



informed solutions

Winchester Market Survey 2016

Report presentation prepared for
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22 February 2016

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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 and traders
- Top line assessment of current market offer (Wednesday – Saturday)
- Top line overview of historic market related research

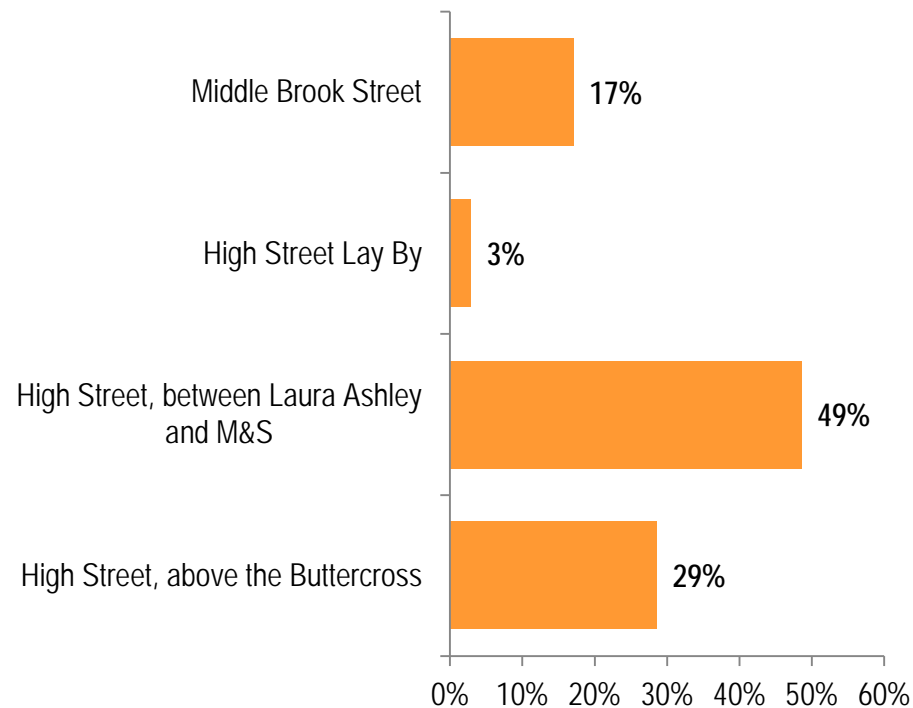
Survey Methodology and Response Rate

- Two bespoke questionnaires were developed specifically for the markets survey; for traders and retailers. Many of the questions are common to both questionnaires
- Face to face, direct distribution method adopted; surveys handed out directly to managers / owners and market traders then collected later the same day. 8 surveys were emailed direct to us
- Surveys distributed on market trading days 3, 4 and 5 February 2016
- Target streets and areas were identified
- Individual confidentiality pledged; responses analysed collectively
- Surveys issued between The surveys achieved an excellent response rate with 111 completed surveys from the retailers and 35 from market traders
- In many instances respondents can provide more than one answer, therefore tables and graphs will not always total to 100; additionally respondents may not have answered every question

Trader Survey Findings

Trading Location

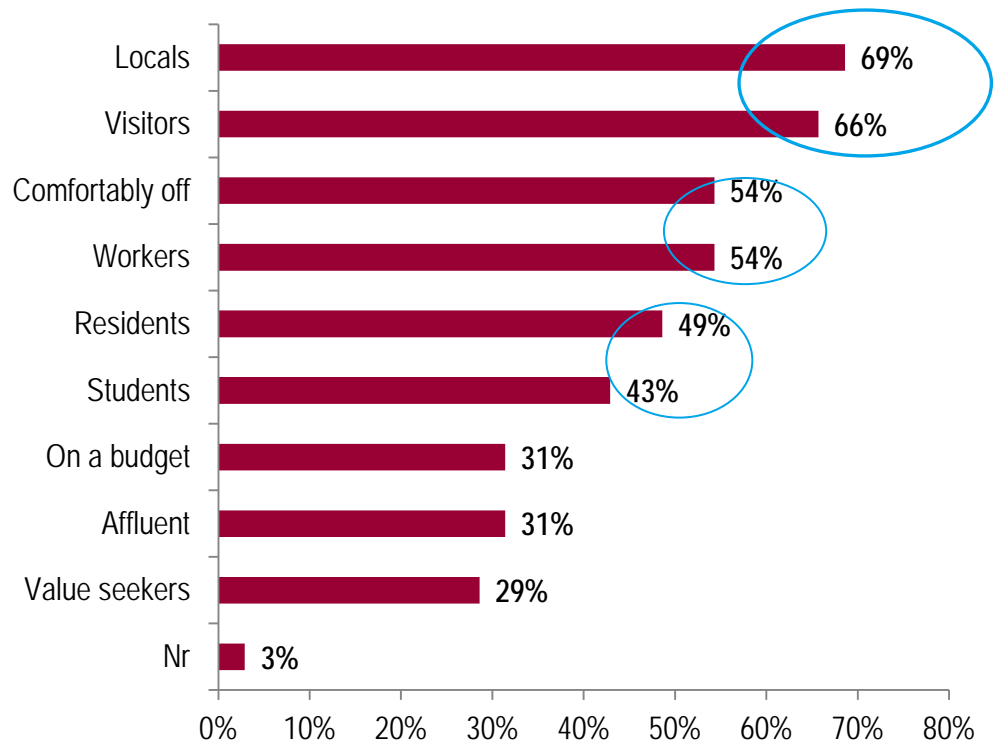
The stall location of the 35 traders surveyed is shown below;



Most of the traders surveyed are located on the High Street between Laura Ashley and M&S

Customer Profile

How would you describe your typical customers?

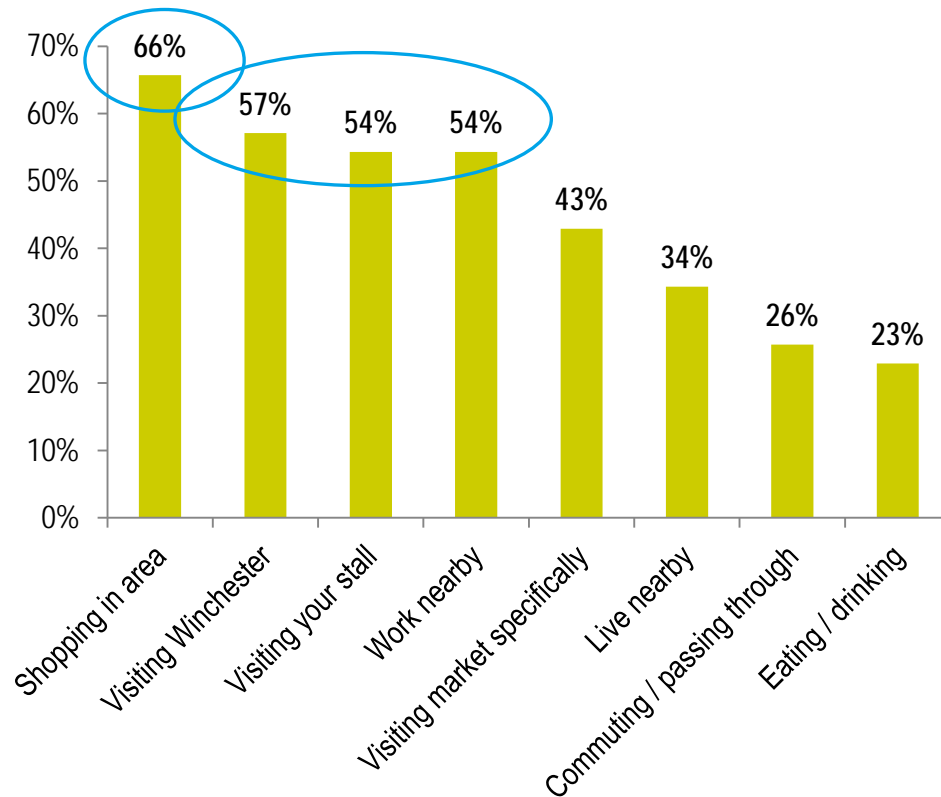


Market traders describe their typical customers as predominantly '*regulars*' – locals and visitors, plus workers

They also describe their customers as 'comfortably off'

Reason for Visiting

What is their main reason for being in the area?

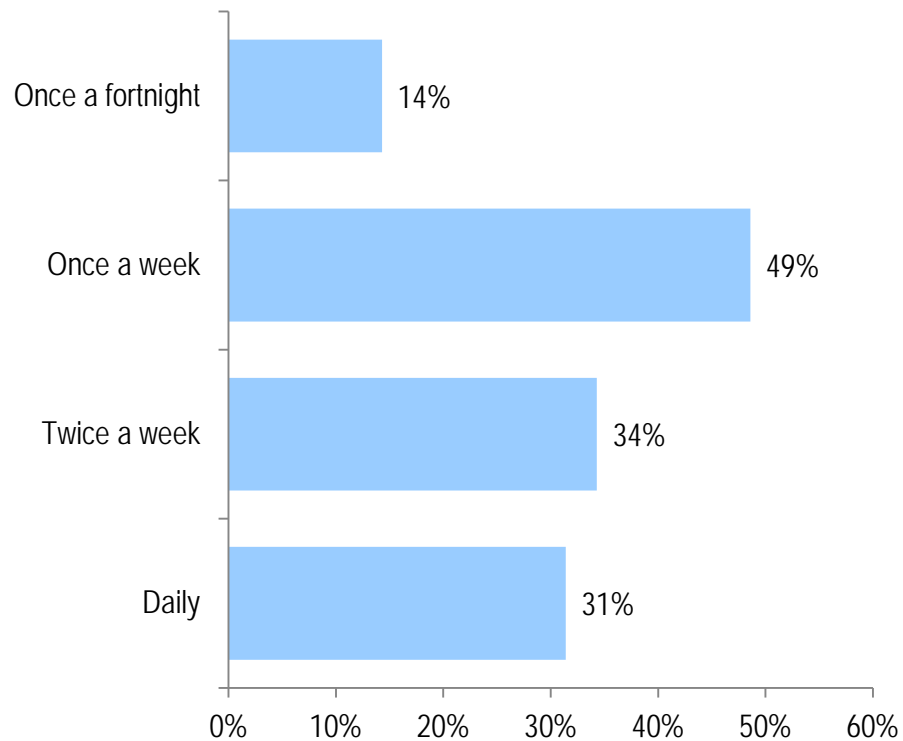


Shopping is the primary visit driver, the tourist and visitor appeal of Winchester is also considered a reason for being in the area as is working nearby

Traders also consider that the market itself is a draw

Visit Patterns

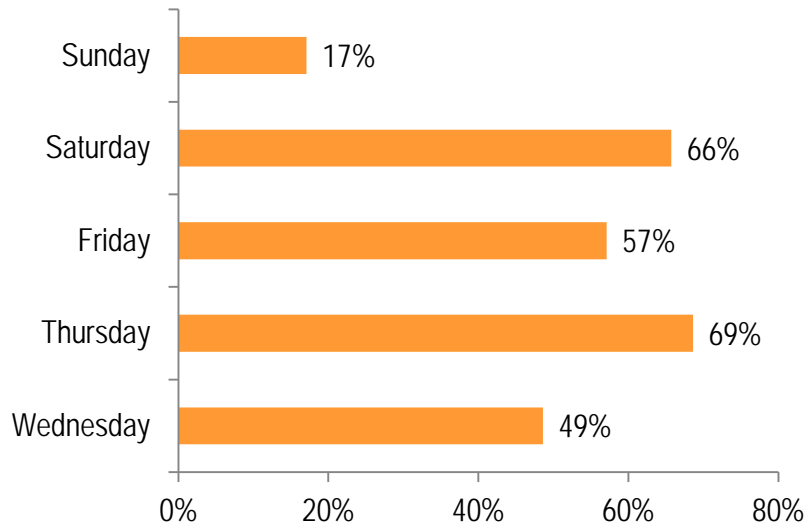
How often do your customers typically visit the market?



