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Revitalising Hawker Culture in Singapore

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1 Introduction

Hawker Centres have a ubiquitous presence in Singapore's landscape. Initially built by the Housing Development Board (HDB) in conjunction with the Ministry of the Environment & Water Resources (MEWR) in the 1970s & 1980s to provide unlicensed street hawkers with a consolidated shelter that imposed order and hygiene onto a squalid industry, these street peddlers were refashioned into a symbol of Singapore's heritage and present society (Kong, 2007). Today, hawker centres across Singapore continue to serve the needs of diverse communities in residential, recreational and business districts by providing affordable and delicious meals (69 Michelin Bib Gourmand in 2021) but also hold immense social and cultural value. For a fledgling nation, food has become a metaphor for multiculturalism and a major building block to the Singaporean identity (Duruz & Gaik, 2015), and hawker centres have played an integral role in the process of nation-building. By providing various local food dishes across the different cultures in Singapore under one roof, hawker centres serve not only as a microcosm of Singapore's multiculturalism where each race retains its own distinctive features while coexisting harmoniously, but also hawker food serves as a bastion of Singapore's history amid a fast-changing metropolis.

However, in recent years, the hawker trade is facing a risk of "going extinct" due to a lack of new-generation hawkers. With the median age of hawkers at 60, according to the National Environment Agency (NEA), many heritage hawkers are at risk of dying out without succession. Recognising this worrying trend, this report looks to first identify the reasons for the stark decline in new-generation hawkers, before evaluating the current state and civil society strategies that have been implemented in the attempts to resolve this problem. In our evaluation, we conceive the possibility of having to reimagine our hawker centres for the future that could look to address the present trends. In doing so, we look to recommend two main policies from a governmental perspective in hope of resolving today's issues, while also assessing the potential trade-offs that might occur.

2 Background

2.1 Significance of Hawker Centres

Hawker centres are heavily patronised by Singaporeans, with 80% of Singaporeans eating out at hawker centres more than once a week and one-third of Singaporeans eating out more than seven times a week (HPB, 2016). Apart from providing the default food option for citizens in a country where eating out is increasingly prevalent (Noble, 2018), hawker centres reduce the effects of inequality by providing affordable options for lower-income households, which spend the greatest proportion of their total income on food. Thus, the low-cost options offered in hawker centres are often their only feasible option, since any savings are significant to them (Goh & Yip, 2020). The decline of such a reliable food option would make it harder for lower-income households to achieve a minimum standard of living and their quality of life would suffer greatly.

Beyond that, hawker centres play an important role in community bonding, as agreed by 81% of respondents in a 2005 survey conducted by NEA-MCDYS. They allow the community to gather and interact with one another, promoting social cohesion as a result. Hawker centres also play a part in Singapore's cultural identity, and its prominence is reflected in the successful inclusion of Singapore’s Hawker Culture into UNESCO’s 2020 intangible heritage list (Yong, 2020). It is for these practical and intangible reasons that we believe Singapore should look to find sustainable ways to preserve her hawker culture and its centres.

2.2 Reported Trends

In recent years, the sustainability of hawker centres has been a topic discussed repeatedly where certain observed trends have been a cause of concern. This has been further exacerbated by the Covid-19 situation.

2.2.1 Struggle to remain Affordable yet Profitable

According to a study done by MTI (2015), raw materials made up 59% of the cost components in the food industry, which implies the sensitivity of the market for raw materials to hawker centre prices; a dollar increase in costs could lead to a 56 cent rise in food prices. Therefore, these circumstances do not interact particularly well with the high price elasticity of demand for hawker food (CNA, 2018). Since hawker centres have culturally served as a source of affordable food, customers tend to respond greatly to changes in food prices. It was reported in the same article that an interviewed hawker experienced a 40% to 50% drop in business when he raised his prices by 50 cents. The conditions for the hawker trade to remain affordable yet profitable are seemingly unfavourable.

