PART I REPORT

A STUDY OF THE AGRI-FOOD SYSTEMS OF ÁLAVA

USING A CONSUMER-PRODUCER-POLICY FRAMEWORK

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PART I: Markets Surveys

1. Introduction

In global and local food systems, consumers influence agricultural markets, production, and policy. The goal of these surveys was to better understand consumer motivations and interests in Vitoria-Gasteiz, as one piece of the consumer-producer-policy nexus. The focus of these surveys were the consumers at local markets in Vitoria-Gasteiz, with the objective of understanding market-goers: their motivations, their consumer habits, and what could be improved at the local markets of Vitoria-Gasteiz.

2. Methods

The surveys were conducted in the local markets of Vitoria-Gasteiz, over the course of three weeks from October 23rd to November 15th, 2021 (see Appendix A for the Market Survey Questionnaire). 144 surveys were conducted in total, 143 in Spanish and 1 in Basque, following the request of the respondent. There are four main local markets in Vitoria-Gasteiz: 1) Abastos, an indoor market located in the building adjacent to Plaza Santa Barbara in the city center, 2) Santa Barbara, an outdoor market in Plaza Santa Barbara, 3) Simón Bolívar, a market located in the Judizmendi neighborhood, about 750m northeast of Plaza Santa Barbara, and 4) Lakua-Arriaga, a market in the North of the city in the neighborhood of Arriaga, about 3km north of the city center.

Each market sells different products: Abastos is the only market that sells fish, and has many more meat vendors as well as a greater variety of canned and pickled goods than any of the other markets. Santa Barbara's main products are fresh vegetables, but vendors also sell fruit, cheese, honey, meat, and baked goods. Lakua-Arriaga and Simón Bolívar have much less produce for sale, as the majority of the markets are occupied by stands selling clothes and shoes. They both offer one or two vegetable stands, baked goods, wine, and walnuts. Lakua-Arriaga additionally has a meat stand and Simón Bolívar has a plant and garlic stand as well as a mushroom stand.

Abastos is open Monday through Saturday, (M-F 9-14h and 15-20h/20:30, and 8-15h on Saturdays), Santa Barbara and Simón Bolívar are open Thursdays and Saturdays, 9 to 14h, and Lakua-Arriaga is open Wednesdays from 9 to 13:30.

Prior to the first survey, a test period was conducted at Abastos, Santa Barbara and Simón Bolívar.

In total, 30 "units" of surveys were conducted, with each unit consisting of 45 minutes. 18 of these in total were conducted at Santa Barbara, Simón Bolívar, and Abastos***,** with 6 units at each market. The surveys were conducted on three Thursdays and three Saturdays, with two time slots each day: 9-11:30 and 11:30 to 14h. Each 2.5 hour slot contained 3 survey units of 45 minutes (a total of 2 hours and 15 minutes, allowing for breaks between units and relocation from one market to another). The distribution of these units was planned so that each market's units were evenly distributed between and within time slots. The goal was to reduce any bias that could come from an uneven distribution of survey times or the order of time slots. Within this planned distribution, the order of the survey units was randomized.

***** *An upstairs area at Abastos, dedicated to organic producers, was visited but no surveys were conducted there due to the very small attendance.*

Additional surveys were carried out at Abastos, as it has longer opening hours and a greater number of customers than Santa Barbara, Simón Bolívar, or Lakua-Arriaga. In addition to the 6 aforementioned survey units in Abastos that took place in the morning hours on Thursdays and Saturdays, another 1.5 units (one full unit and one half unit consisting of 22.5 minutes) were conducted at two other morning hours at Abastos, while 7.5 units (7 units and one half unit) were conducted in the evening hours of Abastos. This allowed for an equal distribution of morning and evening hours, each with 7.5 units each. The weekdays and times for the survey units were randomly selected within a planned distribution of having a minimum of one survey unit per day of the week at Abastos, in order to limit any potential bias based on different days of the week.

The surveys at Lakua-Arriaga were carried out on three Wednesdays, with the timing of the survey unit randomly selected first between and then within two 2.25 hour time slots (9-11:15 and 11:15-13:30h) representing the opening hours of the market. In total, there were 15 survey units carried out at the outdoor markets (6 each at Santa Barbara and Simón Bolívar, and 3 at Lakua Arriaga), and 15 at the only indoor market, Abastos.

The survey was conducted by walking up to people, introducing myself as working with the town hall and asking if the person would be interested in completing a brief survey. Due to the majority of people being in a hurry while shopping, and the difficulty in getting the people walking around to talk to me, most of the surveys were conducted while people were in line waiting to be attended. Questions were asked by the surveyor (myself) and written down on the survey slips.

Tests for differences between groups were conducted with t-tests comparing distributions of different factors of interest.

3. Survey Responses

In total, 144 people were surveyed over the 3 weeks of data collection: 85 (59%) at Abastos, 36 (25%) at Santa Barbara, 10 (7%) at Lakua-Arriaga, and 13 (9%) at Simón Bolívar.

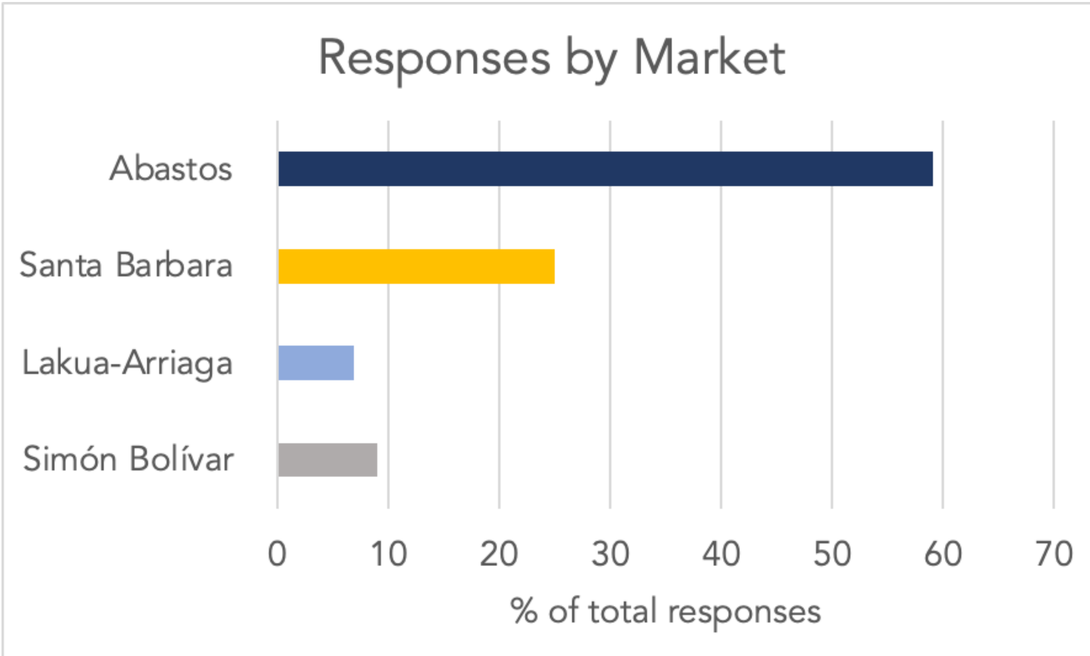


Figure 1.1 Responses by Market.

3.1 Market Visits and General Consumer Habits

33% of people said they went to markets always (twice a week or more, or as often as the market is open), 48% said they went often (once a week or every other time the market is open), 12% said they went sometimes (1-2 times a month), and 7% said they went rarely (less than once a month).

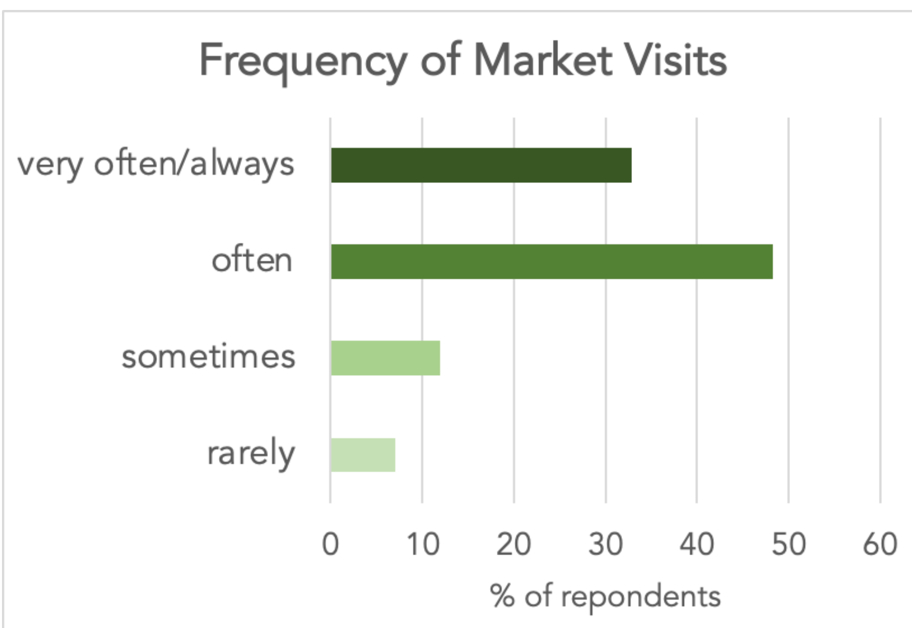


Figure 1.2 Frequency of Market Visits.

When asked what kind of food they purchase at the local markets, 54% responded meat, 50% vegetables, 41% fruit, 34% fish, 21% charcuterie/sausages, 18% dairy products or eggs, 12% bread or baked goods, 9% nuts, 8% canned/pickled goods, 5% clothes, and 6% other categories (plants, garlic, wine, and honey). 3% said they bought "everything" at the local markets.

One person in the study and one person in the test period raised a question asking if products really came straight from the farmers.

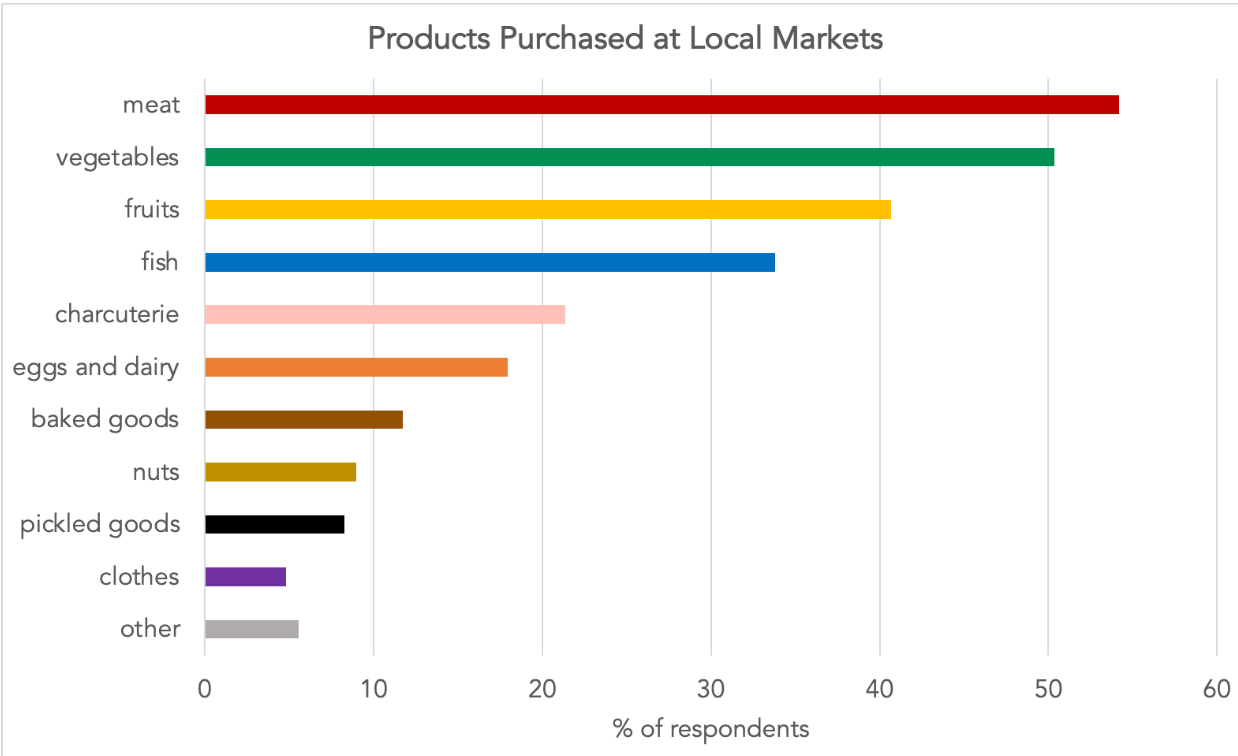


Figure 1.3 Products Purchased at Local Markets.

32% of people said they would like to buy more (or more often) at the local markets, while 66% said no and 1% did not know. 6% said specifically they did not want to buy more because they already bought everything they could at the local markets, while 6% said they would go more if they had more time, and 1% (2 people) said they would go more if the markets were open more days.

Only 18 people offered details on what products they would like to buy more of: of them, 38% said more fruits, 33% more vegetables, 11% (2 people) more fish, 5% (1 person each) more bread, more dairy products or eggs, and more local products, while 22% said they did not want more of any specific product or wanted different products. One person suggested there should be more local artisanal products at the markets.

Participants were asked where they buy the majority of their food, and 33% responded supermarkets, 22% local markets, 10% small businesses, 2 people (1%) responded neighborhood markets, and 1 person each responded specialty stores and direct purchasing from farmers.

32% of respondents, the second largest category after supermarkets, did not buy the majority of their food in any one place, but diversified their purchases, with 82% of them going to local markets, 72% to supermarkets, 61% to small businesses, 11% to specialized stores, and 2% (1 person each) to neighborhood markets and buying from online stores. 10% of respondents specified that they bought all of their fresh produce at the local markets.