Visit patterns are considered frequent, with around half of traders considering that customers visit *at least* once a week if not more often

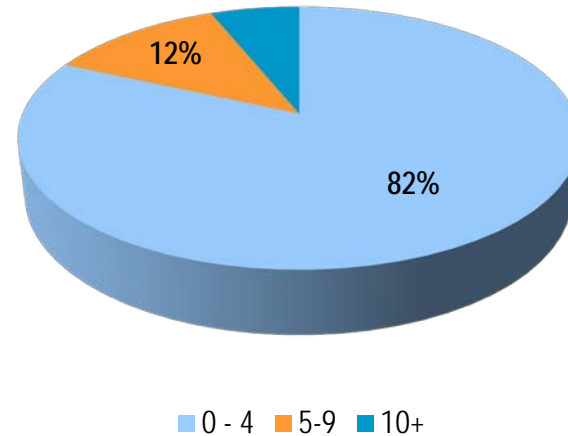
Trading Patterns and History

What days of the week do you trade here?



Traders surveyed include those trading at all of the Winchester markets, in particular Thursday and Saturday

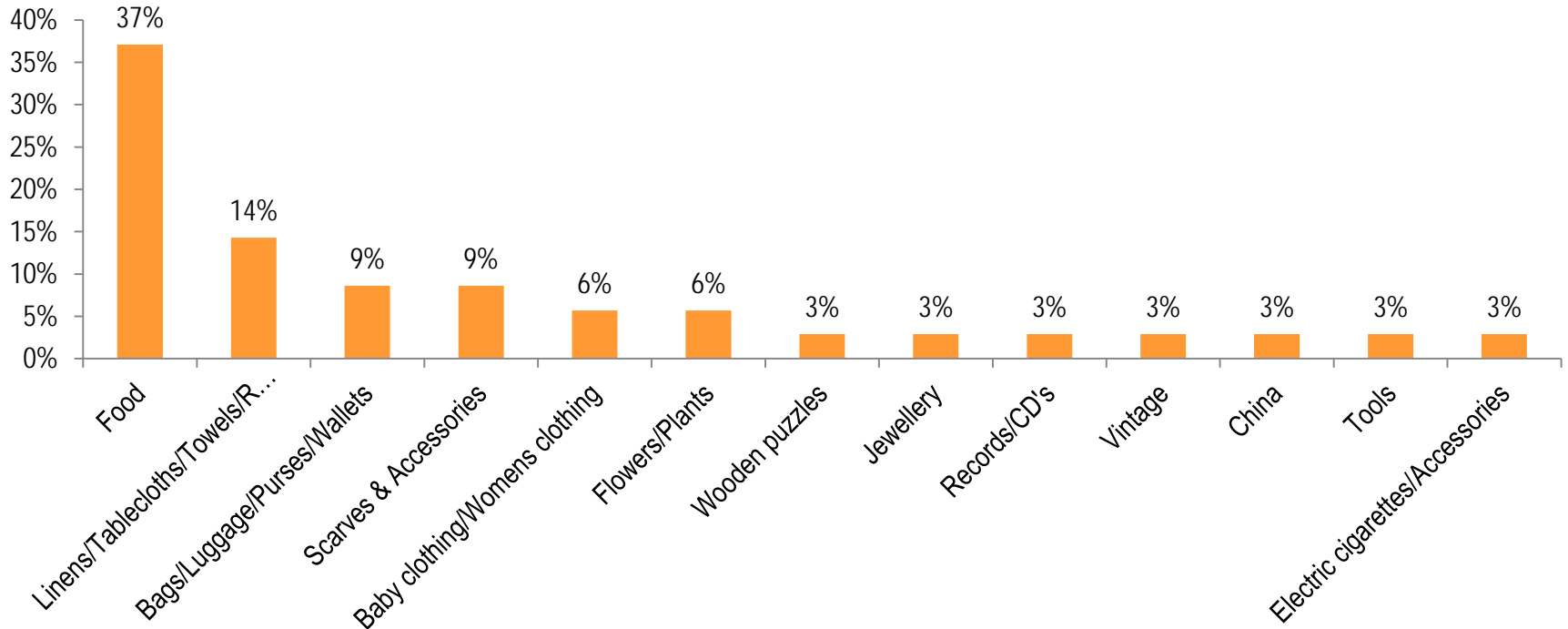
How long have you been trading on this market?



Traders typically started trading on the market(s) in the last 4 years (82%)

Products sold on the Stall

What are the main product categories sold on your stall / unit?

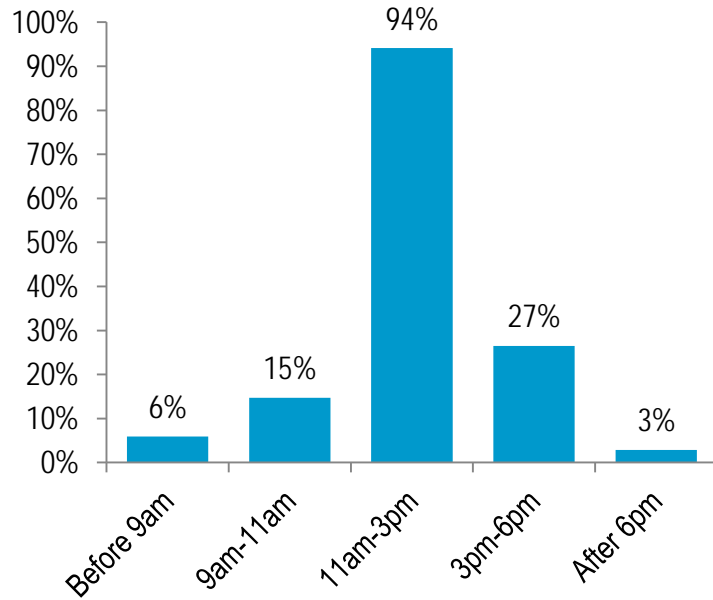


Food is the main product category sold, followed by household textiles (Wednesday market effect)
There is a good spread of categories

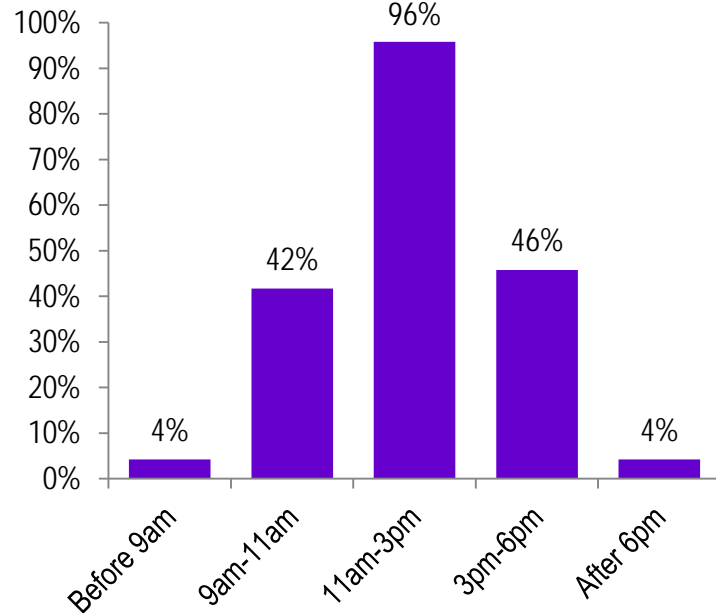
Trading Patterns

What are your busiest times of day; weekdays and weekends?

Weekday



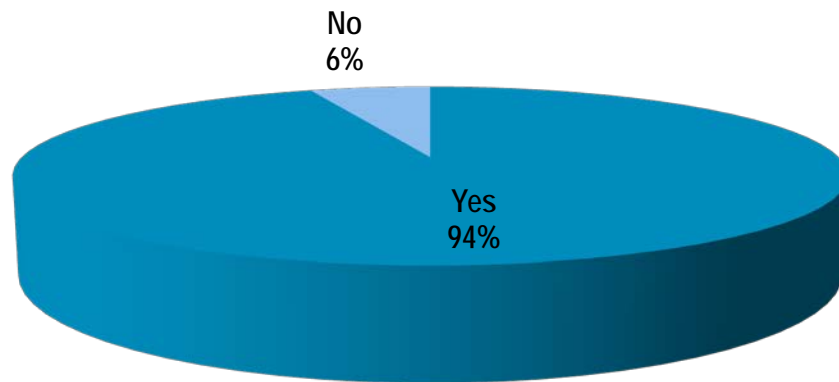
Weekend



Peak trading at the market is 11am-3pm both weekdays and weekends

Trading Hours

Do you think the trading days and opening hours of the market meet customer needs?



The vast majority of traders consider that the trading days and opening hours do meet customer needs

Product Offer

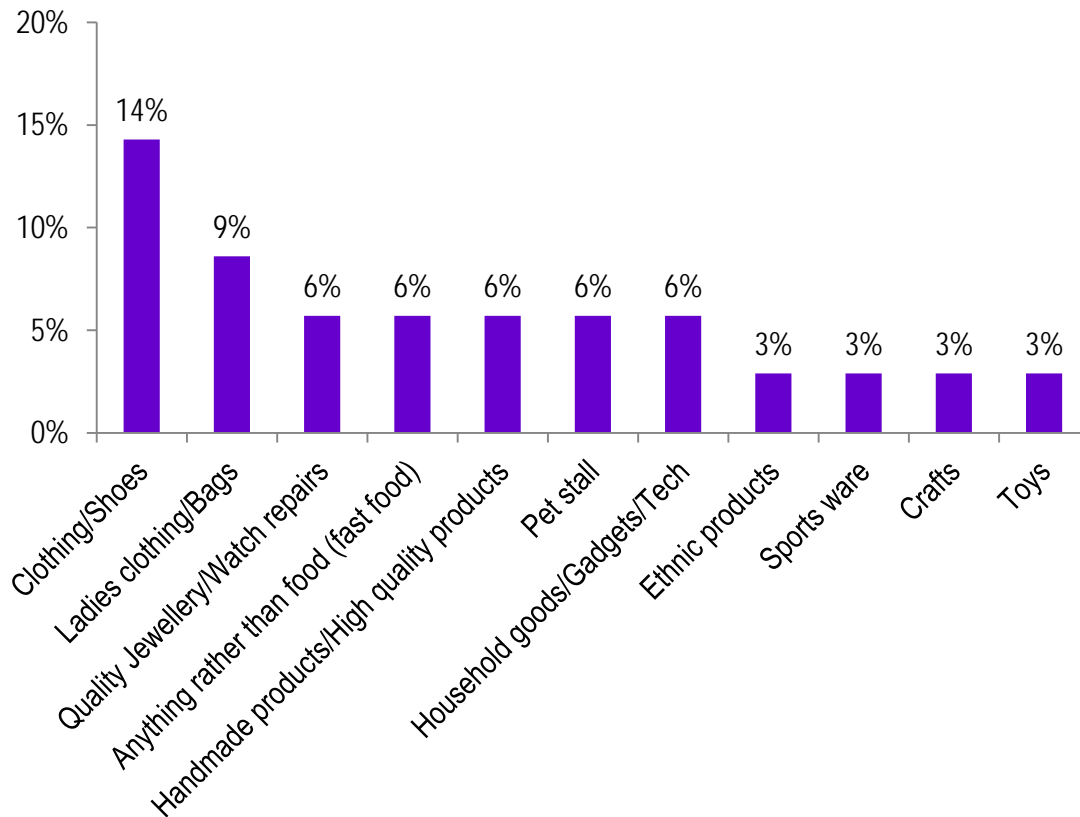
Which do you think are the top three / most popular stalls on the market & why?

