



## Bury St Edmunds Area Working Party 27 July 2010

### Markets Review

#### 1. Summary and Reasons for Recommendation

- 1.1 In order to facilitate future growth and development of the provisions markets, Cabinet directed that a review of the markets service be carried out and that the National Association of British Markets Authorities (NABMA) be engaged to undertake this review.
- 1.2 For the review to be successful it was recognised that wide consultation be undertaken with market traders, users and non-users of the service, Chambers of Commerce, retailers, Town Centre Management, Town Councils, Members and officers.
- 1.3 NABMA have undertaken a full review of the service and together with collating feedback gained through workshops and written representations have now completed a report which incorporates recommendations for future service improvements. This report is attached as Appendix A.

#### 2. Recommendation

- 2.1 It is recommended that the proposed recommendations as detailed in Section 4 of the Markets Review, attached as Appendix A to Report B144, be adopted as the basis for future action.

#### 3. Corporate Objectives

- 3.1 The recommendation meets the following, as contained within the Corporate Plan, :-
- (a) Corporate Priority:1 *'to improve efficiency and value for money'* and
  - (b) Cabinet Commitments: *'to improve efficiency and to promote viability and vitality of provisions markets'*.

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- 4. Key Issues**
- 4.1 The reason to carry out the review was to underpin the future growth and vitality of the markets service both in Haverhill and Bury St. Edmunds.
- 4.2 There was evidence of a gradual decline in footage sold at both markets in the past few years (6% over 5 years Bury St Edmunds and 6 % Haverhill but over the last 2 years) together with a number of concerns such as the age profile of customers, changing shopping habits and convenience. Concern had also been raised over the viability of the Haverhill Friday market in its current location.
- 4.3 This review was an opportunity to engage with market traders and other stakeholders such as Town Councils, B4Bury, retailers, town centre managers, Bury Society and Suffolk County Council to capture their opinions on what was working well and what could be improved. In addition user and non-user surveys were undertaken.
- 4.4 The result is a report that is a bottom up and objective overview of the markets service carried out by industry experts and recommendations that have been arrived at by reference to successful market practices and taking on board many of the concerns and opportunities identified by stakeholders.

- 5. Other Options considered**
- 5.1 It would be an option not to adopt the recommendations but this would defeat the purpose of the review namely to secure the long term viability and sustainability of the market service. The current decline of footage sold could well continue but with the adoption and implementation of the recommendations every opportunity to ensure a vibrant service continues will have been made.

- 6. Community impact** *(including Section 17 of the Crime and Disorder Act 1998 and diversity issues)*
- 6.1 General
- 6.1.1 A successful market is an important service for the whole community not only market traders. For both towns it acts as a draw for visitors and this in turn brings economic prosperity both in income and employment to the area.
- 6.2 Diversity and Equality Impact *(including the findings of the Equality Impact Assessment)*
- 6.2.1 The recommendations specifically those concerning new business support and development together with partnership working will look to promote access to services and information for all.

- 7. Sustainability Impact** *(including environmental or social impact on the local area or beyond the Borough)*
- 7.1 The continued success of the markets in both towns is important as they act not only as a service in their own right, with a diverse range of produce and goods on offer, but also as a focal point bringing considerable numbers of the public to the towns, which in turn supports other retailers and service providers.

<b>8. Consultation</b>
8.1 There was extensive consultation with traders and stakeholders to establish what NABMA should look at as part of the review.
8.2 Workshops facilitated by NABMA were held in both Bury St Edmunds and Haverhill where opinions were sought from traders, retailers, Chambers of commerce, Town Centre Management, Town Councils, Suffolk County Council, Members, users and non-users of the service and officers.
8.3 Customer survey questionnaires were conducted on market days with users and non-users at both towns
8.4 The markets in Haverhill and Bury St Edmunds were analysed individually with separate consultations to reflect the differences in operations and locality
<b>9. Resource implications</b> <i>(including asset management implications)</i>
9.1 £6,000 was identified from earmarked reserves to carry out the review and the review and report has been delivered within this budget.
9.2 It is recognised that some resources will be required to invest in implementing the recommendations. However it is hoped that restructuring of existing posts and savings from a reduction in operational costs from the waste management service review together with the generation of additional market fees through increased footage sold will off-set these costs.
<b>10. Risk Assessment</b> <i>(potential hazards or opportunities affecting corporate, service or project objectives)</i>
10.1 The purpose of the review was to secure the long term economic future for both markets. The implementation of the recommendations will lessen the risk of market contraction especially the development of closer working between the market traders and SEBC.

<b>11. Legal or policy implications</b>
11.1 Whilst there will be legal input for certain elements of the recommendations in the review, for example redrafting the market rights policy, most of what is proposed will not require legal action in order to implement it.

<b>Wards affected</b>	ALL	<b>Portfolio Holder</b>	Economy and Asset Management
<b>Background Papers</b>		<b>Subject Area</b>	Property Management



## St Edmundsbury Council Markets Review



Final Report - June 2010

## Contents

Executive Summary	2
Section 1 – Introduction & methodology	8
Section 2 – Findings	10
Section 3 – Conclusions	23
Section 4 – Recommendations	25
Appendix 1 – Measuring success	28
Appendix 2 – Stakeholder SWOT Bury St Edmunds	30
Appendix 3 – Trader SWOT Bury St Edmunds	32
Appendix 4 – Stakeholder SWOT Haverhill	34
Appendix 5 – Suffolk County Council SWOT	36

## **Executive Summary**

### **Introduction**

1. In March 2010, Nabma Consultancy Services (NCS) was commissioned by St Edmundsbury Council to carry out a review of its two retail markets – in Bury St Edmunds and Haverhill. The purpose of the review was to evaluate current performance and make recommendations to ensure the continued sustainable operation of both markets.

### **Methodology**

2. In order to carry out the review, the following project methodology was adopted:

#### **Desk-top review**

3. This stage of the review used a combination of web-based and documentary research. This included the Council's strategic priorities and vision, tourism reports, retail studies, and markets operational data.

#### **Site visits**

4. Both markets operate two days a week – Haverhill on Fridays and Saturdays, Bury St Edmunds on Wednesdays and Saturdays. Site visits were carried out to both markets on both trading days.

#### **Stakeholder consultation**

5. Separate consultation processes were implemented for Bury St Edmunds and Haverhill. For Bury St Edmunds, this involved a consultation workshop for market traders, a consultation workshop for other stakeholders, and face-to-face interviews for market users and non-users. In addition, stakeholder feedback was provided by Suffolk County Council Economic Team.

6. It was not possible to carry out a market trader consultation workshop for Haverhill market traders. However, a workshop was held for other stakeholders, and a questionnaire sent to the market traders. In addition, a survey of market users and non-users was carried out.

7. The results of the desk-top study, site visits and stakeholder consultations informed the conclusions and recommendations contained in this report.

### **Overall findings**

St Edmundsbury's market operation is very efficient, with a 'lean' structure delivering a significant trading profit. Bury St Edmunds market is thriving and popular with a good range and quality of products. The response by stakeholders to the markets review was also excellent, both in terms of participation and support for the markets.

Haverhill market, by contrast, is struggling, particularly on Fridays, and has a very different demographic base to that of Bury St Edmunds.

In order to ensure that the markets are able to thrive and be sustainable, there are a number of changes that can be introduced to improve the markets at both locations.

### Conclusions

Based on a review of the findings, NCS draws the following conclusions:

#### **In relation to both markets:**

C1. The Council appears capable of implementing the changes necessary to ensure the viability and sustainability of the markets, and as such it is not necessary to seek an external partner at this stage.

