

CABINET

11 APRIL 2012

WINCHESTER MARKET

REPORT OF HEAD OF ESTATES

Contact Officer: KEVIN WARREN    Tel No: 01962 848528

RECENT REFERENCES:

[CAB 2274](#) Winchester Market Update, 7 December 2011

[CAB 2100](#) Management of Winchester Market, 9 February 2011

EXECUTIVE SUMMARY:

The report reviews the outcome of consultation undertaken with retailers, market traders, the BID and the public regarding the market. The report recommends that the principle of continuing with the siting of the Market in the High Street is approved and that the current management arrangements be continued for a further period of a year.

RECOMMENDATIONS:

- 1      That the principle of the market continuing in the High Street be approved.
- 2      That option 1 for the layout of stalls referred to in paragraph 1.15 is approved. The remaining areas of Market operation to continue unchanged.
- 3      That an incentive based management agreement be entered into with SMT

Management for a year commencing on 1 May 2012 for the management and operation of the Weekly, Art and Antiques & Collectables markets and that a direction be made under Contracts Procedure Rule 2.4 accordingly.

- 4 That the Head of Estates be authorised to conclude negotiations for the detailed terms of a management agreement with SMT Management based on the terms set out in the report and in the exempt appendix. B.
- 5 That the principle, when availability permits, of offering up to two stalls on Middle Brook Street to new start up businesses with one month rent free be approved.
- 6 That the purchase of an additional ten pop-up Gazebos be agreed at a cost of £3,300.
- 7 That the Head of Estates be authorised to agree the performance payments due under the original contract, following the receipt of the final turnover accounts for the market, on the basis set out in the exempt Appendix. B
- 8 That the Council continue to work with the BID and City Centre retailers to consider opportunities for increasing footfall in the streets adjoining the High Street.
- 9 That the success of these arrangements be kept under review by the Head of Estates with the Market Manager and reported to Cabinet in October.

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### WINCHESTER MARKET

#### REPORT OF HEAD OF ESTATES

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#### DETAIL:

##### 1 Introduction

1.1 At its meeting of 7 December 2011 Cabinet authorised:

- The moving of six stalls from the section of the High Street between Marks & Spencer and Laura Ashley and their trial siting further up the Street above the Buttercross.
- the holding of further consultations with the BID, retailers, market traders and the Market Manager over the potential to develop a themed approach to the Market.
- requested that the consultation consider reducing the number of days on which the market was held, and
- Agreed that a professional survey of residents and market users be undertaken into perceptions of the market.

1.2 Six stalls were moved up the High Street to the area between LK Bennet and Lloyds Bank in December 2011. The stalls included a high quality florist, toy traders, cake and produce sellers and an antique silver trader. The stalls traded successfully and were complimentary to the retailers in the adjoining shops. Space was available for the bands and choirs around the Christmas tree and the stalls fitted well in the location.

##### Public Consultation

1.3 The Assistant Director (Economic Prosperity) commissioned Tourism South East (TSE) to undertake research on behalf of the City Council and the BID to:-

- Investigate shopper attitudes towards and usage of, the street markets.
- Identify reasons for not visiting the markets among 'non-users'.
- Assess the extent to which markets satisfied the needs of shoppers.

- Assess whether there was strong demand amongst locals and visitors for street markets.
  - Establish average spend per head on market goods to assess competition with local shops.
- 1.4 The survey which is attached as Appendix A, involved a face-to-face interview with a random sample of shoppers and visitors across the city centre. In total 220 people were interviewed, of these, 120 had visited or planned on visiting the street market during their visit that day and 100 did not. Of the total sample, half were local residents and half were visitors. The latter included both tourists and employees working in Winchester but who lived elsewhere. For simplicity, all non-residents were grouped as 'visitors' in the results.
- 1.5 The survey results suggested that many people used the markets for 'window shopping' – looking around but not necessarily buying anything on that occasion. Out of all those who had visited the market on the day they were interviewed, just under half (48%) had purchased one or more items. Around half (49%) of all those who had made a purchase believed that the items bought could not have been purchased from one of the city centre shops. The survey identified that the top reason for buying from market stalls was 'Its speciality' – not available in local shops/food outlet
- 1.6 The survey identified that user's expenditure on market stalls was significantly lower than spend in local shops. On average a person spent £8.01 on goods purchased at a market stall and £20.31 on goods purchased in local shops. Market stalls were popular for purchasing food, whereas most non-food retail expenditure was likely to take place in local shops. Among residents who regularly used the markets, only 7% of the weekly grocery bill was spent at market stalls.
- 1.7 A number of questions were put to the people who were interviewed and the analysis of the answers demonstrated that the majority of people visiting the City Centre, even those who did not visit the market stalls themselves on the day of the survey felt that the markets offered many benefits. Of particular interest was the response received to the statement "Markets make the city centre become unpleasantly overcrowded", which 73% of respondents either disagreed, or strongly disagreed with, while only 9% of people agreed or strongly agreed with the statement. Similarly 77% of respondents did not agree with the statement that "markets made it hard for me to get to the shops I want to visit" and only 7% agreed or strongly agreed with this statement.
- 1.8 To gauge the attitude of the visiting public to the quality of the markets those interviewed were asked to consider whether "markets bring the area down – some stalls are tacky" The overwhelming majority of those questioned did not agree that the stalls brought the area down. When questioned "Do you think that the look and feel of the markets are in keeping with Winchester's image as a visitor destination" respondents were asked to rate the individual

markets. Again the response was overwhelmingly in favour of all days and market types with favourable responses for all days and types of market of between 90% and 100%.

### Footfall Statistics

- 1.9 The BID monitors footfall in Winchester City Centre via remote CCTV cameras at a number of locations. The figures recorded from the camera situated in the Lower High Street during 2010-2012 are set out below.

#### **Lower High Street (Zoo Jewellery)**

<b>Month</b>	<b>2010</b>	<b>2011</b>	<b>Percentage Change 2010 vs. 2011</b>	<b>2012</b>	<b>Percentage Change 2011 vs. 2012</b>
<b>January</b>	197,296	223,749	13%	239,656	7%
<b>February</b>	186,156	197,459	6%	233,185	18%
<b>March</b>	220,613	224,352	2%		
<b>April</b>	201,256	218,799	9%		
<b>May</b>	227,642	226,262	-1%		
<b>June</b>	211,444	227,913	8%		
<b>July</b>	263,362	215,085	-18%		
<b>August</b>	245,925	203,491	-17%		
<b>September</b>	236,296	216,371	-8%		
<b>October</b>	250,748	247,291	-1%		
<b>November</b>	237,954	273,877	15%		
<b>December</b>	267,715	324,924	21%		

These figures reflect the national trend during last summer when retail sales dramatically fell, however the period from November to February 2012 demonstrates strong year on year growth which appears to be ahead of national retail trends. It is worth noting that the footfall in the lower High street is noticeably less than in the middle and upper sections of the High Street, so it would be helpful when funds allowed to install another camera in the middle section of the street.

### Consultation with Retailers

- 1.10 There have been regular discussions held with the shop keepers adjoining the market stalls to ensure that the views of the retailers are taken account of in the management of the Market. The proposal to site some market stalls in the upper High Street was initially raised by local retailers, but resisted over concerns on how well a fragmented market would work. Further discussions with some of the major stores in the upper High Street confirmed that they would support a trial of the stalls in this location.
- 1.11 A consultation exercise has been held with the 28 retailers, banks and the public house immediately adjoining the market stalls on the High Street. By 22 March replies had been received from 25 of those consulted a response rate of over 89%. The responses received are set out below.

