

WINCHESTER TOWN FORUM

9 March 2016

REVIEW OF MARKETS PROGRAMME

REPORT OF ASSISTANT DIRECTOR (ECONOMY & COMMUNITIES)

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RECENT REFERENCES:

None

EXECUTIVE SUMMARY:

Winchester's current programme of markets has been evolving over the last five years, and enjoyed much positive feedback from shoppers, tourists and residents. However, the programme was always intended as a temporary one pending the development of Silver Hill. In view of the Council's decision not to proceed with the planned scheme, and in response to continued concern about aspects of the markets expressed by Winchester Business Improvement District, a review is currently in hand. This will inform Cabinet decisions about the future direction of the markets programme. Town Forum Members are invited to contribute to this review. Members are invited to consider this report alongside a presentation by consultants The Retail Group on the findings of a survey carried out in February 2016 to assess the extent of the impact of the markets on year-round business performance in the city centre.

**RECOMMENDATIONS:**

- 1 That opinions on the markets programme be expressed by Members of Winchester Town Forum to the Portfolio Holder for Local Economy for consideration as part of the wider markets review.

WINCHESTER TOWN FORUM9 March 2016REVIEW OF MARKETS PROGRAMMEREPORT OF ASSISTANT DIRECTOR (ECONOMY & COMMUNITIES)DETAIL:1 Introduction

- 1.1 The programme of markets on and around Winchester High Street has been a success with visitors since it was relaunched in 2010. The programme includes:
- a food and produce market on Wednesday
  - a general market from Thursday to Saturday
  - a rotating line-up of speciality markets each Sunday (art, antiques & collectables, farmers' market)
- 1.2 During the past five years, the presentation, composition and location of stalls has continued to evolve in response to feedback from retailers, the Business Improvement District, the market traders and shoppers.
- 1.3 In recent months, the Hampshire Farmers' Markets – the city's most longstanding market - re-located from Middle Brook Street Car Park to the High Street for a trial period to assess whether footfall and spend would be greater in this more central location.
- 1.4 During discussions with the Business Improvement District (BID) to review the Christmas trading period, concerns were raised about the impact of the weekday markets not just in relation to the busy festive period but on year-round businesses in the city centre, so the Portfolio Holder for Local Economy agreed to carry out a review. The intention is to gather evidence and ideas for the development of the markets programme to ensure maximum benefits to shoppers and retailers alike.
- 1.5 This report summarises the evidence gathered as part of the review and provides context for a presentation of findings by The Retail Group also on this agenda for Winchester Town Forum. It invites Members of Town Forum to contribute to the review, which will inform decisions by Cabinet on 29 March 2016.

## 2 Response to the Markets

- 2.1 The current programme of markets was introduced to add vitality to the High Street at a time when cities around the country were anxious about the effects of the recession.
- 2.2 The last decade has seen a resurgence of support for street markets, with an unprecedented [study](#) by Sophie Watson, Professor of Sociology at The Open University, highlighting the importance of traditional street markets as sites of social interaction and community building in 2009. The [Mary Portas Review](#) for Government on the future of Britain's high streets was published in 2011 and made a strong case for markets because of their ability to add variety and colour to city centres, and also as a launch pad for new retail enterprises.
- 2.3 Face-to-face research carried out in Winchester's central shopping streets by Tourism South East at the end of 2011 found that "94% of local residents and 95% of non-residents felt that the markets made the experience of visiting Winchester more enjoyable". Some 85% of local people and 92% of visitors felt that "markets added to the vitality and vibrancy of the city centre". Meanwhile 83% of local people stated that the "markets offered a greater variety of goods". The markets were also considered to be an example of good practice by national consultants carrying out a retail 'health check' of the city centre in 2013. Stall holders have also thrived, winning awards and securing contracts which have helped to develop their businesses.
- 2.4 However, there have been continued concerns expressed through the Business Improvement District (BID) on behalf of some of their members in relation to the frequency and location of the markets. Congestion, unfair competition, intrusion on the street scene, restricted access, smells and rubbish on the streets have all been cited over the years. Combined with the additional challenge presented by parking reaching capacity at the busiest times of the Christmas period, feedback provided by the BID, suggested that regular customers delayed or cancelled shopping trips or visits to the hairdresser or dentist and loyal, high-value local shoppers went elsewhere impacting detrimentally on local retailers and other businesses
- 2.5 Although supportive of the idea of markets in broad terms, the BID has consistently called for the markets to be reduced in number and removed from the High Street. This does not apply to any of the Sunday markets which enjoy universal support from retailers and are considered to attract new shoppers into the city.

## 3 The Markets Review

- 3.1 At a meeting with the BID in January to discuss the experience of Christmas 2015, the Portfolio Holder for Local Economy agreed to gather evidence about the impact of the markets on the year-round businesses in central Winchester. This will inform a report for Cabinet on 29 March 2016, ahead of the annual renewal month (May) of the current markets operator.

