



informed solutions

Winchester Market Survey 2016

Summary Report

Prepared on behalf of



9 March 2016

OPEN

Objectives & Scope

The key objectives of the study were:

- To conduct an independent survey of both retail businesses and market traders trading in Winchester City Centre
- The objective of the research is to identify future direction for Winchester's markets and to obtain the views and opinions of the businesses located near it and the traders themselves
- The research has been conducted on behalf of Winchester City Council in order to help better understand the role, importance and performance of the existing markets offer

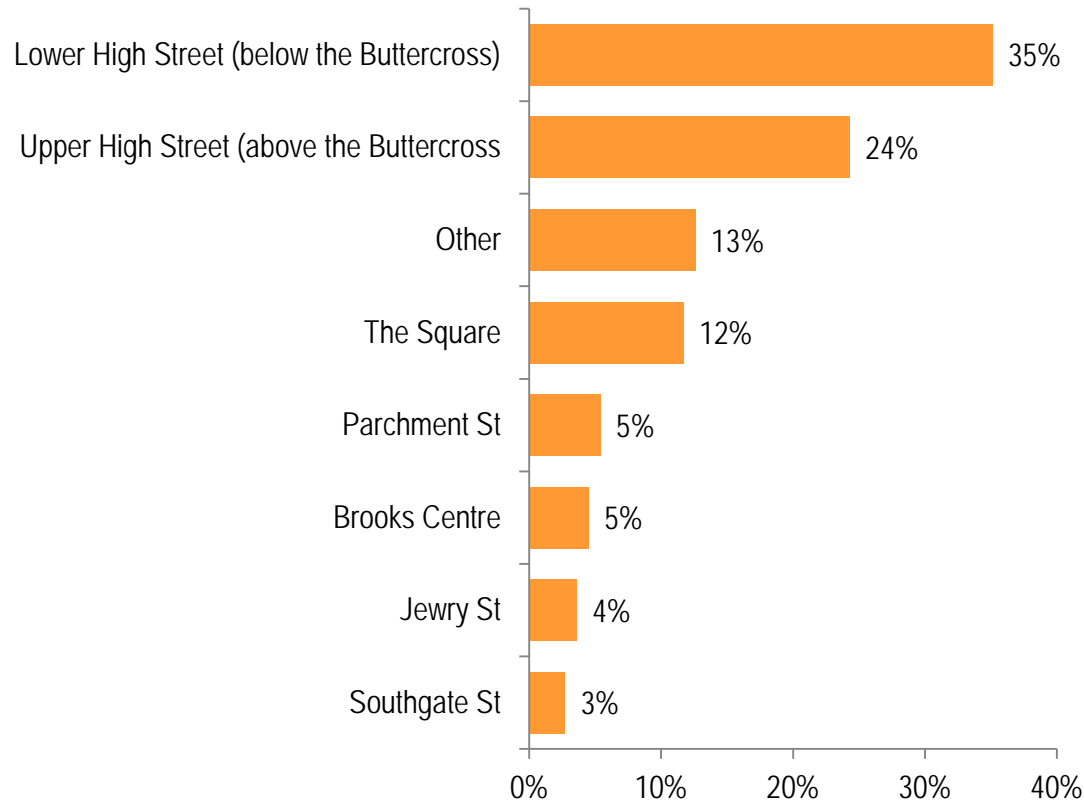
Scope of study

- Detailed survey of retailers (111 completed) and traders (35 completed), shared questions and content; 3, 4 and 5 February 2016
- Top line assessment of current market offer (Wednesday – Saturday)
- Top line overview of historic market related research

Retailer Survey Findings

Shop Locations

The shop location of the 111 retailers surveyed is shown below;