- 1.12 68% of those who replied thought that the number of Markets held in the City Centre were about right, 4% thought that there were not enough markets and 28% that they were too frequent.
- 1.13 When questioned about the density of the stalls 64% thought that it was about right as currently laid out, 8% thought that there were not enough stalls and 28% thought there were too many stalls.
- 1.14 The questionnaire asked retailers to consider whether to continue with the trial layout of stalls above the Buttercross, or whether they would like to revert back to the original layout .The options considered were:
- Option 1- Retained as currently laid out with 14 stalls between Marks & Spencer and Laura Ashley with 6 situated between the Buttercross and Lloyds Bank
  - Option 2 Revert to a maximum of 20 Stalls between Marks & Spencer and Laura Ashley with no stalls above the Buttercross
- 1.15 Twenty three responses were received for option 1 and one for option 2.. One response was received saying that there were specifically too many stalls in the area adjoining M&S and one that there was too few. One person didn't answer the question and noted that they didn't wish to see any stalls in the High Street lay-by.
- 1.16 When asked about the mix of the stalls 60% of those who replied thought that the mix of uses was correct, 12% thought that it was not yet right and 28% didn't know. With regard to the quality of the stalls 60% were happy with this aspect of the market, 12% were not happy and 28% didn't know.
- 1.17 The questionnaire asked whether there were any things that were liked about the market. Numerous individual responses were received noting that the market brought increased footfall and spread customers out along the High Street, bringing increased sales. Respondents noted that the market brought a lively and unique atmosphere to the street. Many noted that the traders were nice people, were doing a good job and one that the market was keeping people employed. The food market was noted by many as being very successful.
- 1.18 When asked if there were any aspects of the market which were of concern, one trader noted that the market looked silly when the stalls were spread out, another that the stalls finished earlier than the shops giving the impression to customers that the town was closing down, several commented on the smell of cheeses, garlic, fish or cooked food. Two responses commented on the difficulty in getting past stalls, one noting that the large bench made a narrow area adjacent to M&S. There was a request for strategic placing of stalls so that similar trades were not placed outside of shops selling the same type of products. Concern was raised about the smell of fried food not being

compatible with clothing stores. One response noted that the market created litter and mess.

- 1.19 One question asked for any suggestions as to how the market could be improved. The issue of siting of stalls was raised in different ways, with one suggestion that the stalls were moved into the middle of the street and another suggesting that the stalls were moved away from the ATM machine. There was a request for more stalls to be added further up the street, for stallholders to trade from both sides of their stalls and for the stalls to be placed back to back, a suggestion that an indoor market might be built, that the food market be held twice a week and that the buses should be stopped from driving along the High Street. There was a request to see greater advertising of the markets both in the City and outside in the media to ensure they play their part in helping increase shopping traffic in Winchester.
- 1.20 The final question asked whether the speciality markets encouraged Sunday trading. Only 15 respondents answered this question with 70.6% agreeing that it did and only 5.9% that it did not.

#### Consultation with Traders

- 1.21 The proprietor of the Baker Boys stall lives in Winchester and initially came onto the Market with a stall in Middle Brook Street. The trading experience at that location was initially positive when the Produce Market was first started but within a few months the stalls were reduced to three or four traders because the trade was not sufficient to keep a business going. The main difficulty was that shoppers would not go into the street from the High Street in sufficient numbers.
- 1.22 As soon as the market was moved into the High Street the customers were coming to the stall in good numbers and the business rapidly developed. The Baker Boys trade at the Winchester market on Wednesday, Friday and Saturday and also at Alton, Southampton, Wokingham, Lymington and Romsey markets. Winchester market is now seen by traders as being the most successful market in the South of England. The proprietor was of the view that to trade successfully on the Winchester Market one had to offer a high quality product as the customers were very discerning.
- 1.23 The Baker Boys had been nominated by customers to the Hampshire Life food and drink awards and had won the 2011 Food Producer of the year award.
- 1.24 A proprietor of a painted furniture business who has worked on the Winchester Market for five years and now trades on Saturday and Sundays reported that since the move onto the High Street business was now much more consistent. In his experience the Sunday Markets attracted large numbers of visitors on speciality trips to the City. The general view among traders was that Winchester Market was very vibrant and was a success for traders, the Council and the city in general.

### Consultation with the BID

- 1.25 Since Christmas there have been two meetings held with the BID to discuss the impact of the changes introduced to the Market just before Christmas. The discussions held with the BID have been positive and have helped further cement business working relationships at a wider level. There remain BID members who are opposed to the Market at one level, but this is more to do with the need to try and boost trade in the streets off the High Street, where footfall figures have not been shown the growth seen in the High Street.
- 1.26 The BID welcome the review undertaken by the City Council and have noted the impact of the Market on trading generally. On behalf of a number of their members, the BID noted that some reservations remained, particularly over the number of trading days, and have asked that its continued impact be kept under review.”.

### Consultation with Environmental Health

- 1.27 The Market has numerous, very successful traders selling food products such as fresh fish, venison, bread, mushrooms, cakes, cheeses, speciality sausages, etc. The traders have become successful and are serving and encouraging demand for such products in the City. Part of the success of these businesses is based upon the quality and exclusivity of the products being sold. To further encourage and develop the quality of the food market it becomes very important to be able to demonstrate to potential customers a quality monitoring regime which is endorsed by the Councils environmental health professionals.
- 1.28 As a first step a member of the Estates team attended a CIEH Level 2 Award in Food Safety in Catering Course run by Environmental Health. The purpose of this training was to enable the Estates team to be aware of the issues relating to food safety, so that when inspecting the market, they would be able to know if best practice guidelines for the sale of food were being adhered to by the traders.
- 1.29 Following on from initial discussions, Environmental Health have been working on the development of a management framework for food traders to assist Estates in providing excellent market facilities that not only sell good healthy sustainable food but do so in compliance with statutory regulations and more importantly with good practice. The proposals for setting up the necessary procedures to include all elements of food safety including the work of Trading Standards are identified in the table set out below.



<b>Winchester Food Market</b>		
<b>Item</b>	<b>Action</b>	<b>Hours</b>
1	Review existing arrangements in other markets	7.5
2	Devise a food safety policy to be attached to the contract between WCC and the Market Management	7.5
3	Devise a trader selection protocol for Market Management to result in an approved trader list	4
4	Devise a Market Manager assessment toolkit to ensure that the Market Managers undertake simple trader compliance checks during trading	7.5
5	Devise an estates audit tool to ensure that the Market Management achieve what is required as part of their contractual arrangements with WCC	7.5
6	Produce a list of additional requirements for stall holders re: brand standard connected to hygiene	4
7	Create a trader's hand book outlining requirements	15
8	Devise a mechanism for the Market Managers to provide up to date information to the WCC Estates Team	4
9	Identify details of any other matters not connected to food safety/health and safety that may require attention	4
10	Health and safety.	15
<b>Total Estimate Hours Needed</b>		<b>75</b>
<b>Total Estimated Cost 61 x £20 per hour</b>		<b>£1520</b>

- 1.30 It is proposed that a member of the Health Protection Team be seconded to work in Estates for two weeks to produce the necessary documentation and procedures. The cost of the work is £1,220 or £1,520 if Health and Safety procedures are also required. The Health Protection team will inspect the market as part of their regulatory checks on an annual basis.

- 1.31 It is therefore being arranged that the Health Protection Team carry out the work listed in the above schedule for the sum of £1,520.