C2. The markets remain popular with a wide range of stakeholders.

C3. In terms of the market customers survey, there was a consistent response in relation to commodities bought (fruit & vegetables being the most popular), why people shop (variety, value for money and friendly and helpful traders), and other facilities wanted (cooking demonstrations and information about council, police, health and other services). The age profile of the market customers (the majority are 60 or over) is significant in terms of the retail offer and marketing/PR strategy for the markets.

C4. The market operation is efficiently run, delivering good and consistent operating profits, but is less effective due to the lack of staffing resources.

C5. There is a lack of forward planning, particularly around attracting new commodities and new business start-ups.

C6. The markets contribute to a number of vision statements contained in St Edmundsbury Vision 2025 document, but their role needs to be better articulated and measured.

C7. The markets tend to operate in a somewhat isolated manner and would benefit from more partnership working.

C8. Communication between the Council, the traders and other stakeholders can be improved.

C9. The current level of marketing and promotion of the market is extremely low and given the current levels of retail competition, need to be improved.

C10. The markets contribute to St Edmundsbury's tourism offer, but would benefit from more targeted marketing.

C11. The markets operational systems and procedures do not appear to be complete nor consistently applied. One example of this relates to the Council's market rights.

C12. Incorporating local food and products into the market offer is a real strength and one which can be developed further.

C13. There is scope to make savings in relation to the markets cleaning and waste management operations, as well as improving recycling rates.

#### **In relation to Haverhill market:**

C14. The Friday market is struggling and would benefit from repositioning along the high street.

C15. The relationship between the stalls and the shops on the high street can be improved.

C16. Haverhill Town Council has developed considerable experience in relation to delivering specialist markets and closer working relationships could benefit both operations.

C17. There appears to be a lack of data in relation to footfall, where shoppers come from and the pedestrian flow between the town centre and the new TESCO/leisure complex.

## Recommendations

### In relation to both markets:

#### Market Rights/EU Services Directive

R1. The Council should redraft its market rights policy, incorporating its view on the implications of the EU Services Directive, and ensure that the policy document is publicly available (preferably on the Council web site), and that the policy is fairly and consistently enforced.

#### Business Support/Development

R2. As part of its economic development remit, the Council should develop a business support package to encourage and support new enterprise/local business development in line with Vision 2025. This package should look at:

- Investing in a small number of stalls for new businesses
- Creating a business support package for new businesses with information and directions to other agencies and services
- Develop trader 'buddies' that will act as business mentors for new start ups.
- Offering time-limited discount rents for key commodities

#### Waste management

R3. The Council should urgently review its current cleaning and waste management arrangements with a view to reducing costs and increasing recycling rates. Any revenue savings should be ring-fenced to support improvements to the market such as the business support package.

#### Marketing/PR

R4. The Council should develop and implement a marketing and promotion plan for the markets. This should include:

- Improved web presence
- Improved macro and micro signage
- Developing 'good news stories'
- Targeted marketing improving links to tourism e.g. coach operators, US Air Bases, local restaurants (supplying local produce), town residents, and businesses, and younger people.
- The option on market loyalty cards/short-stay parking rebates

R5. To support this initiative it is recommended that a ring-fenced budget is established, whereby a marketing levy is charged per stall per week, and the sum matched by the Council. This fund should be jointly managed by the Council and traders, to ensure openness and effective targeting. It will also be necessary to ensure that marketing expertise is used – either from the Council's in-house team or from external professionals. In



particular, there should be liaison with Bid4Bury and the Town Centre Manager in Haverhill on the wider promotion of the town centres - including markets.

### **Customer service**

R6. The Council should, in partnership with the traders, develop and implement a customer charter for markets, clearly setting out customer rights, service standards, and what to do and where to go if a customer wishes to complain.

R7. In addition the Council and traders should seek to develop a 'collect later' service to help shoppers with heavy/bulky items. It should also introduce a car pick up point on the market for the same purpose.

### **Communications**

R8. The Council should develop and implement a markets communication plan, which ensures regular dialogue with market traders and stakeholders. In addition to meetings, the plan should consider:

- Improved web profile and accessibility
- Newsletters to staff/traders
- Notice boards on the markets
- An agreed method for traders to feedback info/comments to market management

Two examples of market web sites are linked below. It is interesting to note that both are independent of the Council's web site, and have been developed from a more commercial perspective.

[www.manchestermarkets.com](http://www.manchestermarkets.com)

[www.norwich-market.co.uk](http://www.norwich-market.co.uk)

### **Partnership working**

R9. In order to capitalise on the support for markets within the borough, it is recommended that the Council seeks to improve partnership working by:

- Creating a markets forum for stakeholders
- Ensuring that markets play an active and participatory role in Bid4Bury.
- Developing specific links with the Chambers of Commerce in relation to promotion and the business support project
- Developing community links such as healthy eating demos on markets with the Primary Care Trust
- Better liaison with County/Town Councils and Town Centre Managers in relation to the economic benefits of markets/business start-ups and promotion.
- Raising the profile of markets in schools by curriculum links to local business/environment and encouraging active participation by schools on the market as part of their health/entrepreneur development
- Creating space for information on Council, police, health and other services.

R10. The market forum should consist of Councillors, senior officers, market management and traders' representatives.

### **Local food/products**

R11. The Council should make better use of the Unique Selling Point (USP) provided by its inclusion of local food and products on the market by:

- Targeting local food/products as a key commodity and attracting new businesses

- Creating a sub-brand within the market that makes local food/produce readily identifiable to customers
- Target marketing this as part of the markets USP

Given St Edmundsbury's strong tourism links, it is recommended that 'local' is defined in relation to produce/products from East Anglia.

### **Systems & Procedures**

R12. The Council should develop and implement an operational management manual for the markets. As part of this it should review its procedures on:

- The location of and charges for premium stalls
- Its allocation system
- Potential reward for 'ever-present' traders
- Trader parking arrangements (both on the markets and off site)
- Its financial accounting processes to ensure that full costs are identifiable against each market
- Its key performance indicators

### **Staffing**

R13. Given the current lean and reactive nature of the markets service staffing resources, the Council should seek to create a new part-time post of business development manager, whose role will be to proactively implement some of the change processes identified by this review, and develop the market. The cost of the new post could be offset by making the full time market superintendent's post part time, once the current member of staff retires.

R14. It is understood that the full time Market Superintendent will be retiring in the near future. Given his experience and expertise, it would be prudent to consider recruiting whilst he is in post to create a period of overlap/handover.

### **Business Plan**

R15. A business plan for the markets should be developed and implemented, setting out the service priorities, change programme actions, resources and financial modelling.

### **Haverhill market**

R16. In relation to Haverhill market, the Council should, in addition:

- Review the stall layout of its Saturday market to ensure that accessibility and permeability are improved as well as access to surrounding shops. The review should also consider the offer that first greets the customer in terms of the visual attractiveness of the commodity and stall layout.
- Continue with its plan to relocate the Friday market from the market square to the high street, in line with the above.
- Seek closer working arrangements with the Town Council and Town Centre manager to better integrate the market with the specialist markets provided by the Town Council.

### **Performance measures**

R17. A range of Key Performance Indicators have been developed nationally for retail markets. Of these, it is recommended that the following are adopted by St Edmundsbury:

- Occupancy rates
- Number of businesses supported through the portfolio's operation

## **APPENDIX A**

- Number of market businesses managed by traders living within the local authority's boundaries
- % waste generated by the markets that is recycled
- Business confidence levels
- Customer satisfaction levels.