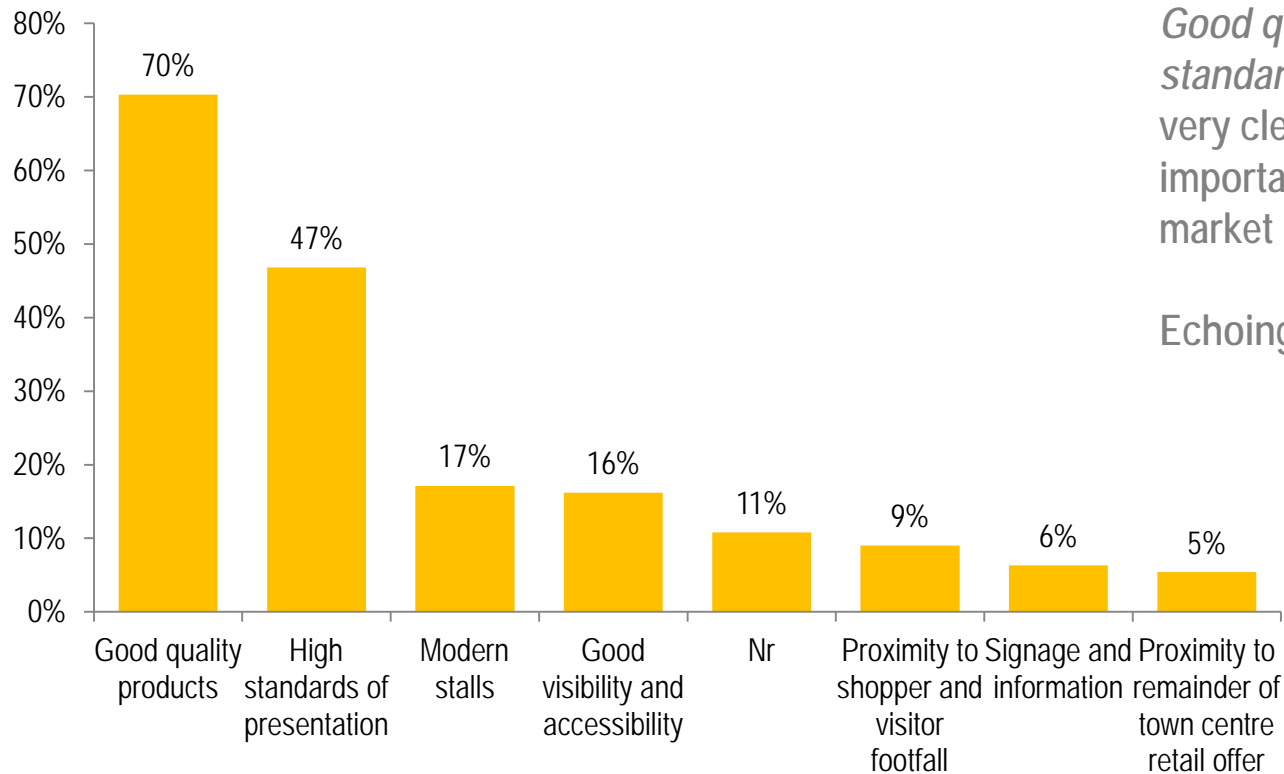
Most of the retailers surveyed (59%) are located on the High Street

RETAILER Survey Summary

- Over half of retailers who responded to the survey are located on the High Street
- Trading patterns get progressively busier across the trading week; **Saturday the busiest day**
- Majority of respondents traded on Sundays **prior to the Sunday markets**
- **Peak trading is 11am-3pm** weekdays and weekends, same as the market
- The majority consider trading days and hours of the market to meet customer needs
- Popular stalls are considered to be **fruit and veg, hot food / takeaway** and other food related product categories; considered to be popular as they offer something different as well as variety and value
- Few (c.20%+) identified gaps in the product offer or opportunities for new themes
- **Good quality products and high standards of presentation** were considered the two most important for a thriving market in Winchester, echoing traders
- The majority over half rate all the markets as OK or good on a range of attributes with the exception of management / policing, which recorded a high no response

Success Criteria

Which of the aspects below would you say are the most important for a thriving market in Winchester?



Good quality products and high standards of presentation are very clearly cited as the two most important things for a thriving market in Winchester

Echoing the views of the traders

THURS, FRI and SAT (General) Market Attribute Ratings

How would you rate the general Thursday, Friday and Saturday street markets on each of the