### The Portas Review of High Streets

- 1.32 In December 2011, Mary Portas unveiled the outcome of her review for the Government into the future of High Streets. The review had 28 recommendations, two of which related to markets. The first recommendation proposed the establishment of a “National Market Day” and the second identified that it should be made easier for people to become market traders by removing unnecessary regulations so that anyone can trade on the High Street unless there is a valid reason why not.
- 1.33 The report observes the need to encourage and enable markets to be new social hubs full of entrepreneurial talent and innovation. The report identifies the need to encourage local people to come to the markets on their high streets, to support the local business there and meet up with their community in the process. The report suggests that by removing unnecessary regulations so that trading can take place on the high street, the Government will make clear their support for British entrepreneurial talent and micro businesses on the high streets.
- 1.34 Having regard to the Portas Report it is recommended that, when availability permits, the principle of offering up to two stalls on Middle Brook Street to new start up businesses with one month rent free, be approved. The recommendations in the review have largely been accepted by the Government and proposals for a national market day are now being developed.

### Conclusions from the Consultations

- 1.35 The TSE Survey data and the results of the consultation with retailers are helpful in determining the way forward for the markets. With regard to the specific issues raised in paragraph 1.1 the following conclusions might reasonably be drawn.

### Stall Siting and Density

- 1.36 The TSE survey posed the following question to both users and non users of the market.

“Would you deliberately avoid the town on market days if you felt that the stalls made it hard to get around.”

The survey showed that 95 % of respondents would not avoid the town , but that 5% would.

1.37 The survey also asked whether respondents felt unsafe in Market day crowds. 98% of respondents reported that they did not feel unsafe, while 2% did. Retailers adjoining the market were asked whether the trial siting of stalls above the Buttercross should be continued with or whether the stalls should revert back to their earlier layout. Of the 24 responses received, 23 favoured the continued siting of a number of stalls above the Buttercross and one the return of the stalls to the section of High Street between Marks & Spencer and Laura Ashley.

1.38 The results of the consultation suggest that the siting of stalls above the Buttercross as identified as Option 1 in paragraph 1.15 should be continued with.

#### Themed Approach to the Market

1.39 The TSE Survey asked respondents whether the markets offered shoppers a greater choice of goods. 79% agreed or strongly agreed with the statement and 3% did not. The survey also asked whether respondents thought that the markets brought the area down-some stalls are tacky? 85% of replies did not agree with this statement while 4% did.

1.40 Retailers were asked whether the market stalls were of the right quality . Fifteen responses were received from those satisfied with the quality, three that were not, while seven expressed no preference. The TSE survey also asked respondents whether the look and feel of the markets were in keeping with Winchester's image as a visitor destination. The question was posed in respect of each market and the results were as follows:

- Wednesday Produce Market Yes 96% No 4%
- Thursday-Saturday General Yes 90% No 10%
- Sunday Farmers Market Yes 98% No 2%
- Sunday Art Market Yes 95% No 5%
- Sunday Antiques yes 95% No 5%

1.41 The results of the consultation suggest that the public and traders are satisfied with the markets as they are currently constituted. There is however strong support among a number of retailers for an increase in the number of produce markets and the Friday market is currently gradually migrating in this direction.

#### Reduction In Days Traded.

1.42 As identified above the TSE Survey made clear the overwhelming acceptance by the public of the different market days and types. The consultation with retailers asked whether the number of markets held in the City Centre was about right, not frequent enough, or too frequent. Seventeen responses were

received stating that the number of markets were about right, one that they were not frequent enough and seven that the market was too frequent.

- 1.43 On balance the consultation responses are supportive of the number of markets remaining the same as they are currently.

Proposals for the Market.

- 1.44 The market has become established as an important part of the Winchester retail offer and has been significantly more successful than was envisaged when the first report on the matter was submitted in February 2011. The Market is continuing to develop and become accepted in the City. The principle of having the market in the High Street has now been accepted by the public and with some reservations the adjoining retailers.
- 1.45 The consultation with retailers has identified a number of practical issues which will be considered with the market manager and addressed when it is possible to do so. One issue highlighted was the smell from sausages being cooked by the sausage trader was not compatible with adjoining clothes retailers. The issue has been addressed by requiring the trader to have the sample sausages cooked elsewhere.
- 1.46 Since the management of the market was taken over by SMT, in consultation with the Estates team, the market offer has been changed dramatically with the introduction of the Produce, Art and Antiques and Collectables markets. There has been a gradual but continuous improvement in the quality of the traders, as evidenced by the awards being won by them. The table below illustrates the success that has been achieved by moving the focus of the market from Middle Brook Street to the High Street.

	Monthly Stall lettings General Market 2010	Monthly Stall lettings General Market 2011 (% growth in brackets)
September	274	479 (+74.8%)
October	257	545 (+112%)
November	233	599 (+157%)
December	292	651 (+123%)

- 1.47 It is recommended that the principal of operating the market in the High Street is accepted and that the efforts of the Managing Agents in making the market one of the most successful in the south of England are acknowledged.
- 1.48 The contract for the management of the market expires at the end of April and it is recommended that the agreement be renewed for a further year on terms

to be agreed by the Head of Estates. The success of the market requires the management fee structure to be revised, because the work load has risen in line with the increased numbers of stalls which are let and the payments to the contractors need to reflect this. An assessment of the management fee due this year and the structure of the fee for the coming year is set out in Exempt Appendix A.

- 1.49 It will be necessary to enter into a new formal agreement with the contractors SMT Management from 1 May 2012, which will continue to make them responsible for:
- Providing weekly account information including cash collection, banking cash, accounting for monies and compilation of performance statistics;
  - Liaising with the Head of Estates to ensure that traders are issued with appropriate street trading permissions;
  - Setting up, taking down and storing stalls;
  - Managing waste collection effectively with the objective of waste minimisation
  - Letting stalls, managing stallholders and liaising with Environmental Health and Trading Standards Officers;
  - Preparation of risk assessments;
  - Working with the Council to effectively promote the markets;
  - Revising and updating the market rules as necessary;
  - The management of Sunday speciality markets for an additional fee.
- 1.50 The success of the Market has led to a need to purchase a further ten market stalls so that there are enough available to meet the day to day needs of the market. The stalls will be the same as the existing Gazebo's and are priced at £330 each being £3,300 in total. Consideration also needs to be given to the purchase of skirts to go around the bottom of the stalls; however quotes received to date have been too expensive for the number of fittings required.
- 1.51 There are often demands made on the Council to close the market to allow for events to be held in the street. The Council stages on average one military event each year and this necessitates the closure of the market. The market has now become established as a feature of the City and given the nature of the agreements with the traders it is not possible to shut the market on an ad-hoc basis. The market is planned around the closure of the High Street on a maximum of three days a year and it is recommended that this be continued with.
- 1.52 Experience demonstrates that it is possible for events to operate around the market quite successfully. It is therefore recommended that normally no more

than three closures of the market are to take place during the course of a year for events. The Market Manager will continue to work with the Head of Estates to ensure that where adaptations can reasonably be made to the market to facilitate events, that this will be done. In practice this will mean liaising with event co-ordinators, adaptation of stall layouts, slightly early closing and escorting people through the High Street.

- 1.53 The Silver Hill development is now proceeding to a CPO Inquiry later this year and in the event that this is successful, a start on development might be expected to occur in early 2014. As part of the development it is proposed to construct a replacement Doctors Surgery on the Upper Brook Street Car Park and this site is used currently for the parking of market traders vehicles. It is suggested that when this car park is no longer available, that the traders be sold permits to park in the Middle Brook Street car park.
- 1.54 When the Silver Hill development gets under way, the Market Manager's offices will be required for the scheme and if the CPO is successful, it will be necessary to make alternative arrangements in the course of the next year.
- 1.55 Discussions with the BID have demonstrated that the footfall in some of the streets adjoining the High Street has not increased and during the course of the next twelve months further discussions will be held to identify if there is any way in which the market might be used to rectify this situation.

