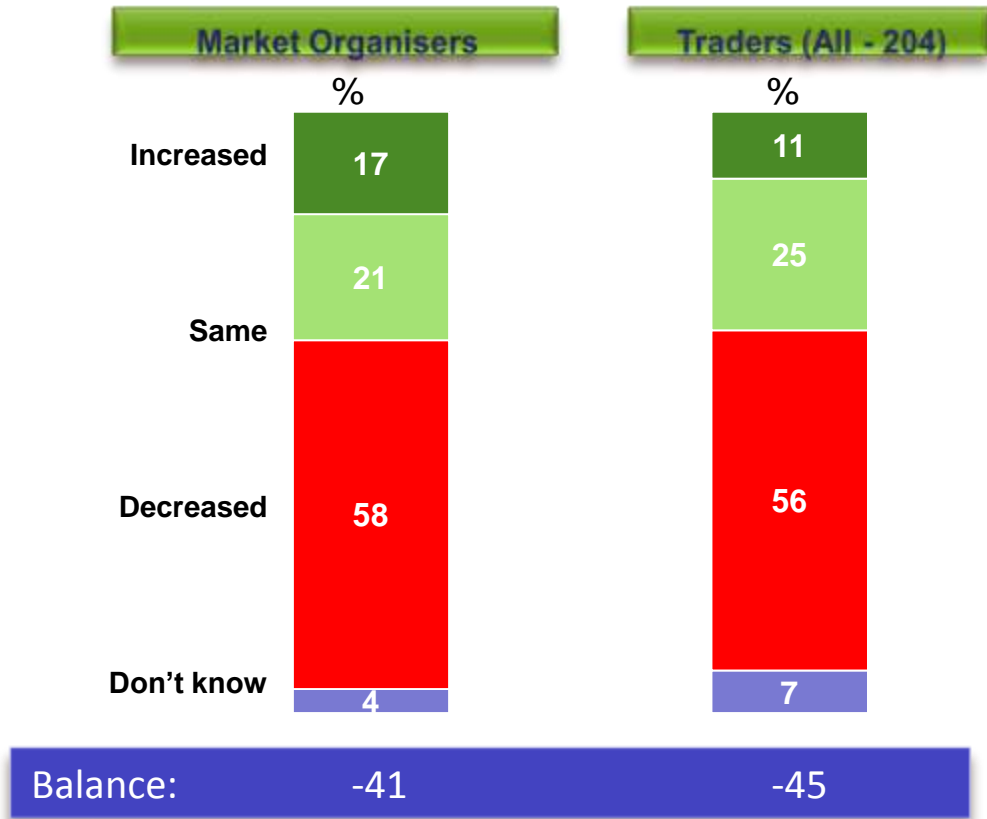
Average Annual Food & Drink Sales (per trader)	€ 16,325
Average No. of Food & Drink stalls per market	15
Total Estimate Annual Food & Drink Sales (all markets - 140)	€27.9 mill

When we combine the results for the average sales per market and the average number of stalls a figure of €4.2 million is recorded for the annual food and drink sales of 21 markets. These 21 markets represent 15% of all Farmers' Markets in Ireland, thus estimating the total annual food and drink sales at €27.9million.

As the average sales per stall was mentioned earlier at €16,325 we can look further into average sales by category. The Dairy category holds the highest sales figure closely followed by Meat & Poultry. However, the Dairy category only accounts for 12% of the food being sold at markets and Meat & Poultry accounts for 17%. These small categories hold the highest average sales.