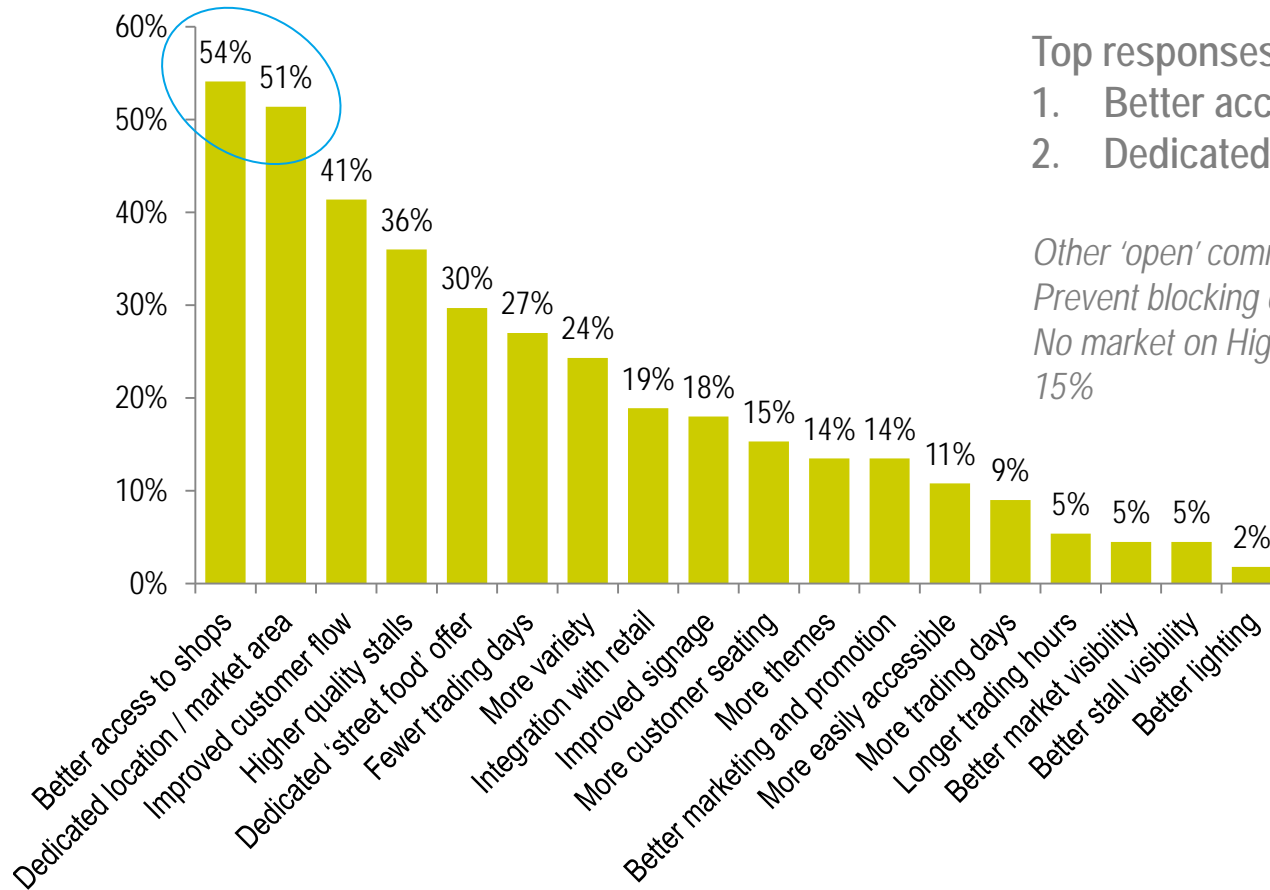
	Very Poor	Poor	OK	Good	Very Good	OK / good
Appearance	10%	11%	32%	23%	6%	61%
Choice and variety	7%	14%	26%	27%	7%	60%
Quality of products	8%	12%	23%	32%	5%	60%
Location / position	16%	13%	26%	23%	6%	55%
Footfall generation	6%	13%	31%	23%	7%	61%
Customer usage	6%	7%	35%	23%	4%	62%
Management / policing	10%	10%	27%	14%	5%	46%

Again, over half of retailers rate the market as OK or good on all attributes, with the exception of management / policing (high no response 35%)

Overall the general markets rate a little lower than the Wednesday market, and in line with Sunday.

Improvements to Current Winchester Markets

How would you like to see the current Winchester markets improve? Tick box



Top responses are;

1. Better access to shops
2. Dedicated location / market area

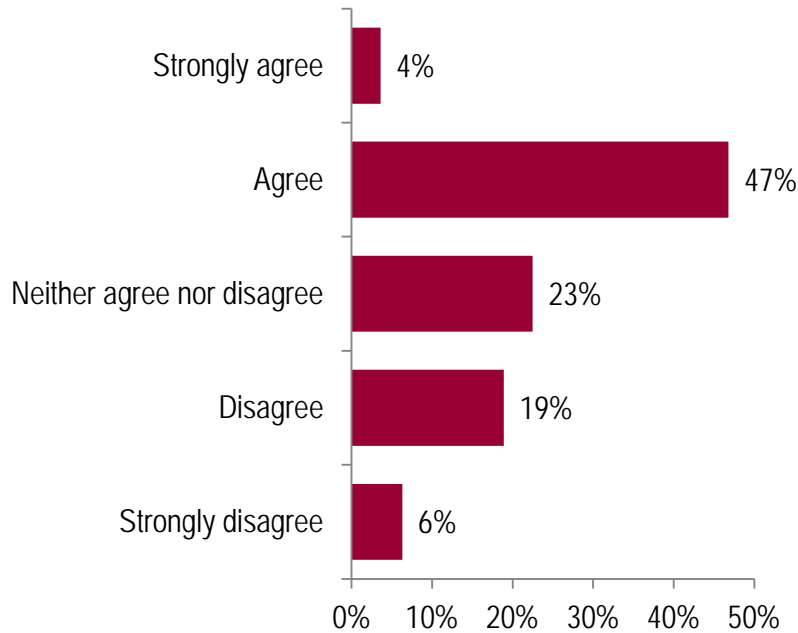
Other 'open' comments included;

