



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

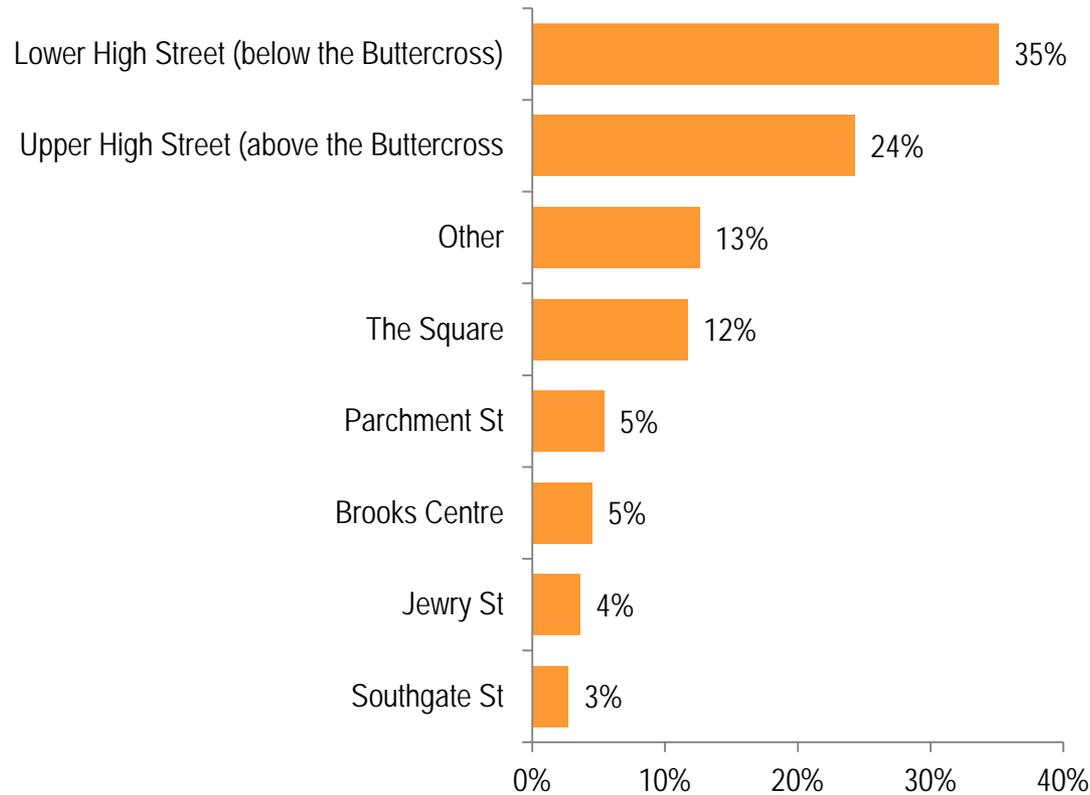
## Scope of study

- 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;