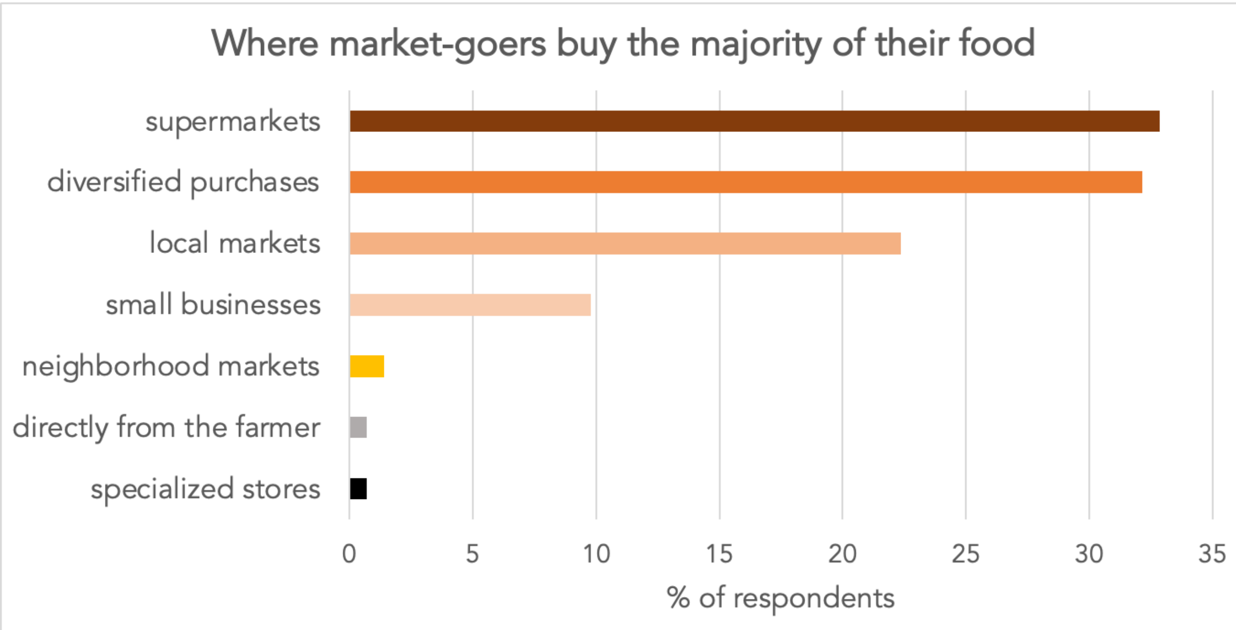


Figure 1.4 Where Market-Goers buy the Majority of their Food.

3.2 Organic Products

56% of people surveyed responded yes when asked if they buy organic products regularly, and 44% said they did not. 4% specifically said they care more about the product being local than being organic, and 6% said that they buy organic products, but not at the local markets. Several people said they buy organic products at the local markets while buying food at a stand that did not sell organic products. 1% (2 people) expressed doubt about products really being organic.

76 people elaborated on what organic products they buy: 68% said vegetables, 46% fruits, 30% dairy products or eggs, 16% meat, 16% bread or baked goods, 13% grains, 10% nuts, and 8% fish, while 7% said they buy everything they can organic and 7% responded otherwise, saying they buy other products such as honey, that they buy what is available, or that they buy products that are in season.

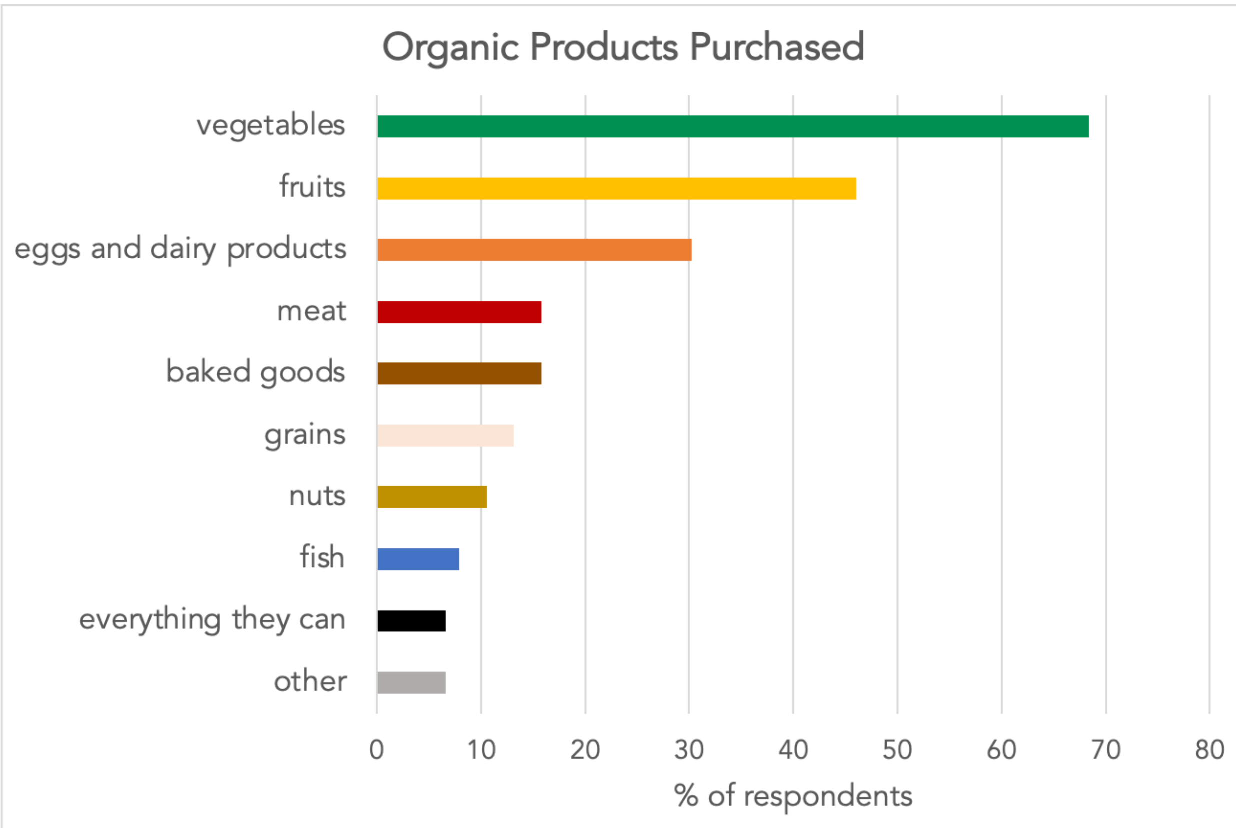


Figure 1.5 Organic Products Purchased by Market-Goers.*

Market-goers were asked what organic products they usually buy,* ***not* *what organic products they buy at local markets.*

59% of people responded that they would like to buy more organic products, while 32% said they did not and 9% said they did not care.

When asked what barred them from buying more organic products, 80 people answered, and 49% said the price was a barrier, 31% said the lack of availability of organic products, 6% a lack of trust in the products, 6% a lack of time to purchase/look for these products, and 5% a lack of information surrounding the products. 5% said acquiring these products was inconvenient, while 15% said that nothing barred them from buying organic, and 4% said they did not know what barriers they faced.

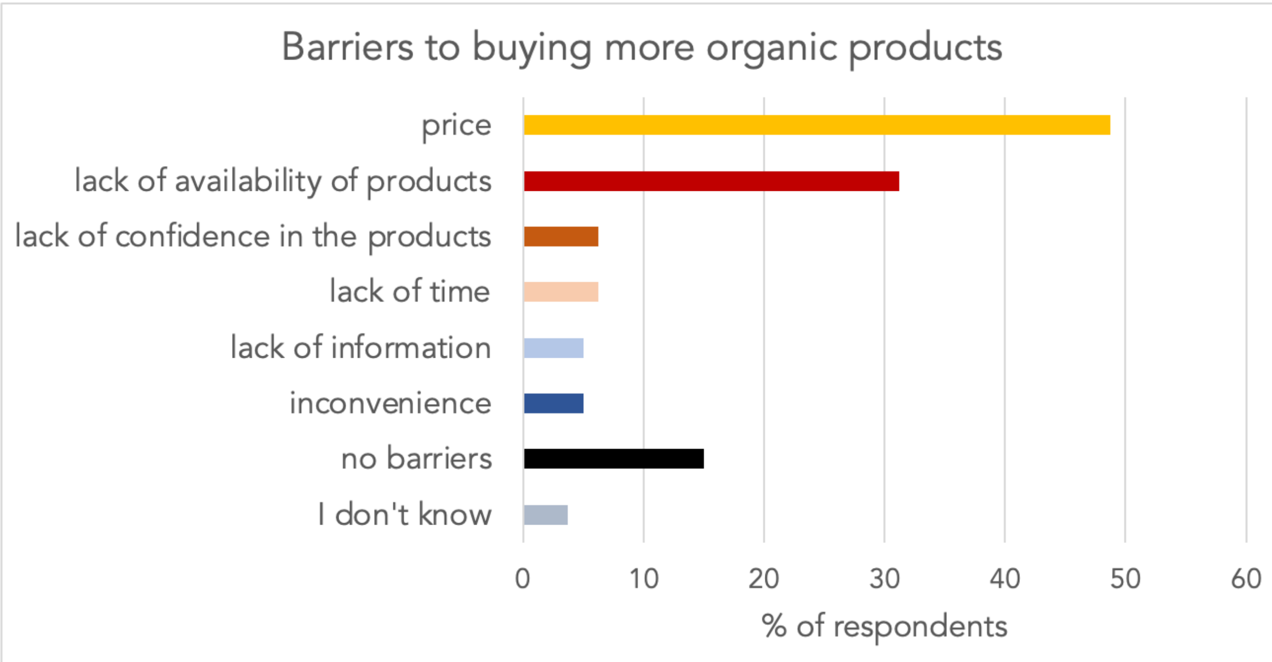


Figure 1.6 Barriers to buying more organic products.

3.3 Motivations and Improvements

The main motivations for going to local markets were: the quality, freshness, or the general products (58%), the local or seasonal products (27%), the respondent's relationship/connection with vendors (19%), and supporting local vendors and small businesses (16%). 8% of respondents went to the market out of habit, 7% went because of good prices, 6% went because of the variety of products, 6% because the products are more natural or have less chemicals, 4% because of the atmosphere, and 4% because of the convenient location. 20% of respondents gave other responses, such as the social experience (3%), having everything in one place (3%), and trusting the products (3%).

Figure 1.7 Main Motivations for Going to Local Markets.

When asked what factors impede them from going to the market more often, or what could be improved in the market, 55% said that there was nothing to improve. 8% said that a delivery, pick-up or an online purchasing service would be an improvement, 7% said the opening hours were inconvenient, 7% said the location of the market was inconvenient, 6% said conditions in outdoor markets could be improved, and 5% said prices were high. Lesser reasons given were as follows: 4% said there were not enough organic products, 4% said that there was not enough variety of products, 4% said there were too many people and not enough distance with the pandemic, 3% said parking should be improved (not having to pay for parking or having more parking spaces). 2% (3 people) said there should be more markets in other neighborhoods in the city and 2% said lines were too long.

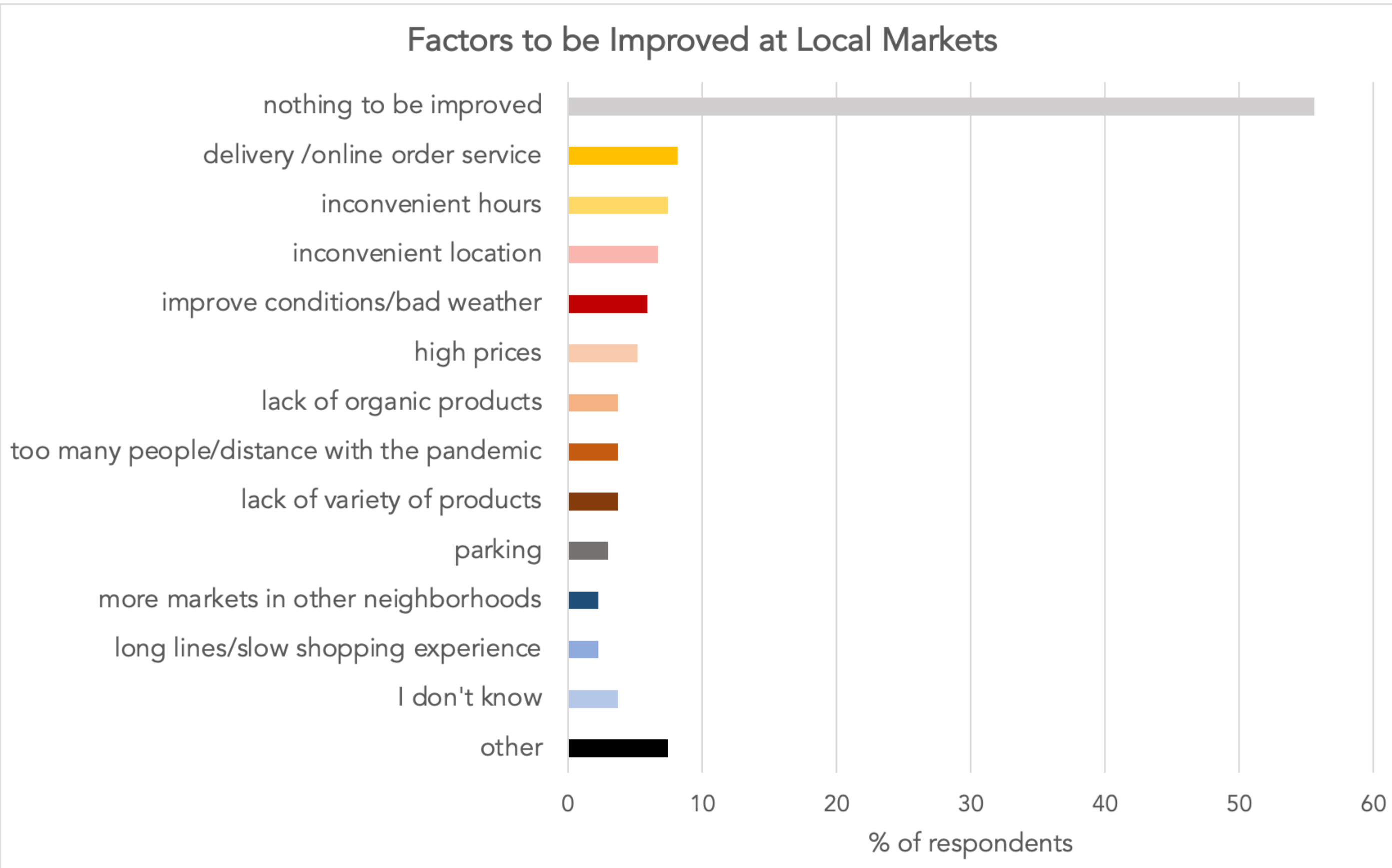


Figure 1.8 Factors to be Improved at Local Markets.

3.4 Demographic Information

3.4.1 Age

Age group demographics were as follows: 2% were 18-24 years old, 10% 25-34, 16% 35-44, 27% 45-54, 23% 55-64, and 21% 65+.