Prevent blocking of shop windows (20%)

No market on High Street move to Guildhall Square
15%

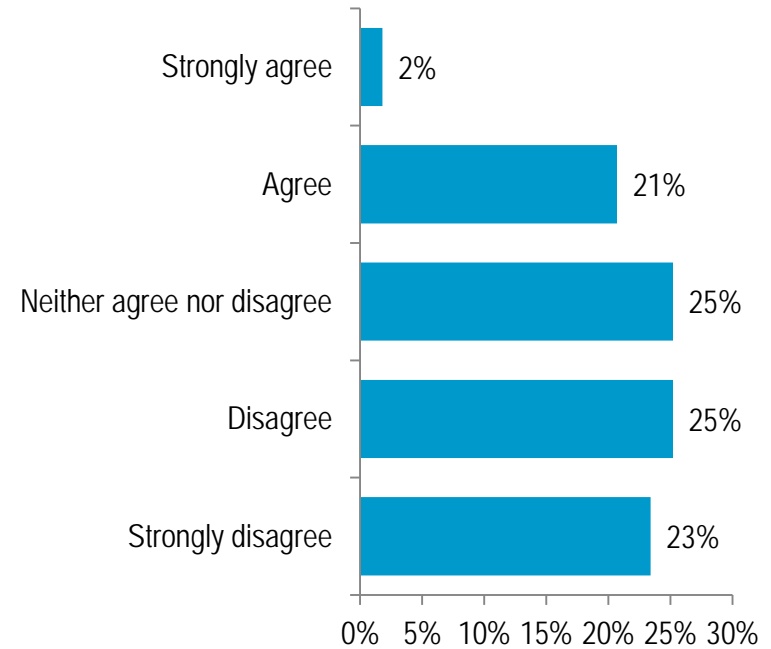
Views and Opinions on Winchester's Markets contd.

Users of the markets also use shops, cafes, services across city centre when they visit Winchester



51% agree, 25% disagree

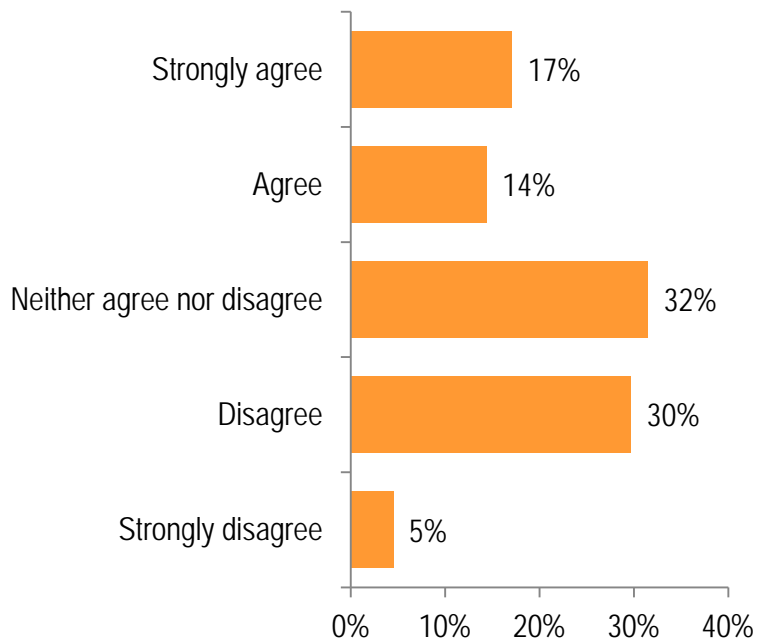
Businesses that are close to the market benefit from being near it



23% agree, 48% disagree

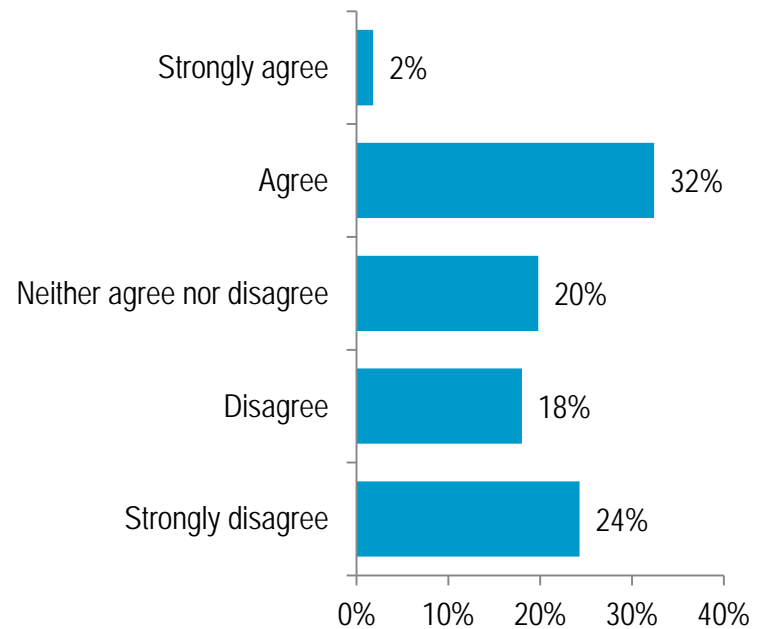
Views and Opinions on Winchester's Markets contd.

