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STROUD SHOPPER SURVEY

Final Report

Prepared for: Stroud District Council and the towns of Stroud, Dursley, Nailsworth, and Wotton-under-Edge

Date: November 2006

1. INTRODUCTION / BACKGROUND.

Beacon Research in association with Colliers CRE were commissioned by Stroud District Council to undertake Annual pedestrian flow counts and Land use and vacancy assessments within the six market towns of Berkeley, Dursley, Nailsworth, Stonehouse, Stroud and Wotton-under-Edge and Shopper surveys in four of these towns; Dursley, Nailsworth, Stroud and Wotton-under-Edge

The assessments provide an update to surveys and analysis, carried out by the agencies, in 2005, as part of the Stroud District Market Towns Study.

The following document represents our report on the survey of Town Centre shoppers in Stroud and is directly comparable to a similar survey undertaken in 2003.

A separate report has been issued on the pedestrian flow counts, land use and vacancy assessments.

2. RESEARCH OBJECTIVES.

The primary objective of the study was to examine visitor behaviour and attitudes in relation to shopping and parking in the Town Centre. Overall we sought to provide the following information.

- Shopper profiles.
- Main stores and centres used for food shopping
- Other centres used regularly for shopping within the area
- General shopper behaviour, reasons for visiting Stroud and mode of transport used.
- Rating of current town centre facilities and environmental features
- Usage of Public spaces
- Car parks used and rating of current car park facilities. Attitudes towards limited free parking.
- General view of shopping and parking provision in the town and any desirable improvements.
- Usage and attitudes to visiting the town centre at night

3. RESEARCH METHODOLOGY.

A total of 150 shoppers were interviewed in the town centre during the period from 14th October to November 4th 2006. Interviews were conducted on Tuesdays and Saturdays

In order to provide the most accurate representation of shoppers visiting Stroud Town Centre, three different interview locations were used, as follows:

1. Church Street Car Park
2. Area of Lloyds Chemist/ Woolworths / Shoe zone.
3. London Rd

These locations were rotated throughout the interview period, with one or more locations being used on each day. Within each location respondents were chosen at random amongst visitors who had completed their shopping.

Following a meeting with Council Officers, a draft questionnaire for the survey was prepared and subsequently agreed, prior to the commencement of fieldwork. A copy of this questionnaire is enclosed with the report.

4. <u>MAIN FINDINGS.</u>

The key results from this survey are summarised as follows:

4.1 The profile of shoppers interviewed would suggest that the town currently attracts shoppers that are slightly younger than average and somewhat up market compared to the national average.

Almost 46% of shoppers are aged 44 or under and 31% are in the highest social groups.

4.2 Precisely 80% of shoppers visit the Town Centre at least once a week including 21% who visit every day.

On average, the typical visitor makes 138 visits a year to the Town Centre, or 2 to 3 visits per week

Over 41% of shoppers said that the weekly Farmers Market **does** influence the frequency of their visits to the town

4.3 Just below a half (48.7%) of all shoppers do **<u>not</u>** use any other Centre **in the area** on a regular basis.

The most popular alternatives to Stroud within in the area are Nailsworth (31.8%) and Stonehouse (17.6%).

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4.5 **Outside** the area the most popular centres visited regularly, are Gloucester (49.1%), Cheltenham (48.4%) and Cirencester (26.7%).

4.6 Shoppers choose to visit other centres both in and out of their area because of the good range of shops, both food and non-food

The choice and range of non food outlets is more important in choosing to visit centres **outside** the area

4.7 Over a third (36.9%) of local shoppers do their main food shop in Stroud Tesco. A further 16.7% use Stroud Sainsbury and 13.3% choose Waitrose.
Three quarters (74%) of shoppers use the four main stores in Stroud for their food shopping.

4.8 Safety and security in the town centre is much less likely (47.3%) to be described as good than it is in the other centres Similarly, access on foot and by car, are generally good, but 22% of shoppers describe access by public transport as poor. Opinions are divided on the retail offer, although 61% describe the range of services as good. Public toilets are particularly badly rated with 52% of shoppers describing them as poor**.**

4.9 Over two thirds (68.9%) of all shoppers believe that there are enough public spaces in the area. Having said that, 41.6% of respondents make no use of any of the public spaces available locally.

Almost two thirds (62.4%) have visited the Cinema at least once but below a half have ever used the Bowling Centre (45.5%). Usage of the Bowling centre increases to 70% amongst respondents aged 16- 24.