2.2.2 Tough Working Conditions

"It's too much hard work, we have to put in 16 hours a day sometimes. It's hot. Kids nowadays wouldn't want to work here." a hawker in his late 60s shared (Diplomat, 2021). Hawkers who sell breakfast items have to open for business as early as 2 am and those manning 24-hour stalls could work up to 20 hours a day.

It is common knowledge that hawkers have to put in long hours and work in harsh environments. Generally, the hawker work environment does not meet the increasing standards expected by the younger generation. Working conditions of hawkers are often viewed as unattractive and unideal.

2.2.3 Shortage of Future Talent

Due to the aforementioned trends, it has resulted in a shortage of future talent in the hawker trade. As reported by Reuters (2019), the median age of hawkers is about 60 years, which is much higher than the national labour force median age of 43 years. The significance of this problem lies in the lack of continuity of the businesses. The hawker trade risks losing its authentic, traditional hawker recipes because there might be no one to pass them to.

2.3 Problem Statement

The reported trends above provide a causal relationship that explains the sharp decline in the number of hawkers. With reference to the above trends (in Section 2.2), the issue can be narrowed down to two overarching problems. Firstly, the tougher business and working conditions represent the present social-economic difficulties that have turned many away from the hawkering industry. Secondly, a declining Hawker Trade due to a lack of new entrants represents the issue of insufficiency of labour to sustain the culture. These intertwined problems of sustaining current hawker businesses and concurrently attracting new hawkers to the trade present a complex situation that requires strategic management, as we look to preserve this national icon by presenting what a reimagined hawker centre might constitute.

3 Singapore’s Current State & Ground-Up Strategies

Singapore has implemented several strategies in response to the declining hawker trade. The strategies aimed to understand and maintain public interest, attract and onboard new hawkers into the industry and improve the existing working conditions of hawkers. One of the key roles of the National Environment Agency (NEA) is to “encourage a vibrant hawker culture”. As such, most of the state responses on the hawker trade involved the NEA.

3.1 Understand and maintain public interest

Ensuring constant demand for hawker food is crucial for the preservation of Singapore’s hawker culture. This has been made especially clear during the COVID-19 pandemic, as many stalls - especially older ones - struggle to stay alive with patronage numbers dropping to 5% of the usual amount (Pei Ting & Naheswari, 2021). Many efforts, both government-led and grassroots, have attempted to understand why people eat at hawker stalls and to inspire more to do so.

3.1.1 State Responses

The state has taken measures to gain a clearer understanding of the core reasons that has brought about the dwindling hawker trade. Having identified the aforementioned trends, the Government has looked to seek insights from the public by conducting surveys with aims to provide hard numbers pertaining to the public opinions and sentiments towards Hawker Centres. In the context of hawker culture, NEA has been conducting its biennial Perception Survey of Hawker Centre Patrons (PSHCP) since 2014 to gain a deeper understanding. According to the findings, the public consistently sees hawker centres as an inextricable and vital part of the community, even garnering the second-highest number of votes as the most important public amenity. Concerning the frequency of patronage, hawker centres were cited as being the most visited eating establishment among respondents. Additionally, the public is generally very satisfied with hawker centres, with overall satisfaction ratings consistently surpassing 90%. These positive results indicate that the issues surrounding hawker trade largely lie outside the realm of consumer demand. Rather, to effectively sustain the hawker trade, strategies should be geared towards supporting hawkers.

3.1.2 Ground-Up Responses

Due to the proliferation of digital media, establishing an internet presence is of paramount importance. As such, there have been several social media initiatives that seek to support the local hawkers.

One such initiative would be the “Eat Shop Play” directory and blog. Besides compiling information and trivia regarding our hawker centres, the blog also features food recommendations when visiting them. This allows residents to be well-informed of recent happenings within hawker centres, as well as more easily find and explore new food options, rather than frequenting the same hawker centres.

On the other hand, many accounts on Instagram have been dedicated to spreading awareness of hawker stalls on the platform. For example, the @savetheelderlyhawkers and @wheretodapao pages promote stalls owned by elderly hawkers, who have little to no media presence. It shares the stories behind the stalls, providing a sense of authenticity to which customers can connect more on a personal level (Moore, 2020). In doing so, more people would be inclined to patronise the stalls, helping the hawkers maintain a steadier flow of income amidst the volatility of the trade that was exacerbated by the pandemic.