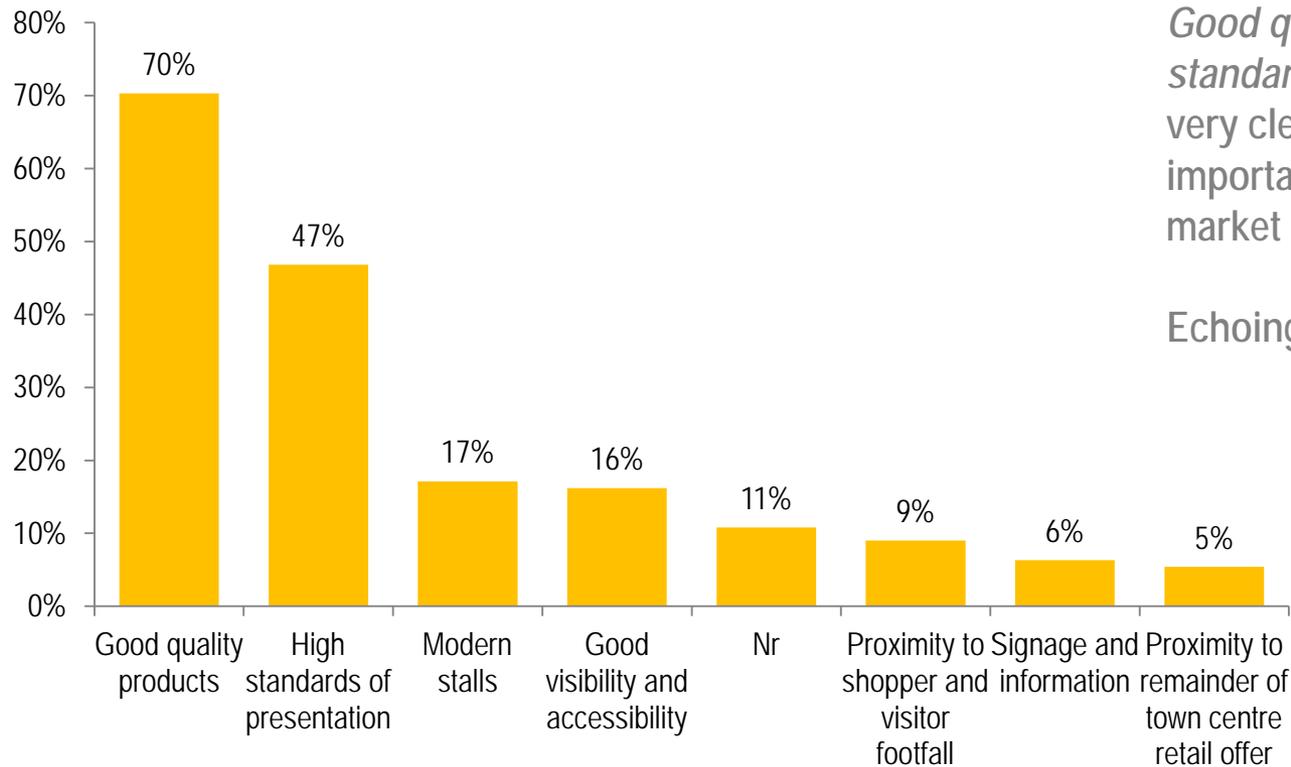
Most of the retailers surveyed (59%) are located on the High Street