4.10 Shoppers were also asked to describe the environment of the town on key features, using the words Good, Average or Poor

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On most features there is a significant minority of shoppers who describe them as poor. In most cases over 35% describe them as good. In particular, the feeling of security, the cleanliness and the Internal and external signage is seen as good. Only 25.1% of shoppers describe the overall attractiveness of the town centre as good, with almost the same number describing it as poor.

4.11 Public toilets and Street cleaning would appear be an essential improvement to the town centre, ahead of more planting and more litter bins.

Over 90% of shoppers were able to nominate at least one possible improvement.

4.12 Just under half (44.7%) of those interviewed and 78% of those aged 16-34 said that they visit the town at night.

Socialising and meeting friends is the most popular reason for visiting the town centre although all three activities are enjoyed by significant numbers

Where people do not use the town centre at night this is likely to be because they don’t go out at night or because of a feeling of being unsafe.

4.13 Over a half (51.6%) of those interviewed said that their main reason for being in Stroud was to shop for goods. This includes 34.7% shopping for non food. A further 10.1% were meeting friends and relatives/ socializing, 10.1% were paying bills / visiting services and 9.9% work in the Town.

4.14 The majority (81.3%) of shoppers intended to stay no more than three hours in the town, including 32.2% staying an hour or less.

The average dwell time was 125.9 minutes

4.15 On average, shoppers in the Town Centre, spent £22.40. This increases to £25.19 on Saturday.

However since 8% of shoppers spent nothing, the actual average amongst spenders is £24.35. Almost 40% of shoppers spent more than £20 during their visit

4.16 Over 54% of visitors to the Town Centre travelled by car, but almost as many (31.3%) walked. Very few shoppers arrived by public transport.

Amongst car borne shoppers, the Cheapside car park was the most popular car park, ahead of the London Road (multi storey).

Precisely 90% of all motorists used the Car Parks, whilst only 7.1% parked on the street.

4.17 Only 46.3% of car borne shoppers say that they are willing to consider other forms of transport for traveling to Stroud

The overwhelming reason for rejecting any alterative to the car is that "*Buses are inconvenient*" (54.8%) and too infrequent (23.8%).

4.18 When asked about local parking, the amount of on-street parking spaces is regarded as poor to average rather than good. Location, design and safety in car parks are all good or average and very few shoppers could comment on the season ticket scheme. Opinions are divided on the quality of service

The most popular improvement to local parking would be for free or cheaper parking.

4.19 An overwhelming majority (83.9%) believe that the introduction of free parking after 4.00pm was a good idea.

5. DETAILED FINDINGS.

In this section of the report, we provide a more detailed analysis of the results, together with extracts from the tabulations, where appropriate.

5.1 Shopper Profile

The profile of visitors to the Town Centre is slightly younger than average and somewhat up market compared to the national average. Whilst the Tuesday and Saturday profiles are slightly different, the base samples are too small comment on their significance

Almost 46% of shoppers are aged 44 or under and 31% are in the highest social groups.

		%
AGE	16-24	15.8
	25-34	10.0
	35-44	20.0
	45-54	19.8
	55+	34.5
	Refused	-
SEX	Male	45.3
	Female	54.7
SOCIAL GRADE	AB	30.9
	C1	31.6
	C2	17.3
	DE	18.4

Note: In broad terms AB = professional and managerial occupations,
C1= Clerical
C2 = Skilled Manual
D = Unskilled Manual
E = Dependent on State benefits

Slightly less than half (47.7%) of shoppers work in the area, and amongst this group, the majority work in Stroud. (Note: The base for these figures is all shoppers, which includes those not in employment)

Area of Work	%		%
Stroud	69.0	Stonehouse	12.7
Dursley	-	Berkeley	1.9
Wotton	-	Ebley	3.8
Nailsworth	3.3	Elsewhere	9.4

5.2 General Shopping Habits

In this section of the report we deal with general shopping habits of visitors to Stroud Town Centre.
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5.2.1 Frequency of Visiting Stroud

Precisely 80% of shoppers visit the Town Centre at least once a week including 21% who visit every day.

On average, the typical visitor makes 138 visits a year to the Town Centre, or 2 to 3 visits per week.

	%
Everyday	21.1
4-5 times a week	12.2
2 – 3 times a week	21.6
Once a week	25.5
Once a fortnight	8.0
Once a month	8.2
Less Often	3.3

Average **138 visits per year**

Frequency of use seems to be reasonably similar across all the different demographic groups. However, weekday visitors are marginally more frequent users than those interviewed on Saturday.

Over 41% of shoppers said that the weekly Farmers Market **does** influence the frequency of their visits to the town.

5.2.2 Other Town Centres regularly used in / outside the area

Just below a half (48.7%) of shoppers do **not** use any other Centre in the area on a regular basis.