3.2 Attract and onboard new hawkers to the industry

With a hawker median age of 60, as compared to the national labour force median age of 42 (Reuters, 2019), the shortage of new and young hawkers entering the trade is worrying. To combat this, several strategies have been implemented to encourage more young people to see hawkering as a viable job opportunity.

3.2.1 State Responses

Although the barriers to entry into the hawker trade are relatively low, the experience of newcomers greatly influences the success of the stall. Research has shown that poor management skills and business sense were among the primary reasons that lead to the failure of Food and Beverage (F&B) businesses in Singapore (The Restaurant Times, 2021). On the other hand, improving and maintaining the quality of the food would earn the stall a good reputation, encouraging repeat visits to the stall (Chron, 2021).

The Government has recognised the need to provide greater business aid to fledgling hawkers by initiating the “Hawker Development Programme” (HDP), which was developed by NEA and SkillsFuture Singapore (SSG) to prepare newcomers for the industry. The programme consists of three stages, the first being a training programme where participants are coached by certified trainers to gain culinary and business expertise. More specifically, they would learn proper practices in hygiene as well as the theory behind ingredients and cooking equipment. They would also pick up entrepreneurship skills in the form of financial planning and inventory management (Rubbish Eat Rubbish Grow et al., 2021). The second stage is a paid apprenticeship at a hawker mentor stall, where they would gain hands-on experience working in the industry. Besides learning the skills required to create hawker food, they are also taught the skills of running a hawker business. This stage prepares participants for the final stage, in which participants set up their hawker stall either through the Incubation Stall Programme or NEA's monthly public tender.

Under the Incubation Stall Programme, successful applicants enjoy a variety of benefits aimed at integrating them into the industry. Among them is the rent subsidy provided for the first few months (50% for the first nine months and 25% for a further six months). Hawkers would also enjoy a kitchen pre-fitted with basic appliances, lowering their initial start-up costs and reducing the barriers to entry. Furthermore, successful applicants would receive mentorship during the first 12 weeks of the stall's opening, where veterans continue to pass down their industry knowledge and provide advice where necessary. This Programme, therefore, provides a holistic system that aims not only to assist hawkers financially during their infancy stages but also to provide business guidance to give hawkers the best possible chance to succeed.

3.2.2 Ground-Up Responses

In collaboration with NEA, several educational institutions have rolled out various training programmes targeted at aspiring hawkers. The "Work-Study Certificate in Hawkerpreneurship" offered by Temasek Polytechnic provided an apprenticeship and incubation phase similar to the HDP. While the apprenticeship and incubation phases remain central to the training programme, the training phase is considerably longer as the programme requires students to take seven modules over two months which consist of lessons in food hygiene, culinary skills, healthy recipes, culinary practicum, management, marketing and entrepreneurship.

3.3 Improve existing working conditions for hawkers

As mentioned in Section 2.2, the tough business and working conditions contribute towards the declining hawker trade. To address this issue, the state along with local food delivery platforms have adopted multiple strategies, mainly employing the use of technology.

3.3.1 State Responses

The Hawker Productivity Grant (HPG) was introduced by NEA to provide funding support to hawkers by co-funding the purchase of automation equipment such as stirrers, mixers and blenders by stallholders, to increase efficiency and ease of food preparation. This funding is through the form of reimbursement, by which hawkers can claim up to 80% of the equipment cost via NEA's e-services, subject to restrictions. Through this initiative, the hawkers can reap multiple benefits such as increased productivity and efficiency (Caldwell, 2016), leading to higher profits, a reduction in waste products and improved reputation amongst hawker patrons (Burton, 2017).

As a joint effort by SG Digital Office and NEA, the Hawkers Go Digital initiative seeks to enhance the livelihoods of hawkers through the use of technologies. It offers hawkers a unified e-payment solution in the form of a QR code that is compatible with a wide variety of online payment applications. The programme also promotes the usage of food delivery platforms as a more sustainable business model.