## Section 1 – Introduction and methodology

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#### **Evaluation criteria**

Research has identified a number of 'critical success factors, for retail markets. For a market to succeed and be sustainable it is important that it has at its heart as many of the critical success factors as possible. Those success factors are:

- Sense of place
- Critical mass
- Good management
- Accessibility and permeability
- Marketing and PR
- Safety and security
- Integration with surrounding retail offer and community
- Partnership working.

These are considered in more detail in Appendix 1. They also link to a number of practical/operational considerations such as:

- A hard standing area
- Good transport facilities
- Adequate lighting

## **APPENDIX A**

- Signage
- Public / trader toilets
- Good natural retail location.

These criteria were used to assess the current and future performance of Bury St Edmunds and Haverhill markets.

## Section 2 - Findings

### National context

In November 2009 the Retail Markets Alliance (RMA) published a report entitled *Markets 21 - A Policy & Research Review of UK Retail and Wholesale Markets*. It contains the most up-to-date information in relation to this section, and extracts are quoted below.

“Markets are unique in retail and wholesale trading terms in that they are still predominantly managed by the public sector. Whilst recent economic events have seen a number of banks returning to the public sector (at least in the short term) the trend remains for commercial activity to be seen to sit more comfortably with the private sector.”

Section 3 of Markets 21 examines the idea of markets performing a ‘public good’ rather than being solely commercial operations. It states:

“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 (APPMG), which identified that successful markets contribute to the social, environmental and economic well-being of the nation, by:

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

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

- Regeneration/economy
- Food & health
- Culture & tourism
- Community cohesion
- Environment

### Headline figures for the value of markets in the UK

	<b>Retail</b>	<b>Wholesale</b>
<b>Number of markets</b>	2,079	26
<b>Number of businesses supported</b>	45,700	1,000
<b>Number of people employed</b>	96,000	10,000
<b>Business turnover p.a.</b>	£3.5 Billion	£4.1 Billion

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.

Markets also provide an opportunity to deliver business-led solutions to regeneration problems. Maida Hill and Borough market in London provide examples of where the

development of markets has acted as a catalyst for change (in particular, using food as a mechanism for change).

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.' The NMTF'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.

A number of studies have identified potential urban 'food deserts' and resolving them in the context of sustainable communities presents significant challenges. At a retail level, markets play a crucial role in ensuring that local communities have access to fresh produce. They also 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. 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.). Manchester's Northenden Community Food Market, and Bolton's Retail Market Demonstration Kitchen show how markets can make a difference.

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.

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.

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.

In 2006, the Joseph Rowntree Foundation published research on *Markets as social spaces*. It 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.

The redevelopment of Gorton retail market in Manchester created a central 'square' with seating to create a social/community space inside the market hall.

During 2009, 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 on local markets.

Retail markets such as Darlington and Bristol have also introduced effective waste management systems, resulting in Bristol St Nicholas market being awarded the National Market Traders' Federation's 'Greenest Market in the UK' award.

In May 2008, the Local Government Association (LGA) published a food packaging study – war on waste – that 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.”

### Local context

The area administered by St Edmundsbury Borough Council contains a population of 98,193 (2001 Census). Bury St Edmunds' population totals 35,473 (2001 Census), and Haverhill, the second largest town in West Suffolk, after Bury St Edmunds has a population of 22,010 (2001 Census).

In January 2007, the Council published a report entitled *St Edmundsbury Local Development Framework – Bury St Edmunds and Haverhill Retail, Leisure and Office Study*. It does not specifically address the issue of the two retail markets, but in relation to retailing generally in Bury St Edmunds, it notes:

“Bury St Edmunds town centre provides a high quality environment for shoppers and offers a wide range of attractive shops and services in a very pleasant historic shopping. Its principal weakness in retail terms is the lack of large modern stores and shops to enable the most popular multiple retailers to stock and display their full range of goods. However, this will be addressed by the Cattle Market Scheme...”

In relation to retailing in Haverhill, the report notes:

“The principal needs in Haverhill town centre in qualitative terms are to introduce new retail 'anchors', to widen the range of shops and services, and to develop the shopping centre in depth so as to counteract its linearity and encourage greater concentration of retail uses...In terms of retail market positioning, the need will be to attract more retailers which are perceived as providing good value, whilst moving the retail offer closer to the mid-market; and so reducing the need for the town's residents to travel further afield for such shopping.”



It also notes that “Pedestrian routes from the car parks to the shopping areas need to be improved and more clearly signed.”

This report was written before the opening of the arc shopping centre in Bury St Edmunds and the TESCO/Leisure development in Haverhill.

In 2008, the Council commissioned East of England Tourism to research the economic impact of tourism in St Edmundsbury. It found:

- 3,317,00 trips (day and staying), of which,
- 3,141,00 day trips
- £170,745,000 total tourism value

No footfall data is available for either Bury St Edmunds or Haverhill. Discussions with the Council revealed that they currently use car parking data as a ‘proxy’ for footfall, and indicated that car park usage in Bury St Edmunds has increased since the ARC shopping centre opened last year.

In December 2005, the Council published Vision 2025, which “is designed to give all of us a clear and shared vision of how we see the beautiful and successful area of St Edmundsbury in 20 years’ time...” The document sets out a number of vision statements grouped under ‘economic success and skills’, ‘health, social care and safety’, ‘housing’, ‘leisure and culture’, ‘sustainable environment’, and ‘transport’. A number of these are relevant to markets and are listed below:

‘In 2025 St Edmundsbury will be a place:

- V:E4 which is an international tourism destination with the town centres of Haverhill and Bury St Edmunds containing a thriving mix of retail, professional services, cultural outlets and hotels.
- V:E6 with an appropriate skilled, productive, trained and adaptable workforce and where there are strong links between the education sector and local industry.
- V:E7 where commercial sites and premises are readily available for new and existing businesses.
- V:E9 with the necessary supporting infrastructure to allow businesses, services and the education sector to thrive.
- V:He1 which has one of the healthiest resident populations in the country.
- V:L7 with a vibrant and safe evening economy and outdoor cafe culture commonplace year round in the towns of Bury St Edmunds and Haverhill.
- V:S1 where communities work together to reduce waste and litter, conserve resources and to make their settlements sustainable and attractive.
- V:S7 where people have access to and use a sustainable integrated transport system.
- V:S10 which has successfully developed home-grow businesses supplying local produce and products.
- V:T3 where all sectors of the community have access to a high quality, reliable, affordable and frequent public transport system.

The vision statements contained in Vision 2025 continue to inform the structure and content of the Council’s annual corporate planning and performance framework and will carry forward into the master-planning process being carried out in both towns.

### Stakeholder Consultation Workshops

These were based on an analysis of Strengths, Weaknesses, Opportunities and Threats (SWOT), and the participants' contributions were recorded and are attached at Appendices 2 - 4. In addition, members of Suffolk County Council's economics team also completed and submitted a SWOT analysis of Bury St Edmunds market, which is attached at Appendix 5.

It is worth noting that the stakeholder participation in this review was excellent and extremely positive. This bodes well for the future of the markets.