The markets provide unfair competition for Winchester's retailers



31% agree, 35% disagree

Broadly, the markets are in the right location / position in the city centre

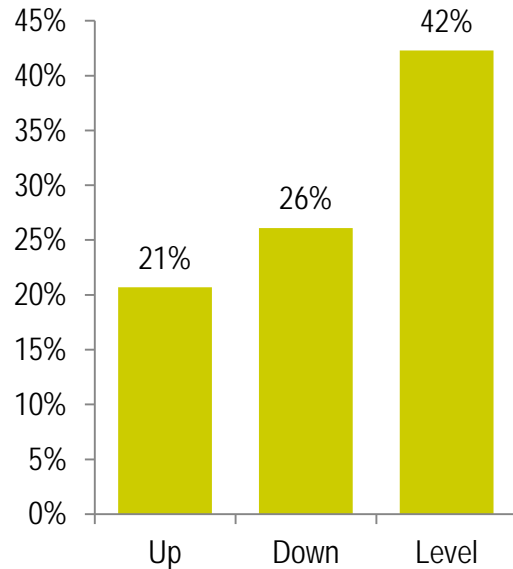


34% agree, 42% disagree

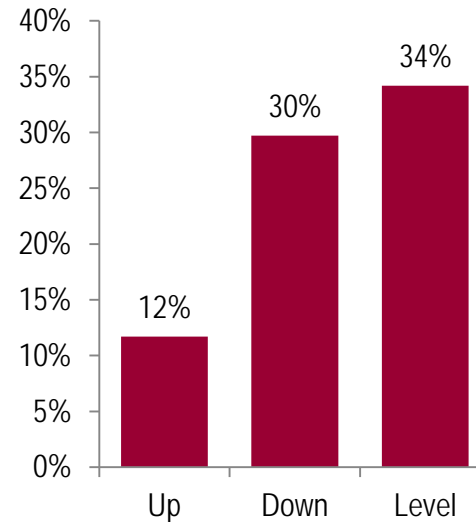
Current Trading in Winchester contd.

And finally in general terms, how are you currently trading in Winchester (v. last year)?

Turnover



City Centre Footfall



Turnover for most is level or up (63%) while city centre footfall is considered by many to be level or down; retailers report better trading performance than traders

RETAILER Survey Summary contd.

- Overall, the Wednesday (food) Market was rated a little more positively
- Suggested improvements focus on providing ***better access to shops*** and consideration of a ***dedicated location / market area*** and also to a lesser extent ***improved customer flow***
- A number of retailers appear to be 'sitting on the fence' with relatively high 'neither agree nor disagree' responses recorded to statements about the market
 - Responses are tipped towards '**agree**' especially for *use of shops, cafes, etc. by market users* and *generating footfall*
 - Responses are more evenly split for *increasing Winchester's retail appeal* and *providing unfair competition*
 - Responses are tipped towards disagree for *benefitting from being near the market* and *being broadly in the right location* but less so
- While for a number of retailers trading performance is down the **majority are level or up** in terms of turnover, ATV and customer numbers
- Footfall in the city centre is considered to be level or down, while Christmas trading was below or in line for most