- 3.2 The original market plans were intended to be temporary, with the development of Silver Hill at that time offering imminent new opportunities. Given the situation in relation to Silver Hill, this was a logical time to take stock of the markets and discuss with Cabinet colleagues what changes might be desirable.
- 3.3 Because of the impact on business in the city centre, the Portfolio Holder felt he should lead the review, although acknowledging the markets were not part of his Cabinet responsibilities. The following elements were agreed with the Chair and Chief executive of the BID, with a view to building a factual rather than anecdotal base on which to make decisions:
- The scope of the review would not include Sunday markets, about which the BID reviews no adverse comment;
  - Given the recent commissioning of the research into visitor/shopper opinions of the markets, this would not form part of the review;
  - Evidence to be considered would include:
    - Footfall data
    - Parking occupancy figures
    - The BID's 'business barometer'
    - Feedback from Winchester Cathedral on the Christmas market.
  - The commissioning of new, independent research into the impact of the markets on BID members;
  - The review would consider the location of the markets and look for other suggestions to develop/enhance the current programme.
- 3.4 In addition to the above, the Council has received some direct feedback from residents in response to a media release about the review. This report invites Members of Town Forum to give their views on the markets as part of the review process.

#### 4 Evidence

- 4.1 Members will hear first hand the findings of The Retail Group in relation to the business impact of the market. A similar presentation is being made earlier today to the BID Forum, an open meeting for BID members. A copy of the report will be circulated to Members following the Town Forum meeting.
- 4.2 Footfall data: contrary to perception, footfall was mainly down in the central shopping area over the Christmas trading period. This reflected a national trend, averaging a 4.2% fall in footfall.

<b>Footfall monitor</b>	<b>Month</b>	<b>Up/Down on 2014</b>	<b>Percentage</b>
Lower High Street	November	Down	5.8%
The Square		Down	1.5%
Parchment Street		Down	2.9%
Lower High Street	December	Down	3.75%
The Square		Up	0.17%
Parchment Street		Down	3.4%

- 4.3 Over the whole year, footfall in the Lower High Street was down 5%. It would be difficult to argue that the market was creating congestion as a consequence of increased numbers of people.
- 4.4 The retail situation nationally is challenging, with an increasing growth of on-line shopping. Successful town centres in the coming years will be those with a diverse offering, including leisure, eateries, working places and retail, which bring people in for 'multi purpose' visits.
- 4.5 Parking use and Car Parking Strategy Refresh: The Parking Strategy, which was adopted in 2014, covers the period 2014-2018 and is due for a mid-term refresh to see if it is meeting the needs of businesses and residents. This is an action in the Local Economy Portfolio Plan for 2016/17. This will ensure that the Parking Strategy is fully aligned with the Economic Strategy. The work is particularly relevant to Winchester where there have been a number of changes to parking provision in recent times, such as the closures of Chesil Surface and Friarsgate Car Parks and the opening of the Pitt Manor Park and Ride, with more in the pipeline. The Council will be undertaking surveys in the spring to see how much capacity exists in our car parks and will be asking the public and businesses for their views relating to the success of the existing Strategy. This will form the framework for taking the refresh forward and will help develop options for changing the strategy, as required, to better meet the needs of our economy and residents."
- 4.6 From the more informal monitoring carried out throughout the year, officers believe that there is adequate parking to meet typical demand, except during the Christmas period when city centre car parks are generally full by 11am from Monday to Thursday. Again, this is not unique to Winchester with many other shopping centre car parks across the country operating at capacity at peak festive times. The BID Chair has asked for greater use of 'smart' technologies for guiding drivers to available spaces and helping them navigate the one way system.
- 4.7 The BID's Business Barometer: The quarterly Business Barometer is compiled by John Kind, Honorary Professor of Winchester Business School at the University of the Winchester, commissioned by the BID. The 17<sup>th</sup> edition was published in mid-January and opens with the words:

*“Business confidence for BID businesses (measured by the median score for their trading outlook for 2016) continues at its highest level since the ‘Barometer’ survey was launched in the Autumn of 2011.*

*Prospects for the 70 BID members answering the ‘business sentiment’ or ‘optimism’ question indicate a median score of +7 on a -10 to + 10 scale.”*

4.8 The report goes on to say:

*“The proportion of all businesses in the sample with a confidence score of at least +8 is 42%. Three months ago, the figure was 39% and nine months ago it was 34%. This means that more businesses are becoming increasingly confident about the trading outlook despite short term volatilities.”*

4.9 The Barometer does also show a 22% fall in the extent to which Christmas met the expectations of the BID businesses and sets out a number of reasons why this might have been the case, including the following:

*”On the High Street, access to shop entrances was restricted by large numbers of shoppers and the location of the market stalls.”*

4.10 But it also continues to say:

*“A number of businesses on the High Street did not refer to ‘people congestion’ and restricted access. Some businesses especially those in the Clothes and Hospitality Sectors were relatively unaffected.... And those on a route to the Cathedral Market, for example, shops in Kingsgate Village, reported very buoyant Christmas trading.”*

4.11 Despite the reduction in footfall, the median takings of the 70 businesses surveyed show year on year growth. Taken as a whole, the Barometer shows that there are localised ‘pinch points’ around the market which cause congestion and are considered to reduce trading opportunities for some retailers, but it in no way suggests that the markets are harmful to the overall business performance of the city centre.