### Summary

- 1.56 The extension of the Market into the High Street has been the catalyst for the market's rejuvenation. The customer surveys undertaken by TSE demonstrate that the market is accepted and enjoyed by the overwhelming majority of the public. Initial concerns by shop keepers have been addressed and a clear majority of those directly adjoining the market can see that the market helps attract shoppers to the City. This is not to say that the Market cannot be improved and during the course of the next twelve months the fine tuning of the offer will continue by where possible seeking to address retailers remaining concerns.
- 1.57 The Market Managers and the Estates Team have taken a declining market and in the space of a year turned it into one of the most successful markets on the South Coast. In times where the news from the retail sector is regularly gloomy this is positive news indeed and helps underpin the future of the speciality retail offer in the City.

### OTHER CONSIDERATIONS:

#### 2 SUSTAINABLE COMMUNITY STRATEGY AND CHANGE PLANS (RELEVANCE TO):

- 2.1 The Art and Antiques & Collectibles Markets relate directly to the Community Strategy by providing residents with the opportunity to become engaged in cultural and creative activities, the markets generally help meet the

prosperous economy objectives by helping residents to enhance their skills and ambitions by running a micro business, make the best use of the City Councils estate to support the local economy and help meet the High Quality Environment objectives by reducing greenhouse gas emissions by making products available locally which might otherwise require residents to make a trip to another town or shopping centre.

### 3 RESOURCE IMPLICATIONS:

- 3.1 The market has required input from Senior Members and officers, the Estates, Parking, Legal, Environmental Health and Finance teams.
- 3.2 The continuing success of the Market requires the purchase of an additional ten market stalls at a cost of £3,300 exc VAT. Further stalls may need to be purchased during the course of the year. Following the outcome of negotiations with suppliers and Market Traders it may be necessary to purchase skirts for the stalls and items of standard clothing (e.g. fleeces with "Winchester Market" logos.) for onward sale to traders.
- 3.3 The costs of running the market grow as it becomes more successful, e.g. refuse collection, electricity, marketing, cash receipting etc.

### 4 RISK MANAGEMENT ISSUES

- 4.1 There are risks associated with the management of cash by outside contractors. The risk is dealt with by robust audit procedures and regular spot checks are undertaken by Estates on stall numbers and cash receipts.
- 4.2 There are risks that the siting of stalls is not convenient for adjoining retailers or emergency services. The risk is managed by regular inspection of the market by the estates team and of continual liaison with shop keepers and the continuation of links with the Police and Fire Service.
- 4.3 There is a risk that the market will attract shoppers away from the adjoining streets. The risk is mitigated by working with the BID to explore the potential of the market to attract shoppers to the adjoining streets.
- 4.4 There is a risk that when large events are brought to the City that the market will hinder the flow of pedestrians. The risk is mitigated by recognising that the Market adds to the success of events and by working with the event organisers to ensure that the event and market are properly co-ordinated.

### BACKGROUND DOCUMENTS:

Record of responses from Retailers on file

### APPENDICES:

Appendix A\_: Winchester Street Market Survey February 2012 Tourism South East

Appendix B Financial Information (Exempt Paper)



# Winchester Street Market Survey

February 2012

TOURISM  
SOUTH EAST

TSE Research  
40 Chamberlayne Road  
Eastleigh  
Hampshire  
SO50 5JH  
Email: [pkhan@tourismse.com](mailto:pkhan@tourismse.com)



Winchester  
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# Research Objectives

This report provides an analysis of the results of a snapshot study of Winchester's Street Markets undertaken by TSE Research on behalf of Winchester City Council and BID. The specific objectives were as follows:

- To investigate shopper attitudes towards, and usage of, the street markets.
- Identify reasons for not visiting the markets among 'non-users'.
- To assess the extent to which markets satisfies the needs of shoppers.
- To assess whether there is strong demand amongst locals and visitors for street markets.
- To establish average spend per head on market goods to assess competition with local shops.



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# Methodology

- The survey involved a face-to-face interview with a random sample of shoppers and visitors across the city centre. In total 220 people were interviewed.
- Of these, 120 had visited or planned on visiting the street market during their visit that day and 100 did not.
- Of the total sample of 220, half were local residents and half were visitors. The latter included both tourists and employees working in Winchester but who live elsewhere. For simplicity all non-residents are grouped as 'visitors' in the results.
- The survey took place over December 2011 and February 2012 and involved both market days and non-market days.
- IQCS verified professional interviewers were used to carry out the interviews.

# Who uses the street markets? (1)

55% of people interviewed had visited or planned on visiting the street market during their trip.

Figure 1: Resident vs. Visitor split among users

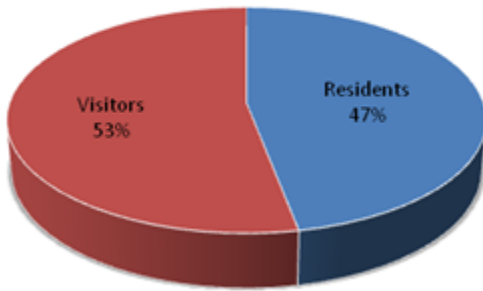


Figure 3: Gender among users

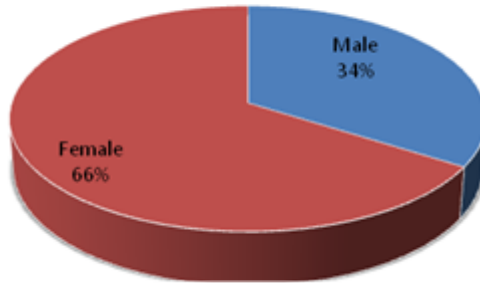


Figure 5: % of respondents who had an illness or disability affecting access to markets

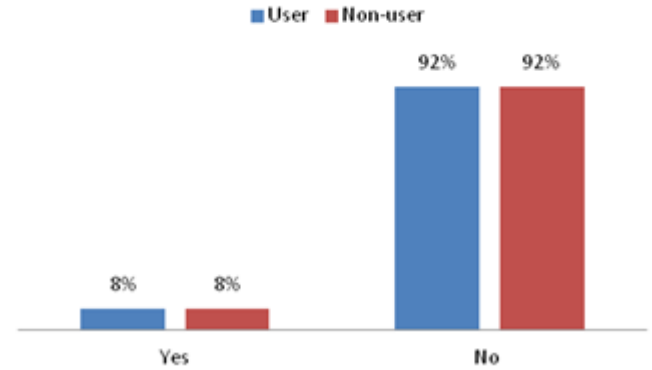


Figure 2: Resident vs. Visitor split among non-users

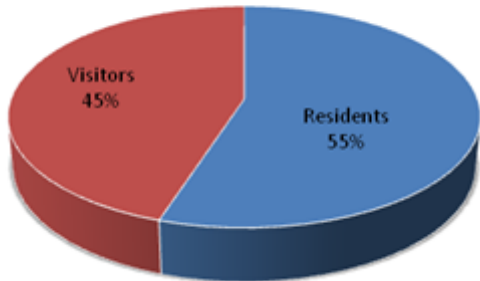
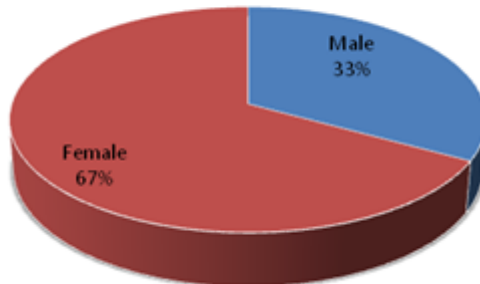


Figure 4: Gender among non-users



No significant difference was found among those visiting and those not visiting the market with regard to gender, disability and whether they were a local resident or non-resident.