## Average Sales Per Day Past 12 Months



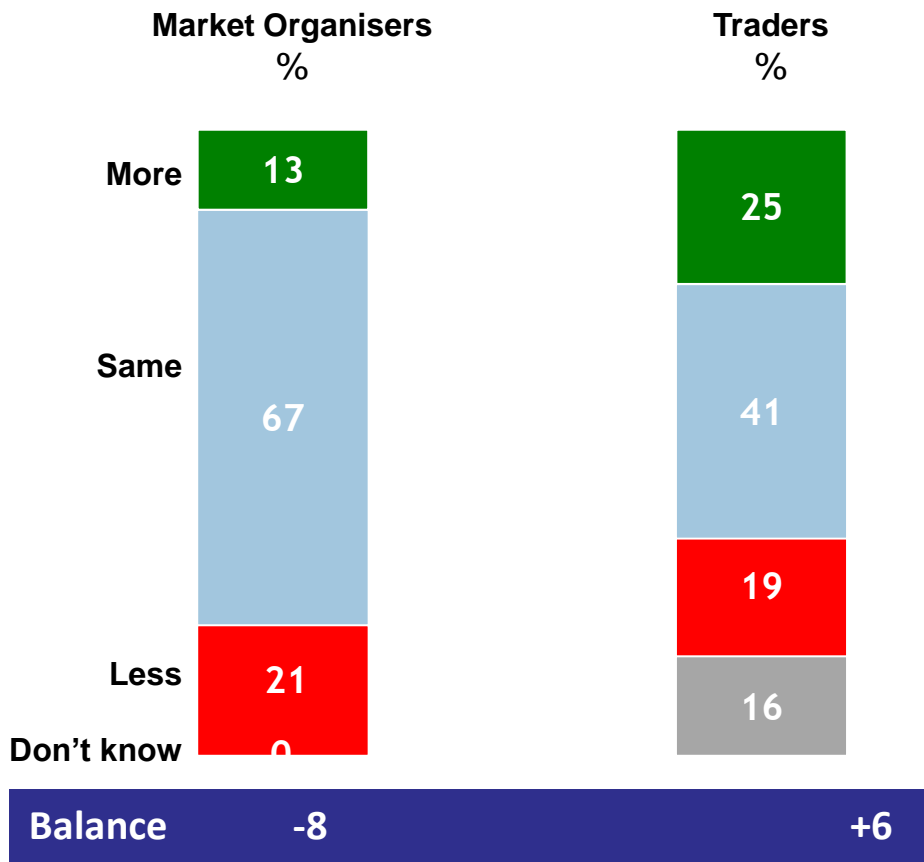
DECREASED		
Market organisers	(base: 14*)	Decreased by 33%
Traders	(base: 115)	Decreased by 25%

INCREASED		
Market organisers	(base: 14*)	Increased by 20%
Traders	(base: 23*)	Increased by 28%

Nearly 6 in 10 organisers and traders believe that the average sales per day has decreased in the past 12 months with a quarter responding that they feel sales have remained the same.

Organisers are slightly more optimistic than traders when noting an increase in sales as 17% of organisers believe that there has been an increase compared to only 11% of traders.