The most popular alternatives to Stroud within in the area are Nailsworth (31.8%), and Stonehouse (17.6%).

	% in area using regularly
Nailsworth	31.8
Dursley	6.9
Wotton	3.1
Berkeley	1.8
Stroud	8.7
Stonehouse	17.6
None of these	48.7

Outside the area the most popular centres visited regularly, are Gloucester (49.1%), Cheltenham (48.4%) and Cirencester (26.7%)

	% outside area using regularly
Cribbs Causeway	16.2
Yate	4.0
Bristol	17.1
Gloucester	49.1
Thornbury	4.2
Cheltenham	48.4
Cirencester	26.7
Swindon Town centre	7.1
Swindon Outlet Village	5.3
Tewkesbury	3.3
None of these	24.7

These figures demonstrate that the centres outside the local area are the genuine alternatives to shopping in Stroud. Less than 25% of Stroud shoppers do not visit at least one of these centres on a regular basis

5.2.3 Why Choose Other Centres

Shoppers choose to visit other centres both in and out of their area because of the good range of shops, both food and non-food.

	In Area %	**Out of Area %**
Close to home / Convenient	20.7	7.3
Close to work / Convenient	14.8	12.3
Good range of food shops / specialist shops	38.4	38.6
Good range of non-food shops	17.2	54.8
Good range of services (Post Office, Bank etc)	-	1.9
Good range of places to eat and drink	3.9	3.5
Easy to get to by car	3.4	3.2
Easy to get to by public transport	-	9.8
Cheap /easy to park	7.4	3.2
Friend/ relative lives there	6.4	2.5
Other	28.1	17.8

The choice and range of non food outlets is much more important in choosing to visit centres **outside** the area

5.2.4 ***Main Centre- Food Shopping***

Over a third (36.9%) of local shoppers do their main food shop in Stroud Tesco. A further 16.7% use Stroud Sainsbury and.13.3% choose Waitrose.

	%
Stroud, Tesco	36.9
Stroud, Sainsbury	16.7
Stroud, Watrose	13.3
Stroud Somerfield	7.1
Nailsworth, Somerfield	2.7
Wotton Under Edge Co-op	0.7
Cainscross Co-op	1.6
Cirencester Waitrose	0.9
Dursley Somerfield	1.8
Gloucester Asda	1.8
Cam, Tesco	2.4
Other	11.2

Three quarters (74%) of shoppers use the four main stores in Stroud for their food shopping. The Other category could include smaller Stroud food stores.

5.2.5 ***Rating of the Town Centre – Retail and facilities***

Shoppers were asked to describe the local retail offer and key facilities, using the words Good, Average or Poor. The results are summarised as follows:

	Good %	**Average %**	**Poor %**	**DK / NA**
Choice and quality of Non-Food shops	24.4	48.7	21.5	5.4
Choice and quality of Food Shops	36.8	34.5	23.3	5.4
Range of Services (e.g. Bank)	61.0	30.5	4.9	3.6
Public Toilets	8.3	20.9	52.0	18.8
Accessibility by public transport	25.4	26.5	21.9	26.2
Accessibility by car	41.5	30.9	13.9	13.7
Accessibility by foot / cycle	57.6	22.4	7.4	12.6
Security/personal safety	47.3	33.2	9.9	9.6

Note: DK/ NA includes all those offering no opinion on a feature or service. This may be because they never use a service, do not have a car, or the town does not have that feature

Safety and security in the town centre is much less likely (47.3%) to be described as good than it is in the other centres Similarly, access on foot and by car, are generally good, but 22% of shoppers describe access by public transport as poor. Opinions are divided on the retail offer, although 61% describe the range of services as good. Public toilets are particularly badly rated with 52% of shoppers describing them as poor**.**

When asked, which types of retailers, services or products they would like to see in Stroud, over 90% of shoppers were able to make at least one suggestion.

	%
None / cant think of any	9.1
Greater choice of clothes / shoes	40.7
More chain stores	15.1
More specialist stores	26.2
More food shops	16.2
More places to eat / drink	5.1
Public toilets	25.3
Baby changing and feeding area	2.9
Street entertainment	13.1
More Police	14.4
More leisure/entertainment facilities (e.g. cinema, gym etc)	4.4
Other	15.1

The first point to make is that a very high proportion of respondents were able to nominate potential additions to the retail mix. In normal circumstances at least half of those interviewed claim that they are quite happy with the current situation.

Secondly, it is very clearly evident from the response that the most critical shortfall in the local retail offer is in the area of clothes and shoe stores, mentioned by 41% of shoppers. A further 26% mentioned more specialist stores. In terms of services, public toilets were the main priority.