It is encouraging to note that there was considerable overlap between the issues raised by the different stakeholder groups. Some of the key issues are summarised below:

Strengths	Weaknesses	Opportunities	Threats
Loyal customer base	Lack of marketing/PR	Develop business start-up packages	Doing nothing
Links to tourism	Poor communication between traders and stakeholders	Healthy eating demos on markets	Failure to attract/retain younger customers
Recognition of benefits of market by surrounding retailers	Lack of business support for new business start-ups	Improve quality control	Supermarkets/out of town shopping
Variety of offer	Lack of signage	Develop links to cafe/restaurant culture	Inflexible management
Affordable rents	Carrying goods to cars	Create shopping pick up points	
Supports local micro businesses	Need to incentivise traders	Loyalty cards	
Local food/products		Better partnership working	
Good critical mass (not Haverhill Friday)		Target key commodities	
		Raise profile of local food/products	
		Better links with bus/tour operators	

One issue that did divide opinion was the physical appearance of the stalls, with some thinking the lack of stall uniformity was a real weakness, while others saw the lack of uniformity and standards as adding to its traditional appeal. There were also mixed views on the proximity of the markets to car parks and to the level of parking charges.

It should be emphasised that the results of the stakeholder consultation sessions helped directly inform the review's conclusions and recommendations – in particular, the common themes identified in the table above.

In relation to the Haverhill stakeholder consultation, it emerged that the Town Council provides a range of specialist markets throughout the year.

### Haverhill traders' questionnaire

Nine completed questionnaires were returned. These represented five Saturday market traders, three Friday market traders and one that trades both days. The results are summarised below:

## APPENDIX A

<b>Strengths</b>	<b>Weaknesses</b>
Rental levels	Location of Friday market
Small but loyal customer base	Layout of market
Friendly atmosphere	Inconsistent management (casuals perceived to get preferential treatment and parking issues)
Lack of competition in relation to commodities	Lack of incentives for regular traders
	Lack of marketing/promotion

Six traders reported a decrease in trade over the last year, three reporting trade was the same.

### User/Non-user surveys

Initial evaluation of these surveys has been carried out. The following tables illustrate some of the key findings.

#### Customer Purchases

<b>Ranking</b>	<b>Bury St Edmunds Wednesday</b>	<b>Bury St Edmunds Saturday</b>	<b>Haverhill combined</b>
1.	Fruit & vegetables	Fruit & vegetables	Fruit & vegetables
2.	Plants, flowers, other gardening products	Plants, flowers, other gardening products	Clothing/bags/jewellery
3.	Fish	Books/stationery/greetings cards	Plants, flowers, other gardening products
4.	Clothing/bags/jewellery	Delicatessen/other food items	Household/DIY
5.	= Household/DIY and Books/stationery/greetings cards	Household/DIY	Delicatessen/other food items

#### Market requirements

<b>Ranking</b>	<b>Bury St Edmunds Wednesday</b>	<b>Bury St Edmunds Saturday</b>	<b>Haverhill combined</b>
1.	A wide variety of goods	The goods sold are value for money	The goods sold are value for money
2.	= Friendly and helpful traders	A wide variety of goods	A wide variety of goods
3.	= The goods sold are value for money	Friendly and helpful traders	Friendly and helpful traders
4.	The goods sold are locally produced	The goods sold are of good quality	The goods sold are of good quality
5.	The market is a safe place to shop	The market is clean and tidy	The market is clean and tidy

### Other facilities wanted

Ranking	Bury St Edmunds Wednesday	Bury St Edmunds Saturday	Haverhill combined
1.	Information about Council, police, health or other services	Cooking demonstrations	Information about Council, police, health or other services
2.	= Cooking demonstrations	Information about Council, police, health or other services	= Cooking demonstrations
3.	= Help to carry shopping to car/bus	Art & heritage displays	= Art & heritage displays

### Customer age profile

Ranking	Bury St Edmunds Wednesday	Bury St Edmunds Saturday	Haverhill combined
Under 35	10%	0%	7%
35-59	39%	38%	22%
60 and over	51%	62%	71%

In relation to customer age profiles, there could be a slight bias in the questionnaire sampling process, as it is often harder to get young people to take the time to complete face-to-face surveys. However, the results reaffirm a common experience on traditional retail markets that the offer appeals more to an older demographic. There are some examples of markets targeting younger shoppers such as the popular and successful Camden markets in London, but to attract younger people would require a major realignment of the offer and marketing strategy. It should also be noted that the UK has an aging population, some of whom have significant disposable income.

### Site visits

Each of the two markets was visited on both trading days.

Bury St Edmunds provides a very good offer with good critical mass, is well located and well supported by customer footfall. The quality of the products sold is generally high and the traders spoken to demonstrated very good product knowledge and customer service. On the down side, there was a lack of macro and micro signage directing customers to the market. Cleaning and waste management was generally good, but see the section below in relation to costs/recycling.

As shown in the photograph below, there is also a regular craft and collectibles market, which takes place in the old Corn Exchange every Wednesday.

**Bury Wednesday Market**



**Sign promoting Wednesday craft market**



**Bury Saturday market – good footfall, good presentation**



**Haverhill**

The Saturday market is well attended has good critical mass, but poses a number of issues in relation to its retail offer. These include poor stall profiling, with dead sides and backs prevalent, congestion caused by traders' vehicles parked on the market, poor layout blocking access to some shop entrances and a lack of variety.

The Friday market is struggling, currently located on the market square, it lacks variety, visual appeal and critical mass.