# 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*

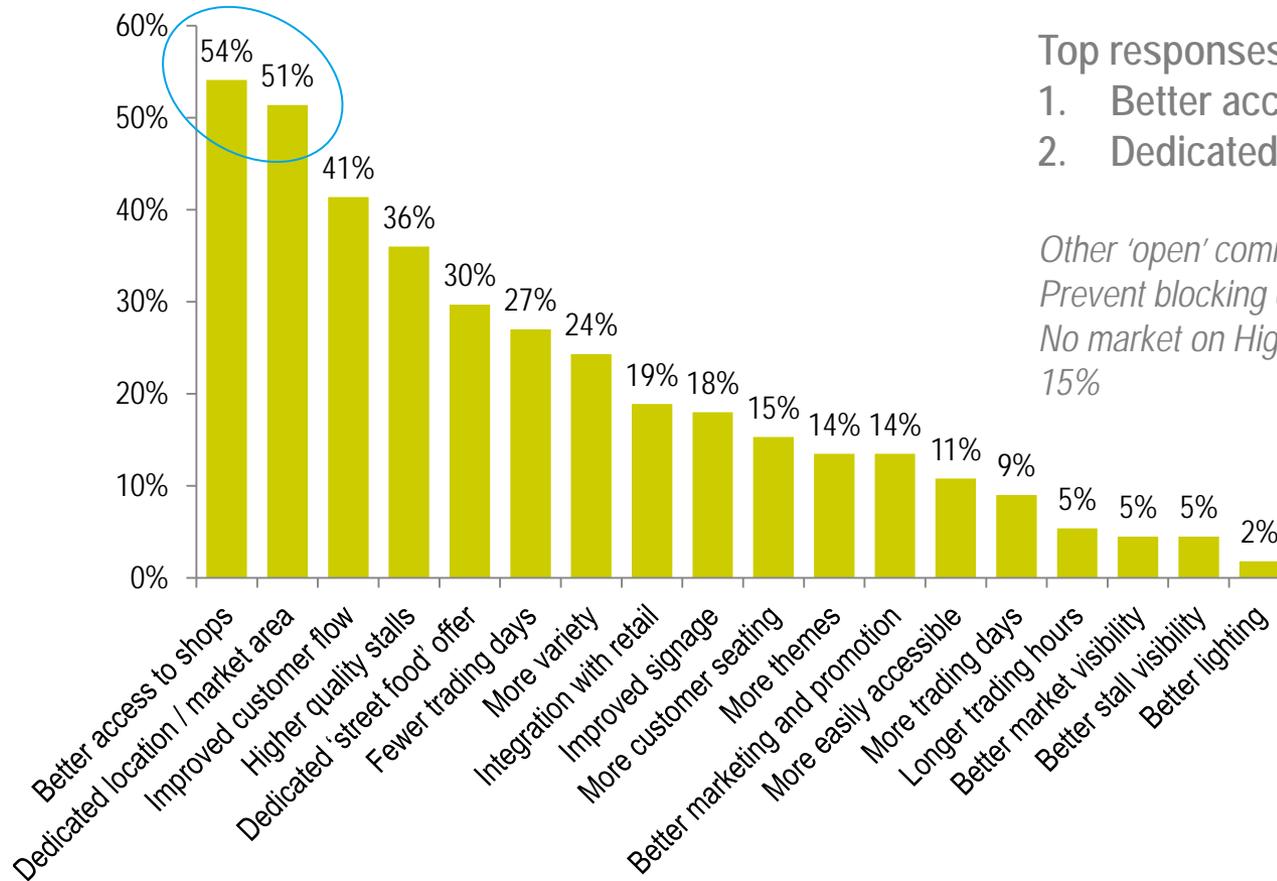
|                       | Very Poor | Poor | OK  | Good | Very Good | OK / good |
|-----------------------|-----------|------|-----|------|-----------|-----------|
| Appearance            | 10%       | 11%  | 32% | 23%  | 6%        | 61%       |
| Choice and variety    | 7%        | 14%  | 26% | 27%  | 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

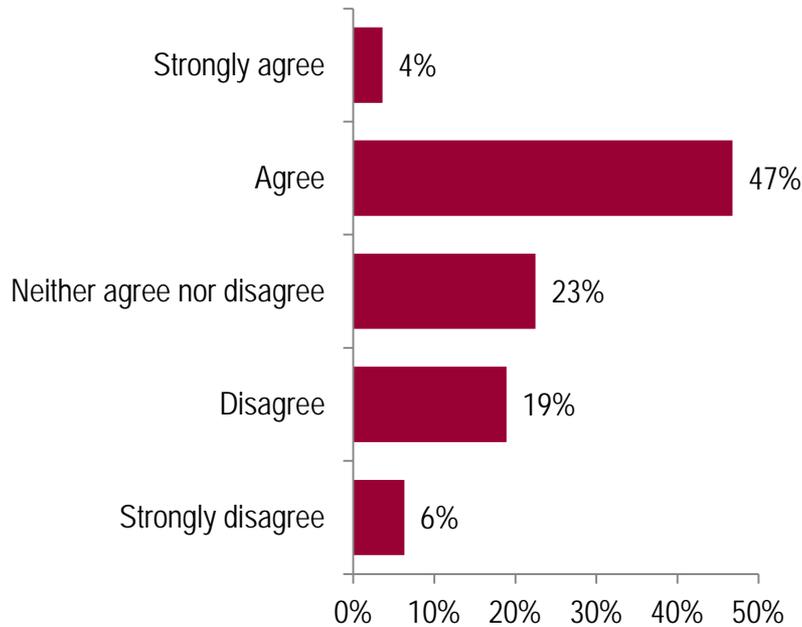
Other 'open' comments included;

Prevent blocking of shop windows (20%)