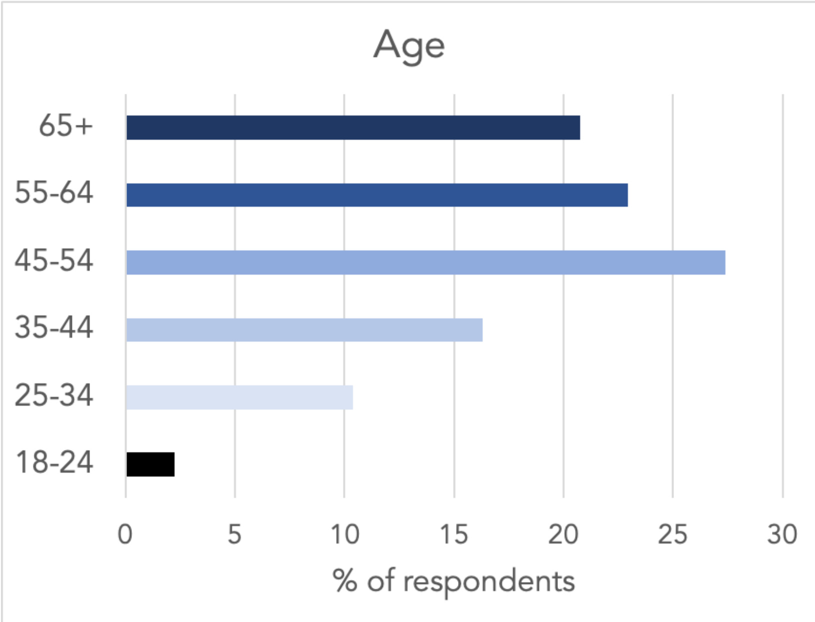


Figure 1.9 Age Demographics of Market-Goers.

3.4.2 Gender

62% of respondents were women and 38% were men.

3.4.3 Language

82% of participants spoke Spanish as their first language, 13% Basque, and 5% another language. 18% spoke Spanish as a second language, 45% spoke Basque as a second language, and 37% spoke another second language.

3.4.4 Place of Origin

70% of respondents were from Vitoria-Gasteiz, 13% from another territory in the Basque Country, 7% from another autonomous community, 5% from another city or town in Álava, and 4% from another country.

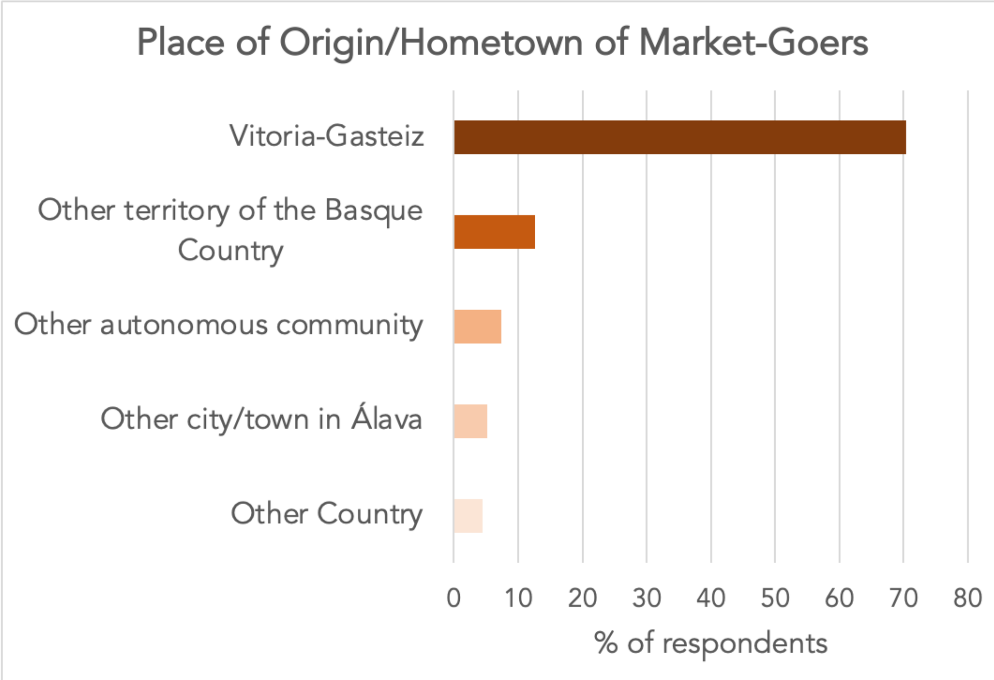


Figure 1.10 Place of Origin/Hometown of Market-Goers.

3.4.5 Neighborhood

49% of respondents lived in the same or an adjacent neighborhood to the market they were in at the time of the survey, while 14% lived 2 neighborhoods away (1 neighborhood further than the adjacent neighborhoods to the market), 15% lived 3 neighborhoods away, 11% lived 4 neighborhoods away, 16% lived in another town/city in Álava, 2% lived in another territory of the Basque Country, and 1% (1 person) lived in another autonomous community of Spain. A detailed map visualization of this data by market can be found in section 4.5.

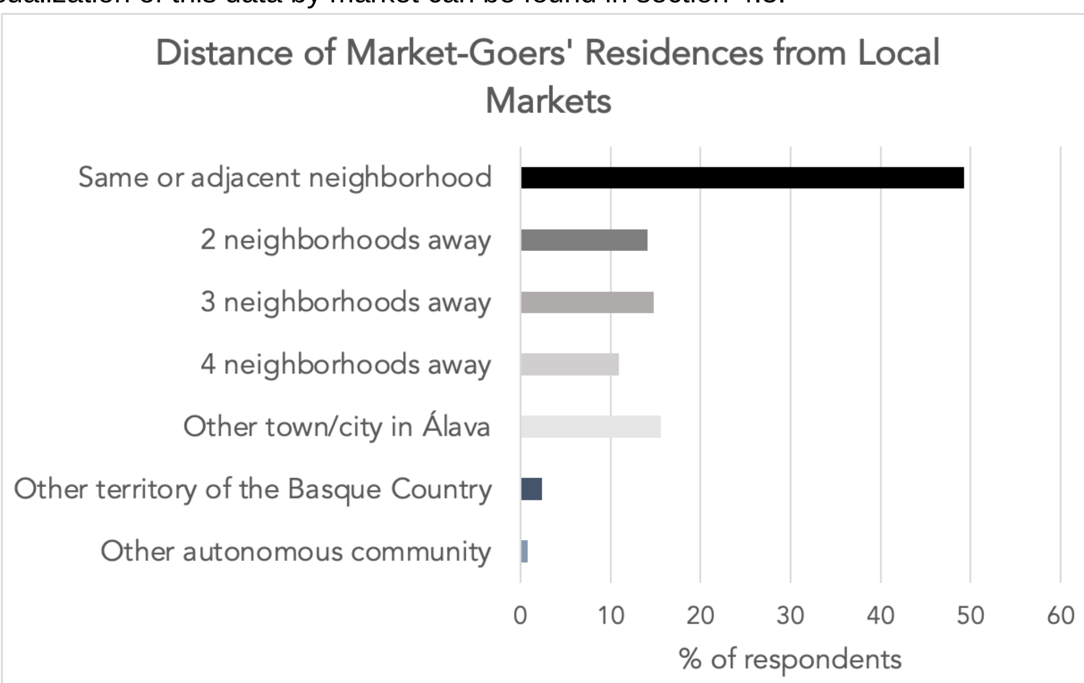


Figure 1.11 Distance of Market-Goers' Residences from Local Markets.

4. **Comparison Between Markets**

For this comparison, Lakua-Arriaga and Simón Bolívar were grouped together, as they had similar characteristics such as the products sold, their location outside of the city center, and both of them being outdoor markets. Additionally, both had fewer respondents than Abastos or Santa Barbara.

4.1 Market Visits and General Consumption Habits

For all of the markets about one third of respondents went to the market always. At Abastos and Santa Barbara, about half of respondents went to the markets often, while a smaller percentage (8% and 14%) went sometimes, and a small minority (5% and 3%) went rarely. At Simón Bolívar & Lakua-Arriaga, fewer people went often (22%), and more people went sometimes or rarely (22% for both).

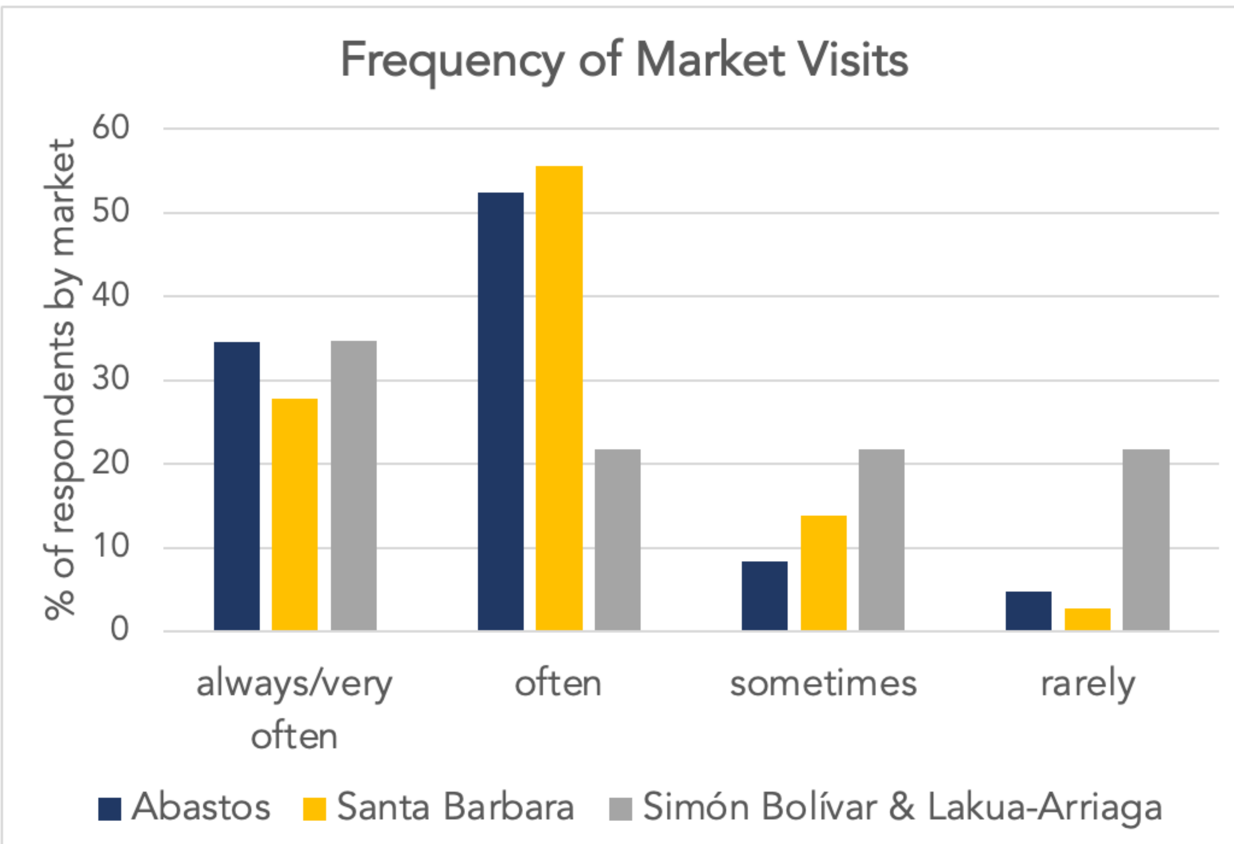


Figure 1.12 Frequency of Market Visits by Market.

The top products purchased at each market were different: at Abastos, they were meat, fish, charcuterie/sausages, and fruits and vegetables. At Santa Barbara, they were vegetables, fruits, dairy products or eggs, and bread or baked goods. At Simón Bolívar & Lakua-Arriaga, they were vegetables and fruits, clothes, and nuts. Plants and clothes were exclusively purchased at Simón Bolívar and Lakua-Arriaga, while pickled goods and charcuterie/sausage meats were almost exclusively purchased at Abastos

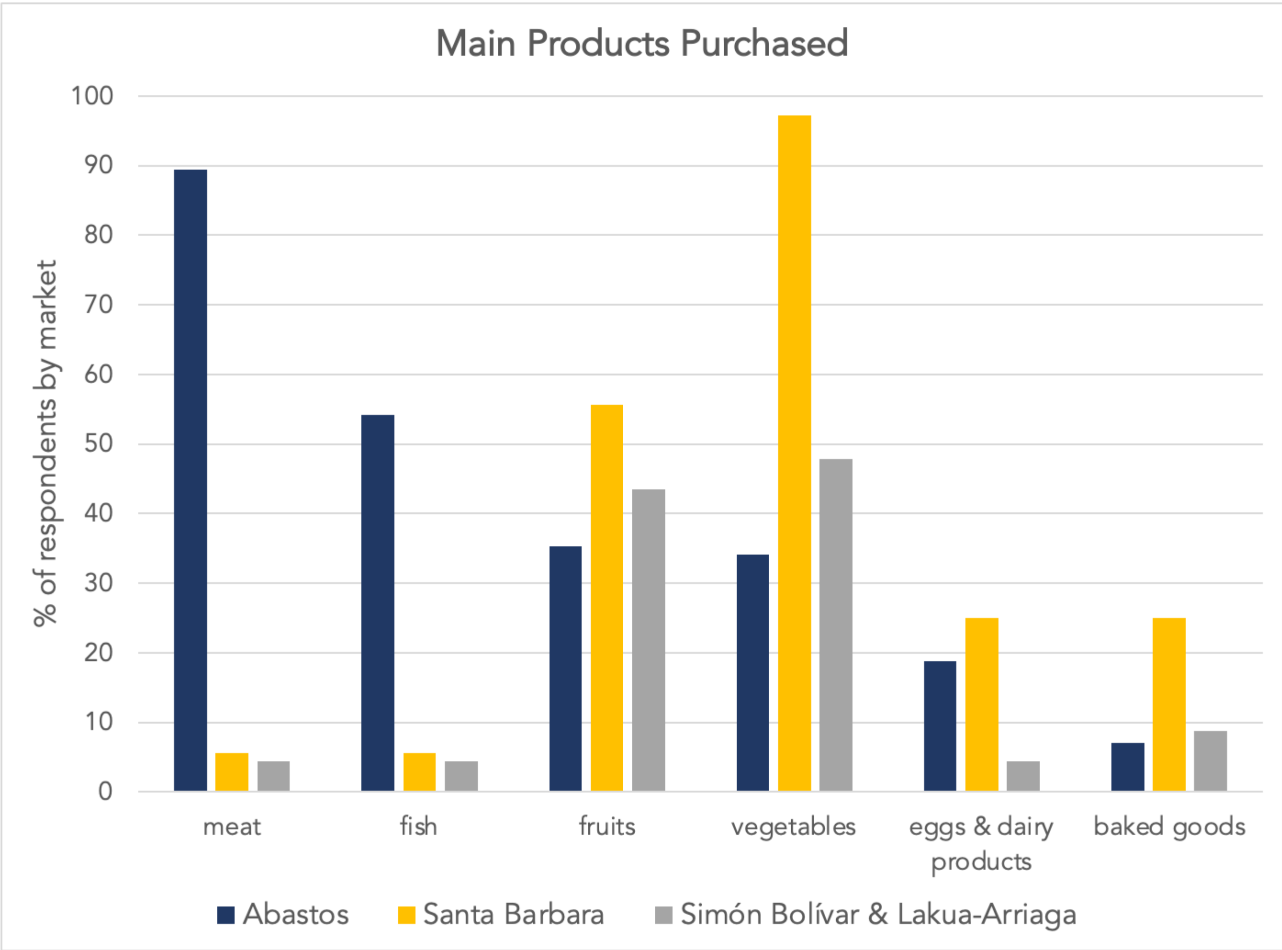


Figure 1.13 Main Products Purchased by Market.