Popular Stalls	Reasons
Fruit and veg	Needed / popular / convenient Good quality
Flowers	
Food (various)	
Cheese	

Fruit and veg, flowers and food were cited as the most popular. They are considered to be popular products for which there is a requirement; convenience and quality are also cited

Product Opportunities / Gaps

Which product categories are missing or lacking in choice in the market, or you feel should be better represented?



Clothing is the most commonly cited as missing or lacking in choice

* 17 (49%) did not answer

New Themes or Themes to Expand

Are there any new themes that could be introduced into the market or existing themed markets that could be expanded?

The majority 83% did not cite any themes that could be added or expanded

Where themes were suggested these are shown in the table opposite

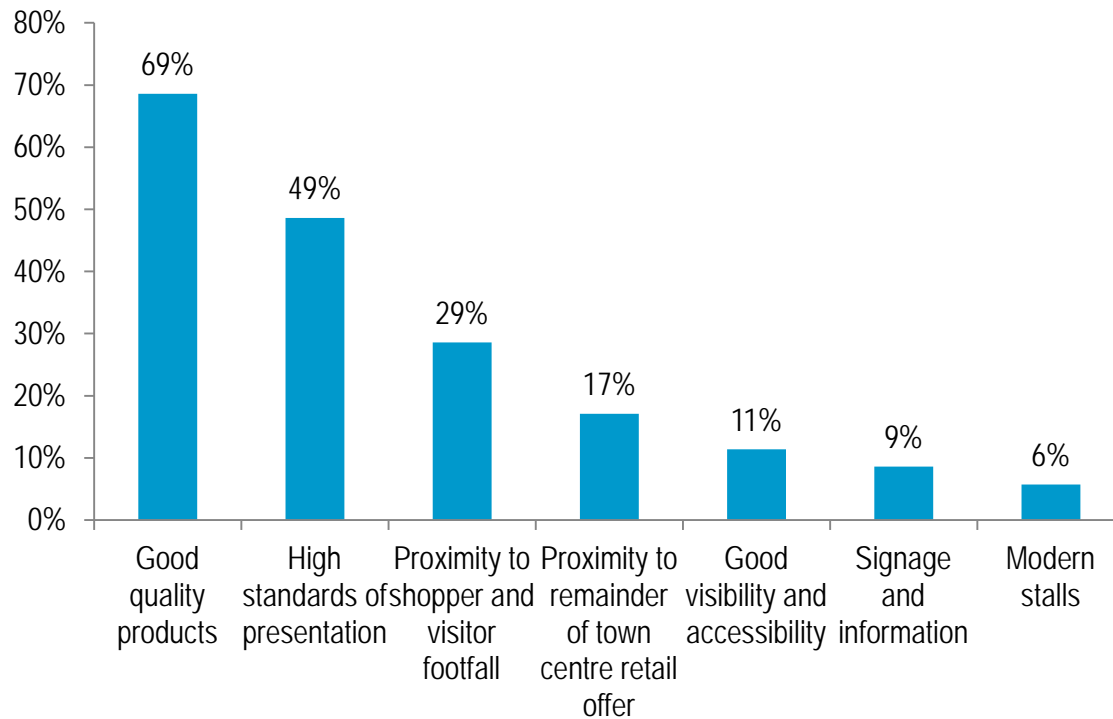
Each cited by 1- 2 traders

Some interesting ideas; common themes are food, 'local' and evening markets

Hampshire Day – local traders / quality local products
Night Market
Sunday Farmers Market
Food Festival
Winchester History & Today
Smorgasbord Evenings (late night / Friday)

Success Criteria

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

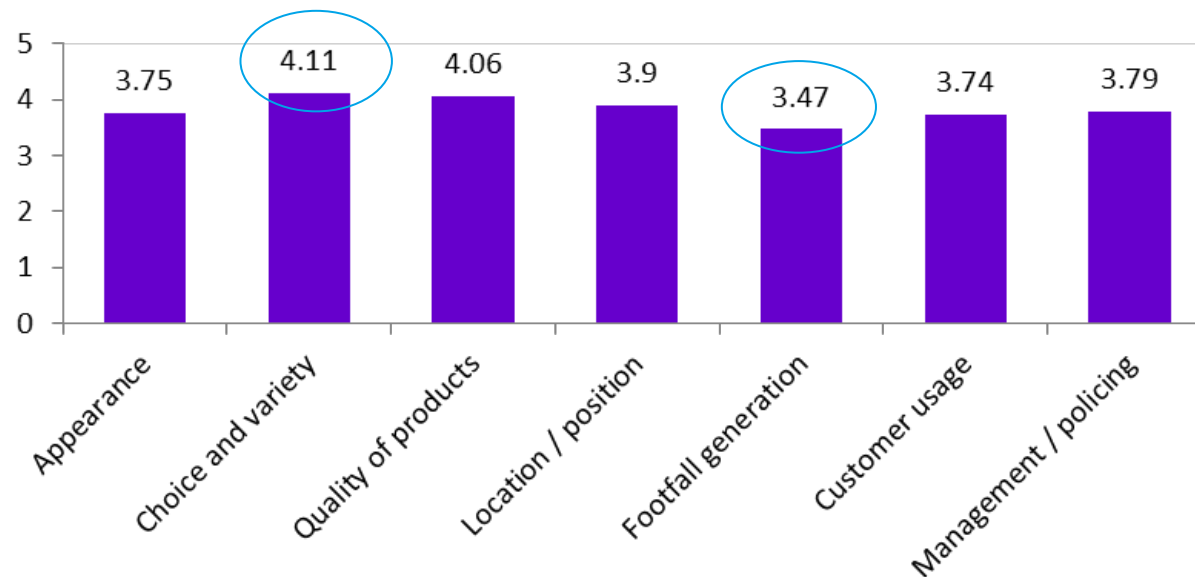


Good quality products and high standards of presentation are clearly considered to be the two most important things for a thriving market in Winchester

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

WEDNESDAY (Food) Market Attribute Ratings

How would you rate the current themed Wednesday food focused street market on each of the following attributes? (Answers weighted 1=very poor and 5=very good)



All aspects rated positively

Lowest scoring was *footfall generation*

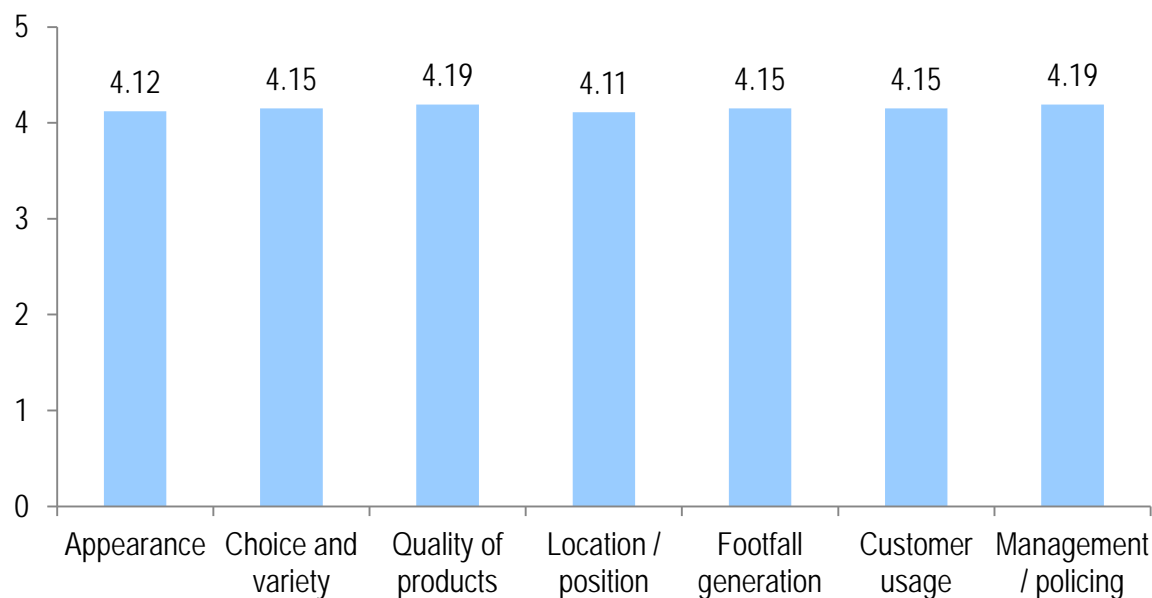
Highest scoring was *choice and variety*

Less than 3% of traders rated attributes as poor or very poor

* Fairly high levels of no response (40-50%)

THURS, FRI and SAT (General) Market Attribute Ratings

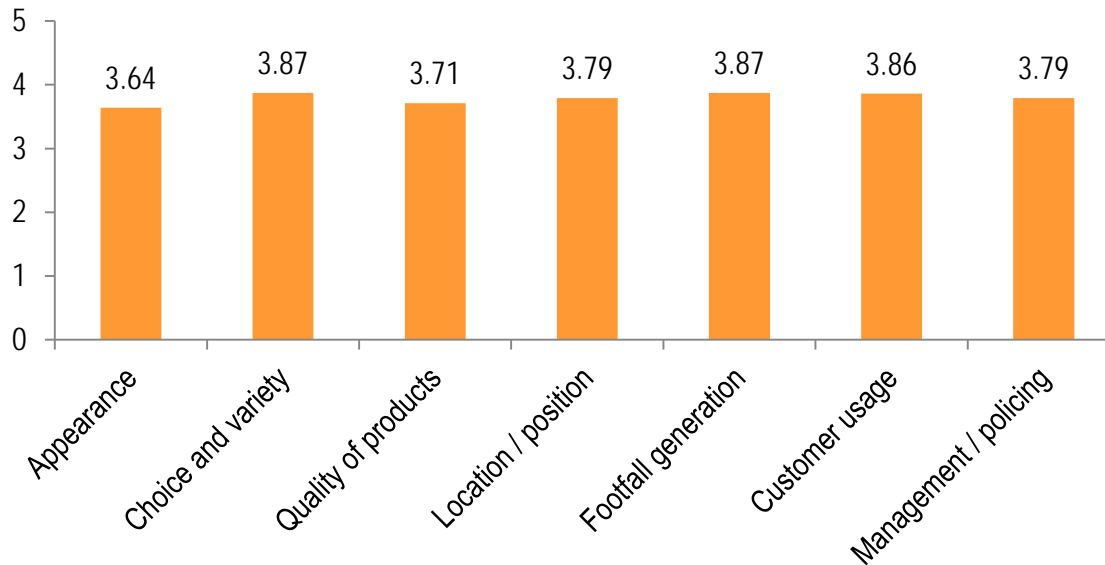
How would you rate the general Thursday, Friday and Saturday street markets on each of the following attributes? (Answers weighted 1=very poor and 5=very good)



All attributes were rated highly, no attribute received a poor or very poor rating, other than a single response for management / policing

SUNDAY (Themed) Market Attribute Ratings

*How would you rate the themed Sunday street markets on each of the following attributes?
(Answers weighted 1=very poor and 5=very good)*