**Haverhill Friday market**



**Haverhill Saturday market – pinch point**





**Haverhill Saturday market – poor profile**



**Haverhill Saturday market – trader parking**

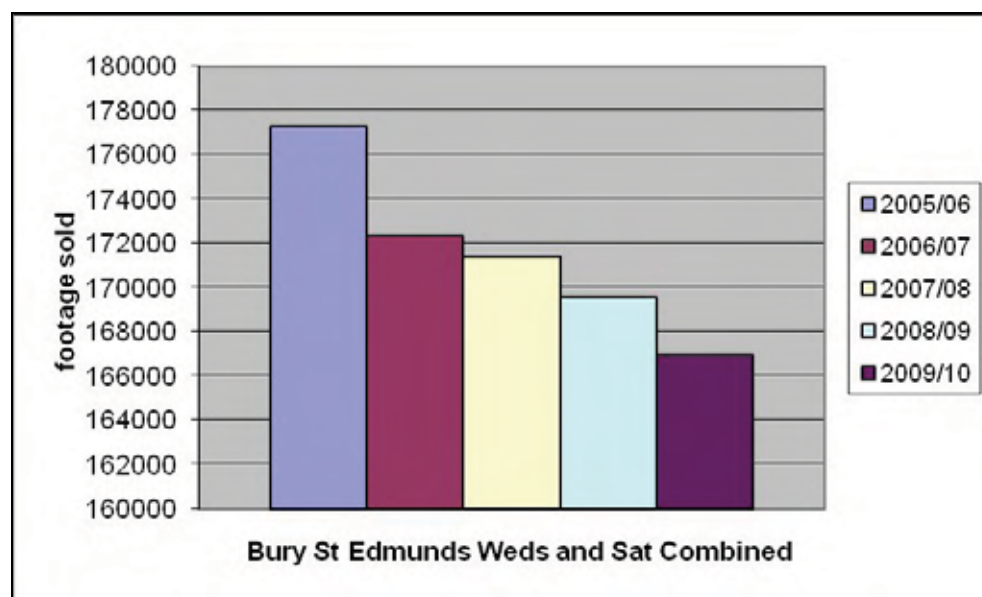


**Operational/Financial management**

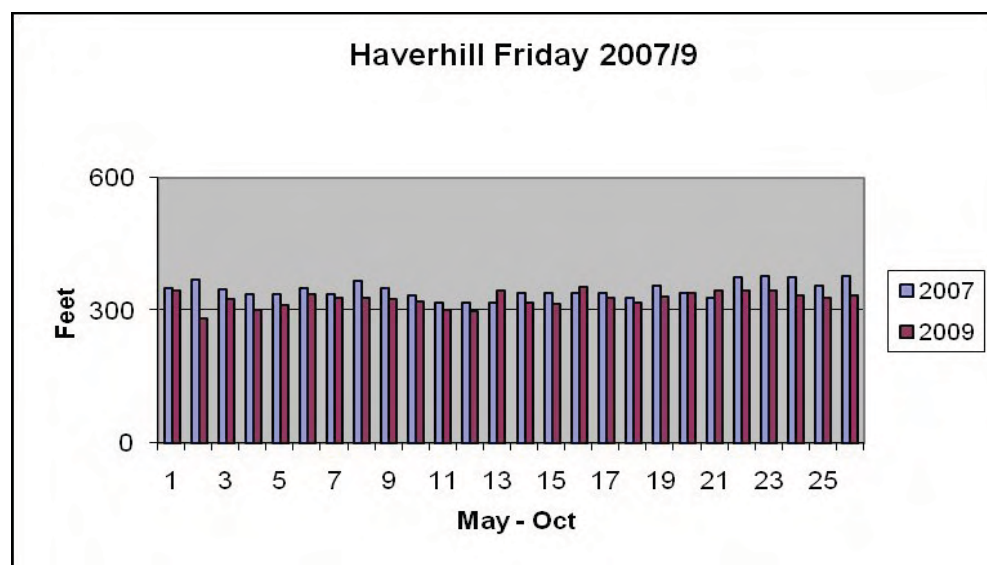
**Occupancy/permanent/casual traders**

The Council currently measures occupancy in two ways – as the number of traders present or as the foot frontage of market space let. Based on data provided by the markets service (measured November 08 – January 10), occupancy at Bury St Edmunds market remains high, with an average of 80 traders on Wednesdays (67 permanent traders and 13 casuals), and 85 traders on Saturdays (71 permanent and 14 casuals). There has, however, been a reduction of space let of almost 6% over 5 years.

Bury	Sat	Weds	Total	% diff.
2005/06	88219	89061	177280	
2006/07	89358	82994	172352	-2.78
2007/08	88599	82807	171406	-0.55
2008/09	87163	82390	169553	-1.08
2009/10	85884	81055	166939	-1.54
<b>Overall</b>				<b>-5.83</b>



At Haverhill market, there is an average of 12 permanent traders on Fridays and 22 on Saturdays. The number of casual traders has not been provided. In terms of stall frontage let, the Friday market has shown a 6% reduction comparing the periods May – Oct 2007 with May – Oct 2009.



The reductions in occupancy are relatively low, and reflect the more difficult trading conditions that many markets have faced over the past five years.

### Commodity profile food/non-food

Based on data provided by the markets service, the food/non-food split for both the Wednesday and Saturday markets at Bury St Edmunds is 30/70%.

The corresponding food/non-food figures for Haverhill are 36/64% for Fridays and 25/75% for Saturdays.

### Accessibility and permeability

Pedestrian flow around and through Bury St Edmunds market is good, but there are some issues in relation to Haverhill market, particularly relating to vehicles, narrow pavements and access to surrounding shops.

### Shopping experience

Overall the shopping experience at Bury St Edmunds market is very good, but there are a number of issues relating to modern retail standards that need to be addressed. These include customer care services (e.g. where and to whom do dissatisfied shoppers complain, some quality standard issues in terms of product and display, better use of 'anchor' products/traders).

### Financial management

The market service continues to show a healthy operating profit. However, the current accountancy procedures make it difficult to benchmark with other markets. For example, it is not clear where and how all the direct strategic and operational management costs are apportioned. Equally, stall charges are calculated on a foot frontage basis, which although not unique, means comparison with markets that charge per stall can be misleading. NCS is aware of one market in Buckinghamshire that charges £2.50 per linear foot.

In relation to stall charges, whilst benchmarking can be useful, more important is how an individual market's fees are perceived by the traders. If they are considered too high, traders will leave or not come onto the market. The fact that occupancy has remained relatively stable at Bury St Edmunds suggests that the ratio of stall charge to stall income is acceptable. In relation to Haverhill market the traders have indicated that the relatively low rent is a reason why they continue trading there.

### **Staffing levels**

In financial terms the Council's market operation performs well, delivering a high level of profit on its operation. This is in part, linked to the staffing levels associated with the operation, which are low. Whilst this has not caused any major issues in recent times, there are two potential problems that need to be considered. The first is that if a highly experienced member of the small team decides to leave/retire it leaves a significant operational skills gap behind. Secondly the low staffing resource means that managers are only able to be reactive, rather than taking proactive measures to ensure the sustainable performance of the markets.

### **Waste management**

Although the cleaning and waste management arrangements on the market are effective (reinforced by feedback from the stakeholder groups), there are two issues that need to be addressed. The first is the cost of the current provision. For Bury St Edmunds market, these costs (based on 2009/10 budget figures) amount to almost £108,500 per annum on an expenditure of £267,700 i.e. 40%. For a two day a week market this equates to over £1,000 a day. For Haverhill market they amount to £38,200 on expenditure of £49,700 i.e. 77%. For a two day a week market this equates to £367 a day.

The second issue relates to the current lack of recycling of market waste – it is understood that all the waste generated on the market currently goes to landfill.

Discussions with market managers suggest that there may be alternative arrangements that can be implemented to address these issues.

### **Food/farmers'/local produce**

It is interesting to note that Bury St Edmunds market is an example of a traditional retail market that integrates local farmers/producers into the market offer, rather than operates a separate farmers' market. Information provided by the markets service suggests there are in the order of 10 product offerings:

- Free range pork products and eggs
- Cup and fancy home baked cakes
- Tea and coffee products
- Rare breed meats
- Veg plants and seeds (grown locally)
- Bread and pastries
- Deli
- Caribbean cakes and pastries
- Olives
- Cheeses, pates

It should be noted that there is no national definition of 'local'. The National Farmers' Retail & Markets Association (FARMA) uses, as part of its certification scheme, food grown, raised or produced within a 30 mile radius of the market (100 miles for London). Kirklees Council recently launched a campaign championing locally produced food at markets entitled "Live Love Local", which allows traders who sell produce grown or raised within 40 miles of the



market (fresh fish can come from up to 100 miles) to display a special logo. Market stalls selling more than 80% of total local produce will have their entire stall branded as 'Live Love Local'. Equally, there can be merit in promoting regional produce.

### **Market Rights/EU Services Directive**

Information provided by the Council shows that Bury St Edmunds market was established under Royal Charter, and that Haverhill market was established by statute. Both these processes confer 'market rights' on the owner, which in effect gives them a monopoly right to prevent/control rival markets within a distance of 6.66 miles of each market. Over time, case law has established that in order to protect those market rights, there must be open and consistent enforcement of the powers. As part of this review, it emerged that the Council has no published policy on market rights and that both in Bury St Edmunds and Haverhill other markets regularly take place that are not licensed by the Council.

There is clear potential to try and develop specialist markets in the arc shopping centre, and it is important that systems and procedures are in place to manage that situation.