3.3.2 Ground-Up Responses

Grab, Singapore's leading tech company, initiated its own Hawker Centre 2.0 pilot programme in May 2020 as an effort to provide a sustainable digitalisation path for hawkers amidst the growing uncertainties of the pandemic. Besides offering a lowered commission rate to hawkers, Grab also implemented new features to enable its users to mix and match orders from different hawker stalls, thereby improving the visibility and accessibility of hawker food to online patrons (Grab, 2020).

Other food delivery platforms such as Foodpanda have also come up with their initiatives, such as free product photoshoots, marketing support, training materials and access to sales analytics. Volunteers from Foodpanda have also visited some hawker centres to share about the programs that the platform has to offer (Foodpanda, 2021).

3.4 Proposal Workgroups

Workgroups are often composed of individuals from various departments and they benefit from having a wide range of opinions and expertise (Hill, 2017). It facilitates the creation of better strategies as the problem can be tackled from different angles. The following are two state-led workgroups related to the hawker trade.

The Workgroup on Sustaining the Hawker Trade was formed in 2019, comprising representatives from the Ministry of Sustainability and the Environment (MSE) and the NEA, along with hawkers, stall assistants and various hawker food advocates. It was created to discuss challenges faced by the hawkers and brainstorm possible solutions that could potentially solve these issues. The workgroup has since put out several recommendations spanning five key areas. Namely, it proposed to change public perception of the hawker trade, offer training programmes for new and existing hawkers, and improve productivity at hawker centres. It also proposed to celebrate hawker culture and promote peer-learning through a strong network of hawkers.

Formed in 2016 with the final report submitted to the government in 2017, the Hawker Centre 3.0 Committee is another workgroup in the same spirit (Hawker Centre 3.0 Committee, 2017). Their suggestions include a one-stop information and resource centre to facilitate exercises like licence applications and tendering of stalls, and the tray-return culture which started being enforced this year.

3.5 Evaluation of Current Strategies

3.5.1 Successful Strategies

While much more can still be done to preserve hawker culture, some strategies were effective in helping hawkers overcome specific, targeted issues. The most successful have revolved around promoting digitalisation in hawker centres by encouraging hawkers to tap on existing digital platforms, such as food delivery platforms and electronic payment methods. Furthermore, the past year of lockdowns and extensive restrictions has seen the demand for food delivery services surge dramatically. In a survey conducted in June 2020, 61% of respondents stated an increase in the usage of delivery platforms (Rakuten Insight, 2021). Despite this pivotal shift in consumer demand, hawkers have been sluggish in engaging food delivery platforms due to poor digital literacy and a lack of digital skills, and this inability has exacerbated the previously mentioned problems in the hawker industry.

However, prominent programmes such as Grab's Hawker Centre 2.0, proved to be highly successful, as the initial rollout had approximately doubled sales volumes for participating hawkers (Grab, 2020). This programme has subsequently been expanded to 24 hawker centres islandwide and shows great promise in being a mainstay in a climate where food deliveries are increasingly becoming the norm for hawkers.

Another successful programme was NEA's Hawkers Go Digital. While the take-up rate as of July 2021 remains around 50%, the value of the transactions for January 2021 surpassed the $14 million mark, a four-fold increase from June 2020 when the programme was launched (Enterprise Singapore, 2021). This shows both how crucial it is to offer online payment options today, as well as how far hawker centres were lagging behind the rest of society when it comes to digitalisation.

Both of these programmes have done much to give hawkers a leg up. More importantly, they demonstrate an effective approach in tackling issues faced by hawkers, and in getting hawkers to adopt their proposed measures. Both programmes took into account the main difficulties hawkers face when attempting to digitalise their businesses; poor digital literacy and a lack of digital skills. They overcame these issues by offering hawkers easy-to-use solutions and by streamlining digital processes for them.

3.5.2 Gaps in Current Measures

Yet, there remain gaps in the current measures. The current solutions have largely failed to sufficiently improve working conditions for hawkers, be it the working environment or the economic viability. Consequently, the inability to provide the necessary improvements has resulted in the continued perception that hawkering is an unviable career path in the eyes of Singapore’s increasingly educated and entrepreneurial workforce.