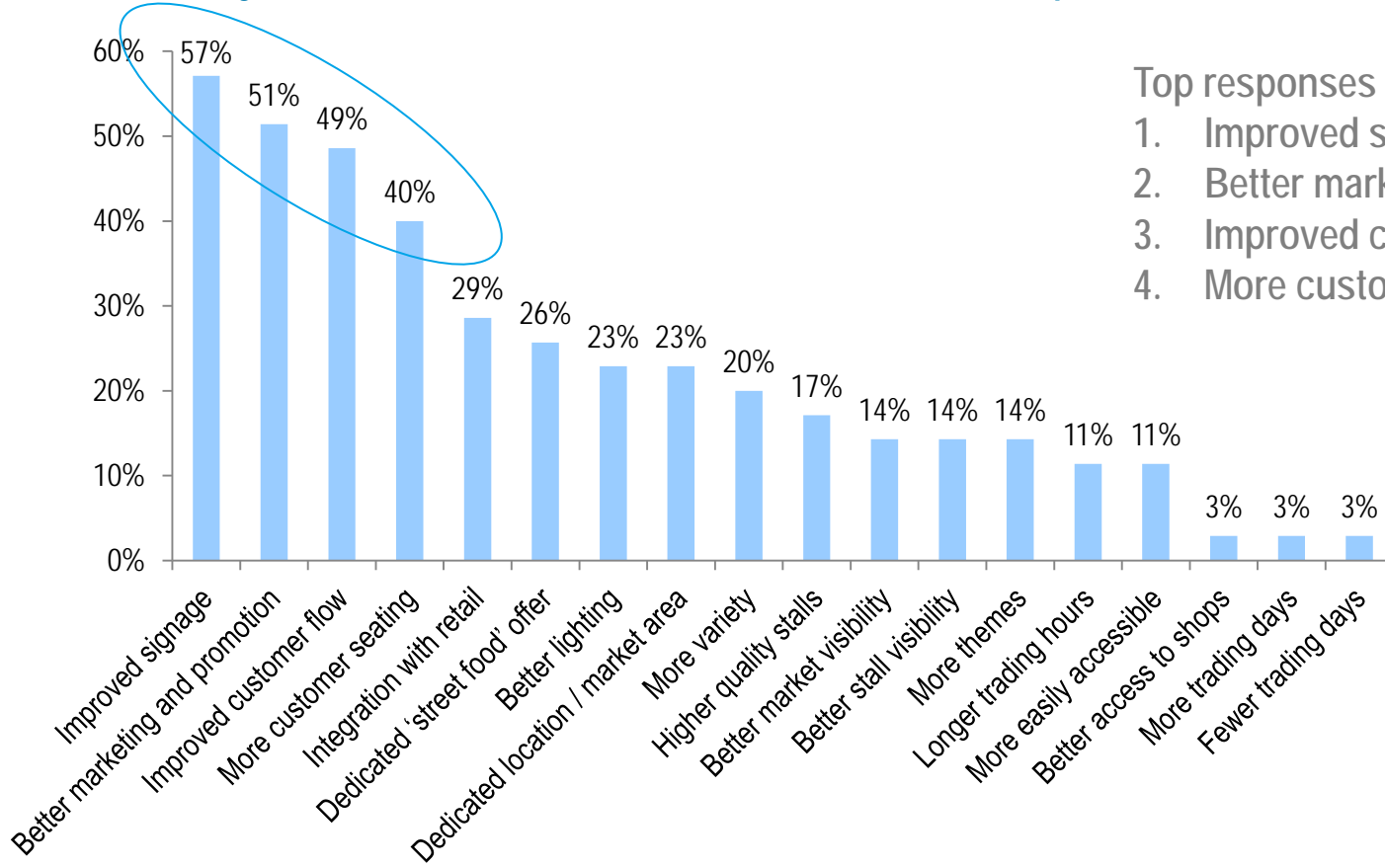
Sunday market ratings were the lower of the three markets; appearance rated the lowest

However no more than two respondents (6%) rated attributes as very poor

* High levels of no response (55-60%)

Improvements to current Winchester Markets

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

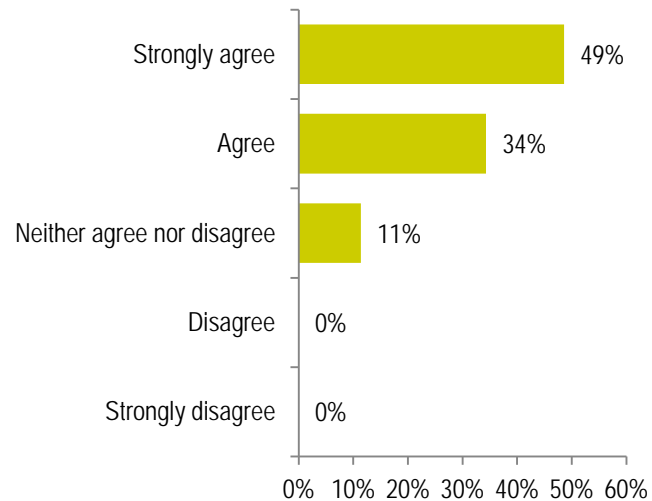


Top responses are;

1. Improved signage
2. Better marketing and promotion
3. Improved customer flow
4. More customer seating

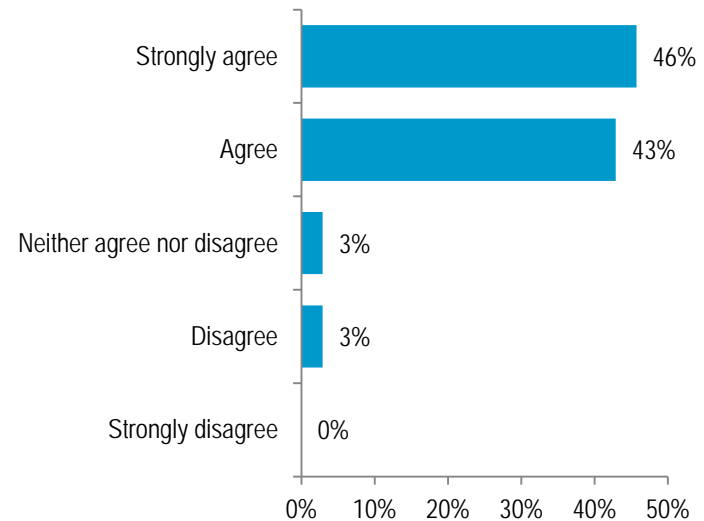
Views and Opinions on Winchester's Markets

Markets in Winchester successfully generate additional footfall to the city centre



83% agree

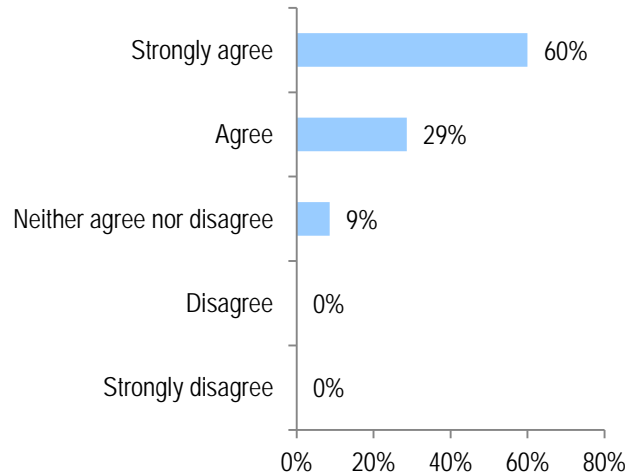
Winchester's retail appeal is increased by its market offer



89% agree

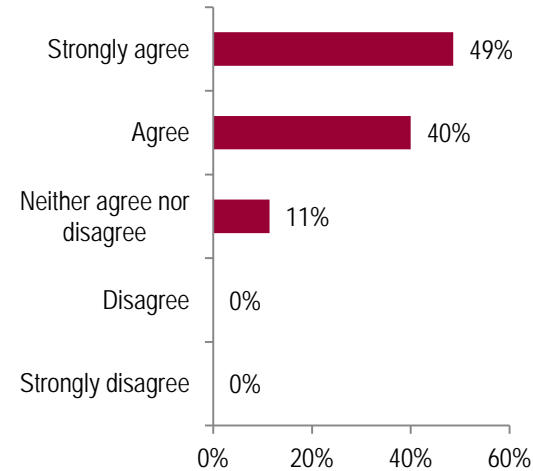
Views and Opinions on Winchester's Markets contd.

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



89% agree

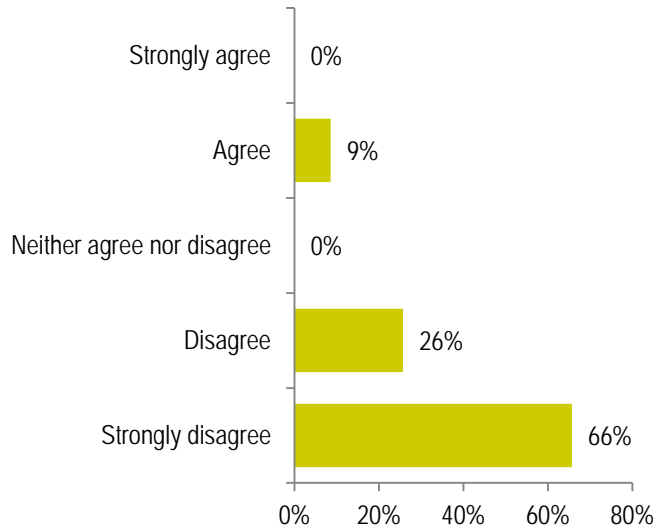
Businesses that are close to the market benefit from being near it



89% agree

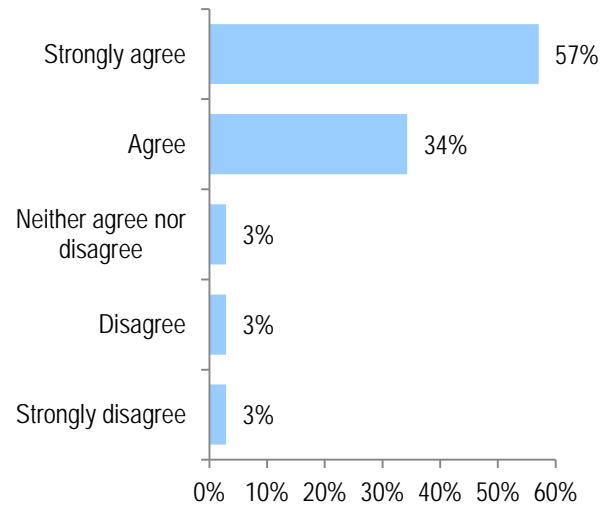
Views and Opinions on Winchester's Markets contd.