No market on High Street move to Guildhall Square  
15%

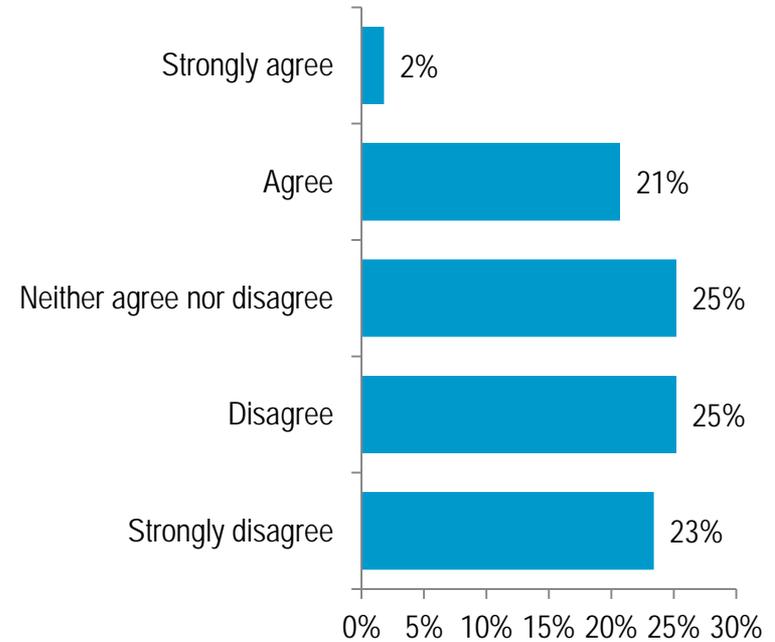
# Views and Opinions on Winchester's Markets contd.

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



51% agree, 25% disagree

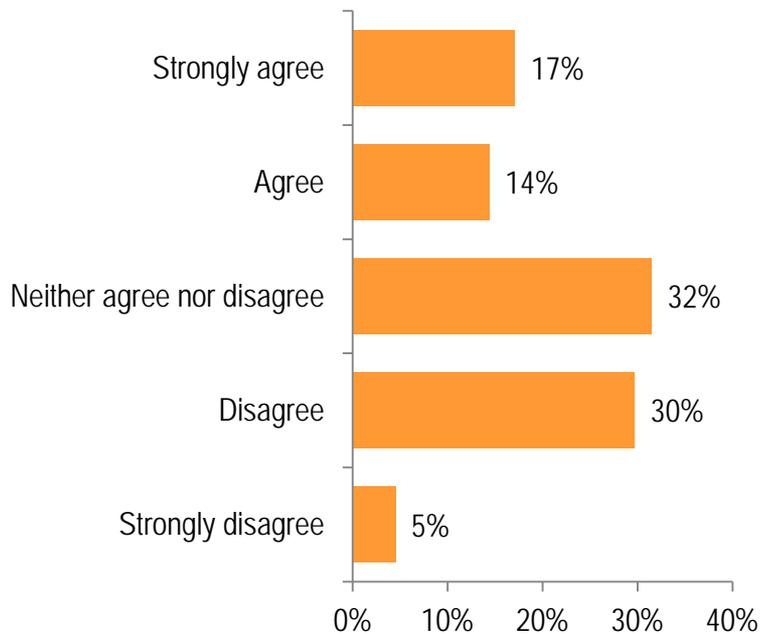
*Businesses that are close to the market benefit from being near it*