The EU Services Directive came into force in member states in December 2009. This directive, as part of the single market process, requires local authorities to set up on-line licence applications and payments for a range of services. It is generally accepted that markets and street trading fall within this requirement. There is, however, currently some confusion as to whether market rights are a barrier to the implementation of the Directive, and although the previous government took the view that they were incompatible with the Directive, the National Association of British Market Authorities (NABMA) took Counsel's advice which suggested that market rights were not incompatible with the Directive. NABMA members have been given advice on how to proceed within their authorities.

### **Systems and Procedures**

There is no detailed, systematic and up-to-date procedures manual for the operation of the Council's markets. This potentially poses a number of risks, including:

- Enforcement of market rights (see above)
- Potential legal challenge to the Council's stall allocation procedure
- Inconsistent and unclear enforcement
- Skills/knowledge gaps as experienced staff leave.

### **Marketing and PR**

There is currently no meaningful marketing budget allocation for the markets service. Equally, the Council's web site does not easily enable a user to find out information about the markets.

## Section 3 – Conclusions

Based on a review of the findings, NCS draws the following conclusions:

**Overall:**

St Edmundsbury's market operation is very efficient, with a 'lean' structure delivering a significant trading profit. Bury St Edmunds market is thriving and popular with a good range and quality of products. The response by stakeholders to the markets review was also excellent, both in terms of participation and support for the markets.

Haverhill market, by contrast, is struggling, particularly on Fridays, and has a very different demographic base to that of Bury St Edmunds.

In order to ensure that the markets are able to thrive and be sustainable, there are a number of changes that can be introduced to improve the markets at both locations.

**In relation to both markets:**

C1. The Council appears capable of implementing the changes necessary to ensure the viability and sustainability of the markets, and as such it is not necessary to seek an external partner at this stage.

C2. The markets remain popular with a wide range of stakeholders.

C3. In terms of the market customers survey, there was a consistent response in relation to commodities bought (fruit & vegetables being the most popular), why people shop (variety, value for money and friendly and helpful traders), and other facilities wanted (cooking demonstrations and information about council, police, health and other services). The age profile of the market customers (the majority are 60 or over) is significant in terms of the retail offer and marketing/PR strategy for the markets.

C4. The market operation is efficiently run, delivering good and consistent operating profits, but is less effective due to the lack of staffing resources.

C5. There is a lack of forward planning, particularly around attracting new commodities and new business start-ups.

C6. The markets contribute to a number of vision statements contained in St Edmundsbury Vision 2025 document, but their role needs to be better articulated and measured.

C7. The markets tend to operate in a somewhat isolated manner and would benefit from more partnership working.

C8. Communication between the Council, the traders and other stakeholders can be improved.

C9. The current level of marketing and promotion of the market is extremely low and given the current levels of retail competition, need to be improved.

C10. The markets contribute to St Edmundsbury's tourism offer, but would benefit from more targeted marketing.

C11. The markets operational systems and procedures do not appear to be complete nor consistently applied. One example of this relates to the Council's market rights.

C12. Incorporating local food and products into the market offer is a real strength and one which can be developed further.

C13. There is scope to make savings in relation to the markets cleaning and waste management operations, as well as improving recycling rates.

### **In relation to Haverhill market:**

C14. The Friday market is struggling and would benefit from repositioning along the high street.

C15. The relationship between the stalls and the shops on the high street can be improved.

C16. Haverhill Town Council has developed considerable experience in relation to delivering specialist markets and closer working relationships could benefit both operations.

C17. There appears to be a lack of data in relation to footfall, where shoppers come from and the pedestrian flow between the town centre and the new TESCO/leisure complex.

## Section 4 – Recommendations

NCS makes the following recommendations:

### **In relation to both markets:**

#### **Market Rights/EU Services Directive**

R1. The Council should redraft its market rights policy, incorporating its view on the implications of the EU Services Directive, and ensure that the policy document is publicly available (preferably on the Council web site), and that the policy is fairly and consistently enforced.

#### **Business Support/Development**

R2. As part of its economic development remit, the Council should develop a business support package to encourage and support new enterprise/local business development in line with Vision 2025. This package should look at:

- Investing in a small number of stalls for new businesses
- Creating a business support package for new businesses with information and directions to other agencies and services
- Develop trader ‘buddies’ that will act as business mentors for new start ups.
- Offering time-limited discount rents for key commodities

#### **Waste management**

R3. The Council should urgently review its current cleaning and waste management arrangements with a view to reducing costs and increasing recycling rates. Any revenue savings should be ring-fenced to support improvements to the market such as the business support package.

#### **Marketing/PR**

R4. The Council should develop and implement a marketing and promotion plan for the markets. This should include:

- Improved web presence
- Improved macro and micro signage
- Developing ‘good news stories’
- Targeted marketing improving links to tourism e.g. coach operators, US Air Bases, local restaurants (supplying local produce), town residents, and businesses, and younger people.
- The option on market loyalty cards/short-stay parking rebates

R5. To support this initiative it is recommended that a ring-fenced budget is established, whereby a marketing levy is charged per stall per week, and the sum matched by the Council. This fund should be jointly managed by the Council and traders, to ensure openness and effective targeting. It will also be necessary to ensure that marketing expertise is used – either from the Council’s in-house team or from external professionals. In particular, there should be liaison with Bid4Bury and the Town Centre Manager in Haverhill on the wider promotion of the town centres - including markets.

### Customer service

R6. The Council should, in partnership with the traders, develop and implement a customer charter for markets, clearly setting out customer rights, service standards, and what to do and where to go if a customer wishes to complain.

R7. In addition the Council and traders should seek to develop a 'collect later' service to help shoppers with heavy/bulky items. It should also introduce a car pick up point on the market for the same purpose.

### Communications

R8. The Council should develop and implement a markets communication plan, which ensures regular dialogue with market traders and stakeholders. In addition to meetings, the plan should consider:

- Improved web profile and accessibility
- Newsletters to staff/traders
- Notice boards on the markets
- An agreed method for traders to feedback info/comments to market management

Two examples of market web sites are linked below. It is interesting to note that both are independent of the Council's web site, and have been developed from a more commercial perspective.

[www.manchestermarkets.com](http://www.manchestermarkets.com)

[www.norwich-market.co.uk](http://www.norwich-market.co.uk)

### Partnership working

R9. In order to capitalise on the support for markets within the borough, it is recommended that the Council seeks to improve partnership working by:

- Creating a markets forum for stakeholders
- Ensuring that markets play an active and participatory role in Bid4Bury.
- Developing specific links with the Chambers of Commerce in relation to promotion and the business support project
- Developing community links such as healthy eating demos on markets with the Primary Care Trust
- Better liaison with County/Town Councils and Town Centre Managers in relation to the economic benefits of markets/business start-ups and promotion.
- Raising the profile of markets in schools by curriculum links to local business/environment and encouraging active participation by schools on the market as part of their health/entrepreneur development
- Creating space for information on Council, police, health and other services.

R10. The market forum should consist of Councillors, senior officers, market management and traders' representatives.

### Local food/products

R11. The Council should make better use of the Unique Selling Point (USP) provided by its inclusion of local food and products on the market by:

- Targeting local food/products as a key commodity and attracting new businesses
- Creating a sub-brand within the market that makes local food/produce readily identifiable to customers
- Target marketing this as part of the markets USP

Given St Edmundsbury's strong tourism links, it is recommended that 'local' is defined in relation to produce/products from East Anglia.