The markets provide unfair competition for Winchester's retailers



92% disagree

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

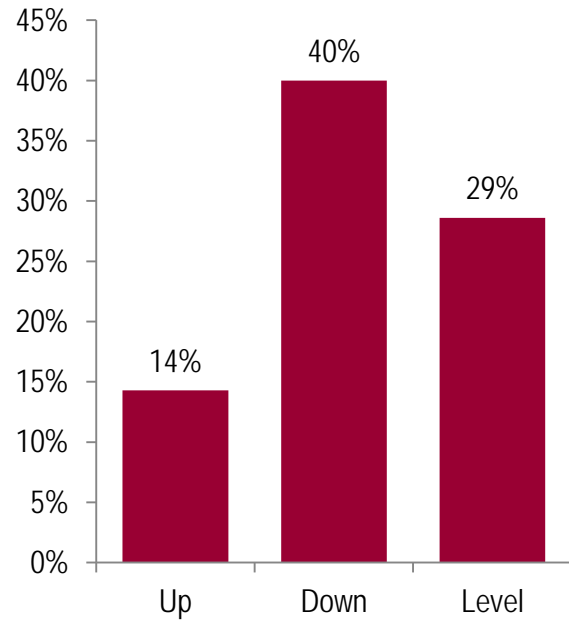


91% agree

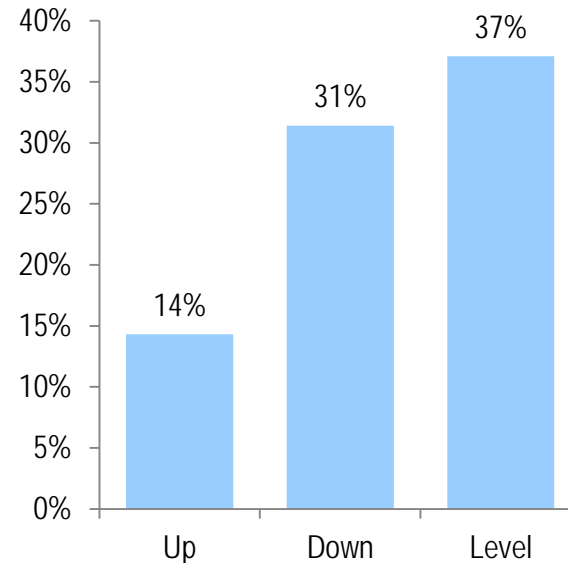
Current Trading in Winchester

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

Customer Numbers



Average Transaction Value

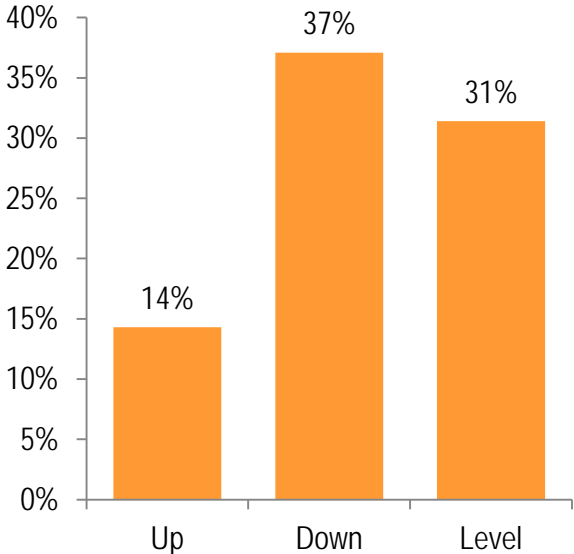


Both customer numbers and ATV are level or down for most

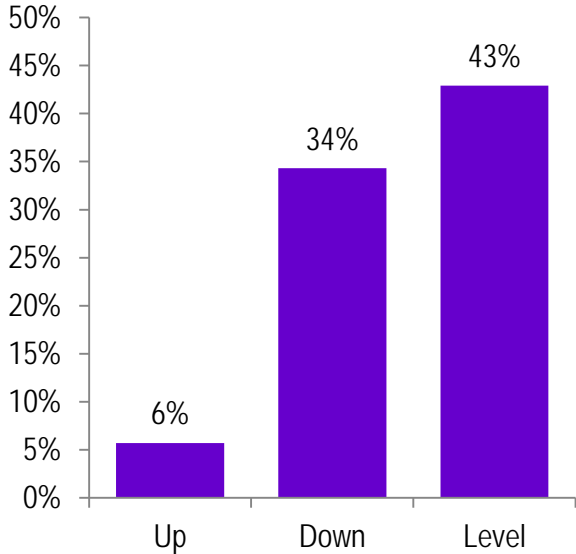
Current Trading in Winchester contd.

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

Turnover



City Centre Footfall

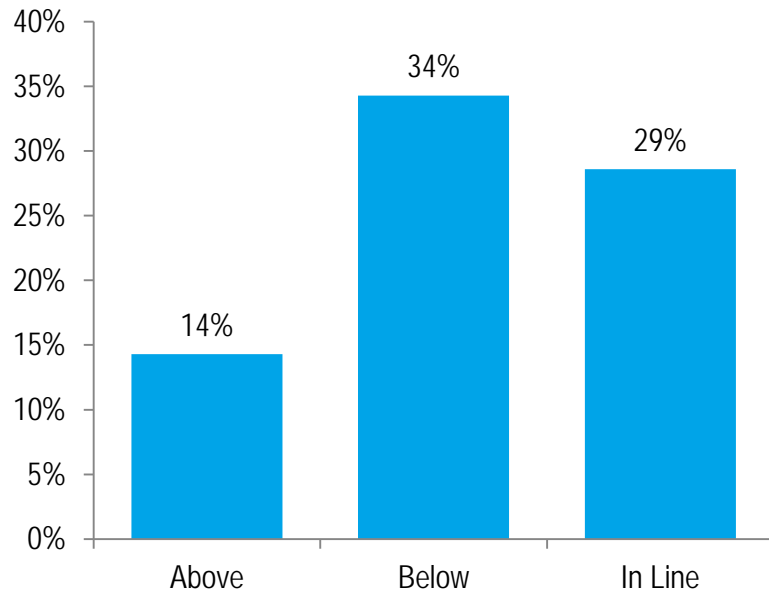


Turnover and city centre footfall are also both considered to be level or down by most

Current Trading in Winchester contd.

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

Christmas Trading v. expectations



Christmas trading was below or in line with expectations for most

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

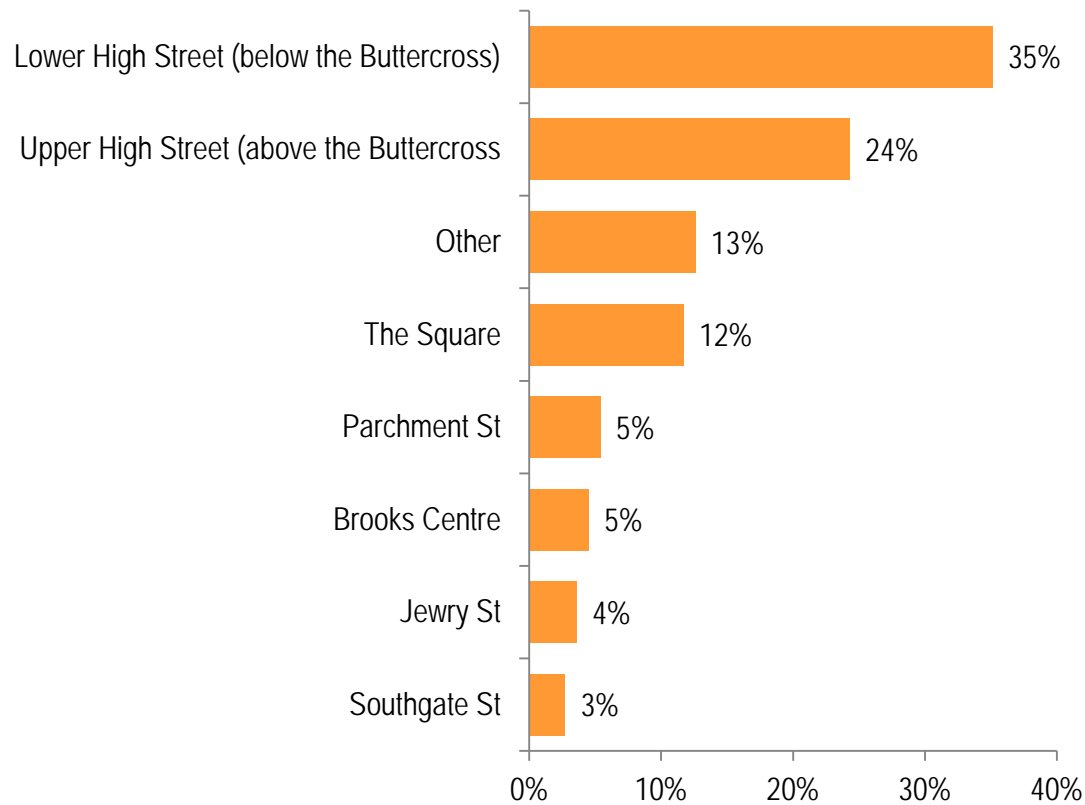
TRADER Survey Summary contd.

- 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

Retailer Survey Findings

Shop Location

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



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

Trading Patterns: Busiest Days of the Week

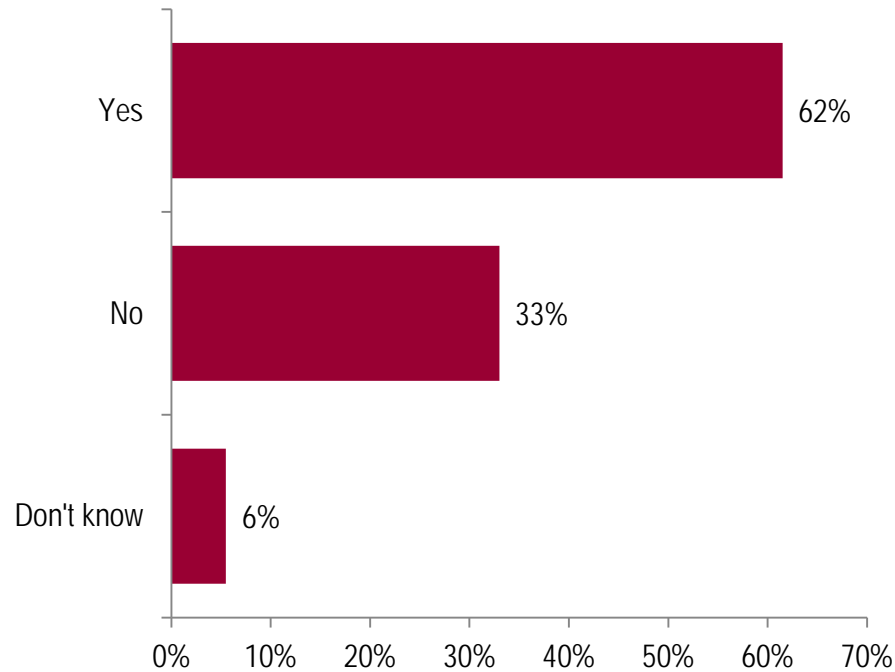
Which days of the week are your busiest? Ranked 1 – 7, where 1=busiest and 7=quietest

	1 Busiest	2	3	4	5	6	7 Quietest
Monday	13%	7%	8%	10%	6%	16%	23%
Tuesday	6%	13%	11%	8%	21%	22%	7%
Wednesday	4%	5%	15%	22%	25%	6%	10%
Thursday	5%	8%	25%	26%	14%	6%	2%
Friday	10%	41%	17%	5%	5%	10%	1%
Saturday	69%	2%	2%	-	1%	6%	10%
Sunday	7%	21%	14%	9%	5%	5%	17%

Trade gets progressively busier over the course of the week, with Saturday the busiest day; Sunday is split, busy for some, quiet for others

Sunday Trading

Did you open on Sundays prior to the regular Sunday markets?