23% agree, 48% disagree

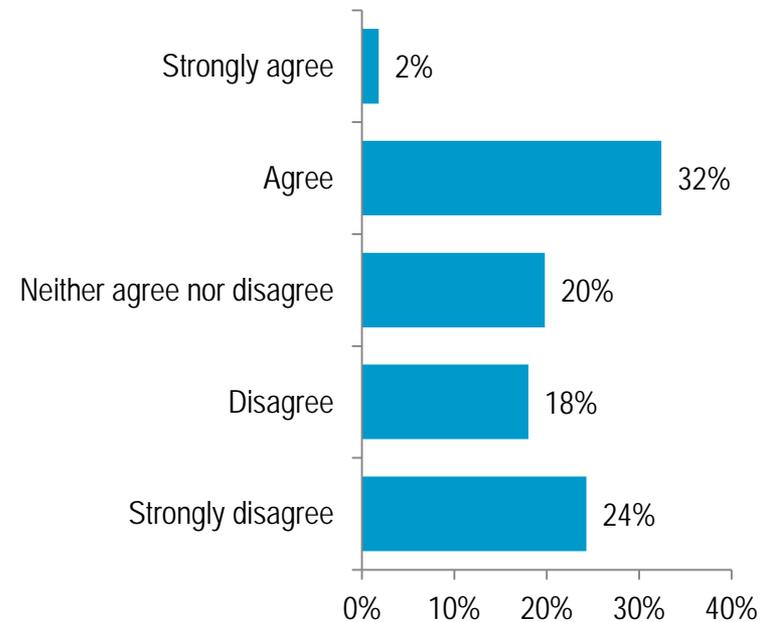
## Views and Opinions on Winchester's Markets contd.

*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*

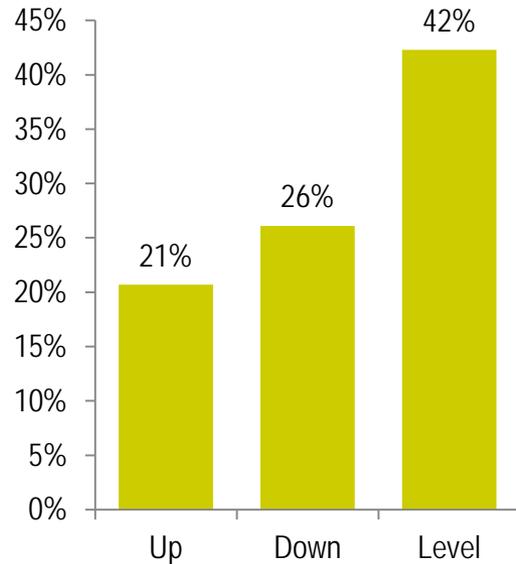


34% agree, 42% disagree

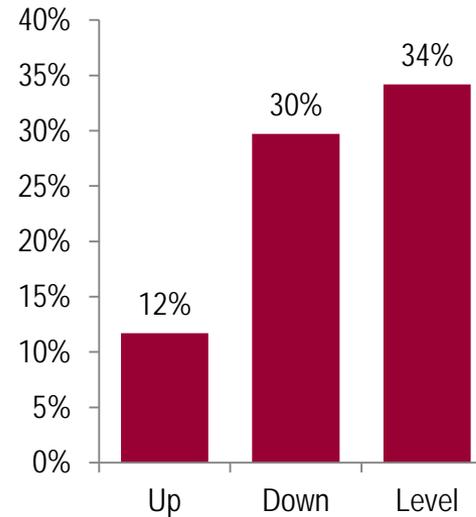
## Current Trading in Winchester contd.