### **Systems & Procedures**

R12. The Council should develop and implement an operational management manual for the markets. As part of this it should review its procedures on:

- The location of and charges for premium stalls
- Its allocation system
- Potential reward for 'ever-present' traders
- Trader parking arrangements (both on the markets and off site)
- Its financial accounting processes to ensure that full costs are identifiable against each market
- Its key performance indicators

### **Staffing**

R13. Given the current lean and reactive nature of the markets service staffing resources, the Council should seek to create a new part-time post of business development manager, whose role will be to proactively implement some of the change processes identified by this review, and develop the market. The cost of the new post could be offset by making the full time market superintendent's post part time, once the current member of staff retires.

R14. It is understood that the full time Market Superintendent will be retiring in the near future. Given his experience and expertise, it would be prudent to consider recruiting whilst he is in post to create a period of overlap/handover.

### **Business Plan**

R15. A business plan for the markets should be developed and implemented, setting out the service priorities, change programme actions, resources and financial modelling.

### **Haverhill market**

R16. In relation to Haverhill market, the Council should, in addition:

- Review the stall layout of its Saturday market to ensure that accessibility and permeability are improved as well as access to surrounding shops. The review should also consider the offer that first greets the customer in terms of the visual attractiveness of the commodity and stall layout.
- Continue with its plan to relocate the Friday market from the market square to the high street, in line with the above.
- Seek closer working arrangements with the Town Council and Town Centre Manager to better integrate the market with the specialist markets provided by the Town Council.

### **Performance measures**

R17. A range of Key Performance Indicators has been developed nationally for retail markets. Of these, it is recommended that the following are adopted by St Edmundsbury:

- Occupancy rates
- Number of businesses supported through the portfolio's operation
- Number of market businesses managed by traders living within the local authority's boundaries
- % waste generated by the markets that is recycled
- Business confidence levels
- Customer satisfaction levels

## Appendix 1 – Measuring Success

### **Successful and Sustainable Markets - Critical Success Factors**

The Retail Markets Alliance has reviewed a number of versions of Critical Success Factors for retail markets, and produced a 'hybrid' version taking the common and best elements of each. These are listed below. The more areas the market conforms to, the greater chance it has to succeed.

#### **Sense of place**

Locations are said to have a strong 'sense of place' when they have strong identity and character that is deeply felt by local inhabitants and by many visitors. Successful markets such as La Boqueria in Barcelona, and Borough market in London clearly demonstrate this. This sense of place reflects not just the physical nature of the market and location but also the cultural and social diversity of the area.

#### **Critical mass**

This measure looks at the scale of the market in relation to its location, and is not just about size. It is important that the market has critical mass for two reasons. Firstly, placing 25 stalls in a space that can support 125 stalls means that the market will appear small and inconsequential. Equally, a 20-stall market that fills its location is more likely to appear bustling and thriving. In relation to size, the larger the market, the more chance it has to survive economic downturn.

#### **Good management**

Good management is fundamental to any successful market and should not be undervalued. Good decision making, effective communication, business acumen and the ability to deliver a safe, clean and inviting environment are essential. Equally, the effective capture, management and analysis of information and data is an important constituent of successful markets. It is both strategic and operational and recognises the need for, and delivers investment in markets.

#### **Accessibility & permeability**

The market needs to be accessible for all users, so good transport links (public and private) are essential. The market must be welcoming with good entrances, and the interior must be designed to allow good customer flow. This factor also includes location, arguably, the single most important success factor. Markets placed in the wrong location fail.

#### **Marketing & PR**

The market needs to be promoted to raise the awareness both for shoppers and to retain and increase the traders' base. Marketing strategies should recognise the market's brand and emphasise its 'unique selling point' (USP). There should be strong positive links with the local media.

#### **Safety & security**

Customers do not like to frequent places that have high levels of crime and anti-social behaviour. Equally, they will react to perceptions of crime as well as actual crime. It is essential, therefore, that where this is an issue it is tackled robustly and effectively.



### **Integration with surrounding retail offer and community**

The market offer has to be understood in relation to the surrounding retail offer. Is the market competing with or complementing that retail offer? What differentiates the market offer from the other shops, so that it can attract and retain its own customer base? Equally, the market offer has to be aligned to its demographic base. Understanding retail customer profiles, spend patterns and values and the types of commodity and services that different customer types prefer is essential.

### **Partnership working**

Sustainable markets need partnership working. This involves not just effective working between managers and traders, but also building and maintaining links with, for example, other council departments, local businesses, town centre managers, local schools, colleges and universities, local primary care trusts, and the local media. They will vary from location to location.

## Appendix 2 - SWOT analysis of Bury St Edmunds market

### Strengths, Weaknesses, Opportunities and Threats identified by stakeholders at meeting held 15 April 2010

#### **1. Strengths**

- Good quality cheap fruit and vegetables
- Variety of offer/product balance
- Reputation
- Brings people into town
- Prime location
- Tourist attraction – particularly Wednesday with coach trips
- Some positive feedback from visitors on its 'charm'
- Very friendly atmosphere
- Intimate/not too large
- Good occupancy rates/continued demand from traders
- Good footfall (though differences between Wednesday and Saturday)
- Good return for the borough
- Works well with the majority of businesses/links to Town Centre Management
- 4 shops also have stalls on the market
- Majority (approx 85%) of traders local
- New stalls regularly appear
- Affordable levels of rent
- Sufficient car-parking
- Value car-parking
- Country buses still bringing people into town/market
- Adds to strong independent retail offer of the town
- Market is well managed (Council perspective)
- Good cleanliness/waste management
- Good links to regulatory services (e.g. Trading Standards/Environmental Health)
- Good links to media

#### **2. Weaknesses**

- Footfall
- Lack of marketing
- Demographics – fewer young people shopping on market
- Lack of facilities – toilets, proximity of car-parks etc
- Lack of craft/farmers' markets
- Seasonality
- Is market shopping more of a chore?
- Narrowness of main market thoroughfare (perceived rather than real?)
- Physical appearance – shambolic
- Lack of investment
- Relationship with traders – do traders think the council really supports the market?
- Communication with traders – irregular and formal
- Lack of understanding of how hard it is to run a successful market business

- Capacity of the traders to change/improve
- Uncertainty over what happens to the trading profits
- Lack of business support for new/existing traders
- Traders' representatives tend to be fruit and vegetable traders
- 1 or 2 'inappropriate' stalls
- Parking at Christmas – if not in by 10:00 AM can't get into 'park and ride' locations
- Lack of signage
- Website poor
- Customer care of *some* traders
- Lack of complaints procedure – do shoppers know where/how to complain?
- Cash based transactions – only a few traders offer payment by card facilities
- Poor links to County Council's strategic role
- Range of offer
- Congestion on the market – mobility buggies/prams etc (perception?)
- Market blocks view from town to St John's Street

### 3. Opportunities

- Use of market for 'business incubation'
- Better partnership working e.g. with Chamber of Commerce/ Council's Economic Development team
- Option of providing/setting up stalls for new market businesses
- Develop closer engagement between market traders and retailers
- Consult with Youth Council
- Improve quality control – currently only regulatory by borough
- Develop customer service training – adopt an 'Ambassador' approach
- Investment
- Improve community links – PCTs/Colleges etc
- Make better use of market town curriculum link to schools
- Try to get more 'good news' market stories in media
- Develop farmers,/organic/local food offer
- Review offer in relation to ethnic minorities
- Are trading hours what shoppers want?
- Develop market links to town's cafe culture
- Build on the market's tradition
- Work more closely with bus companies in relation to out of town services/customers
- Make Wednesdays 'event day'
- Opportunities to link market with e-trading
- Loyalty cards
- Option of making better use of Corn Exchange