The majority of respondents were female.

# Who uses the street markets? (2)

Figure 6: Age distribution of all members of group

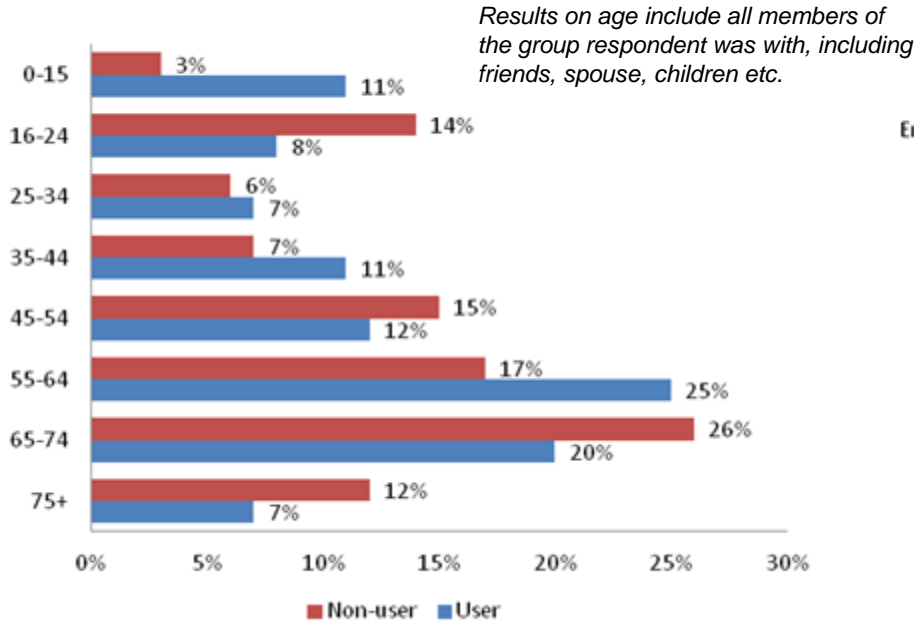
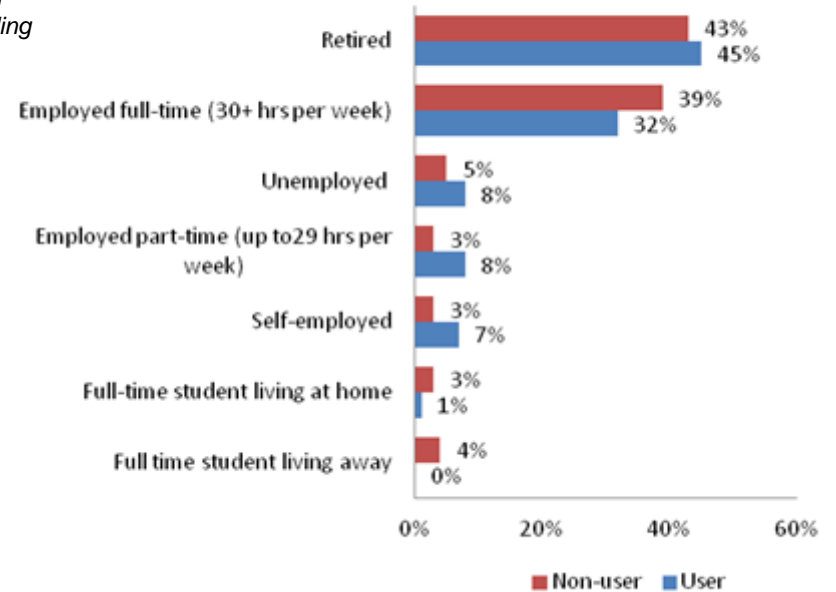


Figure 7: Employment status of head of household



Only marginal differences were found between market users and non-users with regard to age and employment status.

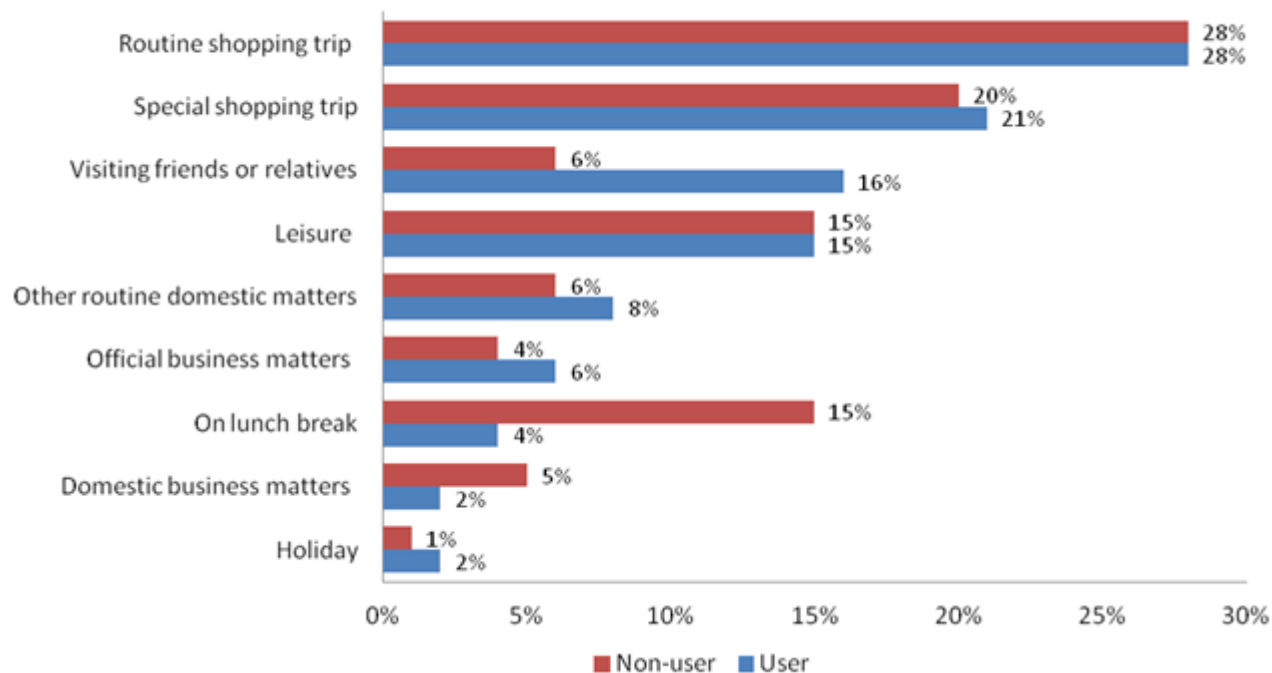
49% of market users and 45% of non-market users were aged 54 years and under. Market visitors were slightly younger and more likely to be with young children.

The percentage of self-employed workers, part-time workers and those who were currently unemployed was marginally higher among market users than non-market users.



# Who uses the street markets? (3)

Figure 8: Reasons for visiting Winchester City Centre



The most popular reason for visiting Winchester city centre among both market users and non-market users was a 'Routine shopping trip'. This was followed closely by 'Special shopping trip'.