*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

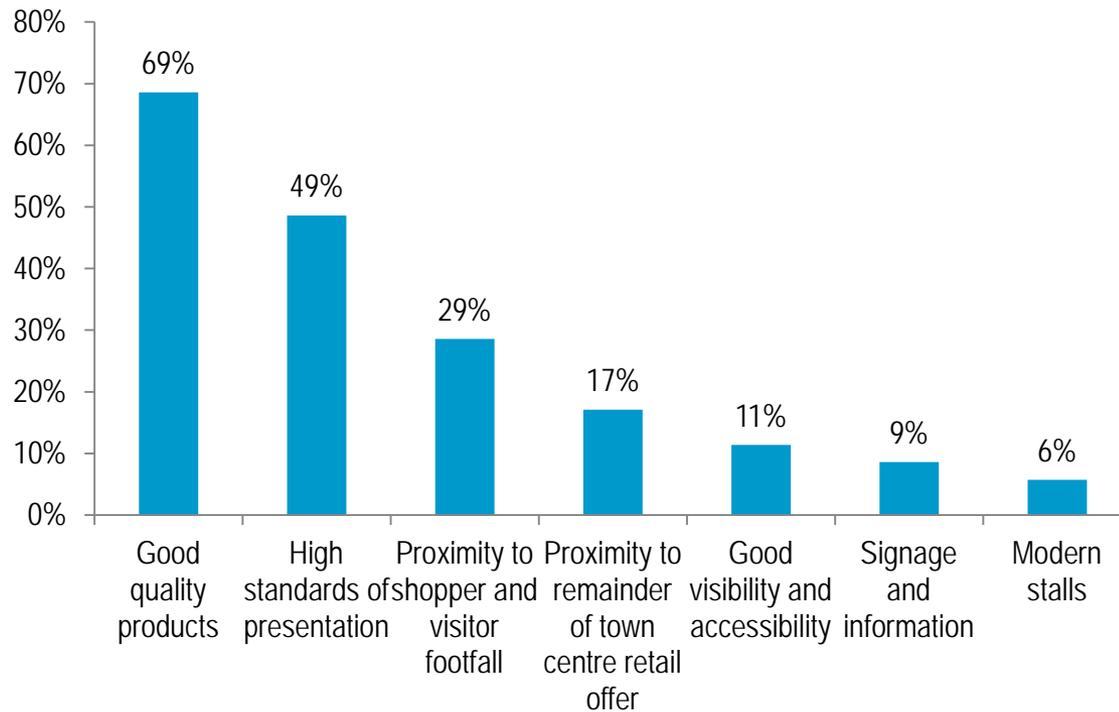
# Trader Survey Findings

# 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?*

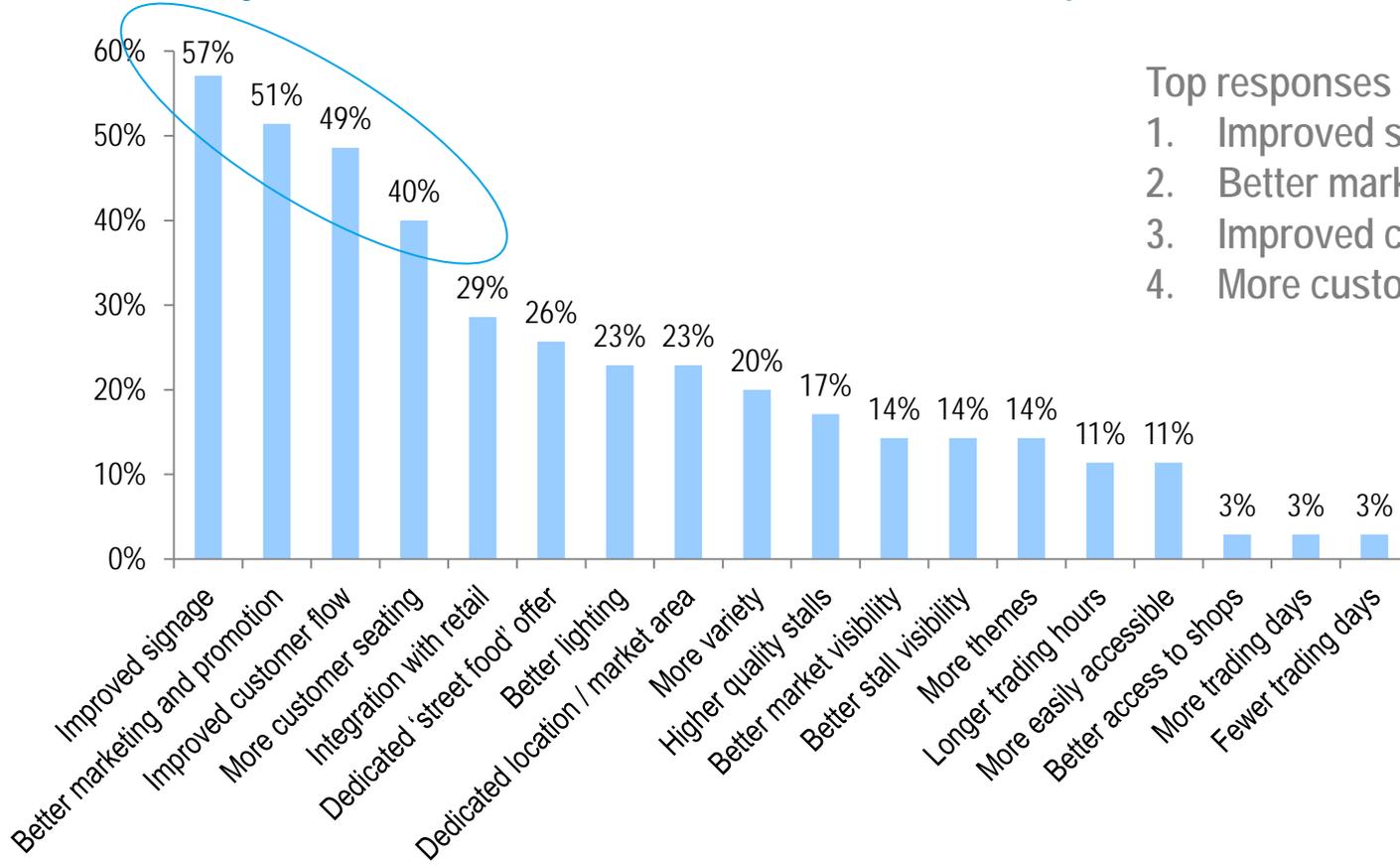


*Good quality products and high standards of presentation are clearly considered to be the two most important things for a thriving market in Winchester*

*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