Shoppers were also asked about the new Cinema and Bowling Centre.
Almost two thirds (62.4%) have visited the Cinema at least once but below a half have ever used the Bowling Centre (45.5%). Usage of the Bowling centre increases to 70% amongst respondents aged 16- 24.

Frequency of visits	**Cinema**	**Bowling Centre**
	%	**%**
Once	13.6	13.8
2/3 times	22.8	12.9
4/5 times	7.9	6.6
More than 5 times	20.4	13.1
Never	37.6	54.5

5.2.6 Public Spaces

Over two thirds (68.9%) of all shoppers, believe that there are enough public spaces in the area. Nevertheless, 41.6% of respondents make no use of any of the public spaces available, locally.

Public Spaces used	**%**
None	41.6
Stroud Park Gardens	24.2
Stroud Bank Gardens	24.4
Stroud, Subscription Rooms Forecourt,Top of town, Stroud Parliament Street Stroud	14.9
Stratford Park	16.0
Park by church	3.2
Other	5.6

The main uses made of public spaces are 'Take children to play' 'walk' and 'Picnic'

5.2.7 Rating of the Town Centre – Environment

Shoppers were also asked to describe the environment of the town on key features, using the words Good, Average or Poor
The results are summarised as follows:

	Good %	**Average %**	**Poor %**	**DK / NA**
Cleanliness	24.1	49.5	25.4	1.0
Seating areas and benches	34.7	37.7	22.9	4.7
Amount of litter bins	39.4	36.5	18.2	5.9
Overall Attractiveness	25.1	50.0	24.9	-
Feeling of security	45.3	40.6	13.1	1.0
Signage (to and from town centre)	40.4	32.8	6.7	20.2
Signage (in around town centre)	37.9	33.5	12.8	15.8
Lighting	45.1	32.3	6.4	16.3

Note: DK/ NA includes all those offering no opinion on a feature. This may be because they never use the feature, or the town does not have that feature

On most the features there is a significant minority of shoppers who describe them as poor. In most cases however over 35% describe them as good. In particular, the feeling of security, the cleanliness and the Internal and external signage is seen as good. Only 25.1% of shoppers describe the overall attractiveness of the town centre as good, with almost the same number describing it as poor.

5.2.7 *Improvements to the Town Centre – Environmental*

Finally, shoppers were asked what improvements to the environment of the town centre they would like to see.

Over 90% of shoppers were able to nominate at least one possible improvement

	%
None / DK / Cant think of any	7.8
Public / toilets / Street cleaning	55.6
More seating areas and benches	17.1
More Planting	29.3
More Litter Bins	22.0
CCTV	18.7
More facilities for the disabled	11.3
Other	20.5

Note: None /DK includes all those unable to make any suggested improvements.

Public toilets and Street cleaning would appear to be an essential improvement, ahead of more planting and more litter bins.

5.2.8 *The Town Centre at night*

Just below half (44.7%) of those interviewed and 78% of those aged 16-34 said that they visit the town at night.

Main reason for visiting	**%**
To socialise	70.0
To visit places to eat/drink	64.2
To visit leisure/entertainment facilities	43.5
Other	5.2

Socialising and meeting friends is the most popular reason for visiting the town centre although all three activities are enjoyed by significant numbers

Where people do not use the town centre at night this is likely to be because they don't go out at night or because of a feeling of being unsafe.

	%
I don't go out in the evenings	49.0
Too far away from home	9.8
Feels unsafe	27.0
Not enough places to eat/drink	4.5
Not enough entertainment/ leisure facilities	9.0
Lack of public transport, Not enough cultural activities Nothing for my age group	6.1
Other	4.5

Where they say that they feel unsafe, this is mainly because of the presence of too many youths and not enough police.

Why feel unsafe?	**%**
Not enough police	41.1
Too many youths	75.0
Poor street lighting	5.4
No CCTV	12.5
Other	17.9

5.3 About this Visit

The following comments relate specifically to the shopping trip undertaken at the time of interview

5.3.1 Reason for Visiting Stroud

Just over half (51.6%) of those interviewed said that their main reason for being in Stroud was to shop for goods. This includes 34.7% shopping for non food. A further 10.1% were meeting friends and relatives/ socializing, 10.1% were paying bills / visiting services and 9.9% work there.