For example, the Hawker Productivity Grant has seen limited appeal; As of October 2021, only around 11% of cooked food stallholders tapped on the grant (Ministry of Sustainability and the Environment, 2021) because many of the industrial-grade equipment which qualifies for the grant are largely unfamiliar to hawkers. Furthermore, the present red-tape, where hawkers have to first purchase the equipment and subsequently prove gains in efficiency before receiving any reimbursement, causes great uncertainty among hawkers. This has dissuaded many hawkers from tapping on the grant to adopt better equipment.

Furthermore, initiatives such as the Hawker Development Programme and the Incubation Stall Programme (ISP), which sought to promote the proliferation and handing down of traditional hawker skills and culture, have seen low uptake rates. The ISP saw a total of 38 successful applicants, 28 in the first two years following its launch. Of the 28, only 10 opened incubation stalls and 3 went on to open fully-fledged hawker stalls (Shiying, 2020). The rest did not even complete the programme despite heavy subsidies and lowered risks. The low-interest levels in such programmes reveal a potential misalignment between the Government’s initiatives and the core issues faced by new and existing hawkers, of which should be targeted if hawkering is to be a viable career choice in Singapore’s modern job market.

4 Policy recommendations

4.1 Policy 1: Differentiated classes to preserve hawker culture in the face of gentrification

As Singapore advances in terms of quality of life and cost of living, traditional hawker culture is on the decline. At the same time, we need to create room for our new generation of hawkers to grow and flourish. To preserve our hawker centres and ensure they stay relevant for the foreseeable future, we look to reimagine hawker centres by creating differentiated classes. Class 1 hawker centres will be a space for greater innovation and creativity, for our new generation of hawkers to take root and grow, while Class 2 hawker centres will be bastions for hawker traditions as we know them today.

4.1.1 (Policy 1) Key Characteristic: Differentiated Classes

Class 1 hawker centres will be located in high-traffic and more affluent areas, with higher rents but greater business potential. Stalls will be more spacious, with greater flexibility with regard to ownership to create room for entrepreneurship and business growth. Pioneering and advocating for a new model of hawkers with innovation at their core will help to address many issues faced by hawkers. Ideally, the new wave of hawkers will see renewed popularity, have more financially robust businesses and garner greater legitimacy for hawking as a career path. In doing so, this will ensure a sustainable hawker environment for the future.

Class 2 hawker centres will mainly be in residential areas, to provide neighbourhoods with affordable hawker fare. Doing so will preserve traditional food at affordable prices, as well as ensure that hawker centres can continue to be communal spaces. Subsidies will also be granted to stall owners in Class 2 hawker centres, helping to keep prices low while ensuring that the stallholders can make a decent living. Stallholders will be free to choose the type of food served, but they will not be allowed to go above a defined price to maintain affordability.

4.1.2 Strategic Placement

Market research will be conducted to determine the location and size of new hawker centres, and which class they should belong to. This can be based on but not limited to the average income of surrounding households, as well as land valuation. We can make use of the existing hawker stall rental evaluation mechanisms to determine the value and rent price of stalls at particular locations.

The outcome we intend is for all households to have access to both Class 1 and Class hawker centres within a comfortable range of travel, possibly within 20 minutes as idealized by the 20-Minute-Town concept from the Land Transport Master Plan 2040 (Land Transport Authority, 2020). Doing so will keep travel times low, which is critical in reducing the adverse effects on lower-income households who tend to be the most affected by any increase in trip distance (Tan & Arcaya, 2020).

4.2 Policy 2: Quotas to ensure Traditional Stalls are not left behind

One major feature of Hawker Centres is the provision of affordable local food to Singapore. To preserve this unique feature amid change, we propose to reserve select stalls for traditional, local food. We look to identify a minimum number of stalls in each hawker centre that must be classified to sell traditional & local foods. Furthermore, these stalls will have strict guidelines to adhere to, to maintain the essence of these traditional foods. To facilitate the preservation of affordable local food, this policy should work in conjunction with increased subsidies to incentivise hawkers to sell local food.