26% of respondents in Abastos wanted to go to the markets more often or buy more, compared to 44% at Santa Barbara and 35% at Simón Bolívar & Lakua-Arriaga. At Abastos, 8% of respondents specified that they already buy everything they can at the market, and 6% said the same at Santa Barbara, while 5% and 12%, respectively, said they would go more if they had more time. At Santa Barbara, 6% (2 people) said they wish the market were open more days.

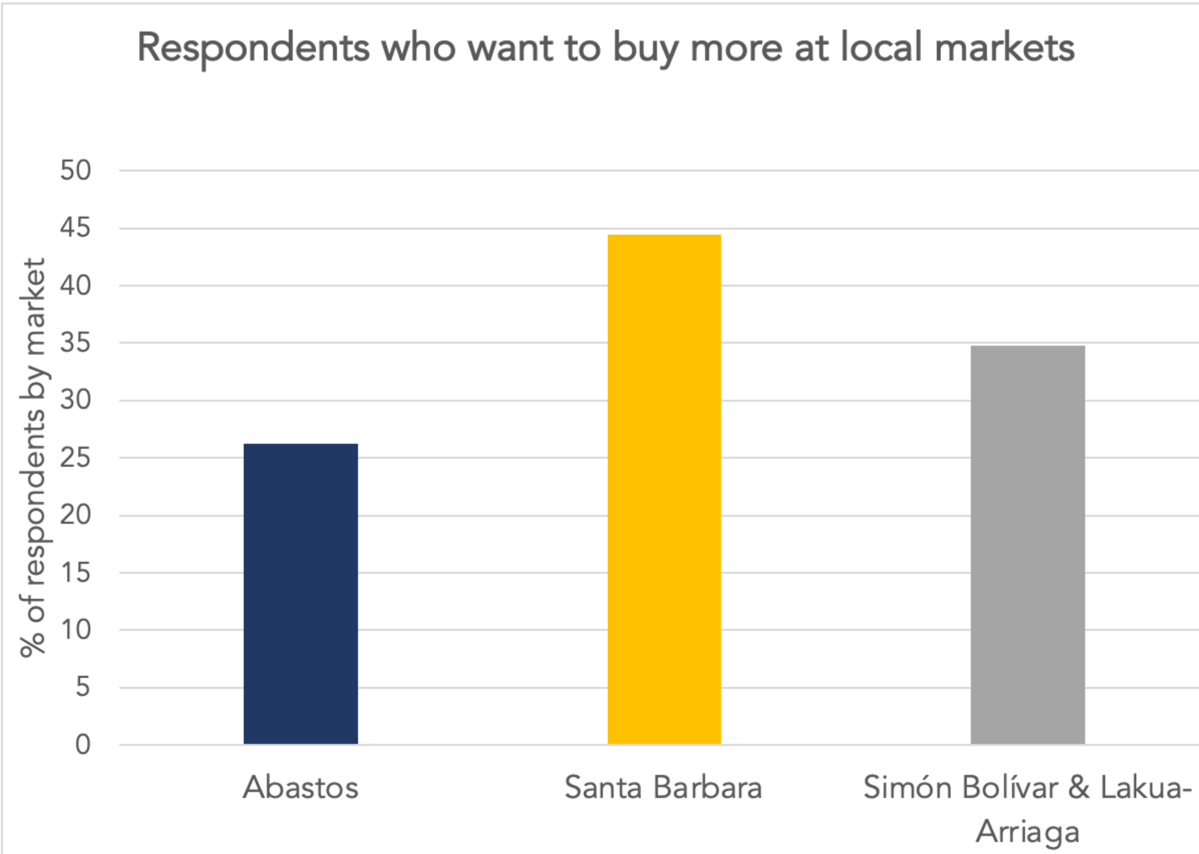


Figure 1.14 Percentage of Respondents who want to buy more at Local Markets - Market Comparison.*

*****This includes people who want to buy more at local markets and/or go to the market(s) more often.

Few people specified which products specifically they would like to buy more of, and therefore there are few responses per market. The most requested items at Abastos were more fruits (3 people), vegetables (3 people) and fish (2 people). At Santa Barbara they were more fruits (3 people), and vegetables (2 people). There is no data on this for Simón Bolívar & Lakua-Arriaga.

When asked where people buy most of their food, the top answer at Santa Barbara (44%) and Abastos (32%) was that respondents diversified their purchases between different stores. At Santa Barbara, this was followed by supermarkets (25%), local markets (19%), and small businesses (11%), while 17% of respondents specified that they bought all of their fresh produce at local markets. At Abastos, 29% of respondents bought most of their food at local markets, 28% at supermarkets, and 6% at small businesses, while 10% specified that they bought all fresh produce at local markets. At Simón Bolívar & Lakua-Arriaga, 61% of respondents bought most of their food at supermarkets, followed by 26% at small businesses, and 13% who diversified their purchases, while 13% specified that they bought all fresh products at small businesses.

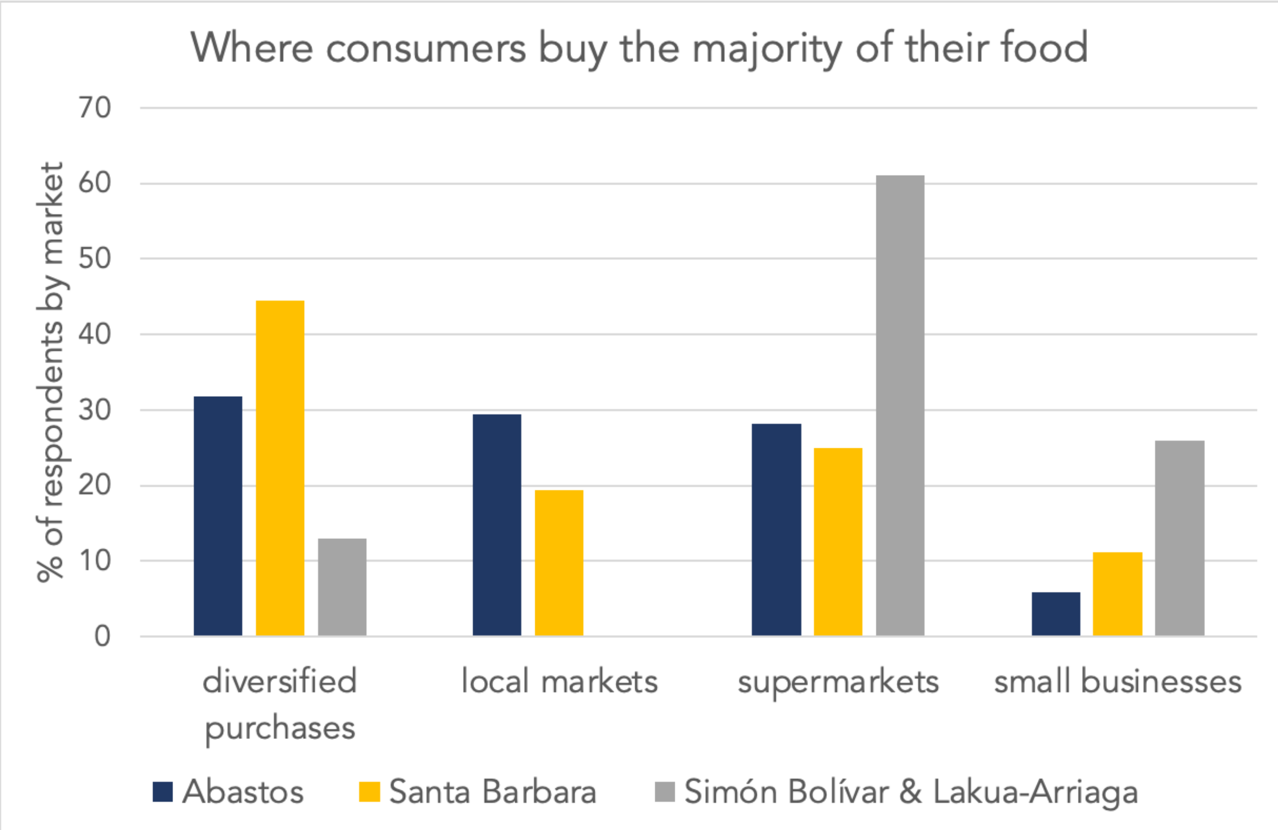


Figure 1.15 Where Consumers buy the Majority of their Food - Market Comparison.

4.2 Organic Products

At Abastos, 49% of respondents said they regularly buy organic food, with a higher percentage at Santa Barbara (67%) and Simón Bolívar & Lakua-Arriaga (65%). Abastos also had a lower percentage of respondents wanting to buy more organic products (54%), compared to Santa Barbara (67%) and Simón Bolívar & Lakua-Arriaga (65%).

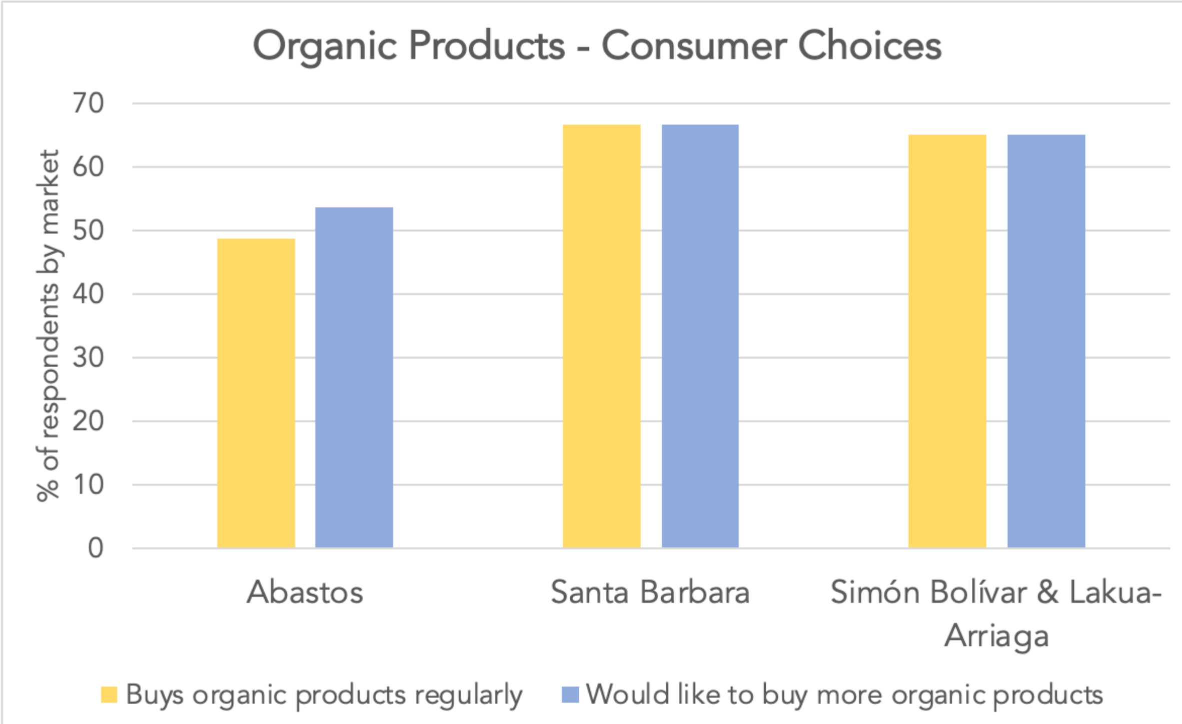


Figure 1.16 Organic Products - Consumer Choices: Market Comparison.

The main two organic products bought by respondents at all markets were vegetables and fruits. Other top 5 organic products purchased were dairy products/eggs, meat, and grains by respondents at Abastos (in order of most to least purchased products), and dairy products/eggs, bread/baked goods, and grains by respondents at Santa Barbara.

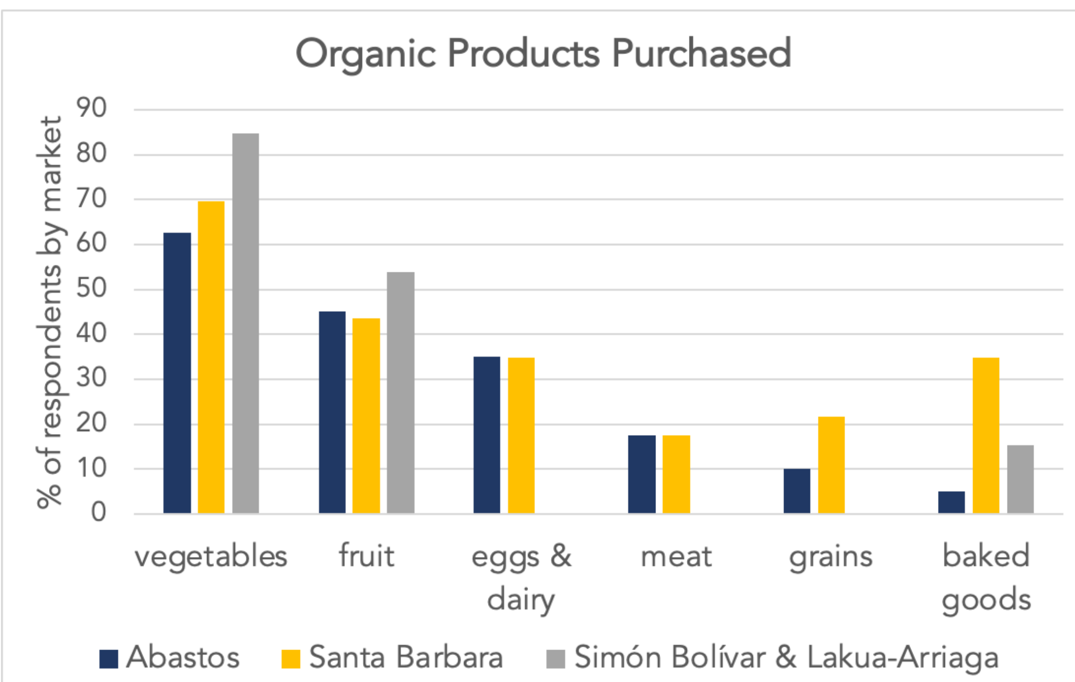


Figure 1.17 Organic Products Purchased: Market Comparison.*

Consumers were asked what organic products they bought in general, **not what organic products they specifically bought at local markets.*

Respondents who wanted to buy more organic products were asked what impeded them from doing so. The response to this question was very similar across markets, with the most common answer being the price, followed by the lack of availability of products. At Abastos and Santa Barbara, the third most common response was that there was nothing impeding people from buying organic products.