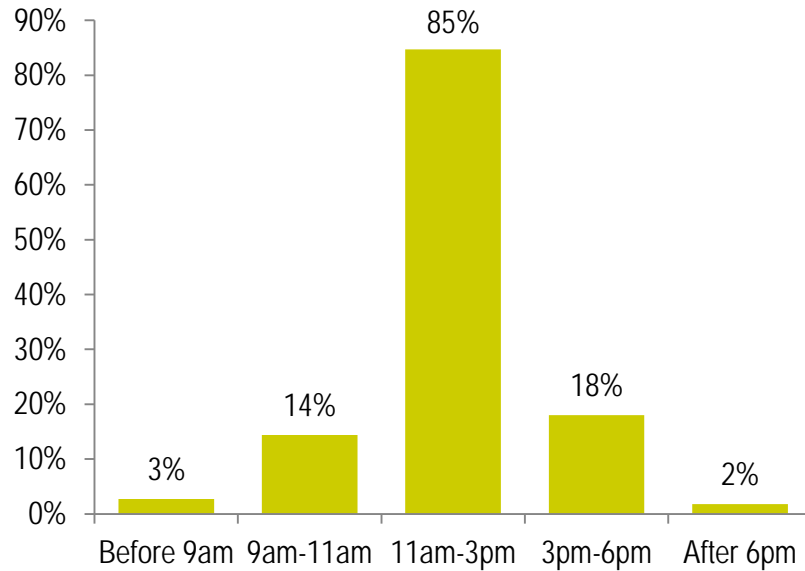


The majority of retailers (62%) surveyed traded on a Sunday prior to the Sunday Markets

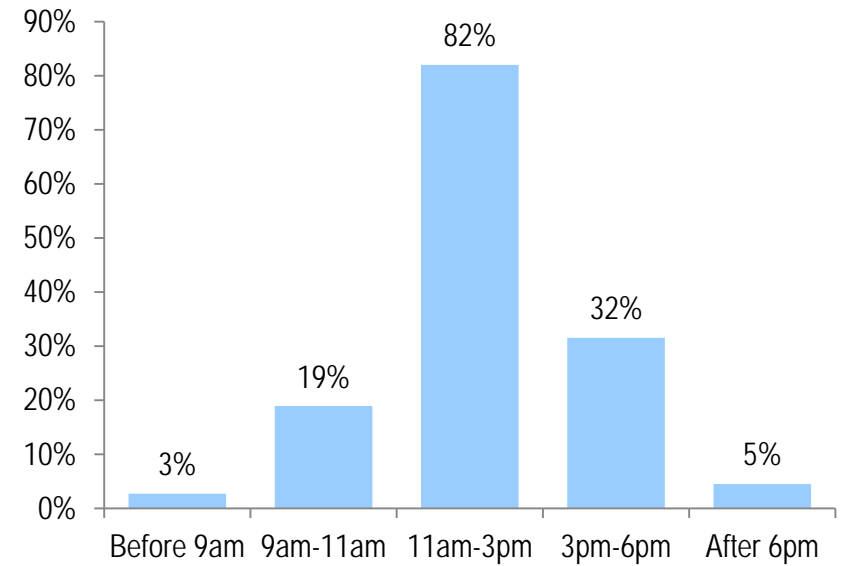
Trading Patterns: Busiest Times

What are your busiest times of day; weekdays and weekends?

Weekday



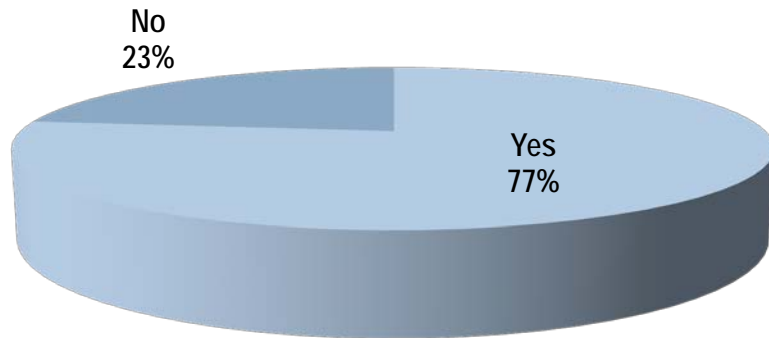
Weekend



Peak trading for retailers is 11am-3pm both weekdays and weekends; reflecting findings of the traders survey

Trading Hours

Do you think the trading days and opening hours of the market meet customer needs?



The vast majority of retailers consider that the trading days and opening hours of the market do meet customer needs

Where they didn't reasons cited included; *congestion 3-4pm* and that it *closes before the shops*

Product Offer

Which do you think are the top three / most popular stalls on the market & why?

Popular Stalls	Reasons
Fruit and veg	Specialist / quality / unique Variety / choice Value Snacks / quick / good service
Hot food / takeaway / snacks	
Food / bakers / fish	
Farmers / cheese	

Fruit and veg, hot food and other food products in general were cited as the most popular. They are considered to offer something different, as well as variety and value

* Just over half of retailers answered this question

Product Opportunities / Gaps

Which product categories are missing or lacking in choice in the market, or you feel should be better represented? 21% answered

Most retailers did not answer this question (79%)

Where they did the most common responses are shown in the table opposite

Negative comment from a small number of retailers

Homewares/ Art & Craft/ Local Crafts/ Toys	13% (14)
Market not needed / doesn't suit Winchester	13% (14)
Sweets	5% (6)
Stalls that fit Winchester brand / better quality	5% (6)
Food stalls / More variety / Jacket Spuds	5% (5)
Fashion / clothes / younger	5% (5)

New Themes or Themes to Expand

Are there any new themes that could be introduced into the market or existing themed markets that could be expanded?

The majority 76% did not cite any themes that could be added or expanded

Where themes were suggested these are shown in the table opposite

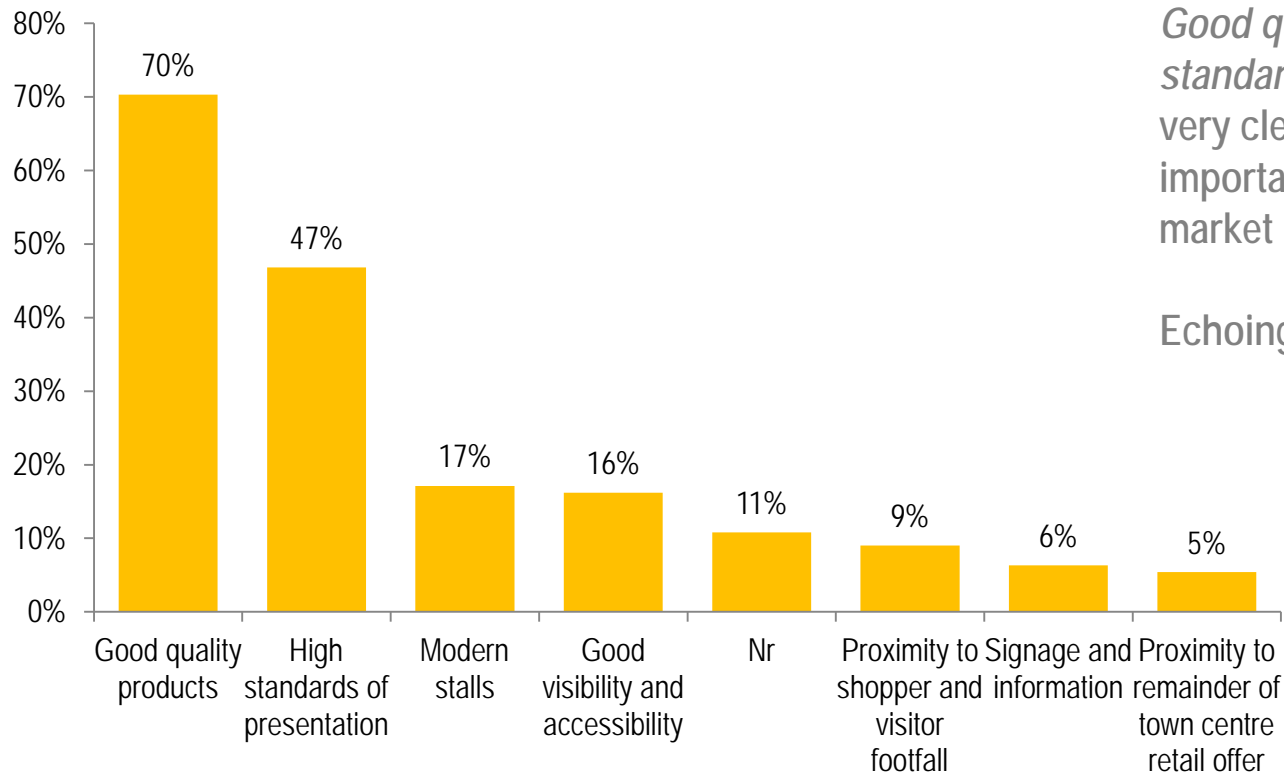
Some interesting ideas; common themes are food, clothing and 'local'

Additional comment about improving market layout and some negative comment about the market from very small minority

Better quality food / Vintage / Themed / Clothes	11% (12)
More craft based stalls	7% (8)
Healthy food / Vegan / Gluten free / artisan/ local	5% (6)

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

WEDNESDAY (Food) Market Attribute Ratings

How would you rate the current themed Wednesday food focused street market on each of the following attributes?

	Very Poor	Poor	OK	Good	Very Good	OK / good
Appearance	5%	9%	35%	29%	6%	70%
Choice and variety	6%	4%	22%	40%	14%	76%
Quality of products	5%	5%	27%	34%	11%	72%
Location / position	14%	12%	25%	25%	8%	58%
Footfall generation	8%	13%	32%	20%	6%	58%
Customer usage	4%	9%	33%	25%	5%	63%
Management / policing	8%	11%	29%	14%	5%	48%

Well over half of retailers rated the Wednesday market as OK or good, with the exception of management / policing which recorded a high no response (33%)

Lower scoring were *location / position* and *footfall generation*

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

SUNDAY (Themed) Market Attribute Ratings

How would you rate the themed Sunday street markets on each of the following attributes?

	Very Poor	Poor	OK	Good	Very Good	OK / good
Appearance	7%	5%	27%	23%	13%	63%
Choice and variety	4%	5%	20%	32%	13%	65%
Quality of products	5%	5%	20%	31%	14%	65%
Location / position	13%	14%	22%	22%	7%	51%
Footfall generation	5%	9%	24%	24%	11%	59%
Customer usage	4%	9%	23%	22%	14%	59%
Management / policing	7%	8%	25%	14%	8%	47%

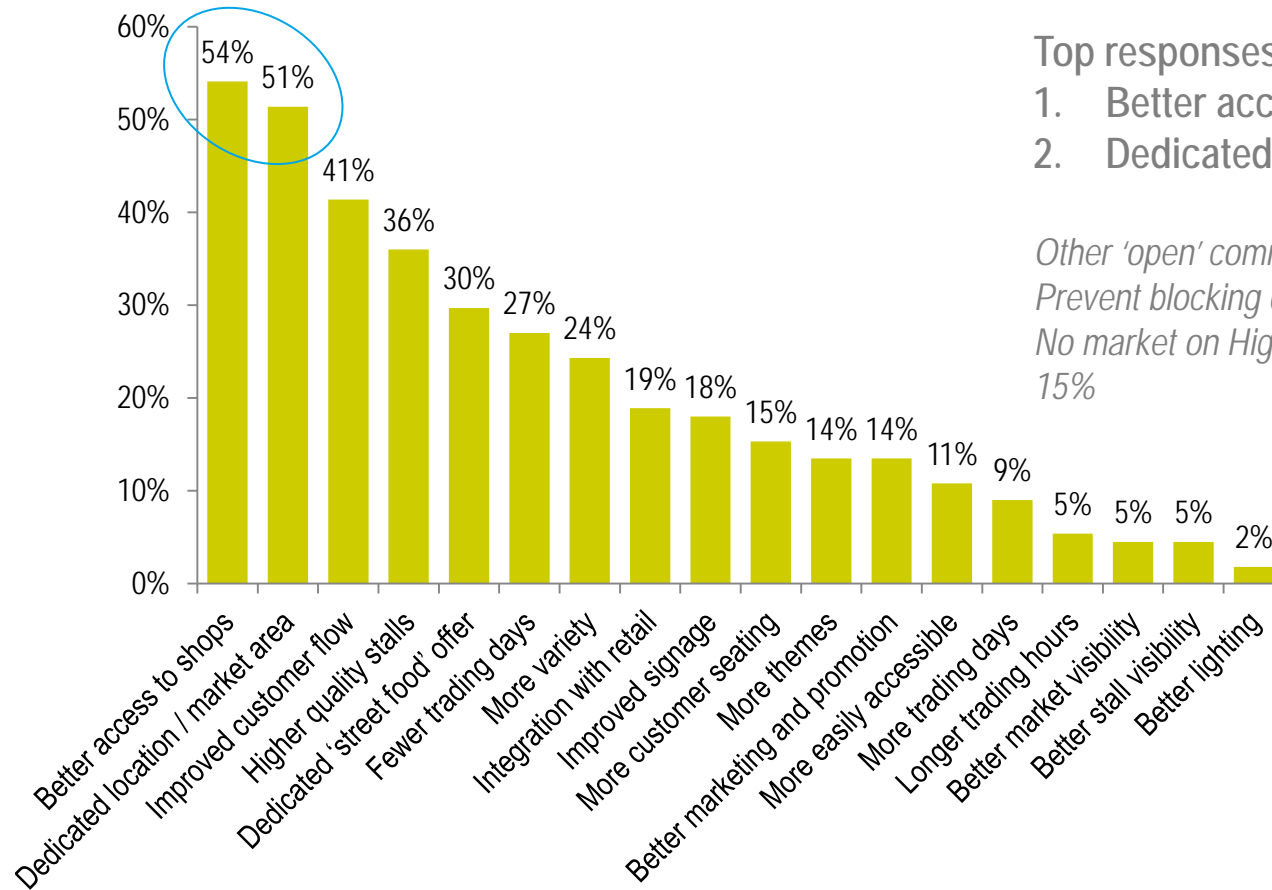
Ratings for the Sunday Market reflect those for the other markets