4.12 Feedback from Winchester Cathedral’s Christmas Market: a copy of the full feedback is attached at Appendix 1. Whilst this is very useful in developing Christmas plans for 2016, only the elements relating to parking and people movements are extracted below:

- Coach numbers were 268, accounting for 8150 visitors: this compares to 264 and 7921 visitors in the previous year. There were [also] many coaches that arrived without booking in who were here to go specifically to the market, estimated to be in the region of a further 100+ coaches. This is the first time [the Cathedral has] seen this many.

- The coach parking facility was again a great success and much appreciated by the groups, drivers and companies respectively.
- The Park and Ride services also appeared to work well and the additional Sunday services were greatly appreciated.
- The very mild, wet and windy weather throughout the Christmas Market and Ice Rink period made for some challenging trading conditions. Despite this, the general feel throughout the market was that visitor numbers were very good and the overriding response was of a strong trading period compared to previous years.

4.13 Some pressure on the city centre is inevitably associated with this strong performance of the Cathedral's Christmas events – and indeed the Council invested in the development of these events at the outset precisely because these events were designed to revitalise the city's Christmas trading performance.

## 5 Next Steps

5.1 Cabinet will be asked at the end of March to consider the evidence gathered in recent weeks, and to determine the way it wishes the markets programme to evolve in response to this. Whilst this report does not seek to pre-empt the recommendations to Cabinet, options might relate to some combination of the following:

- signage
- trading days
- market opening hours
- stall locations
- product lines
- market themes.

5.2 Town Forum's contributions will form part of the evidence underpinning this Cabinet report. Any photos or case studies would be especially welcomed by officers.

## OTHER CONSIDERATIONS:

### 6 COMMUNITY STRATEGY AND PORTFOLIO PLANS (RELEVANCE TO):

6.1 The markets programme was conceived to support a vibrant local economy, in line with the Community Strategy outcomes for Economic Prosperity. It also generates a revenue stream for the Council in support of the corporate 'Efficient and Effective' outcome.



## 7 RESOURCE IMPLICATIONS:

- 7.1 There are no immediate implications arising from this report. Any changes to the markets programme proposed to Cabinet will be accompanied by their corresponding financial impact.
- 7.2 The survey carried out by The Retail Group was funded from the Economic Prosperity Commissioning Budget.

## 8 RISK MANAGEMENT ISSUES

- 8.1 There is a perceived risk from the markets programme to the wellbeing of the local economy. This review seeks to establish the accuracy of the perception and put in place measures to mitigate it if necessary.

## BACKGROUND DOCUMENTS:

[Winchester Business Improvement District Business Barometer – 17<sup>th</sup> Edition](#)

## APPENDICES:

Appendix 1: Feedback from Winchester Cathedral

## APPENDIX 1

Feedback from Winchester Cathedral

- Coach numbers this year stand at 268 accounting for 8150 visitors, this compares to 264 and 7921 in the previous year. It is worth noting that there were many coaches that arrived without booking in with us who were here to go specifically to the market. We estimated this to be in the region of a further 100+ coaches which we haven't recorded, this is the first time we've seen this many and it's a sign that companies are now familiar with the procedure and believe in the brand value of the event and the city.
- The coach parking facility was again a great success and much appreciated by the groups, drivers and companies respectively.
- The Park and Ride services also appeared to work well and the additional Sunday services were greatly appreciated, thank you for your assistance with both of these facilities.
- This at the market new traders made up nearly 25% of all those present.
- We also switched out a fifth of all chalets at the mid-point in the market to ensure repeat visitors benefited from a changing scene.
- 23 different charities, all with a local presence, benefited from free use of a chalet to fundraise during the market. The benefit was both in raising highly valuable funds and public awareness of their causes.
- Numerous school groups, choirs and local acts were invited to perform for visitors during the market period, again all raising much needed funds and profile.
- In addition to the many Christmas services within the Cathedral, this year we also hosted two outdoor community carol services in conjunction with a wide range of local church groups, both were greatly appreciated by those who attended.

- To celebrate the 10<sup>th</sup> year of the market we built a larger rink, incorporated a Christmas tree into it, redesigned the café, added additional outside and covered seating areas and increased the viewing spaces.
- We further improved the food court layout and added new local caterers selling local produce.
- We linked to the High Street by increasing the pea-lighting from the Cathedral up to the Buttercross and introducing up lighting to the trees running from the Cathedral to the Bargate (Gieves and Hawkes). This provided lovely walkways for visitors moving between the two areas.
- We also added colourful banners to the lampposts in the Outer Close to add to the festive spirit.
- Joint marketing with BID included shop posters on the high street and poster boards (including back-lit ones) at Southampton (Millbrook Road, West Quay and the airport), Portsmouth, Salisbury and Waterloo Station.
- Production of Christmas in Winchester guide and distribution of 100,000 copies.
- The very mild, wet and windy weather throughout the Christmas Market and Ice Rink period made for some very challenging trading conditions. Despite this, the general feel throughout the market was that visitor numbers were very good and the overriding response was of a strong trading period compared to previous years.

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