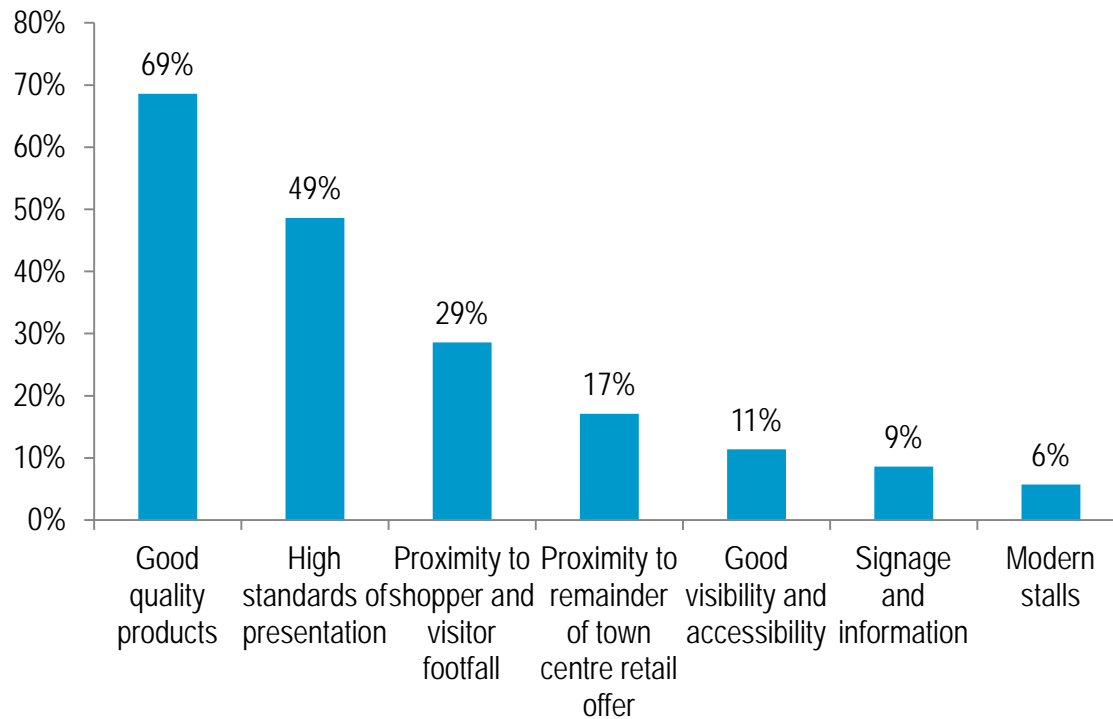
Trader Survey Findings

TRADER Survey Summary

- Customers are primarily regulars and locals; visitors are also very important
- Customers are typically described as 'comfortably off'
- Shopping in the area or visiting Winchester are primary visit drivers; market(s) itself is also considered a draw
- Visit patterns to the market are considered frequent, at least weekly
- Traders surveyed trade across the week and are relatively new (0-4 years) with food the dominant product category
- Peak trading is 11am-3pm weekdays and weekends
- Trading days and hours are considered to meet customer needs
- Popular stalls are fruit and veg, food, flowers and cheese; these categories are considered needed and popular, with convenience and quality also factors
- Missing categories focus on clothing; however circa half did not provide an answer
- While an interesting mix of additional themes was suggested the majority did not reply

Success Criteria

Which of the aspects below would you say are the most important for a thriving market in Winchester?