### 4. Threats

- Doing nothing!
- Privatisation
- Modest expectation of traders
- Changing shopping patterns
- Reduction in cash transactions generally
- Supermarket customer loyalty – loyalty cards/discounts free parking etc
- Young people don't want to shop on markets
- Balance between 'traditional' and 'old fashioned' may put people off
- Do young people want to be retailers?
- Lack of customer service
- Demand for organic/local food might be met elsewhere

## Appendix 3 – SWOT analysis of Bury St Edmunds market

### Strengths, Weaknesses, Opportunities and Threats identified by market traders at meeting held 15 April 2010

#### **1 Strengths**

- Generates significant profit - £135k in 2009/10, £139K in 2008/9
- Traded well through recession
- Loyal customer base
- Still has casual traders turning up
- Link to tourism – the market attracts people into town
- Helped establish the Christmas market
- Individual character
- The traders
- Location – good link between arc shopping centre and Gardens
- Quality of product
- Recognition of benefit of market by surrounding retailers
- Generic publicity material often uses market image on front
- Traditional – building long-term relationships with customers/families
- Some commodities attract younger people
- Local media supports market/traders
- Good residential population in town centre

#### **2 Weaknesses**

- Reduced footfall due to relocating council offices/businesses outside town centre
- Accessibility (car-parking). Town car not bus-fed
- Toilet provision
- Everything is being directed to arc shopping centre
- Detrimental effect of arc build/opening – market has not recovered. First 3/4 weeks of opening saw boost but decline since (also affecting other retailers – not just market)
- Younger/older customer split between arc and town centre
- Very different demographics between Wednesday and Saturday (Saturday younger - though views mixed)
- Arc took existing retailers out of shops in town
- Lack of communication with council
- Infrequent meetings with senior council officers/members
- More senior managers only turn up if there's a problem
- Traders not listened to
- Lack of signage
- Distance to carry shopping from market to car-parks
- Licence fee structure based on old layout of 'premium' stall. These have changed
- No reward for regular traders – 'permanent' casuals and casuals only turn up when it suits them – 'fair weather traders'
- Lack of marketing/marketing budget

- Marketing material for Christmas market does not make reference to provisions market
- Poor web site
- Too many gaps in market – outdated allocation procedure
- Some traders want to pack up early on Wednesdays
- Vans blocking access to market
- Some traders' offers don't attract younger customers
- Dearest car-parking charges in the area
- Lack of incentives for new business start-ups

### **3 Opportunities**

- Develop Business start-up package
- Reward for 52 week a year traders
- Develop portering operation to carry customers shopping to car
- Expand the market towards arc shopping centre
- Promote more restaurants buying from the market
- Introduce free parking till 11:00AM
- Create a shopping pick-up point near the market
- Introduce a minibus link to car-parks
- Target marketing campaign to local American military bases
- Develop better links to Business Link/Chamber of Commerce
- Introduce products that extend trading hours (early and late)
- Develop better links to schools/colleges
- Healthy eating demos on market
- Potential better links to specialist markets – but needs marketing
- Develop/contribute to Bury's Unique Selling Point (USP) – Cathedral, Abbey Gardens, Georgian architecture, improving restaurants

### **4 Threats**

- Council indifference
- Privatisation (control/regulation, charges)
- Loss of management staffing experience/expertise
- E-retailing
- Out of town shopping
- Continued empty shops in town (rent/rates)

## Appendix 4 – SWOT analysis of Haverhill market

### Strengths, Weaknesses, Opportunities and Threats identified by stakeholders at meeting held 16 April 2010

#### **1. Strengths**

- Just having a market here
- Saturday market successful – good critical mass
- Low cost fruit and vegetables
- Personal service/social interaction
- Meeting place for older generation (Fridays)
- Complementary offer to the high street – sometimes can get products you can't find on the high street
- Low stall rents
- Relatively low retail vacancy rate (approx 7%) not changed in 12-18 months – still demand.

#### **2. Weaknesses**

- Lack of data on demographics/customer habits (no footfall counts, no customer profiling, 16,000 retail directories sent out but coupons only returned from Haverhill)
- Do we need a Friday market?
- Moving Friday market would disrupt local businesses
- Traders get preferential treatment over shop keepers – low rent trading times etc
- Restrictive practices in relation to management of market - who gets on
- Lack of co-ordination between public transport links to outlying area and market/market days
- Disability access – shop mobility does not operate on Saturdays
- No dedicated trader parking
- No free parking (short stay) for shoppers
- Weight of shopping and distance to car-park
- Communication with traders
- Website
- Trader no-shows – 'fair weather traders'
- Infrastructure – e.g. not enough power supplies (None in Queen Street)
- Potential to restrict access to Church for services (Fridays)
- Haverhill is isolated geographically
- Lack of signage (and road closure /diversion signs in particular)
- Some crime/security issues – shoplifting/pickpockets
- Not enough choice on Friday market (depth and range)
- Tried specialist French/Italian markets in Queen Street – perceived as expensive but some traders did well – attracted different type of customers
- Borough operates Friday/Saturday market, Town Council operates specialist markets

#### **3. Opportunities**

- Moving the Friday market from the square to the high street
- Better links to specialist markets
- Better marketing

- Joined up/partnership working
- Target key commodities e.g. sports kit for younger people
- Better co-ordination at borough level between markets and car-parks
- Retirement of management staff
- Option of management by town council
- No local competition – appeal to residents (price of petrol to travel)
- Option for farmers'/local food market
- Incentives/ information/support for new businesses on market
- Link to mentor units in town
- Extended use of square
- Option of Friday/Saturday evening trading

#### **4. Threats**

- Apathy
- Inflexible management
- Perceived as older generation – not capturing 'youth market'

# Appendix 5 – SWOT Analysis of Bury St Edmunds Market by Suffolk County Council Economics Team

## **St Edmundsbury markets SWOT analysis**

### **Strengths**

- Local Food
- Local small traders
- Variety of products on sale
- Supports micro businesses
- Good for supporting start up ventures
- Good to close the town to traffic on market days giving the town a relaxing atmosphere

### **weaknesses**

- Is there an understanding of the provenance of products (supporting greenest county and local businesses)
- The market stalls are un co-ordinated / do not match so the market has a tatty image. Compared to Ipswich, Cambridge, Norwich where the stalls are co-ordinated

### **Opportunities**

- Specialist area of the market for food and drink for example (esp. Locally sourced)
- Charities section of market
- Can the BID company get involved and support the market development as the market is an integral part into drawing people into BSE for example
- Themed days for the market – again can the BID company support. E.g. Halloween, bonfire night, May Day, Valentine Day
- Special offers through the market. E.g. Stowmarket did a loyalty card system with purchasers from the market. When they had 10 purchases they got something free from one of the local shops / free parking for a day offer!.
- Match making of a market stall with a retailer – help to broker relationships where they can be mutually beneficial in a business perspective (esp. Where no immediate competition)
- Map of the market – especially if change the layout. Use as a marketing tool
- Keep the try and buy some stalls do
- Open up a 'plush' market area in the arc development on certain weekends during the year.
- Can there be an area within the market run by the market officer during the peak hours of the day for people to shop and drop. i.e. purchases from the market can be heavy which puts some people off buying their products from a market. Can there be a secure area for leaving shopping and coming back for it whilst browsing market /



shops (a bit like a cloakroom model). Clearly not for perishable goods. Costs involved include insurance and a person to man the stand.

### **Threats**

- Other towns with markets
- Supermarkets
- Internet
- Sunday carboots where many traders go now

**SCC, economic development, May 2010**