There was a higher proportion of no response, likely to indicate that some retailers are less familiar / aware of the Sunday Market

* Higher no response for the Sunday Market 22%-38%

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

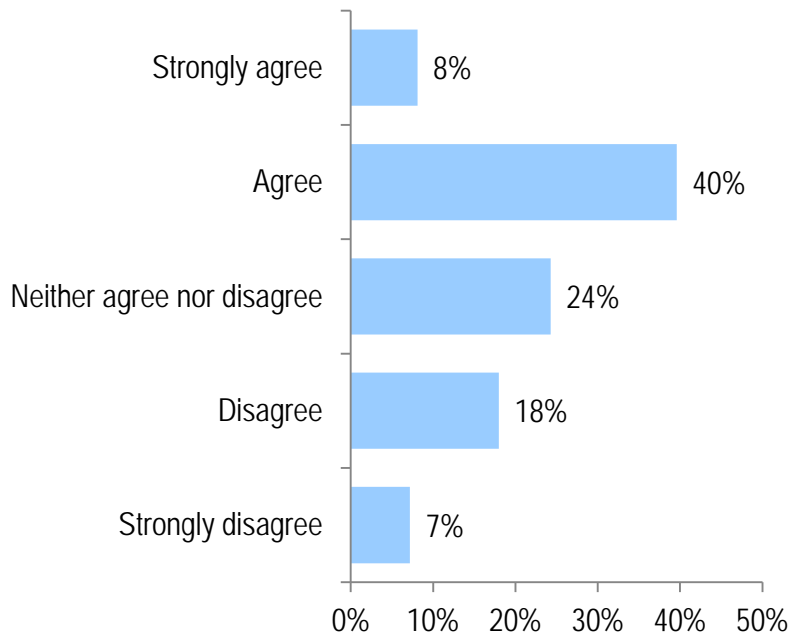
Other 'open' comments included;

Prevent blocking of shop windows (20%)

No market on High Street move to Guildhall Square
15%

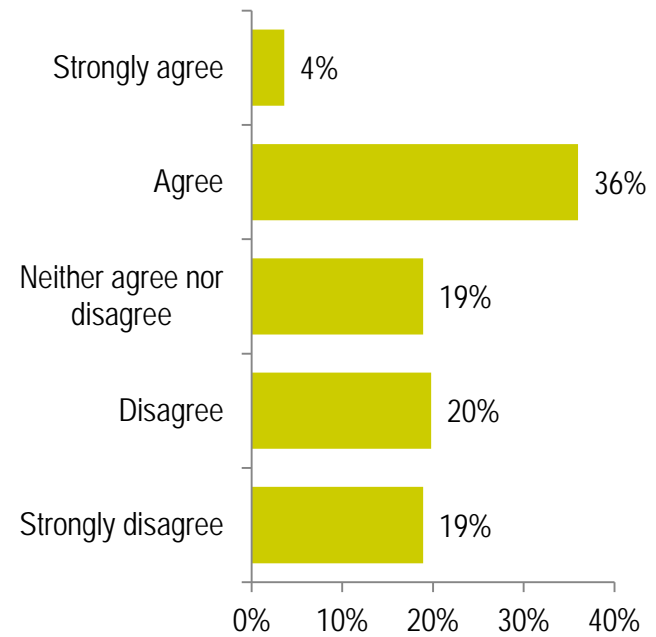
Views and Opinions on Winchester's Markets

Markets in Winchester generate additional footfall to the city centre



48% agree, 25% disagree

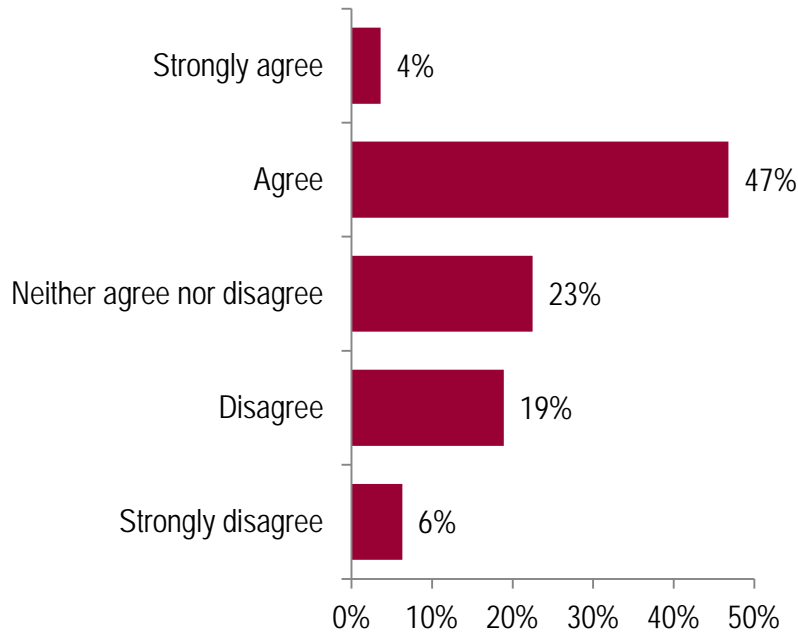
Winchester's retail appeal is increased by its market offer



40% agree, 39% disagree

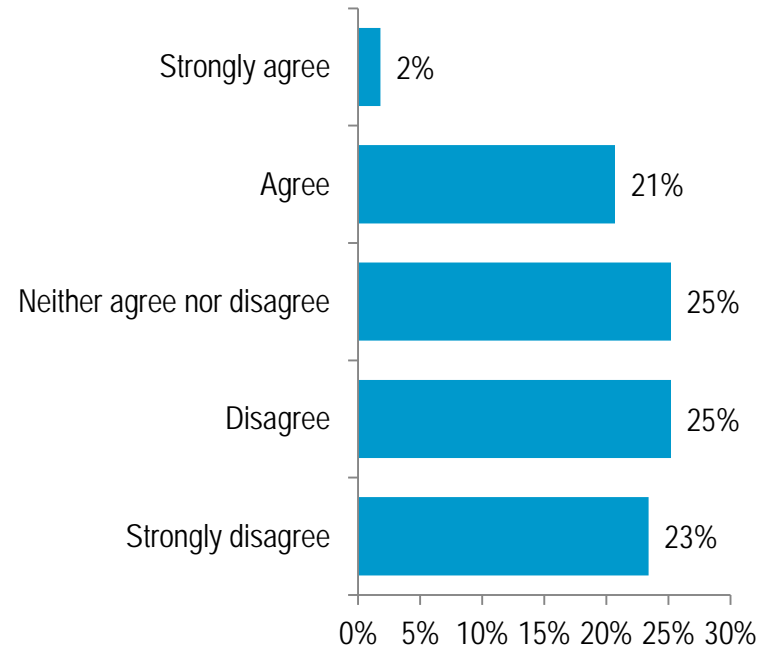
Views and Opinions on Winchester's Markets contd.

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



51% agree, 25% disagree

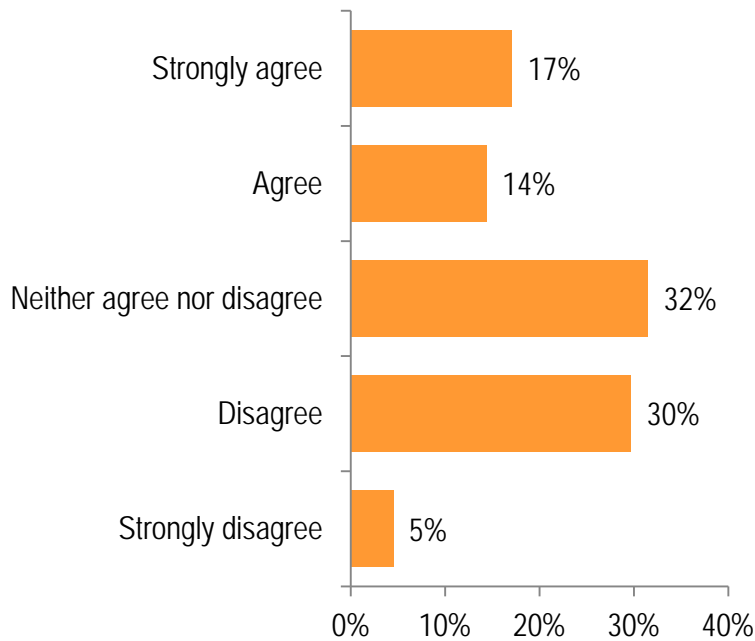
Businesses that are close to the market benefit from being near it



23% agree, 48% disagree

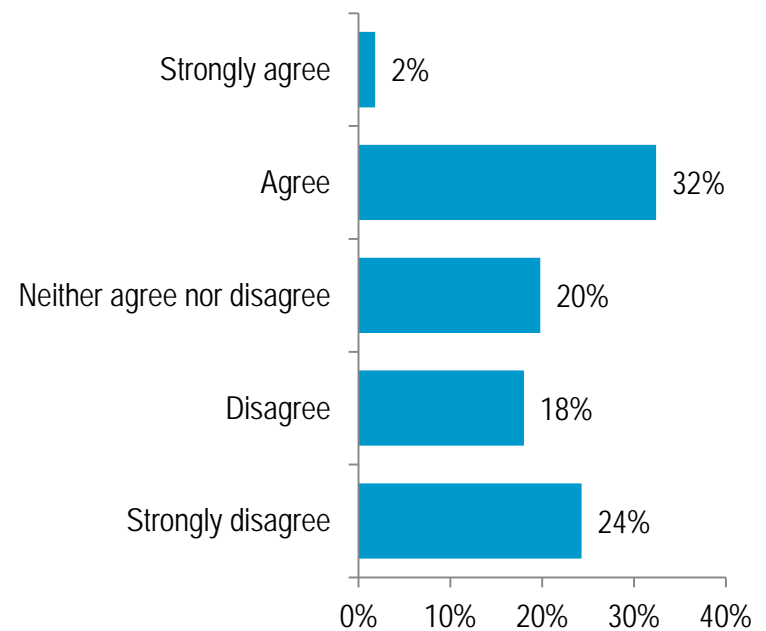
Views and Opinions on Winchester's Markets contd.