4.3 Motivations and Improvements

At all markets, the main reason people went to the market was the quality of the products, while the local/seasonal products was in the top three reasons for all markets. Abastos was the only market where customer service or the relationship with vendors was one of the main motivations for going to the markets.

At Abastos, the responses were as follows, in order of most to least frequent responses: the quality or freshness of the products, the customer service and their relationship with the vendors (29%), the local/seasonal products, supporting local or small businesses, and custom or habit (13%). Main motivations for Santa Barbara in the same order were the freshness, quality or general products, the local and in-season products, buying straight from the farmer (17%), the good prices, and the healthier products (8%). At Simón Bolívar & Lakua-Arriaga, the primary responses were the freshness/quality of the products, the local/seasonal products, the atmosphere (13%), supporting local vendors, and good prices.

Figure 1.18 Motivations for Going to Local Markets: Market Comparison.

When asked what impeded people from going to the market more often, buying more, or what could be improved, the majority of people answered nothing in all markets (56% in Abastos, 49% in Santa Barbara, and 71% in Simón Bolívar & Lakua-Arriaga). In Abastos, the most common suggestions were home delivery and online purchasing or pick up services as improvements, followed by complaints that opening hours were inconvenient, and prices were high. At Santa Barbara, the most common suggestions were offering more organic products, improving conditions for vendors and customers (with cold weather, rain, etc), and complaints included inconvenient hours, and the inconvenient location. At Simón Bolívar & Lakua-Arriaga, the most common complaints were a lack of variety of products and poor conditions in bad weather.

4.4 Demographic Information by Market

4.4.1 Age Comparison

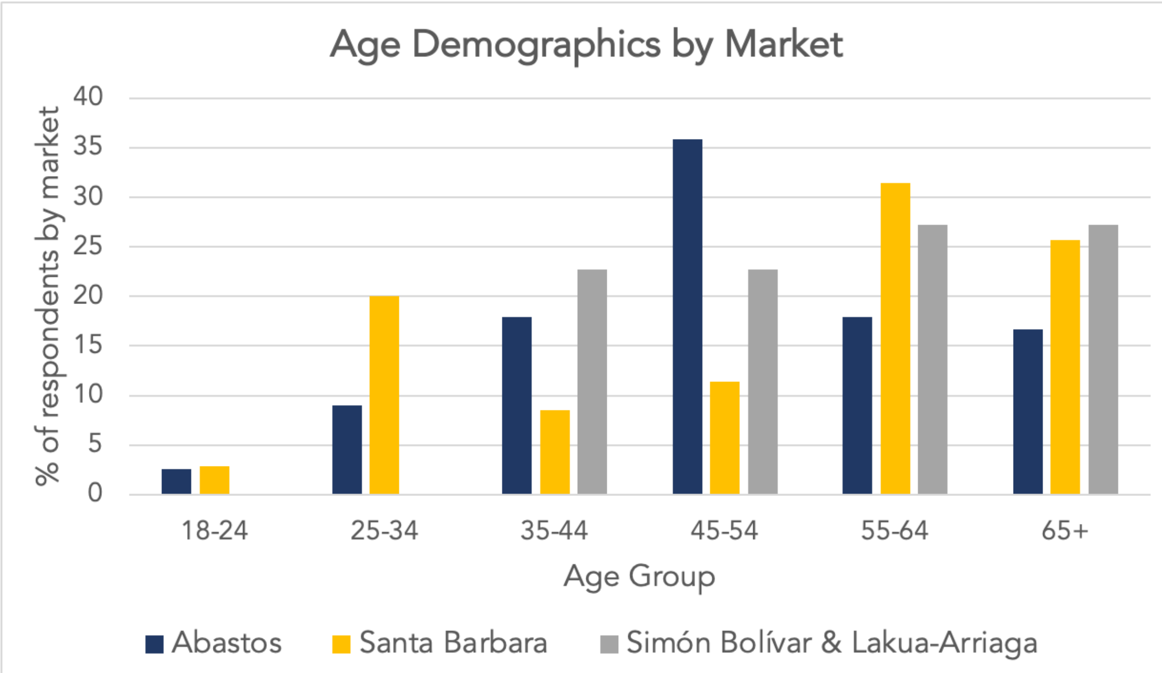


Figure 1.19 Age Demographics by Market.

Age	18-24	25-34	35-44	45-54	55-64	65+
Abastos	3%	9%	18%	36%	18%	17%
Santa Barbara	3%	20%	9%	11%	31%	26%
Simón Bolívar & Lakua-Arriaga	0%	0%	23%	23%	27%	27%

Table 1.1 Age Demographics by Market (% of respondents per market).

4.4.2 Gender Demographics

	Women	Men
Abastos	62%	38%
Santa Barbara	67%	33%
Simón Bolívar & Lakua-Arriaga	55%	45%

Table 1.2 Gender Demographics by Market (% of respondents per market).

All markets had a higher percentage of women than men represented in the surveys.

4.4.3 Hometown

Simón Bolívar & Lakua-Arriaga had the highest percentage of market-goers who were from another country.

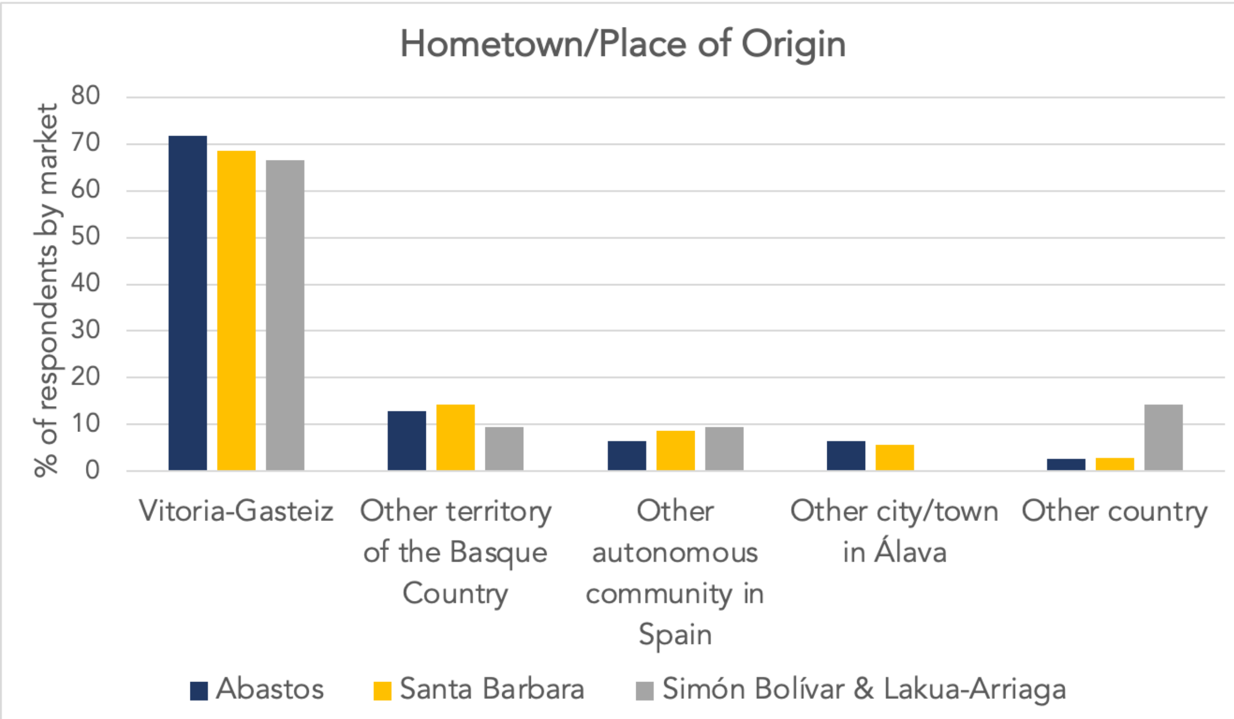


Figure 1.20 Hometown/Place of Origin by Market.

	Vitoria-Gasteiz	Other city/town in Álava	Other territory in the Basque Country	Other autonomous community in Spain	Other country
Abastos	72%	6%	13%	6%	3%
Santa Barbara	69%	6%	13%	6%	3%
Simón Bolívar & Lakua-Arriaga	67%	0%	10%	10%	14%

Table 1.3 Hometown/Place of Origin by Market (% of respondents per market).

4.4.4 Language

Santa Barbara had the highest percentage of market-goers who spoke Basque as their first language, with a similarly high percentage at Abastos. Simón Bolívar & Lakua-Arriaga had the highest percentage of market-goers who spoke a first language other than Spanish or Basque, with a similarly high percentage at Santa Barbara.

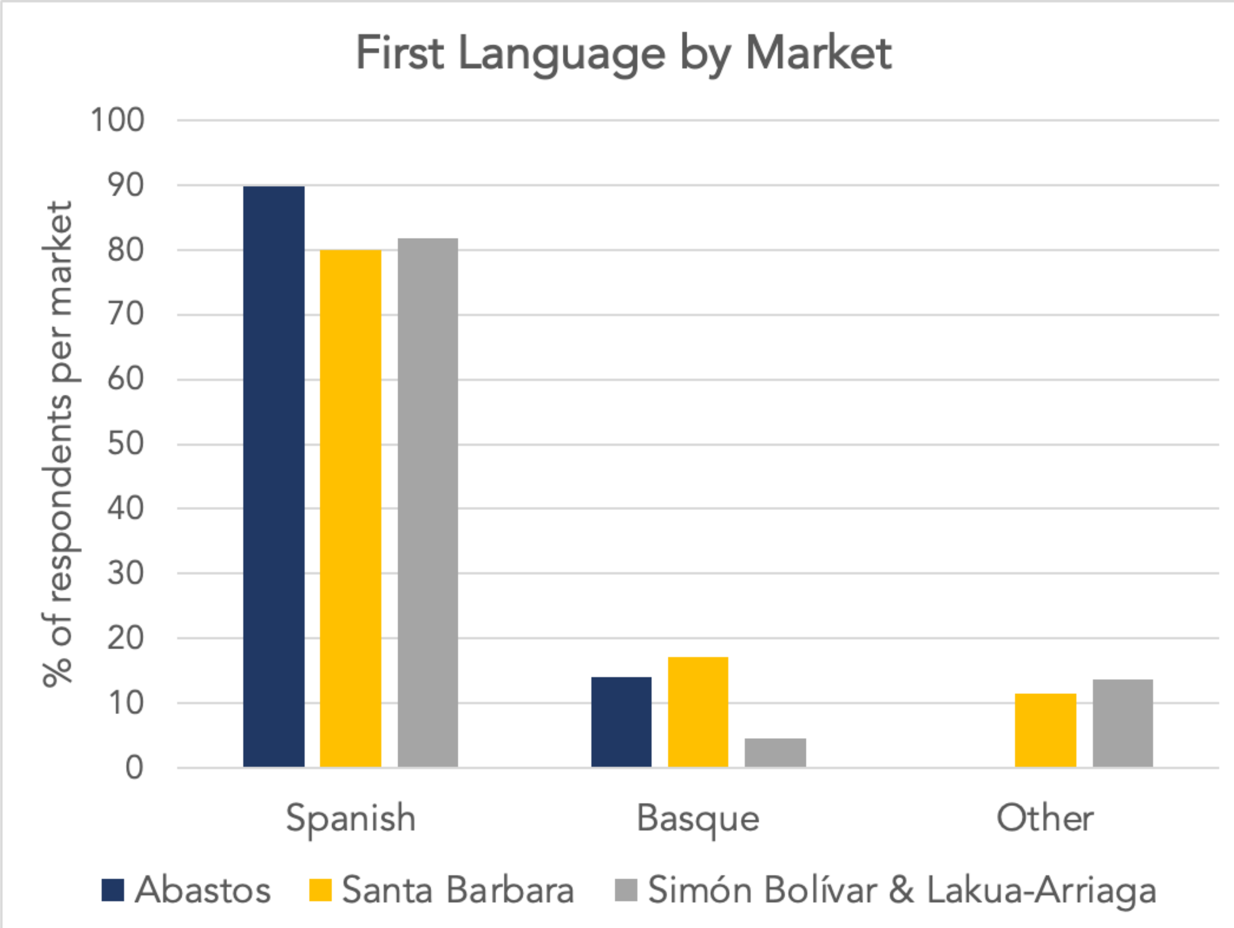


Figure 1.21 First Language by Market.

	Spanish 1st Language	Basque 1st Language	Other 1st Language	Spanish 2nd Language	Basque 2nd Language	Other 2nd Language
Abastos	90%	14%	0%	8%	27%	27%
Santa Barbara	80%	17%	11%	17%	34%	31%
Simón Bolívar & Lakua-Arriaga	81%	5%	14%	18%	32%	5%

Table 1.4 First and Second Language by Market.

7.1% of the general population of Vitoria-Gasteiz speaks Basque as their first language. (Gobierno Vasco, VI Mapa Sociolingüístico, 2020). This is lower than the percentage of first language Basque speakers at both Santa Barbara and Abastos.