## Average Sales Per Day Next 12 Months

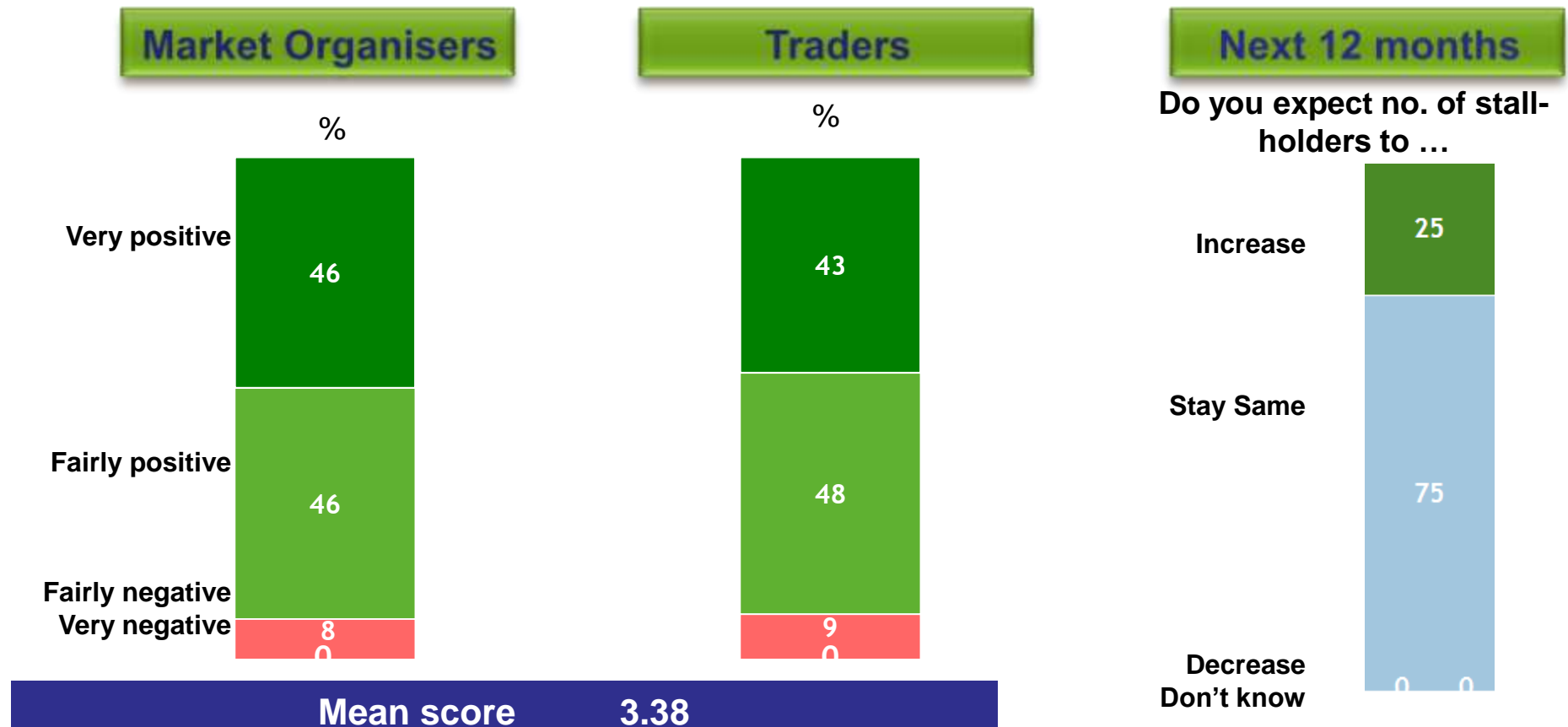


WILL DECREASE		
Market Organisers	(Base 4*)	Decrease by 14%
Traders	(Base 38)	Decrease by 18%
WILL INCREASE		
Market Organisers	(Base 2*)	Increase by 15%
Traders	(Base 50)	Increase by 26%

Market organisers do not feel as optimistic as Farmers' market traders that sales figures will improve in the next 12 months with just under 7 in 10 stating that they expect figures to remain the same. A quarter of traders believe that daily sales will improve in the next 12 months.



## Section 8: The Future of the Farmers' Market



9 in 10 Market organisers and traders are fairly/very positive when it comes to the future of Farmers' markets. However only a quarter expect the number of stall-holders to increase as three quarters believe that the number will stay the same.

As organisers and stall-holders believe that the number will remain the same perhaps their positive outlook for the future will be placed on customers and an increase in customer visits and spending.

75% of organisers and traders also reported that they had not faced any difficulty in recruiting stall-holders in the past 12 months as there had been a 29% increase in the number of stall-holders employed in the past 12 months.

## Section 9: Key Conclusions



# Key Conclusions

## Farmers' markets and Irish food culture

Farmers' markets are an important part of the Irish Food culture landscape for consumers. The sector is, for many, an aspirational vision of how many of us would 'like to live'. There are obvious strengths to the sectors' image around supporting local business and the local community. However, much of that imagery is also merged with perceptions of Farmers' markets being 'for foodies' and 'not for me'. As a result, the sector does have an issue with price perception – consumers generally expect prices to be high at a Farmers' market. Consumers are therefore surprised when they actually visit a Farmers' market and learn that there is potentially great value to be had.

## Farmers' markets can offer “value” in broad sense...

Value at a Farmers' market is about much more than just price. In fact, Irish consumers recognise that the quality of our food produce is amongst the best in the world. This means that consumers will pay attention to any kind of a 'deal' on Irish food on sale at a Farmers' market – because they believe they are getting top quality produce. Of the five 'components' that make up consumers' definition of a Farmers' market (Food, Localness, Quality, Value and The Experience), Value is the most important issue. The other elements are important. But unless Irish consumers believe they are getting good value at a Farmers' market, they are unlikely to attend. The other components can be addressed via the marketing mix...

## The importance of Farmers' Markets to traders appears very high

- ✓ On average, traders operate a stall for over 100 days a year
- ✓ 48% of traders have been operating for over 5 years
- ✓ 80% of traders consider Farmers' Markets as their key sales channel.

Over half of traders grow/produce their own produce, with this rising to 62% of traders outside Dublin and about one in three traders sell non Irish and imported goods (this rises to 43% of Dublin traders). Traders outside Dublin operate their stalls according to the traditional idea of Farmers' Markets whereas one will more likely find a variety of products including non Irish and imported goods.

Traders are more negative than market organisers about the decrease in customer numbers in the past year with traders outside Dublin appearing the worst hit. The sales figures for traders varies considerably by location, with Dublin traders claiming daily sales 40% higher than those outside Dublin (during both Winter and Summer seasons). Strikingly, Dublin traders estimate their annual sales at the market surveyed to be nearly twice that of those traders outside Dublin (24K versus 13K). One can estimate total annual food and drink sales for all markets registered with Bord Bia at €25 – 30mn with sales in summer season typically exceeding winter season by 15-20%.

Traders and organisers do typically agree that sales have decreased in the past twelve months, but traders are marginally more optimistic than market organisers about the next twelve months, and are also generally optimistic about the markets future.

*Bord Bia*

**Irish Food Board**