# Why are markets used? (1)

Figure 9: Whether goods purchased at market during visit to City Centre

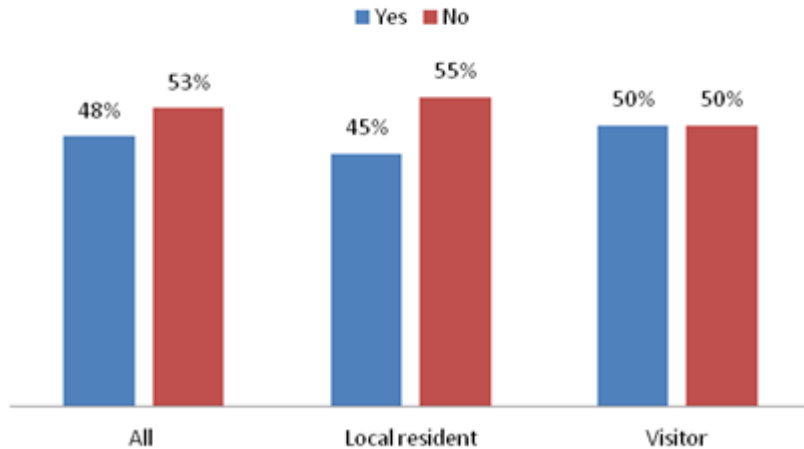
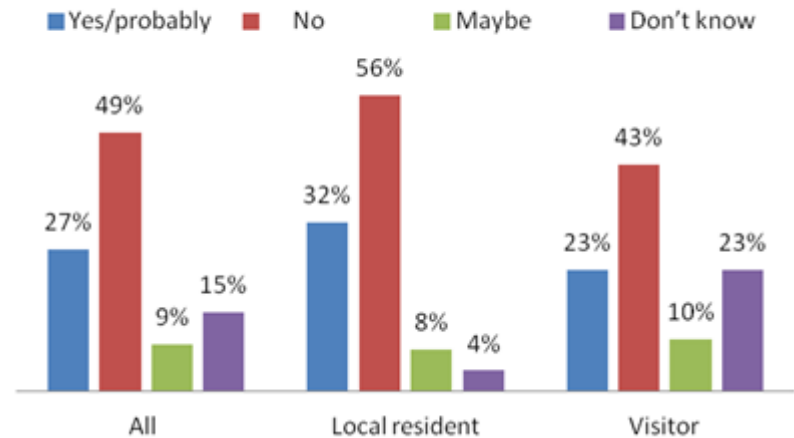


Figure 10: Whether same/similar item could have been purchased from City Centre shop



The results suggest that many people use the markets for 'window shopping' – looking around but not necessarily buying anything on that occasion. Out of all those who had visited the market on the day of they were interviewed, just under half (48%) had purchased one or more items.

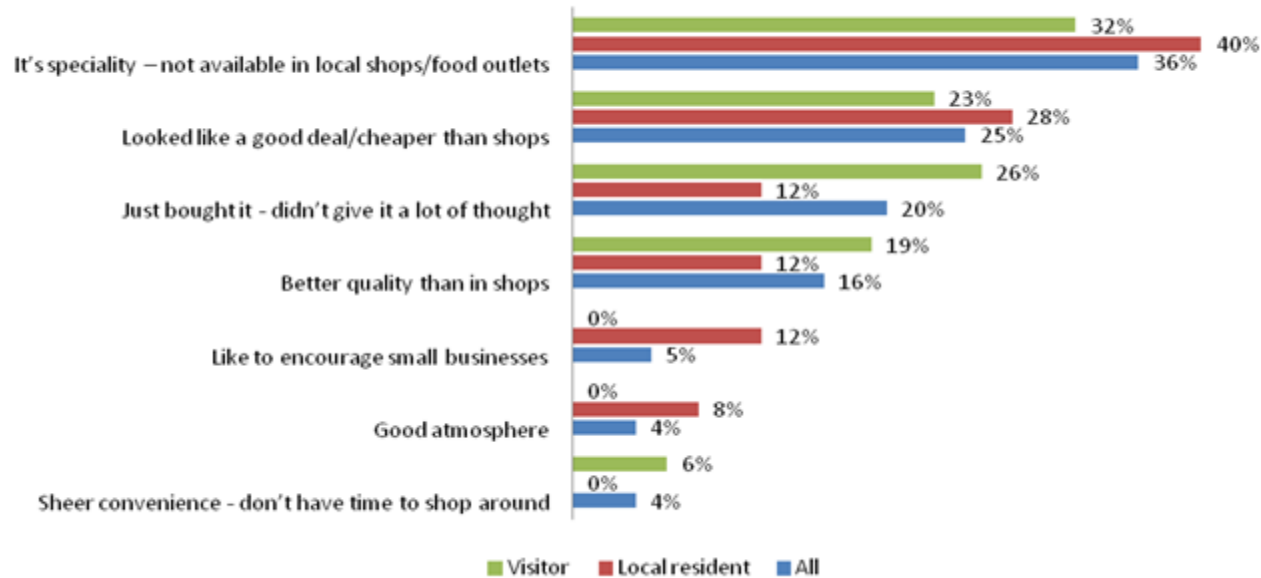
Around half (49%) of all those who had made a purchase (of which 56% were residents and 43% were non-residents) believed that the item(s) could not have been purchased from one of the city centre shops.





# Why are markets used? (2)

Figure 11: Reasons for buying from market stalls



Given that many market users did not feel that the item(s) purchased could have been obtained elsewhere in the city centre, it is not surprising to find that top among the reasons for buying from market stalls are 'It's speciality – not available in local shops/food outlet' followed by 'Looked like a good deal/cheaper than shops'.

Non-residents (tourists and non-resident employees) were more likely to be impulsive in their purchasing behaviour – just over a quarter (26%) bought goods without giving it a lot of thought.

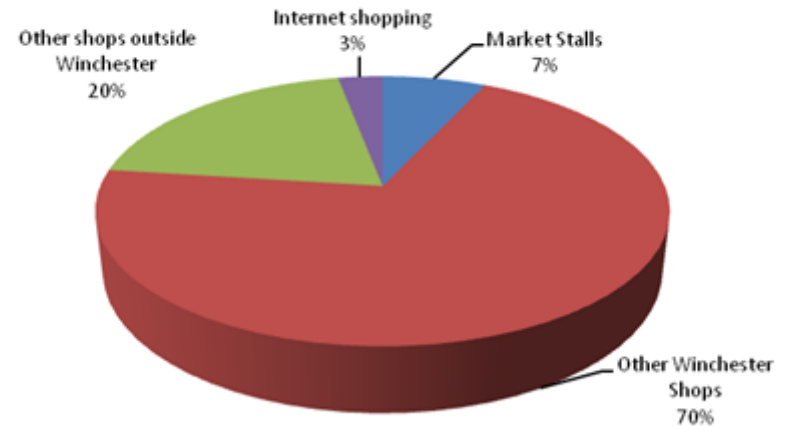


# Why are markets used? (3)

Average spend per person with market stalls			
	All	Local resident	Visitor
Food & Drink	£4.74	£3.15	£5.93
Retail goods	£3.27	£2.94	£3.52
Total	£8.01	£6.09	£9.45

Average spend per person with other shops/food outlets			
	All	Local resident	Visitor
Food & Drink	£3.79	£4.90	£3.00
Retail goods	£16.52	£17.68	£15.70
Total	£20.31	£22.58	£18.70

Figure 12: Breakdown of where resident weekly grocery shopping takes place



Expenditure on market stalls is significantly lower than spend which takes place in local shops.

On average a person spends £8.01 on goods purchased at a market stall and £20.31 on goods purchased in local shops.

Market stalls appear to be popular for purchasing food and drink, whereas most retail expenditure is likely to take place in local shops.

Among residents who regularly use the markets, only 7% of the weekly grocery bill is spent with market stalls.