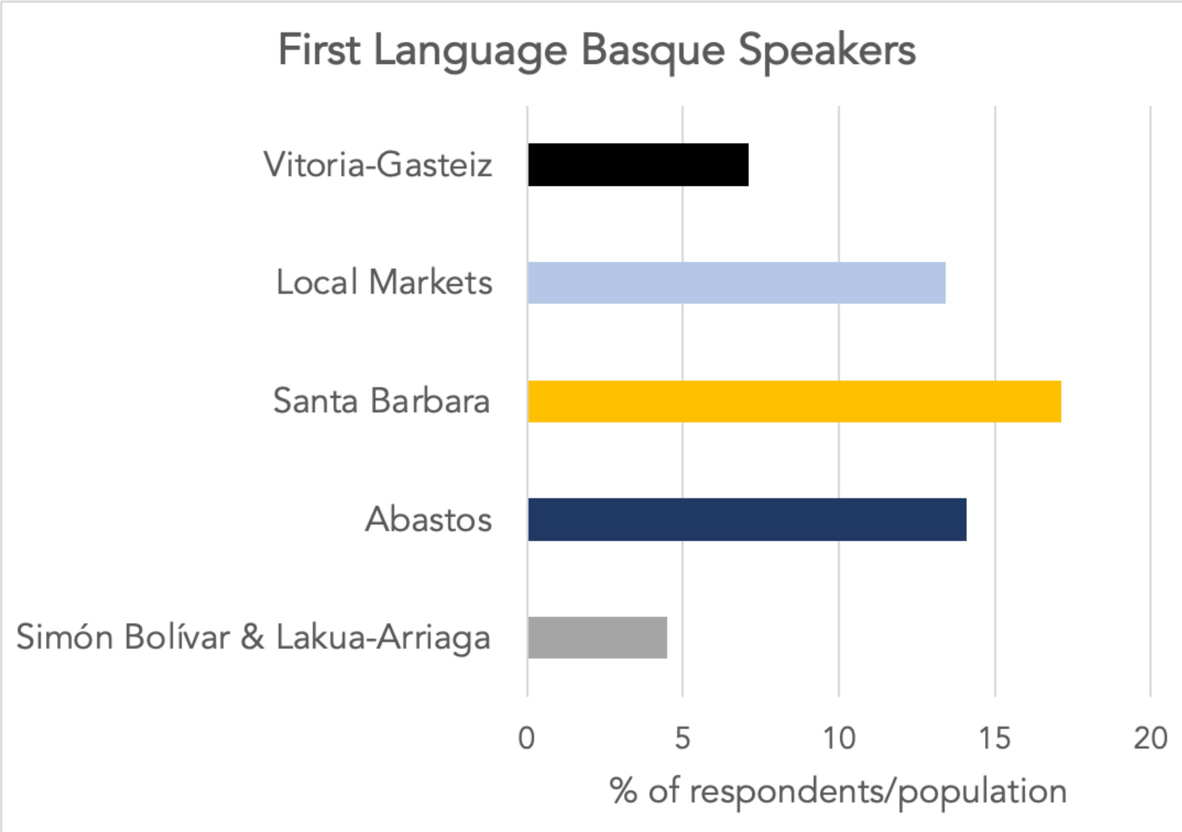


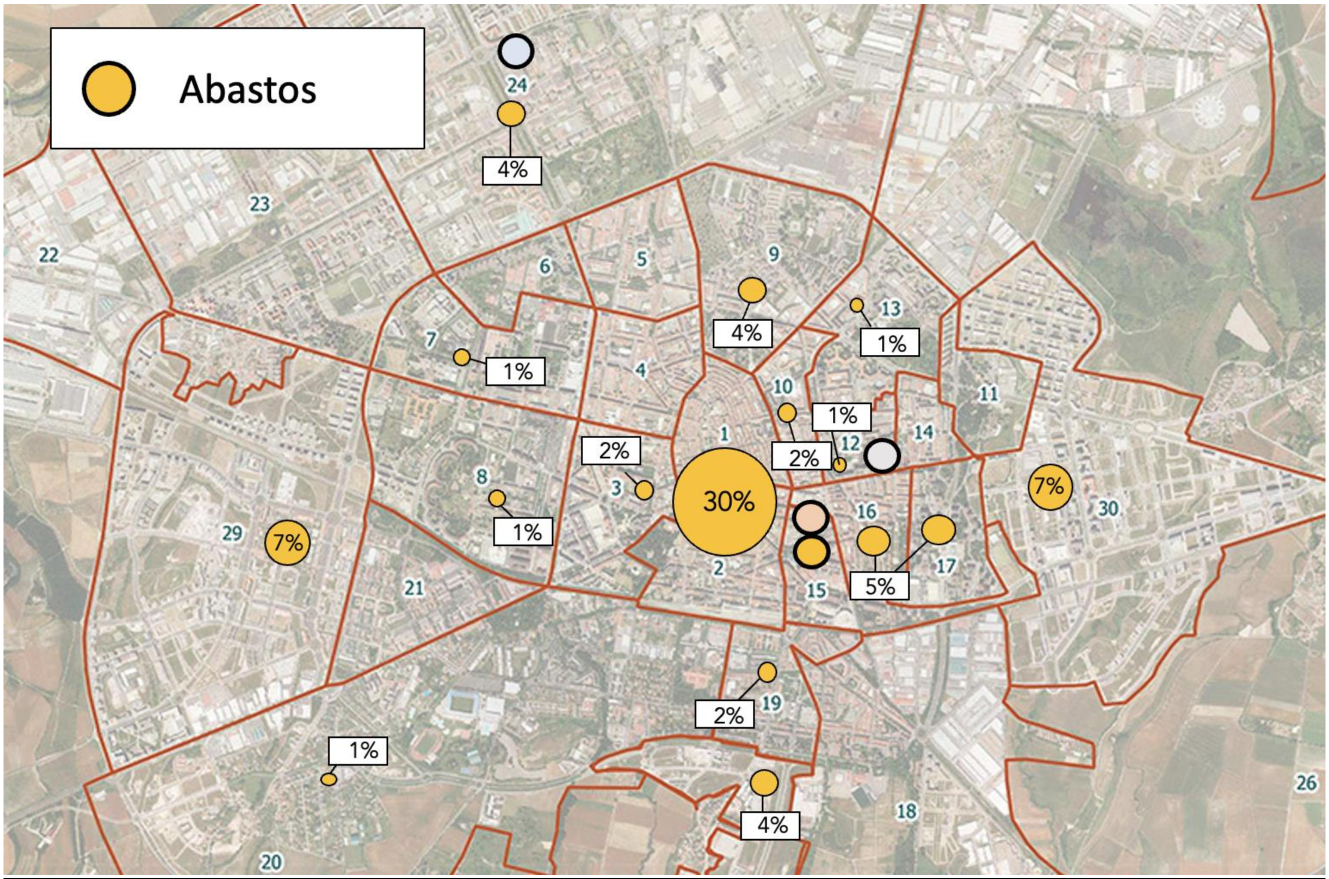
Figure 1.22 First Language Basque Speakers - Comparison between Local Markets and Vitoria-Gasteiz.

4.5 Distance from Markets

A large percentage of market-goers at each market lived in the same or adjacent neighborhood to the market where they were surveyed. See the maps below for a more detailed look at which neighborhoods markets-goers for each market lived in.

	Same or adjacent neighborhood	2 neighborhoods away	3 neighborhoods away	4 neighborhoods away	Other city/town in Álava	Other territory of the Basque Country
Abastos	47%	15%	12%	13%	9%	4%
Santa Barbara	52%	12%	24%	3%	9%	0%
Simón Bolívar & Lakua-Arriaga	53%	16%	11%	16%	0%	5%

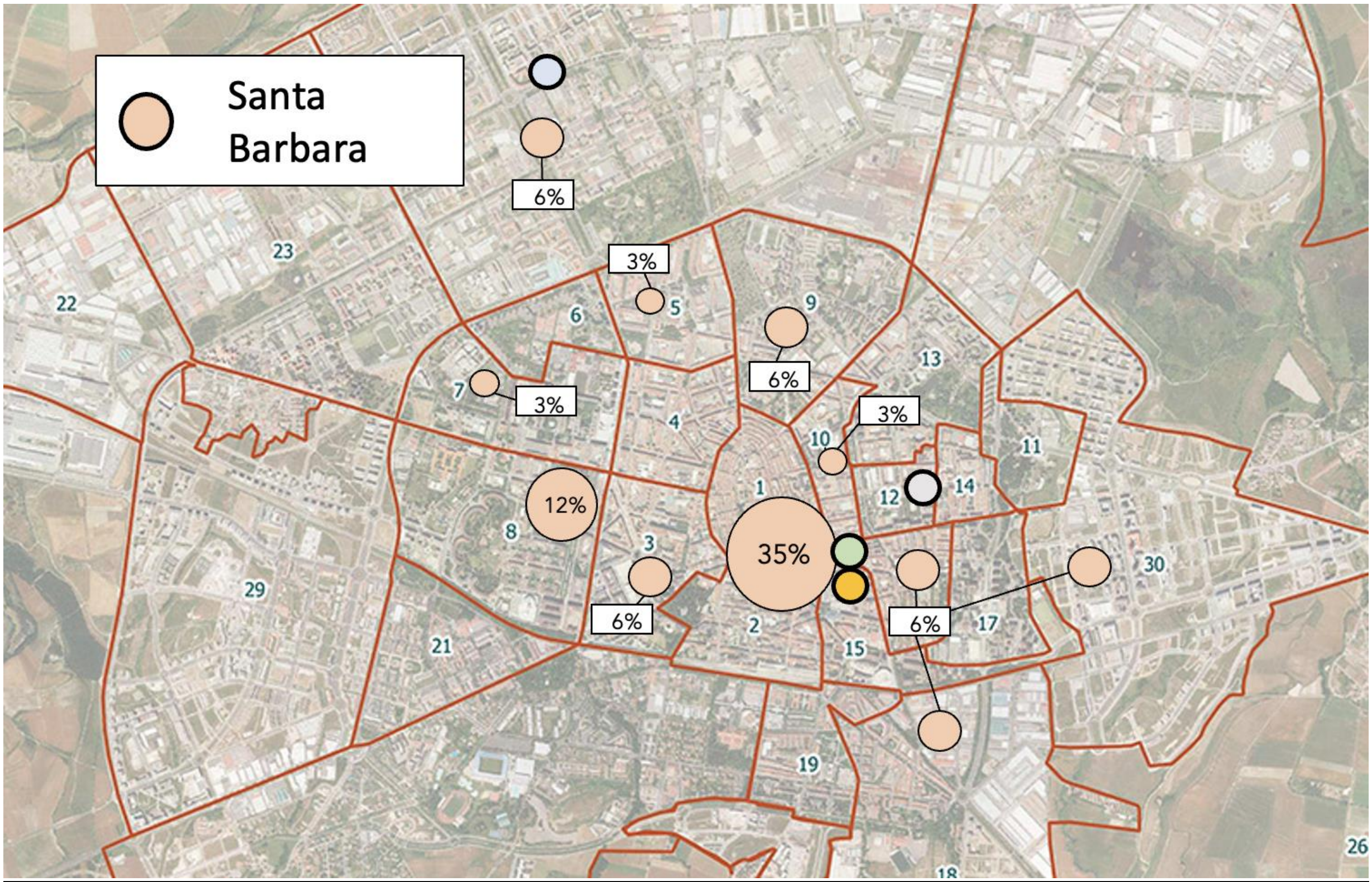
Table 1.5 Distance from Market of Residences of Market-Goers - Market Comparison.



Map 1. Distribution of Market Goers' Residences in Vitoria-Gasteiz - Abastos (n= 84)*

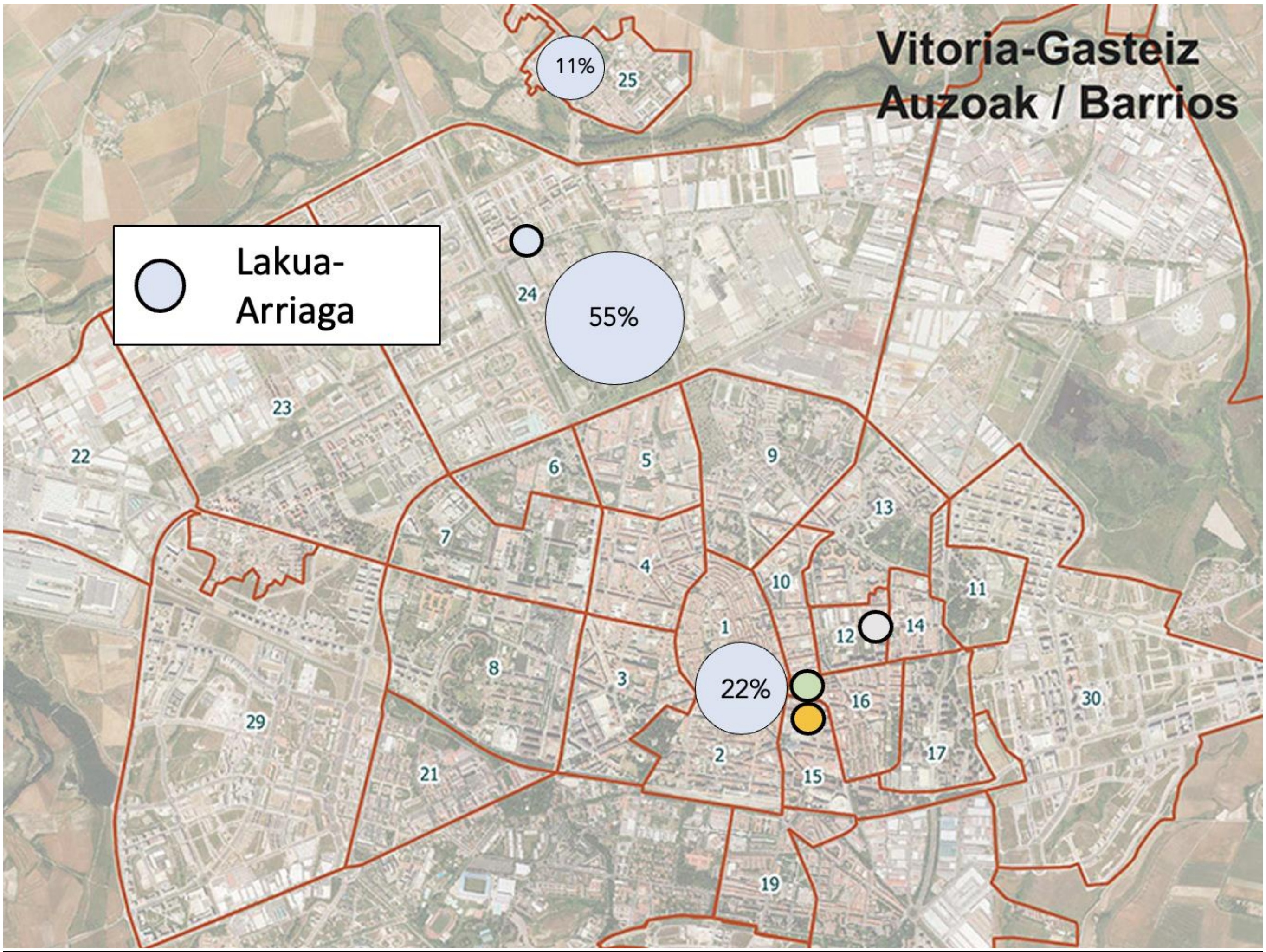
** The circle at the center of the map includes the neighborhoods Casco Viejo, Centro, and Ensanche. People who live outside of the municipality are not represented in this map.*

Image Source: Gasteiz Hoy



Map 2. Distribution of Market Goers' Residences in Vitoria-Gasteiz - Santa Barbara (n=35)*