Based on the Makan Index (IPS Social Lab, 2016), certain foods (e.g. chicken rice) are simply expected to be cheap. It is easy to justify $5 for a bowl of noodles, but people only expect to pay at most $3.50 for a plate of rice. To ensure such businesses remain profitable, we can provide subsidies so these stalls will be able to compete with other more profitable stalls. This will aid in keeping traditional cost food alive.

A quota for traditional stalls will also be introduced for every hawker centre. This is similar to the existing quota for halal stalls in hawker centres of 10% (Ministry for Sustainability and the Environment, 2011).

5 Stakeholder Impacts (Winner and Losers)

The recommended policies we propose would bring about varying effects on the different stakeholders in the hawker industry.

5.1 Winners and Losers of Policy 1

Winner: Lower-income consumers

The less affluent will find the Class 1 hawker stalls less affordable. It may feel like the government is diverting resources to benefit the rich, but we believe that the current trajectory of our society is for the demand for higher-cost options to rise. By separating hawker centres into classes, we are protecting the affordable options, while allowing progress to take place naturally elsewhere.

Losers: Class 2 Stall Owners and Current Hawkers

The introduction of the price cap on Class 2 hawker centres would tend to favour the consumers at the expense of the hawker. Stallholders in Class 2 hawker centres who serve traditionally less expensive food may find it difficult to turn a profit as their price cap will be lower compared to their production cost. Our group acknowledges the unique circumstances and intends to address this further in Policy 2. For this reason, we recognise that this policy cannot stand on its own, and requires Policy 2 to work effectively.

Also, long-established stalls and their customers might lose out. The displacement of these stalls may disrupt their business when they shift to a new location, and regular customers will find it difficult to continue patronising these stalls.

5.2 Winners and Losers of Policy 2

Winners: Class 2 Stall Owners and All Consumers

In Section 5.1, it was identified that Class 2 hawkers tend to be vulnerable in light of the shift to the new hawker centre class systems. This is compounded by the trend (highlighted in Section 2.2.1) where raw materials prices rise faster than the costs consumers are willing to pay. Our second policy, therefore, intends to protect these class 2 hawkers with subsidies, as it is believed that they should be compensated for the positive externalities they create in the form of consistently affordable prices. The policy would regulate their hawker business allowing for sustainable profits, encouraging them to continue serving traditional food.

In this way, Singapore's culture of preparing traditional food is maintained, preserving the significance these foods have on our heritage. And of course, the low-income consumers will benefit greatly from this, as there will still be accessibility to food at a very affordable price.

Losers: Class 1 Stall Owners

Non-traditional food stalls will have to compete with the lower price points of traditional food stalls, especially if class 1 and class 2 hawker centres are particularly close to each other. Class 1 Hawker Centres might struggle to progress towards the diversity it seeks if the incentives for mending traditional food stalls cause a skew in demand.

5.3 Overall Evaluation of Policies

Policy 1 and Policy 2 are complementary to each other, where the gaps in a policy recommendation are addressed by the other policy. They function together to create a stable environment both for hawkers to do business and for customers to enjoy familiar and sustainable hawker culture.

6 Conclusion

The Hawker Centres in Singapore today are a national treasure; the present decline in hawkers poses a significant problem and it compels us to re-imagine the future of what hawker centres could be if Singapore intends to preserve this unique entity that today embodies a national culture. While there have been a host of measures initiated by the Government that look to address both key problems identified, this report recognises that the current measures only serve the current hawkers. Although efforts have been made to lower the barrier to entry for new hawkers, little is done to enhance the attractiveness of this lifestyle.

With reference to this gap, our report proposed 2 policies - differentiated classes of hawker centres and traditional stall quotas in hopes to improve the outlook on hawker trade, attracting new entrants through new opportunities and better prospects.
Finally, in our impact evaluation, it is acknowledged that we have to be cautious about how both policies are being regulated as they are reliant on each other to promote the sustainable growth that we seek for our hawkers.

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