# Shopper/visitor opinions / satisfaction (1)

Figure 13: Importance of Wednesday food & produce market

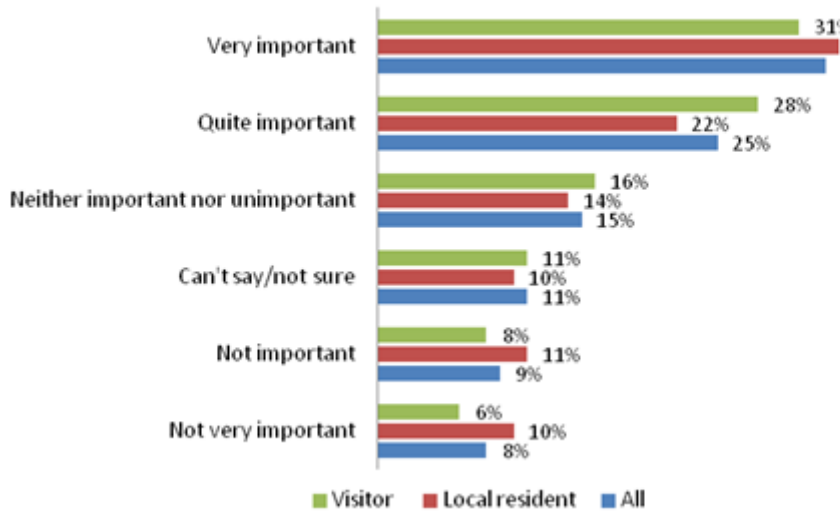
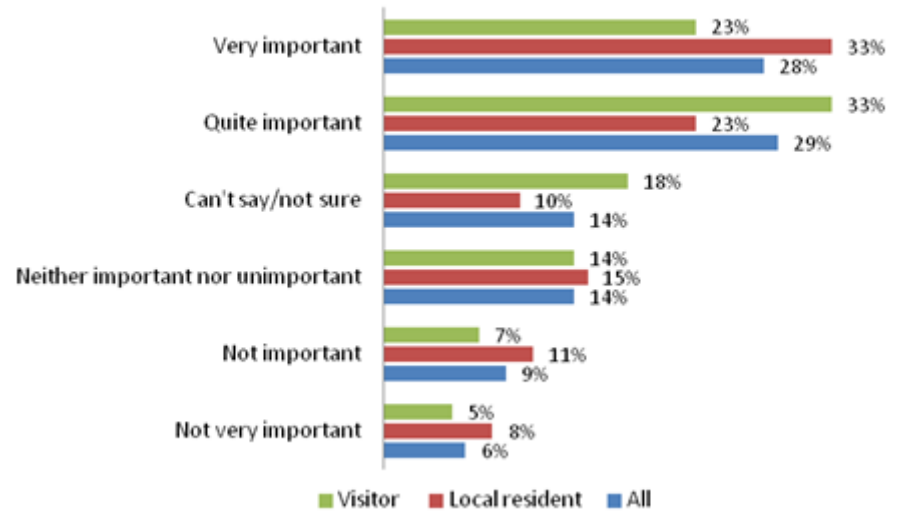


Figure 14: Importance of Thursday to Saturday general market



Market users were asked to rate the importance of the three different types of markets.

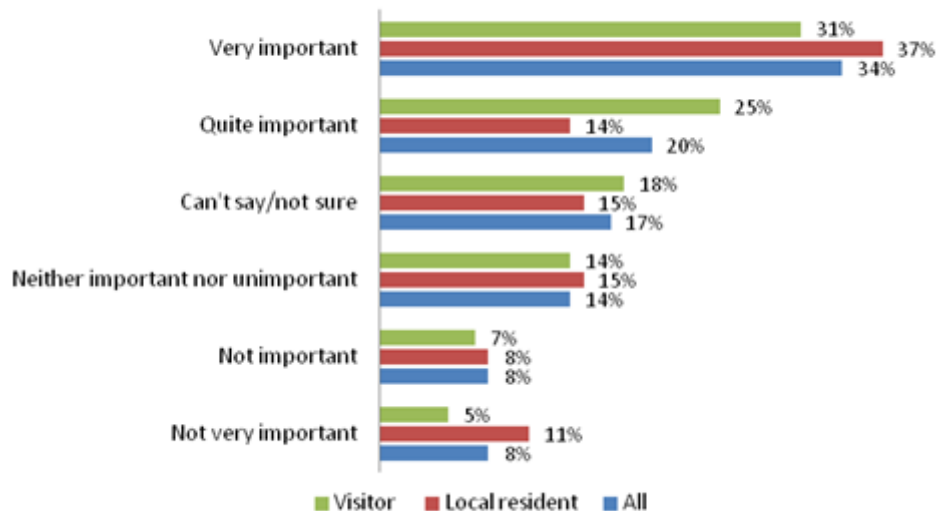
The results show that non-residents generally placed more importance on the Sunday speciality market (31% state 'Very important' see next slide) and the Wednesday food & produce market (31% state 'Very important') than the Thursday to Saturday general market (23% state 'Very important').

A third to just slightly above a third of residents felt all three types of markets were very important.



# Shopper/visitor opinions / satisfaction (2)

Figure 15: Importance of Sunday speciality market



Although the survey found an element of indifference among some users; a smaller but significant minority of visitors stated that the markets were 'Neither important nor unimportant' or replied that they 'Can't say/not sure' about their importance, 94% of local residents and 95% of non-residents felt that the markets made the experience of visiting Winchester more enjoyable.

# Shopper/visitor opinions / satisfaction (3)

“Markets adds to the vitality and vibrancy of the city centre”

	All	Local resident	Visitor	User	Non-user
Agree	50%	43%	56%	47%	60%
Strongly agree	38%	42%	36%	45%	18%
Neither agree or disagree	6%	11%	2%	3%	15%
Disagree	3%	4%	1%	3%	3%
Don't know	3%	0%	5%	2%	5%
Strongly disagree	0%	0%	0%	0%	0%

“Markets offer greater choice of goods”

	All	Local resident	Visitor	User	Non-user
Agree	64%	61%	67%	66%	60%
Strongly agree	15%	21%	10%	18%	8%
Neither agree or disagree	14%	17%	11%	12%	20%
Don't know	4%	0%	8%	3%	10%
Disagree	3%	1%	3%	3%	3%
Strongly disagree	0%	0%	0%	0%	0%

“Markets offer more competitively priced goods than shops”

	All	Local resident	Visitor	User	Non-user
Agree	48%	46%	49%	48%	48%
Neither agree or disagree	24%	25%	23%	26%	18%
Strongly agree	12%	17%	8%	13%	8%
Don't know	10%	6%	14%	8%	15%
Disagree	6%	7%	6%	4%	13%
Strongly disagree	0%	0%	0%	0%	0%

The results suggest that the majority of people visiting Winchester city centre, even those who did not visit the market stalls themselves on the day of the survey felt that the markets offered many benefits.

# Shopper/visitor opinions / satisfaction (4)

“Markets offer opportunity to buy local produce – reduces carbon footprint”

	All	Local resident	Visitor	User	Non-user
Agree	57%	51%	62%	56%	60%
Strongly agree	26%	33%	21%	31%	13%
Don't know	8%	1%	13%	3%	20%
Neither agree or disagree	7%	10%	5%	8%	5%
Disagree	2%	4%	-	2%	3%
Strongly disagree	0%	0%	0%	0%	0%

“Markets make the city centre become unpleasantly over-crowded”

	All	Local resident	Visitor	User	Non-user
Disagree	57%	56%	59%	58%	55%
Strongly disagree	16%	15%	17%	22%	0%
Neither agree or disagree	13%	14%	11%	11%	18%
Agree	6%	10%	3%	5%	10%
Don't know	5%	0%	9%	3%	13%
Strongly agree	3%	6%	0%	2%	5%

“Markets makes it hard for me to get to the shops I want to visit”

	All	Local resident	Visitor	User	Non-user
Disagree	64%	64%	63%	64%	63%
Strongly disagree	13%	11%	14%	17%	0%
Neither agree or disagree	12%	17%	8%	11%	15%
Agree	6%	7%	6%	7%	5%
Don't know	5%	0%	9%	2%	15%
Strongly agree	1%	1%	0%	0%	3%

Only a very small number of people felt that the market stalls made the area become unpleasantly over-crowded or made it hard for them to get to the shops they wanted to visit.