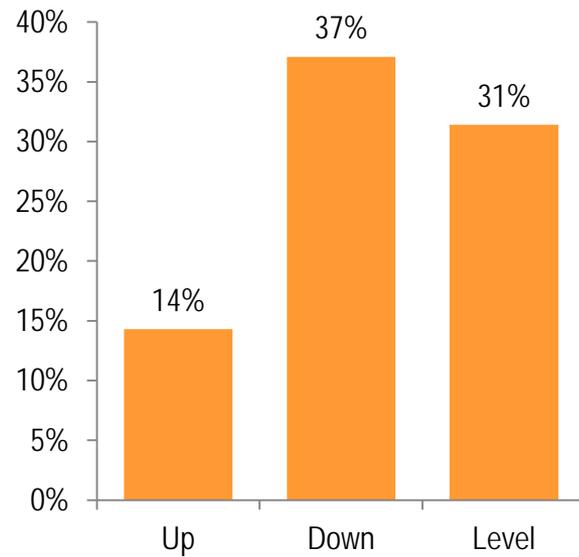


- Top responses are;
1. Improved signage
  2. Better marketing and promotion
  3. Improved customer flow
  4. More customer seating

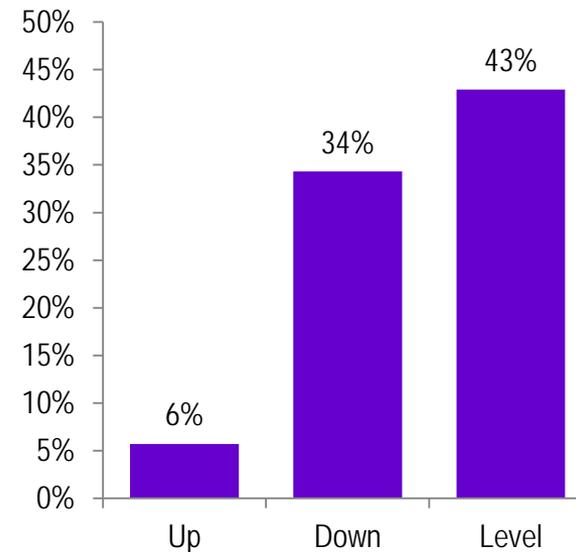
## Current Trading in Winchester contd.

*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 (3<sup>rd</sup>)
- 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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