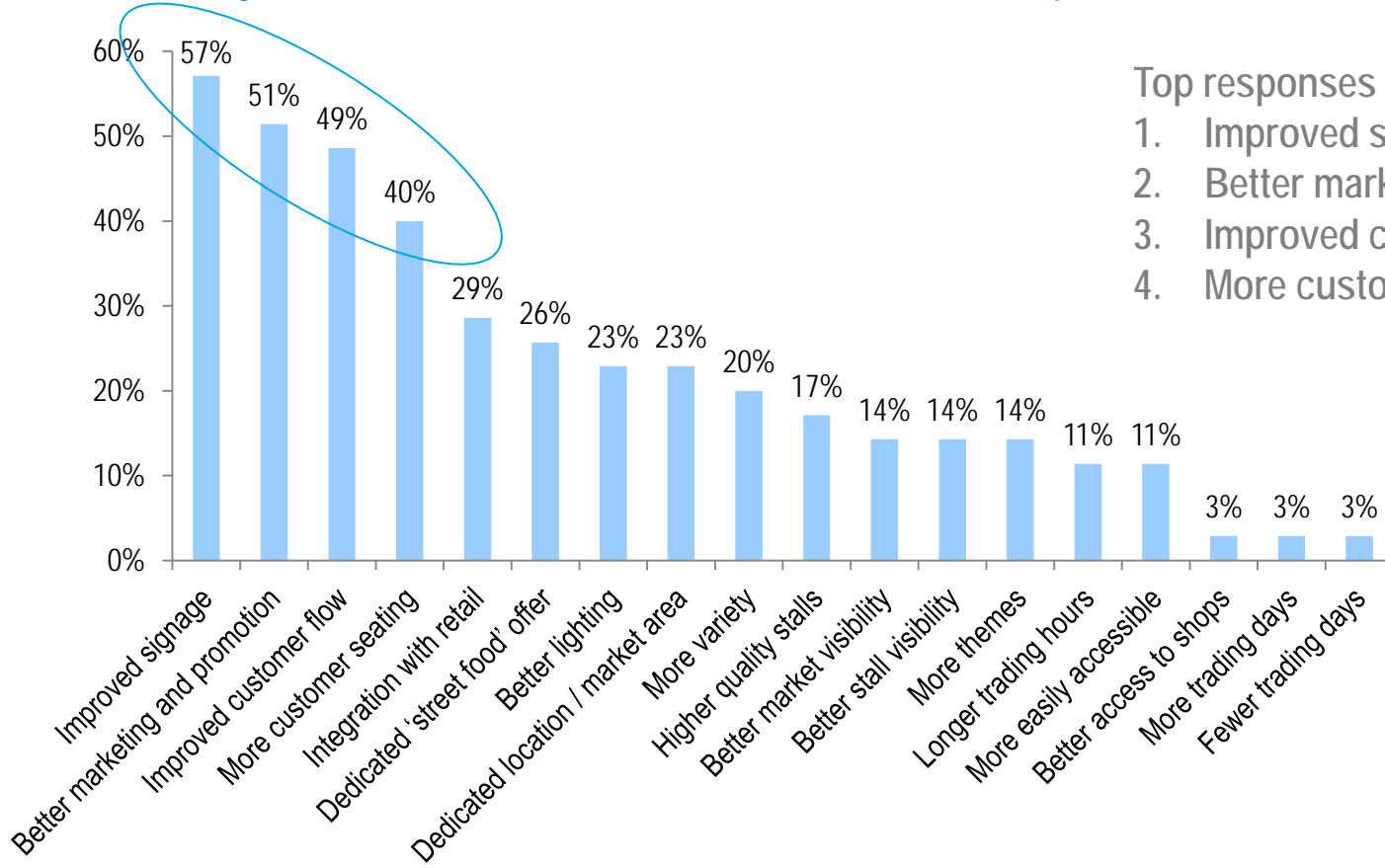


Good quality products and high standards of presentation are clearly considered to be the two most important things for a thriving market in Winchester

Proximity to shopper and visitor footfall is also considered important but to a lesser extent

Improvements to current Winchester Markets

How would you like to see the current Winchester markets improve? Tick box

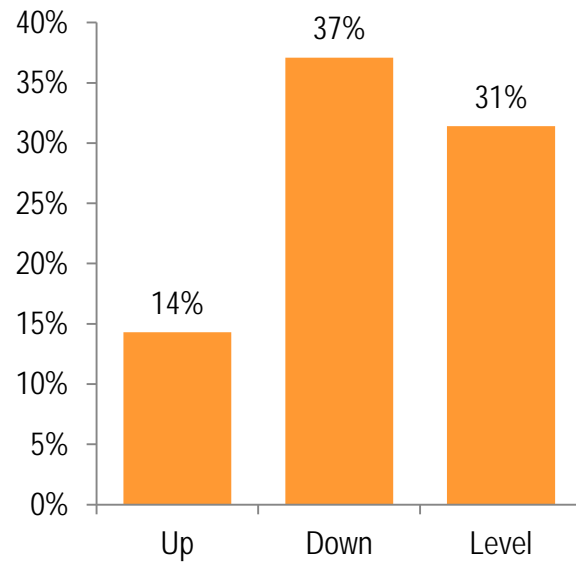


- Top responses are;
1. Improved signage
 2. Better marketing and promotion
 3. Improved customer flow
 4. More customer seating

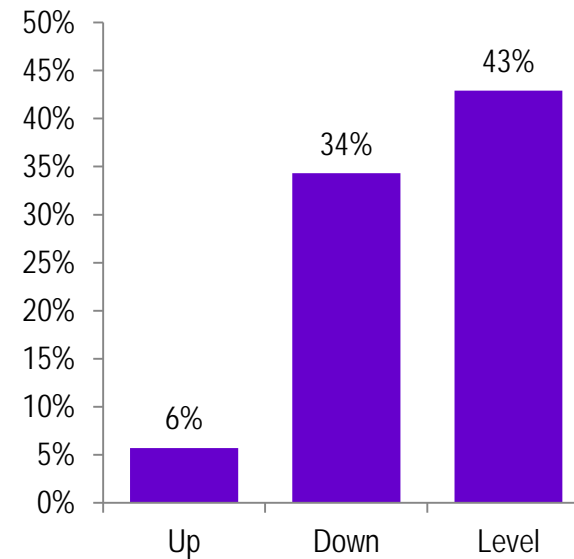
Current Trading in Winchester contd.

And finally, in general terms how are you currently trading in Winchester (v. last year)?

Turnover



City Centre Footfall



Turnover and city centre footfall are also both considered to be level or down by most

TRADER Survey Summary contd.