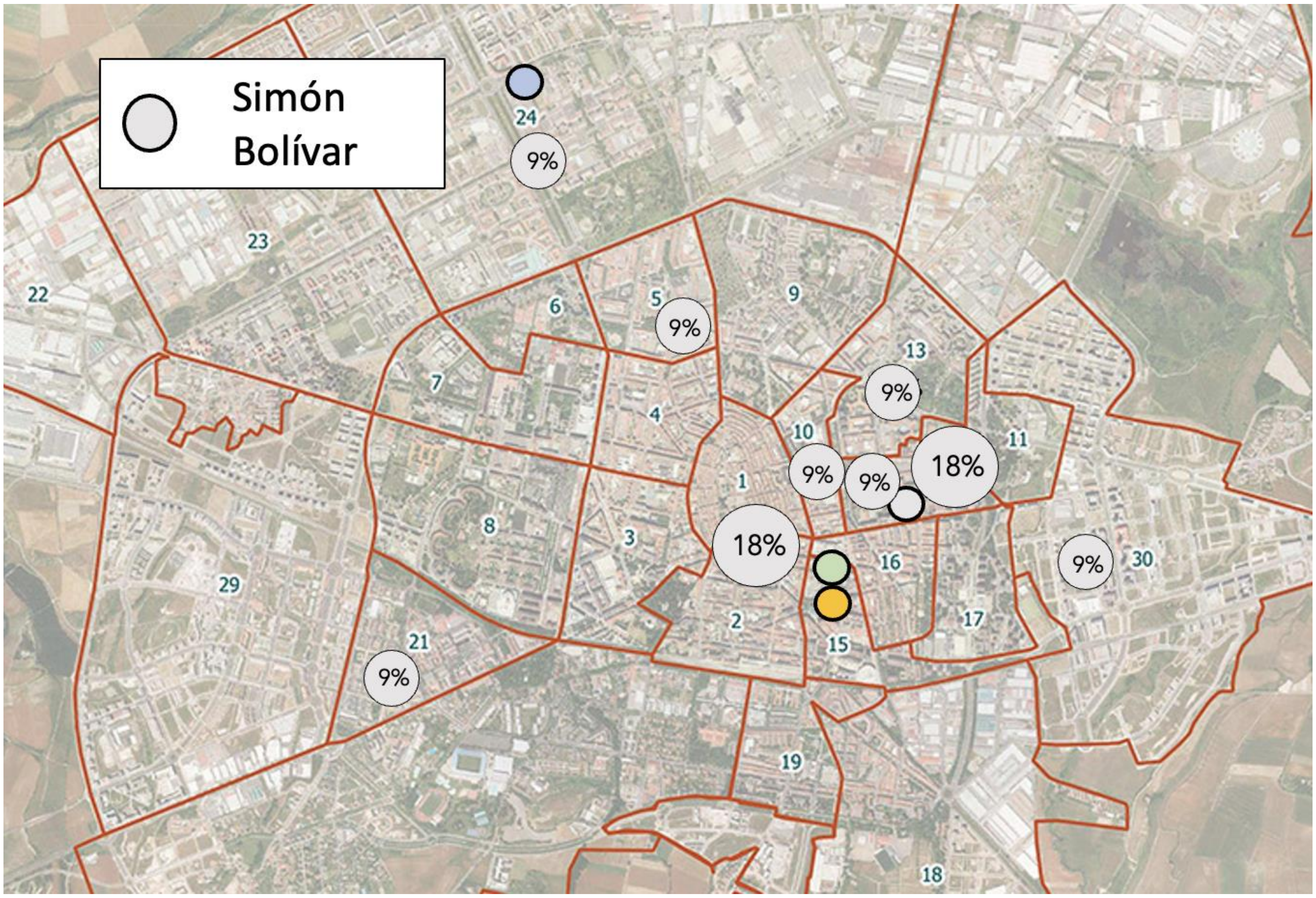
** The circle at the center of the map includes the neighborhoods Casco Viejo, Centro, and Desamparados.*
People who live outside of the municipality are not represented in this map.
Image Source: Gasteiz Hoy



Map 3. Distribution of Market Goers' Residences in Vitoria-Gasteiz - Lakua-Arriaga (n=9)*

** The circle at the center of the map represents the neighborhood Centro. People who live outside of the municipality are not represented in this map.*

Image Source: Gasteiz Hoy



Map 4. Distribution of Market Goers' Residences in Vitoria-Gasteiz - Simón-Bolívar (n=11)*

** The circle at the center of the map represents the neighborhood Centro and Casco Viejo. People who live outside of the municipality are not represented in this map.*

Image Source: Gasteiz Hoy

5. Analysis

5.1 Significant Differences

There was a significant difference between the percentage of people who spoke Basque as a first language in the markets of Abastos and Santa Barbara compared to the general population of Vitoria-Gasteiz. In Abastos and Santa Barbara, 15% of people spoke Basque as their first language, compared to 7.1% of the general population (p=0.0318).

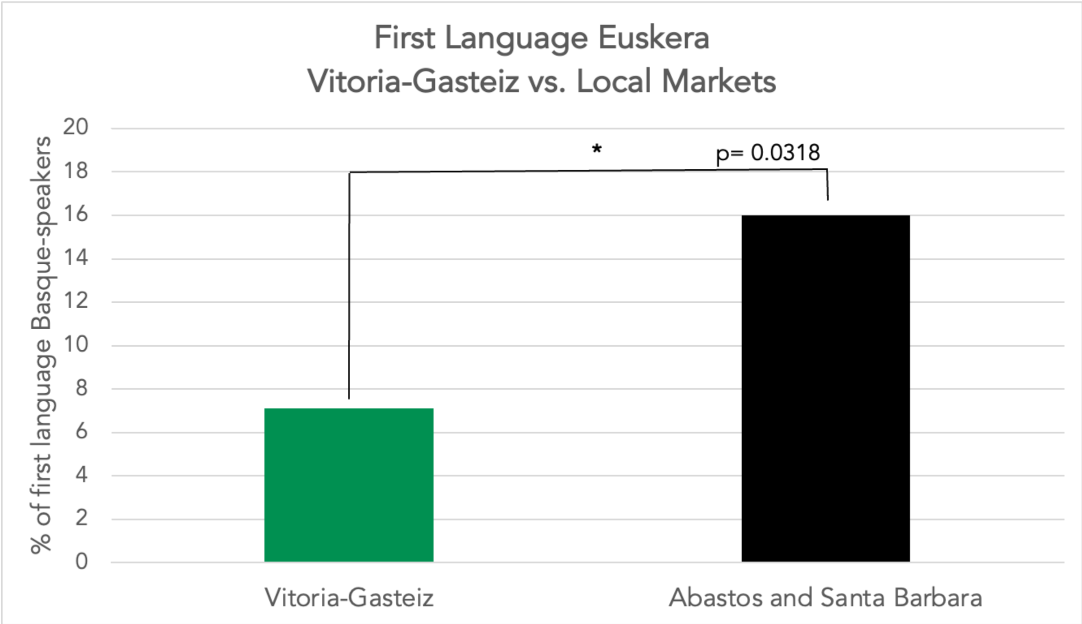


Figure 1.23 Basque as First Language - Comparison between Local Markets and Vitoria-Gasteiz.

There was also a significant difference by gender: 40% of women wanted to buy more or go to local markets more often, compared to 22% of men (p= 0.0111).

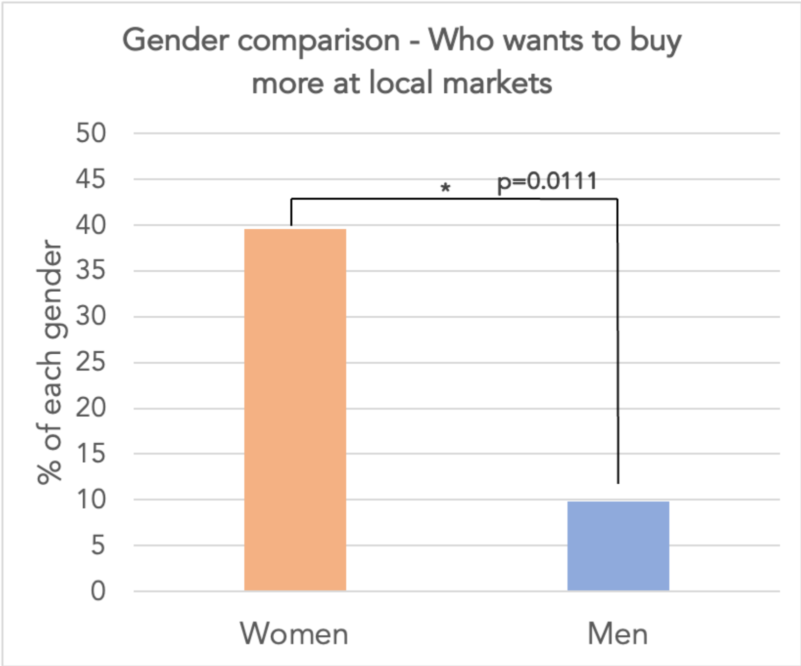


Figure 1.24 Who wants to buy more at local markets - Gender Comparison.

All other differences were either not significant or not tested for significance.

5.2 Other Comparisons By Gender

61% of women tended to buy organic products, compared to 41% of men, while 60% of women and 59% of men wanted to buy more organic products.

5.3 Comparisons by Age

There were no significant differences by age. Some of the nonsignificant trends were as follows: people 35-44 years old seemed to go to local markets more (91% went always or often) than people 34 years old and younger (65% went always or often). People 35-44 years old tended to want to buy more organic products the least (52%), and those between 55 and 64 wanted to the most (68%). Those 25-44 years old tended to want to go more often or buy more at local markets (42%) more than those over 55 years old, of which only 25% wanted to go to local markets more often or buy more at local markets.

5.4 Comparisons by Language

Overall, purchasing trends related to market visits and organic products did not differ between Basque and non-Basque speakers. 57% of people who spoke Basque and 55% of people who did not speak Basque tended to buy organic products, 80% of people who spoke Basque and 81% of people who did not speak Basque frequently went shopping at local markets, and 59% of the two groups wanted to buy more organic products. Additionally, 29% of people who spoke Basque and 35% of people who did not speak Basque wanted to buy more or go to local markets more often.

5.5 Comparisons by Place of Birth

32% of people from Vitoria-Gasteiz and 33% of people from outside of Vitoria-Gasteiz wanted to buy more or go to local markets more often.

6. Demographics by Question

Who buys organic products?
50% of people 25-54 years old, 60% of people 55+, 0 of 3 people 18-24 years old
61% of women, 41% of men
50% of people from Vitoria-Gasteiz, 61% of people from outside of Vitoria-Gasteiz
57% of people who speak Basque, and 55% of people who do not speak Basque

Who wants to buy more organic products?
64% of people 25-34 years old, 52% of people 35-44, 61% of people 45-54, 68% of people 55-64, 56% of people 65+, 1 of 3 people 18-24 years old
60% of women, 59% of men
57% of people from Vitoria-Gasteiz, 67% of people from outside of Vitoria-Gasteiz
59% of people who speak Basque, and 59% of people who do not speak Basque.

Who goes to the market often?
91% of people aged 35-44, 80% of people 45+, 65% of people 18-34 years old
83% of women, 75% of men
83% of people from Vitoria-Gasteiz, 73% of people from outside of Vitoria-Gasteiz
80% of people who speak Basque, and 81% of people who do not speak Basque.

Who wants to buy more at local markets or go to local markets more often?
43% of people 25-34 years old, 32% of people 35-44, 41% of people 45-54, 26% of people 55-64, 21% of people 65+, 1 of 3 people 18-24 years old
40% of women, 22% of men
32% of people from Vitoria-Gasteiz, and 33% of people from outside of Vitoria-Gasteiz
29% of people who speak Basque, and 35% of people who do not speak Basque.

7. Discussion

7.1 Survey Responses

The distribution of survey responses was reflective of the time spent in each market, as well as how many people frequented each market. The majority of participants were surveyed at Abastos, where half of the survey time slots were conducted. It also seemed to be the most frequented market, especially during peak hours, while during opening and closing hours, fewer people visited the market. Santa Barbara also seemed highly frequented, while Simón Bolívar and Lakua Arriaga, although large markets as well, were largely focused on selling clothing and had much less foot traffic in the areas where food was sold. Therefore, the fewer responses in the latter two markets is indicative of the lower number of people who frequent those markets as well as the fewer number of survey units conducted at Lakua-Arriaga.

Since most surveys were conducted while people waited in line, the stands with the longest lines are most represented in the responses. At Abastos, these were the meat and charcuterie stands, and at Santa Barbara, these were the largest vegetable stands with large varieties of vegetables. Smaller stands with fewer products at Santa Barbara (such as smaller vegetable stands or cheese, bread, or meat stands) rarely had lines, and therefore were less represented in the survey. This does not apply as much to Simón Bolívar and Lakua-Arriaga, as there were much fewer lines and fewer stands at these markets.

7.2 Market Visits and General Consumption Habits

7.2.1 Market Saturations

The majority of respondents (81%) went to the market always or often, which shows that the markets are very popular with those who frequent them. This indicates a high saturation of the markets by market-goers, meaning that the majority of people who go to the market are able to go often, and do not need to go any more than they already do (their needs as consumers are being met), with a relatively small group of people who could increase the frequency of their market visits. The percentage of people going often or always was high for Abastos (86%) and Santa Barbara (83%), but much lower (56%) for Simón Bolívar & Lakua-Arriaga. The majority of people did not want to buy more at local markets for all markets, with the highest percentage of people wanting to buy more at Santa Barbara, followed by Simón Bolívar & Lakua-Arriaga. This is indicative of a higher saturation of the market at Abastos compared to Santa Barbara and Simón Bolívar & Lakua-Arriaga. This may be because of the fewer opening days of the outdoor markets compared to Abastos, which only take place once or twice a week, or the lack of products available at outdoor markets compared to Abastos. The lower saturation at Santa Barbara and Simón Bolívar & Lakua-Arriaga could indicate a consumer need for more opening days at outdoor markets, more variety products at those markets, or for more accessible markets in different parts of the city, where consumers' needs are not being met.

7.2.2 Gender Differences

There was a significant difference between men and women, when asked who wanted to go to the market more often or buy more, with women wanting to buy more compared to men. The majority of people surveyed were also women, and these results may be related to some women being the main food purchasers of the family and having more interest in local markets, but it is difficult to assess any conclusion from these gender differences.

7.2.3 Where People Purchase Their Food

Although overall, the most frequent response was that people bought the majority of their food at the supermarket, this only was the leading answer at Simón Bolívar & Lakua-Arriaga, and at Abastos and Santa Barbara, the most frequent response was diversifying purchases. This may indicate that those going to Abastos and Santa Barbara have more time or more options for their purchases, as they may live closer to the center of the city, allowing them to diversify their purchases more easily, living close to Abastos, Santa Barbara and many other shops in the city center. Those going to Lakua-Arriaga likely live farther from the center and may have fewer options in their neighborhood or less time to be able to diversify their purchases. Additionally, living in the center of the city is more expensive than living in other neighborhoods, which may indicate a lower level of economic means of customers in Simón Bolívar & Lakua-Arriaga compared to those at Abastos and Santa Barbara. Simón Bolívar & Lakua-Arriaga are generally seen more as "mercadillos" than full markets, and this could be associated with lower prices and thus draw people with lower incomes to these markets. A difference in economic means could also explain the lower level of diversification and higher percentage of people buying the majority of their food at supermarkets at Simón Bolívar & Lakua-Arriaga, as supermarkets may be less expensive than other options.