# Shopper/visitor opinions / satisfaction (5)

“Markets bring the area down – some stalls are tacky”

	All	Local resident	Visitor	User	Non-user
Disagree	65%	65%	64%	61%	75%
Strongly disagree	20%	22%	18%	27%	0%
Neither agree or disagree	6%	7%	5%	5%	8%
Don't know	5%	1%	8%	3%	13%
Agree	3%	1%	5%	3%	3%
Strongly agree	1%	3%	0%	1%	3%

The overwhelming majority of people interviewed did not believe that the market stalls brought the area down.

“Do you think that the look and feel of the markets are in keeping with Winchester’s image as a visitor destination? ”

Wednesday food and produce market					
	All	Local resident	Visitor	User	Non-user
Yes	96%	97%	95%	95%	97%
No	4%	3%	5%	5%	3%

Thur – Sat general market					
	All	Local resident	Visitor	User	Non-user
Yes	90%	86%	94%	91%	87%
No	10%	14%	6%	9%	13%

# Shopper/visitor opinions / satisfaction (6)

“Do you think that the look and feel of the markets are in keeping with Winchester’s image as a visitor destination? ”

Sunday farmers’ market					
	All	Local resident	Visitor	User	Non-user
Yes	98%	98%	97%	97%	100%
No	2%	2%	3%	3%	0%

Sunday art and design market					
	All	Local resident	Visitor	User	Non-user
Yes	95%	93%	96%	96%	96%
No	5%	7%	4%	4%	4%

Sunday antiques and collectables market					
	All	Local resident	Visitor	User	Non-user
Yes	95%	93%	96%	96%	97%
No	5%	7%	4%	4%	3%

The overwhelming majority of people interviewed believe that the look and feel of all the different market days/types are in keeping with Winchester’s image as a visitor destination.



# Shopper/visitor opinions / satisfaction (7)

Figure 16:  
"Would you deliberately avoid the town on market days if you felt the stalls made it hard to get around?"

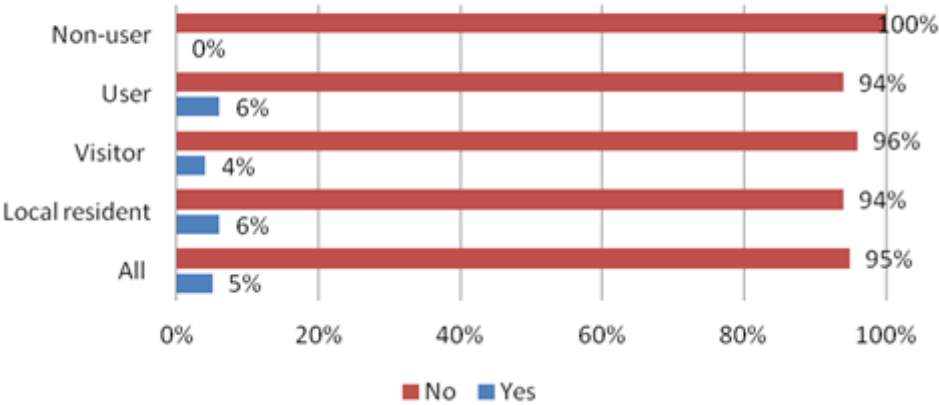
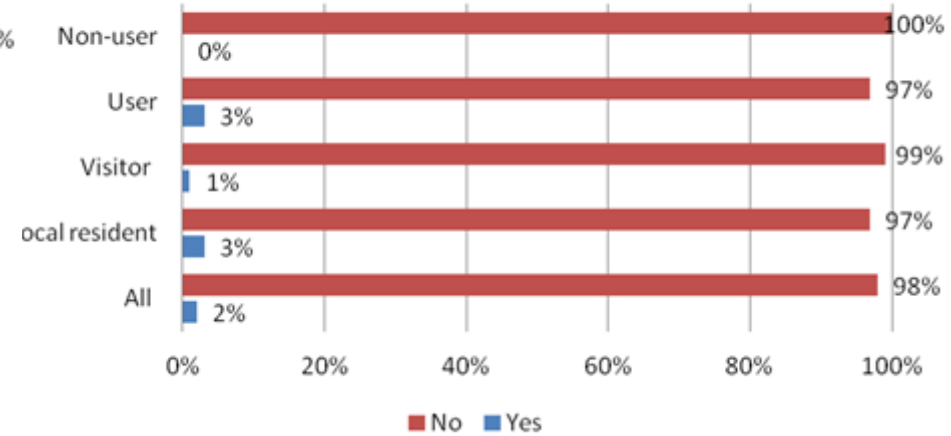


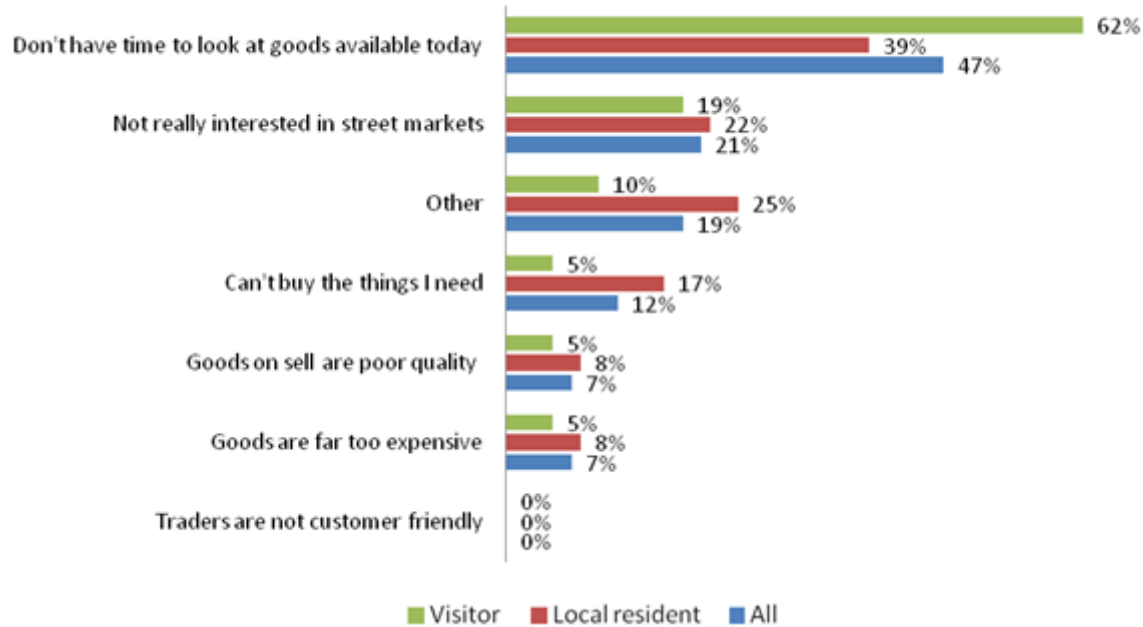
Figure 17:  
"Do you ever feel unsafe in market day crowds?"



The results suggest that access around the city centre and feeling unsafe are not significant issues on market days.

# Non-market stall user

Figure 18: Reasons for not using the markets



45% of those interviewed did not plan to visit the market stalls on that day. The main reason given was that they did not have time to look around.

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End of report



Winchester  
City Council