	Main reason %	**Other reason %**
Food shopping (Supermarket)	6.8	6.7
Food shopping (Other)	10.1	14.9
To shop for non-food goods	34.7	28.7
Work here	9.9	0.7
Pay bills / visit services	10.1	10.0
Visiting places to eat or drink	2.8	3.8
Visit Doctor / Optician / Chemist	2.3	0.9
Meet friends / Relatives	10.1	3.3
Other	13.0	19.3

Similarly, the ‘other’ reasons given for being in Stroud were dominated by shopping for goods, although 10.0% were paying bills / visiting services.

5.3.2 Length of visit

The majority (81.3%) of shoppers intended to stay no more than three hours in the town, including 32.2% staying an hour or less. The average dwell time was 125.9 minutes.

	%
Less than 30 minutes	13.3
30 minutes to 1 hour	18.9
1 – 2 hours	31.3
2 – 3 hours	17.8
3 – 4 hours	7.6
4 – 8 hours	7.8
8 hours or more	3.3
Average Visit	**125.9 mins**

5.3.3 Average Spend

On average, shoppers in the Town Centre spent £22.40. This increases to £25.19 on Saturday.

Amount Spent	%
Nothing	8.0
Less than £10	21.8
£10 - £19.99	20.7
£20 - £49.99	30.4
£50+	19.1

However since 8.0% of shoppers spent nothing, the actual average amongst spenders is £24.35. Almost 50% of shoppers spent more than £20 during their visit

5.3.4 Mode of transport

Over 54% of visitors to the Town Centre travelled by car, but almost as many (31.3%) walked. Very few arrived by public transport

	%
Car – Driver	50.9
Car – Passenger	3.2
Bus	10.1
Walked	31.3

This pattern is reasonably typical of a Town the size of Stroud although we might have expected more bus passengers and fewer shoppers walking into the centre. This may indicate that the catchment area for the Town is relatively small.

5.4 Parking

A number of questions were asked specifically of car borne shoppers which related to car parking and car parking charges.

5.4.1 Parking Location

The Cheapside car park was the most popular car park, ahead of the London Rd (Multi storey).

	%		%
Car Park – Cheapside	20.4	Car Park – Church St	8.8
Car Park – NCP Multi storey	11.7	Car Park – Stroud Station	5.0
Car Park- Parliament St	3.3	Other Car Park	13.8
Car Park – London Rd (Surface)	11.2	On the Street	7.1
Car Park– London Rd (Multi storey)	15.8	Dropped off	2. 9

Precisely 90% of all motorists used the Car Parks, whilst only 7.1% parked on the street.

5.4.2 *Alternative Transport*

Only 46.3% of car borne shoppers say that they are willing to consider other forms of transport.
The overwhelming reasons for rejecting any alterative to the car is that "*Buses are inconvenient*" (54.8%) *and "too infrequent" (23.8%).*

5.4.4 Rating of Car Parks – Key Features

All shoppers were also asked to describe local car parking on a number of key features, using the words Good, Average or Poor. The results are summarised as follows:

	Good %	**Average %**	**Poor %**	**DK / NA**
Amount of on-street parking spaces	14.7	17.1	49.3	18.9
Amount of car parking spaces	34.8	32.5	19.3	13.5
Season ticket scheme in Council car parks	5.1	7.3	6.4	81.1
Price of Council car parks	20.7	30.2	18.2	30.9
Payment method	24.0	27.3	14.4	34.2
Frequency of patrols in Council car parks	4.9	9.1	10.4	75.6
Friendliness and helpfulness of staff in Council car parks	9.3	9.6	10.4	70.7
Location	37.4	36.6	11.0	15.0
Design / layout	25.3	38.9	13.6	22.2
Safety / Security	19.0	33.8	14.8	32.4
Quality of service	12.3	34.7	13.4	39.6

Note: DK/ NA includes all those offering no opinion on a feature. This may be because they never use the feature, do not have a car, or the town does not have that feature

The amount of on-street parking spaces is regarded as poor to average rather than good. Location, design and safety are all good or average but very few shoppers could comment on the season ticket scheme. Opinions are divided on the quality of service

5.4.5 Improvements to Car Parks

All shoppers were finally asked what improvements were needed to local car parks.

	%
DK / Cant think of anything	43.8
More Car Parks	20.2
More / better disabled parking	4.4
Free / cheaper parking	40.1
Other	11.5

Note: None /DK includes all those unable to make any suggested improvements.

The most notable requirement is for Free/ cheaper parking, mentioned by 40% of shoppers. Amongst “others” were a large number of different individual answers.

Finally, shoppers were asked to comment upon the idea of introducing free car parking after 4.0pm. An overwhelming majority (83.9%) thought it a good idea.

	%
Very good idea	66.4
Quite a good idea	17.5
Not a very good idea	5.4
Poor idea	4.0
DK / No opinion	6.7

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