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

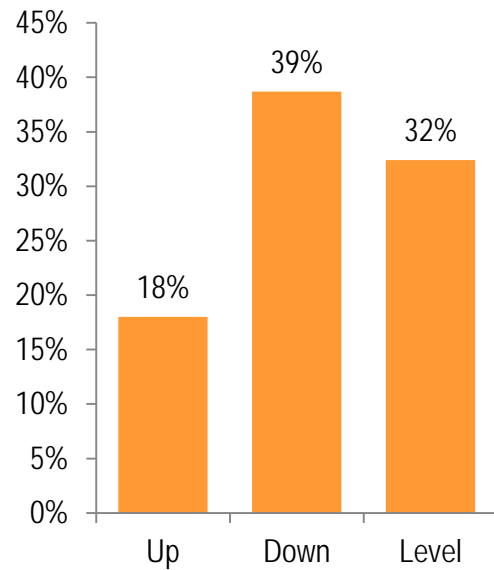


34% agree, 42% disagree

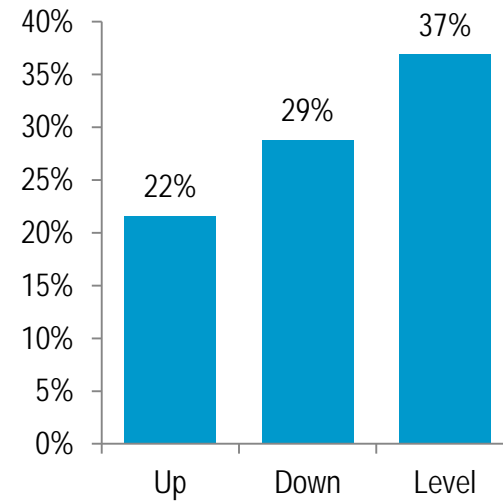
Current Trading in Winchester

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

Customer Numbers



Average Transaction Value

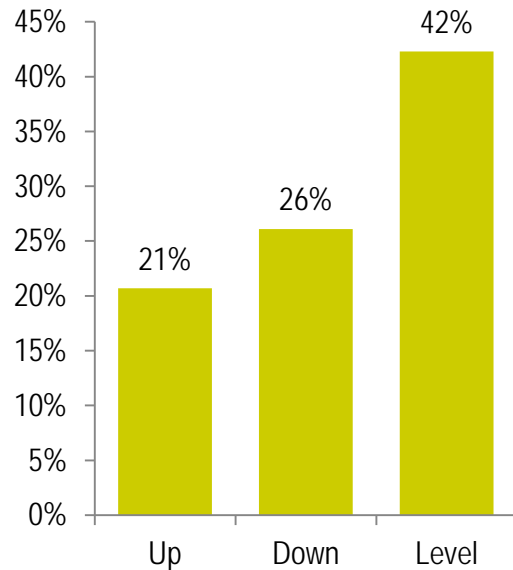


Both customer numbers and ATV are level or down for most; reflects market performance; however over half are level or up

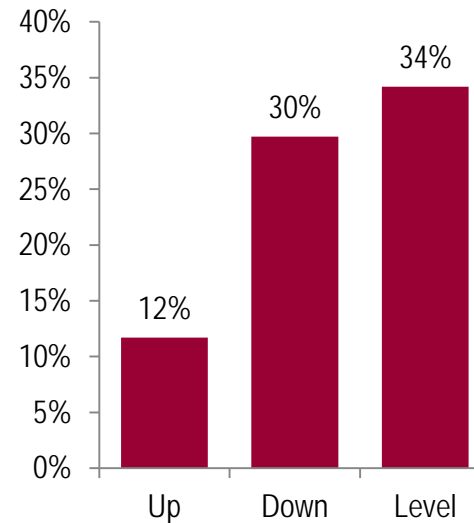
Current Trading in Winchester contd.

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

Turnover



City Centre Footfall

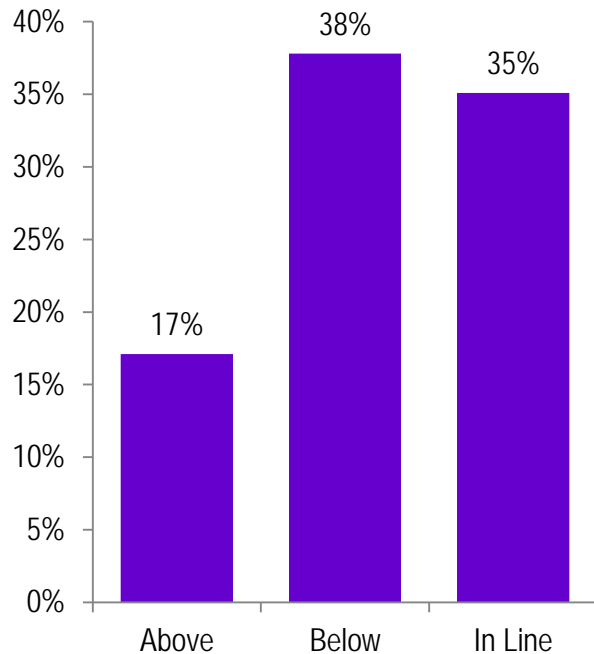


Turnover for most is level or up (63%) while city centre footfall is considered by many to be level or down; retailers report better trading performance than traders

Current Trading in Winchester contd.

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

Christmas Trading v. expectations



While Christmas trading was below expectations for over a third of retailers (38%), it was in line or above expectations for over half (52%)

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

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

Existing / Historic Research Review

Winchester Street Market Survey

- Survey report dated February 2012
- Specific objective to research consumer usage and views of the market
- 220 face to face interviews
- 120 had visited or planned to visit the market; 100 did not
- Surveys conducted on both market and non-market days
- Represent a combination of both users and non-users
- Usage is pretty high, 55% had or planned to visit (given some will have been non-market days)
- Of those who had visited the market 48% made a purchase (market days only)
- Around half of these don't believe the item could have been bought in the local shops
- This is further supported by the main reasons given for buying from market stalls
 - 1) Speciality, not available in shops
 - 2) Good deal / cheaper

Winchester Street Market Survey contd.

- Market users were asked to rate the importance of the three different types of markets (Wednesday food, Thursday-Saturday general and Sunday specialist)
 - In all instances over half consider them to be 'quite' or 'very important' - 54-57%
 - Low percentages felt them to be 'not important' - 15-17%
- 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%

Winchester Street Market Survey contd.

Opinions overall were very positive;

	'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%

Winchester BID Annual Review 2015

- Commentary in the annual review in reference to Christmas trading
- 70 BID members surveyed
- External factors affecting fall in the extent to which Christmas expectations were not met (22% reduction) included;

Some local residents unwilling to come into town centre due to parking and people (congestion from Cathedral Christmas Market and the High Street Markets)

Some independents saw a fall in their regular customers, however congestion and access not mentioned by all

Shop entrances on the High Street being restricted by large numbers of shoppers and location of market stalls

Off High Street locations affected because 'people' congestion on the High street made shoppers reluctant to seek out secondary streets

The unseasonal very wet weather encouraged shoppers to purchase on line rather than visit the shops

Winchester BID Annual Review 2015 contd.

- However, a number of businesses on the High Street did not refer to people congestion and restricted access
- Clothes and hospitality sectors in particular were relatively unaffected
- And those en route to Cathedral Christmas Market, e.g. shops in Kingsgate Village reported very buoyant Christmas Trading
- A variety of other internal as well as more external factors were also cited

Best Practise Markets Success Factors

Markets Review: Key Findings and Success Factors

Based on other leading markets we have worked on across the country, the following are best practise learning lessons from the better and more successful ones;

- Visible active trading is essential
- Easy access, routing & internal permeability
- Adjacency to good footfall levels
- External trading
- Strong food offers, with varied ranges and product category depth
- Self service F&V
- Strong service offers
- Strong & wide catering choice and styles
- Modern contemporary offers
- Customer seating and facilities
- Flexibility and adaptability of stalls
- High standards of product presentation
- Multi sensory experience, sounds, sight and taste
- New traders
- Additional daily themes and focus
- Clear signage and information
- Collective promotions
- Linked selling
- Integrated offers, categories and choice
- Critical mass
- Clear internal sightlines
- Recognised anchors

Markets Review: 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

Overview Retail Assessment of 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
- Lower High Street tends to have the better quality traders. The offer includes large F&V, luggage / leather goods, flowers (opposite & under cover), ciabatta grill, clothing/household, scarves, bedding, Thai food, gift, cheeses, hot food, olives, bread and a modern coffee van
- Middlebrook Street tends to have 'old school' traditional stalls and traders, including a butcher van, flower stall, watch and mobile, a Vape stall and a traditional market 'café operator with covered seating area
- Upper High Street is a smaller section of the market and contains handmade goods such as jigsaws, tableware, mugs, clothes (south American theme) coffee stall, leather goods and some weak hot food traders
- The Layby is used mainly for hot food traders on a Saturday, with 3 weak 'bric a brac' type stalls

Key Findings contd.

- The market does a good job of not blocking side streets
- There are frequent gaps where retail fascias 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!



Markets Review: Assessment Criteria

Current Market Assessment	Score 1-5 (1=poor, 5=good)
Visibility	3
Announcement / Arrival	2
Retail Standards	3
Customer Appeal	4
Stall Appearance	4
Mix (range / variety)	3
Critical Mass / Impact	3
Signage (macro and micro)	1
Footfall Levels	5
Location	3
Total score	31 out of 50 (62%)

Project Conclusions

Survey Conclusions

The findings of both the Retailer and Traders surveys need to be considered as a collective rather than comparative data sets.

- The findings are clear on the two most important criteria for a thriving market in Winchester; quality and presentation
- It is also clear on the benefits of the market 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

Survey Conclusions contd.

However 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		✓

Survey Conclusions contd.

- The number of trading days and the trading hours are broadly accepted; although the disassembly of stalls mid afternoon causes congestion. The management and policing of the market could be more visible
- Unsurprisingly traders are very positive about the role of the market; indeed most retailers are also positive. There appears to be a minority that are negative about the market, with a strong view by some that being adjacent to the market is not a benefit
- The 'convenience offer' foods hot and cold is viewed as the strongest element of the market, indeed with more street food being a requirement
- Despite a low response from retailers there are other product categories and themes that can be explored; the key is for good quality stalls and traders

Overall Conclusions

- Traders like the market very much
- Consumers like the market very much. They want to be able 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 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
- A more detailed understanding of potential customer group demand and needs is required; the residents (locals), workers, shoppers and visitors

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

Appendix I: List of RETAILER Respondents

Anokhi	Ernest Jones	Laura Ashley	Pavillion	The Hambleton
Argos	EWM	Lloyds Pharmacy	Phase Eight	The Montique
B.E.Chaplin	Fat Face	L'Occitane	Pure Home Lifestyle	The White Company
Bang & Olufsen	Fone World	London Camera Exchange	Reads of Winchester	Three UK
Bell Fine Art	Forme	Magoie Shoe Repairs	Reeve the Baker	Tinc
Boots	Gieves & Hawkes	Mail Boxes Etc	Rick Stein	Travelbag
Boots Optician	Habels Sleep Shop	Maison Blanc	River Island	Vision Express
Cadogan	Hays Travel	Mansons & Company	Robert Dyas	W.C.P
Cafe Nero	Hobbs Ltd	Marks & Spencer	Rohan	Warren and Son
Card Factory	Holland & Barrett	McDonalds	Russell & Bromley	Waterstones
Carphone Warehouse	Hotter Shoes	Mint Velvet	S36 Timpson	WH Smith
Carter Marsh & Co	Jack Wills	Mistral	Saog Zong	Whittard
Cath Kidston	Jaeger	Moda in Pelle	Searle & Taylor Kitchens	White Stuff
Cex Winchester	James Jewellers	Monson/Accessorize	Shoon	Wildsports
Char	Jane McIntyre	Montezumas	Specsavers	Winchester Bookshop
Childhoods Dream	Jeremy France Jewellers	Multiyork	Stagecoach	Winchester HMV
Clarks	John Lewis	New Look	Starbucks	Winchester Photographic
Copyman	JoJo Maman Bebe	Next	The Black Bottle	Wine Utopia
Crew Clothing Co	Jones Bootmaker	O2 Winchester	The Body Shop	Woodruffs
Crystals	Joules	Offord & Sons	The Courtyard Dress Agency	Zoe Jewellers
Debenhams	Kuoni	Old Fashioned Sweetie Shop	The Entertainer	
EE	L.K.Bennett	Parchment Jewellers		

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