7.3 Organic Products

The majority of people regularly buy organic products, with the highest percentage at Santa Barbara (67%), followed by Simón Bolívar & Lakua-Arriaga (65%) and Abastos (49%). This could be due to the slightly higher availability of organic products at Santa Barbara (which has two organic vegetable stands), compared to the other markets where there are no organic stands (Simón Bolívar & Lakua-Arriaga), or where organic stands are completely separated from the rest of the market (like in the Abastos building). However, the question was posed about organic food purchases in general, and was not specific to which organic products were bought at the local markets. A relatively high number of people at Simón Bolívar & Lakua-Arriaga, where few or no organic products are offered, regularly bought organic products. Therefore, this data could be indicative of the general level of conscientiousness about organic products at each market, with higher conscientiousness at Santa Barbara and Simón Bolívar & Lakua-Arriaga compared to Abastos. The responses to this question may also be affected by potential misunderstandings that all products at the markets are organic, due to a lack of knowledge about what organic products are and how they relate to local products. As mentioned earlier, there were several people who said they bought organic products at the local markets while not standing at an organic stand.

The most purchased organic products were fruits and vegetables, indicating that these products are the most available organic products or easiest to access. This may indicate a relative lack of access (economically or otherwise) to organic meat, dairy and eggs, and other foods such as grains or fish.

It is important to note that questions like "Do you buy organic products?" or "Would you like to buy more organic products?", may be leading questions and result in overly positive responses, as people may associate buying organic positively and therefore say they buy organic to make themselves look better to the surveyor. This is a common phenomenon in psychology, and this survey was not exempt from such effects. However, my personal impression as a surveyor was that people felt quite comfortable telling me that they did not care about organic food at all, that they had no interest in it, or that it was, to quote one person surveyed "bull****".

Across all markets, the barriers to buying organic were very similar, mostly referring to the price and lack of availability, with some referring to the lack of trust or information, and others citing the inconvenience in buying or finding organic products. One couple interviewed remarked that it was impossible to buy organic products because of the high prices compared to the relatively low salaries in the region. There is a clear economic impediment to accessing organic products, as well as a general lack of availability, reflected in the local markets which offer few organic products. With a lack of availability, purchasing such products may be timely and further de-incentivize purchasing organic. Additionally, the lack of information or trust in the products is reflective of the complex nature of sustainability in food production. There may be a lack of information available to consumers about organic products or a general misunderstanding of what makes a product organic or sustainable.

7.4 Motivations and Improvements

The draw of the market was clear: the quality of the products, the local and seasonal products, and supporting local and small businesses. These factors were more important than environmental factors, health factors, or financial factors that could draw people to the markets. Some people talked about growing up in Vitoria-Gasteiz and going to local markets with their parents, and others mentioned trying to keep the city alive and fighting against large multinationals taking over. The draw of respondents' relationships with the vendors and good customer service stood out at Abastos, but was not one of the main draws for any of the other markets.

7% of respondents said the good prices motivated them to go to the market, highest at Santa Barbara, followed by Abastos and Simón Bolívar, while in factors that could be improved, 5% said prices were too high, mostly people in Abastos. This reflects the reality that prices of products are generally higher in Abastos than at other markets.

It is important to note that the motivations that came to mind to participants, may not be the consumers' real motivations. At Abastos, only 4% cited their proximity to the market as a motivation, despite 47% of participants living in the same neighborhood as the market. It is likely that the responses to these questions are the answers that were most salient to the market-goers at the time of responding to the survey, as opposed to the "true" underlying reasons for going to the markets.

The majority of respondents were happy with the market as it was, with no complaints or suggestions on how to improve it. Some participants at Abastos suggested facilitating different modes of purchasing, indicating that the inconvenience of going to the market at certain hours and waiting in line impedes people from buying as much as they would if online purchasing and pick up or delivery were implemented. In outdoor markets, the conditions were more of a complaint, due to the exposure to weather at the outdoor markets. In line with previous parts of this discussion section, the main complaint being the need for more organic products at Santa Barbara may point to an increased awareness about sustainable food at the market, and/or a lack of availability of organic products. The complaint of lack of variety at Simón Bolívar & Lakua-Arriaga is reflective of the very small portion of the market that is dedicated to food.

7.5 Demographic information

7.5.1 Age

The largest group of market goers were middle-aged (45+), with much fewer young people visiting the markets. The largest percentage of young people were at Santa Barbara, and the lowest at Simón Bolívar & Lakua-Arriaga. It is possible that the people who are older have more of a tradition of going to local markets and continue to do so, or that they have more economic capacity or time to buy products at local markets, which may be more expensive (like at Abastos) or take more time than going to the supermarket.

7.5.2 Gender

The majority of people who responded to the survey were women, which seemed to be reflective of the higher percentage of women at the markets, but which may also be reflective of the bias of more women being more willing to talk to me, as a woman myself. Although I did not track the people who said no to the survey, my impression was that more men said no to taking the survey than women.

7.5.3 Place of Origin

Simón Bolívar & Lakua-Arriaga had the highest number of people from another country, which may be reflective of the neighborhood Lakua-Arriaga is in, with less expensive rents in the neighborhoods in the periphery of the city compared to the center where the other markets are located.

7.5.4 Language

The percentage of people who spoke Basque in Santa Barbara and Abastos was significantly higher than that of the general population in Vitoria-Gasteiz. This may be because of the cultural ties Basque speaking people have to the local markets, their greater economic capacity allowing them to buy more high quality foods, or their economic capacity to live closer to the center of the city where Santa Barbara and Abastos are located. Since Basque speakers can access higher-paid jobs, the economic factor may be a mediating factor between the percentage of Basque speakers at different markets. Based on the survey, people who spoke Basque and those who did not had similar responses concerning their consumer habits.

7.6 Distance from Markets

Overall, the majority of people who went to the markets lived close by, although Abastos and Santa Barbara also drew people from neighborhoods farther away. This may mean that to get more market attendance, more markets in different parts of the cities should be set up.

7.7 Other Limitations and Future Expansions

Since this study was conducted at local markets, it is not representative of the entire population of Vitoria-Gasteiz. Instead, it represents a small subset of the population that is most invested in buying local or most able to buy local. This may correlate with other differences, as shown by the difference in Basque speakers at Abastos and Santa Barbara compared to the general population of Vitoria-Gasteiz. Since the survey is focused only on a small subset of the population, by definition it will not capture people who do not frequent local markets, which likely make up the majority of the population of the city. Therefore, the survey results cannot explain what barriers the majority of the population would need to overcome in order to start shopping at the local markets.

This survey can be seen as a first step towards the goal of improving the popularity of the local markets, by first surveying people who already go to the markets, and seeing who would like to go more often or buy more, and what could be improved. A potential second stage of a project could involve surveying the population that does not frequent the local markets and looking at consumer habits and motivations to figure out how to draw them to the local markets of the city.

Another limitation of the study is that the time spent talking to market-goers was very short and therefore only allowed for a simple questionnaire, although more in-depth questions would have been useful for a deeper understanding of consumer habits and people's motivations for their purchases.

Additionally, although an equitable distribution is always a goal in surveying, natural biases on the surveyor's and market-goers' part make it very difficult for a perfectly equitable distribution to be achieved. This applies to gender and age distributions as well as distributions of different stands at the market, as mentioned earlier. My identity as a young, foreign woman likely affected who was willing to take the survey.

One important topic not addressed by the survey is the issue of re-selling at the local markets, which, according to one study from 2001 (Gómez Pascual, 2001), made up 75% of the market stands at Santa Barbara. A 2010 study confirmed that 60% of market-goers at Santa Barbara purchased some or all of their food from vendors who re-sold products, and showed that only 10% of consumers believed they were purchasing re-sold products, indicating high levels of fraud/misinformation at the market (Mańkowska & Chao Seijo, 2010). The authors of this report pointed out that the City Hall's control of resale was not sufficient or efficient and that it allowed re-sellers to continue attracting consumers and continue selling their products. It was clear in my study that certain stands had much more variety than others, and one farmer (who may or may not have the correct information, but who had spent many years selling his products at the market) said that only two fruit and vegetable stands (including his own) were not re-sellers at Santa Barbara. This goes in stark contrast to the official data of the City Hall, which says there is no re-selling at any local markets, and a 2012 study that said that only 23% of stands re-sell products. Future studies with researchers more capable of making specific evaluations about the re-selling at markets should look into this issue at Santa Barbara.

Other topics to include in future surveys could include economic questions, however people may not be willing to answer such questions in a public setting.

8. Policy Recommendations

Overall, the markets are popular with consumers, who have few complaints. However, there is an array of policy decisions that could attract more service at the local markets, improve the experience for customers and/or vendors, and better support producers.

The policy recommendations for Section I will only apply to the City Hall of Vitoria-Gasteiz, as the City Hall is the entity that has control over the local markets.

1. Implement delivery or online services for markets
2. Amplify opening hours/days of markets
3. Improve conditions for vendors and consumers (cover at all outdoor markets, heaters on cold days, etc.)
4. Increase the number of organic products offered
5. Allow for easier access to markets by improving parking, allowing online services, or allowing markets in less-served neighborhoods to open
6. Increase the food variety or number of food stands at Simón Bolívar and Lakua-Arriaga
7. Conduct improved studies on re-selling of products at Santa Barbara

Factors such as high prices of food or organic products are not under the control of the City Hall, but will be discussed in the report summary in Section IV.

9. Section 0 & I References

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APPENDIX A: CONSUMER SURVEYS

ENCUESTA MERCADO: __________ FECHA: ____ HORA: __ Nº __

1. ¿Con qué frecuencia va Ud. de compras en los mercados locales* de Vitoria-Gasteiz?

a. Siempre (dos veces o más por semana)
b. Muchas veces (aprox. una vez por semana, o 3-4 veces al mes)
c. A veces (1-2 veces al mes)
d. Pocas veces (menos que una vez al mes)
e. Nunca antes de hoy

**mercados locales = mercados locales del Ayuntamiento de Vitoria-Gasteiz*

2a. ¿Qué productos coma Ud. habitualmente en casa? *(Selecciona sí o no)*
2b. ¿Qué productos compra Ud. en los mercado locales? *(Selecciona sí o no)*
2c. ¿Qué porcentaje de la cantidad total (kg) de este producto compra Ud. en los mercados locales? *(Elige una opción para cada producto que compra en los mercados locales)*
2d. ¿Qué productos le gustaría comprar en mayor cantidad (o más frecuentemente) en los mercados locales? *(Selecciona sí o no)*

	2a.	2b.	2c.					2d.
	Como este producto habitualmente en casa	**Compro este producto en los mercados locales**	**Todo o casi todo (75-100%)**	**Más de la mitad (50-75%)**	**Aprox. la mitad (50%)**	**Menos de la mitad (25-50%)**	**Poco o muy poco (>0-25%)**	**Me gustaría comprar más de este producto en los mercados locales**
Frutas	**Sí / No**	**Sí / No**						**Sí / No**
Verduras y hortalizas	**Sí / No**	**Sí / No**						**Sí / No**
Carne	**Sí / No**	**Sí / No**						**Sí / No**
Pescado	**Sí / No**	**Sí / No**						**Sí / No**
Lácteos y huevos	**Sí / No**	**Sí / No**						**Sí / No**
Pan y bollería	**Sí / No**	**Sí / No**						**Sí / No**
Otro producto: ___________								**Sí / No**

3a. ¿Qué productos suele comprar ecológicos? ____
3b. ¿Le gustaría comprar más productos ecológicos? a. Sí b. No c. No sé/ no me importa
3c. ¿ Si sí, qué le inhibe de comprar más productos ecológicos? ____________________________

4. ¿*Dónde* compra Ud. la mayoría (más de 50%) de la comida que consume?

a. Mercados locales de Vitoria-Gasteiz
b. Mercados de barrios
c. Supermercados/Hipermercados (Eroski, Carrefour, Lidl, etc.)
d. Pequeños comercios (frutería, carnicería, pescadería, ultramarinos etc.)
e. Tiendas especializadas (Tierra Viva, Veritas, Bioalai, etc.)
f. Tiendas online (que no tienen establecimiento físico)
g. Ninguno, diversifico mis compras entre los siguientes tipos de tiendas:___________________

5a. ¿Cuáles son *sus motivaciones* principales para ir de compras en los mercados locales de Vitoria-Gasteiz?
6a. ¿Qué factores ve Ud. como obstáculos más importantes que le inhibe de comprar más en los mercados locales (en mayor cantidad o más frecuentemente)?
6b. ¿Una mejora en qué factores le permitiría o facilitaría a Ud. comprar más en los mercados locales
(en mayor cantidad o más frecuentemente)?

5. Motivaciones para ir al mercado	**5a.**	**6.** Obstáculos/factores a mejorar	**6a.**	**6b.**
Precio		**Precios altos**		
Calidad/sabor/frescor de productos		**Baja calidad/sabor/frescor de productos**		
Variedad de productos		**Falta de variedad de productos**		
Sostenibilidad medio ambiental		**El mal tiempo (frío, lluvia) me impide de ir**		
Quiero/quiere comprar productos locales/apoyar a vendedores locales		**Me falta información sobre los mercados (horarios, ubicación, productos)**		
Ubicación conveniente		**Ubicación inconveniente**		
Horarios convenientes		**Horarios incovenientes**		
Conozco/conoce a los vendedores		**Conozco mejor a vendedores en otro(s) lugar(es) de compra**		
Por costumbre voy/va al mercado		**Por costumbre voy a otros lugares de compra**		
Accesibilidad		**Poca accesibilidad**		
Atención del personal (los vendedores)		**Dificultad con el transporte de comida a casa**		
Factores culturales		**Filas largas/ dura mucho tiempo ir de compras allí**		
La experiencia social		**N/A, No quiero comprar en mayor cantidad o más frecuentemente en los mercados locales**		
Otra: ___________________		**Otra:** _________________		

8. ¿Cuántos años tiene Ud.?
a. 18-24 d. 45-54
b. 25-34 e. 55-64
c. 25-34 f. Más de 65
d. 35-44

10. ¿De dónde es?
a. Vitoria
b. Otra ciudad/pueblo en Álava
c. Otro territorio de Euskadi
d. Otra comunidad autónoma de España
e. Otro país

9. Género: ¿Cómo identifica Ud.?
a. Mujer
b. Hombre
c. No-binari@
d. Otro: __________

11. ¿Qué idiomas habla?
Selecciona todas las respuestas que aplican
□ Euskera- lengua materna □ Euskera- segunda lengua
□ Español- lengua materna □ Español- segunda lengua
□ Otra lengua materna □ Otra segunda lengua

12. ¿En qué zona de Vitoria vive? □ Casco Viejo □ Ensanche □ Lovaina □ Coronación □ El Pilar □ Gazalbide □ Txagorritxu □ San Martín □ Zaramaga □ El Anglo □ Arantzabela □ Santiago □ Aranbizkarra □ Arana □ Desamparados □ Judimendi □ Santa Lucía □ Adurtza □ San Cristóbal □ Mendizorrotza □ Ariznabarra □ Al-Gobeo □ Sansomendi □ Arriaga-Lakua □ Abetxuko □ Zabalgana □ Salburua □ Aretxabaleta □ Otra zona: ___________