- **Quality products and high standards of presentation** were considered the two most important for a thriving market in Winchester, above proximity to shopper and visitor footfall (3rd)
- All markets rated highly across the range of attributes; Thurs / Fri / Sat general market the highest rated
- Suggested improvements focus on **signage, marketing and promotion** and improved customer flow
- Traders view benefits of the markets positively in terms of footfall generated, retail appeal and usage of other shops, cafes, etc. and that retailers benefit from being near it
- Broadly they consider that the markets are in **the right location / position**; at least no drivers for change
- Traders did not tend to agree that the markets provide unfair competition for the retailers
- **Trading** performance is **challenging for a large number**, however broadly similar numbers (in many cases more) are level or up in terms of customer numbers, ATVs and turnover
- Similarly in terms of views on city centre footfall levels and Christmas trading

Other Research Areas

- Existing Customer Research
- Best Practice Market Location
 - Objective Market Review

Winchester Street Market Customer Survey February 2012

Consumer opinions overall were very positive;

- 94% of local residents and 95% of non-residents felt that markets made the experience of visiting Winchester more enjoyable
- Over 90% consider each of the different types of Winchester Market to be in keeping with Winchester's image as a visitor destination
- Access and safety on market days are not considered issues and are not putting people off
- Non-market stall users, 45% of those interviewed, gave the main reason for not using as;
 - Don't have time to look today 47%
 - Not interested in markets 21%

	'Agree'	'Disagree'
Add to vitality and vibrancy	88%	
Markets offer greater choice of goods	79%	
Market(s) offer more competitively priced goods than shops	60%	
Opportunity to buy local produce (reduce carbon footprint)	83%	
Markets make city centre unpleasantly over-crowded		73%
Markets make it hard to get to the shops		77%
Bring area down – some stalls are tacky		85%

Best Practice: Markets Location Criteria

And in terms of location success factors ...

- Integrated to the retail offer of the town / city centre
- High visibility and impact to passing consumers
- Easy customer access
- Part of the shopping route
- Space for 30+ stalls; and ability to expand / grow
- Clear access to and visibility of retailers to be retained
- Ability and space to erect 'Market Trading Today' type signage
- Reasonable access to traders vehicles
- Ability to accommodate / be close to other themed market offers

In order to thrive markets need to be visible, accessible and close to key existing footfall routes

Objective Review Winchester Market: Key Findings

- The market trades in 3 locations weekdays and 4 on Saturdays; Middlebrook Street, Upper High Street, Lower High Street and the layby
- All 4 areas are physically disconnected and feel more so due to the lack of signage
- The 4 areas tend to have different types of traders and equipment
- The market does a good job of not blocking side streets
- There are frequent gaps where retail fascia's are clear
- Most stall backs in use are clear (with the exception of the Layby food traders)
- There is no signage to link the offers
- Unfortunately the lead-in stalls at the top of the market are frequently some of the weakest
- Stalls near The Buttercross cause the most congestion
- The disparate nature of the 3 elements fragments the offer and makes it appear ubiquitous

The Good



The Bad



The Unacceptable!



Project Conclusions

Overall Conclusions

- Traders and consumers like the market very much. Consumers want to find and use the market easily
- Retailers are a mixed bunch. Some like it, **many are ambivalent** and a few are very negative about it
- The two most important criteria for a thriving market in Winchester; **quality and presentation**
- The market provides benefits in terms of generating footfall and market users also using shops, cafes, etc.
- The survey is conclusive that a market offer in Winchester is needed and provides benefits
- The majority of retailers are positive in their rating of the existing appearance, choice, variety, quality, location, footfall and customer usage
- The market offer is relatively well managed and seen as an asset for Winchester City Centre, certainly for the majority of consumers
- **It does however need to evolve and improve** on many levels including, offer, choice, range, quality of stalls, consistency of standards, signage, promotion, integration to retailers, adjacency to retailers, some operations – take down
- A more detailed understanding of potential customer group demand and needs is required; the residents (locals), workers, shoppers and visitors

Survey Conclusions contd.

There is clearly a need to improve certain aspects, both from retailers and traders perspective

Aspects to improve include	From Retailers	From Traders
Better access to shops	✓	
Dedicated location / market area	✓	✓
Improved customer flow	✓	✓
Dedicated street food	✓	✓
Quality stalls	✓	✓
Promotion		✓

Future Direction

- For continued success and maintain the current level of positive contribution, the future market location needs to continue to be in high footfall and high visibility location
- Short term opportunities & initiatives to minimise impact on adjoining retailers need to identified and implemented
- The market will benefit from being consolidated to a single entity, as well as being better promoted
- This could include remaining in some part of the current locations
- Ease of access for shoppers to the market and nearby retail and facilities is essential
- A detailed space requirement and location assessment should be completed
- Existing positive relationships need to be built on
- Benefits of the market to the city needs to be published and promoted

The Retail Group Informed Solutions

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