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DURSLEY 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 Dursley 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 Wotton 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 possible park and ride facility.
- 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 Dursley Town Centre, two different interview locations were used, as follows:

1. Market Hall, Parsonage St

2. Barclays Bank, Parsonage St

These locations were rotated throughout the interview day, 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 older than average and somewhat up market compared to the national average.

Almost 47% of shoppers are aged 55 or over and 32% are in the highest social groups.

4.2 Precisely 84.5% of shoppers visit the Town Centre at least once a week including 23% who visit everyday.

On average, the typical visitor makes 131 visits a year to the Town Centre, more than 2 visits per week

4.3 Just below a half (44.4%) of shoppers do **<u>not</u>** use any other Centre **in the area** on a regular basis.

The most popular alternatives to Dursley within in the area are Stroud (42.2%), Wotton (14.7%) and Nailsworth (13.4%).

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4.5 **Outside** the area the most popular centres visited regularly, are Gloucester (56.2%), Cribbs Causeway (45.5%) and Bristol (32.1%).

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 both inside and outside the area

4.7 Almost a half (46.3%) of local shoppers undertake their main food shop in Cam -Tesco. A further 12.1% use Somerfield in Dursley.

Almost a half of all shoppers use Tesco, Cam for their food shopping, whilst 16.8% choose the three main Stroud stores and only 12% use the main Dursley Supermarket.

4.8 Safety and security in the town centre is described as good by almost 88% of shoppers (99% of those offering an opinion). Similarly, access on foot and by car, are generally good, but 45% of shoppers describe choice and quality of non-food shops as poor. The range of services are good, rather than poor but 25.5% of shoppers describe the Public Toilets as poor.

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4.9 More than half (61.0%) of all shoppers, believe that there are enough public spaces in the area. Having said that, 61.7% of respondents make no use, of any of the public spaces available locally.

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

Of all the features almost a half (49.2%) regard overall attractiveness as poor and a third (33.9%) say that cleanliness is poor. However, the feeling of security, seating areas and the Internal and external signage are all seen as good.

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4.11 Public toilets and More Planting would be the most popular improvements to the town centre, ahead of litter bins and more seating.

Almost 80% of shoppers were able to nominate at least one possible improvement.

4.12 Almost three quarters (72.5%) of those interviewed said they do not visit the town at night and this falls to 50% of those aged 16-34.

"Socialising and meeting friends" is the most popular reason for visiting the town centre although very few visit for leisure/ entertainment(4.9%).

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 lack of facilities rather than any feeling of being unsafe

4.13 Over a half (55.6%) of those interviewed said that their main reason for being in Dursley was to shop for goods. This includes 34% shopping for food. A further 20.4% were paying bills / visiting services, 9.4% work in the Town and 9.4% were using health care facilities.

4.14 The majority (92.5%) of shoppers intended to stay no more than two hours in the town, including 78.4% staying an hour or less.

The average dwell time was 66 minutes

4.15 On average, shoppers in the Town Centre, spent £17.35. This increases to £19.58 on Saturday.

However since 10.2% of shoppers spent nothing, the actual average amongst spenders is £19.32. Almost 33% of shoppers spent more than £20 during their visit

4.16 Over 59% of visitors to the Town Centre travelled by car, and 45.3% walked
Amongst car borne shoppers, the Castle Street car park was the most popular car park, by some considerable margin, ahead of May Lane.

Over 84% of all motorists used the Car Parks, whilst only 9.3% parked on the street.

4.17 Over 95% of car borne shoppers say that free parking is important to them in choosing to visit Dursley.

Perhaps because of this, only 28.6% were prepared to consider taking shuttle bus to the centre of the town

4.18 Again, only 39.6% of car borne shoppers say that they are willing to consider other forms of transport for traveling to Dursley.

The overwhelming reason for rejecting any alterative to the car is that "*Buses are inconvenient*" (78.7%).

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

The most popular improvement to local parking would be more car parks

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 older than average and slightly 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 50% of shoppers are aged 55 or over and 32% are in the highest social groups.

		%
AGE	16-24	8.7
	25-34	11.4
	35-44	16.1
	45-54	16.8
	55+	47.0
	Refused	-
SEX	Male	26.0
	Female	74.0
SOCIAL GRADE	AB	32.2
	C1	31.6
	C2	15.4
	DE	18.1

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

Only 43.6% of shoppers work in the area, and amongst this group, the majority work in Dursley. (Note: The base for these figures is all shoppers, which includes those not in employment)

Area of Work	**%**		**%**
Stroud	12.6	Stonehouse	7.9
Dursley	52.4	Berkeley	11.1
Wotton	11.1	Ebley	-
Nailsworth	-	Elsewhere	4.8

5.2 General Shopping Habits

In this section of the report we deal with general shopping habits of visitors to Dursley Town Centre.

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5.2.1 Frequency of Visiting Dursley

Almost 85% of shoppers visit the Town Centre at least once a week including 23% who visit everyday.

On average, the typical visitor makes 131 visits a year to the Town Centre, more than 2 visits per week.

	%
Everyday	22.8
4-5 times a week	5.4
2 – 3 times a week	21.5
Once a week	34.8
Once a fortnight	4.7
Once a month	6.0
Less Often	4.8
Average	**131 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.

5.2.2 Other Town Centres regularly used in / outside the area

Just below a half (44.4%) of shoppers do **not** use any other Centre in the area on a regular basis.

The most popular alternatives to Dursley within in the area are Stroud (42.2%), Wotton (14.7%) and Nailsworth (13.4%).

	% in area using regularly
Stroud	42.2
Wotton	14.7
Nailsworth	13.4
Berkeley	8.1
Stonehouse	7.4
None of these	44.4

Outside the area the most popular centres visited regularly, are Gloucester (56.2%), Cribbs Causeway (45.5%) and Bristol (32.1%)

	% outside area using regularly
Gloucester	56.2
Cribbs Causeway	45.5
Bristol	32.1
Cheltenham	21.4
Yate	6.7
Thornbury	5.4
Cirencester	5.4
Swindon Town centre	1.3
Swindon Outlet Village	-
Tewkesbury	0.7
None of these	15.6

These figures demonstrate that the centres outside the local area are the genuine alternatives to shopping in Dursley. Less than 16% of Dursley 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	6.4	-
Close to work / Convenient	10.1	0.8
Good range of food shops / specialist shops	24.2	37.7
Good range of non-food shops	60.6	44.4
Good range of services (Post Office, Bank etc)	2.6	0.8
Good range of places to eat and drink	1.3	6.5
Easy to get to by car	-	16.3
Easy to get to by public transport	-	-
Cheap /easy to park	3.8	17.1
Friend/ relative lives there	5.1	2.5
Other	3.9	11.5

The choice and range of non food outlets is the most important factor in choosing to visit centres inside and outside the area.

5.2.4 *Main Centre- Food Shopping*

Almost a half (46.3%) of local shoppers do their main food shop in Cam Tesco. A further 12.1% use Somerfield in Dursley.

	%
Cam, Tesco	46.3
Dursley, Somerfield	12.1
Yate, Tesco	2.0
Yate, Morrisons/ Somerfield	0.7
Quedgely, Tesco	2.7
Stroud, Watrose	6.7
Stroud, Sainsbury	5.4
Stroud, Tesco	4.7
Internet	1.4
Local Village Shop	6.7
Cribbs Causeway, Asda	1.3
Gloucester, Asda	2.0
Other	8.0

Almost a half of all shoppers use Tesco, Cam for their food shopping, whilst 16.8% choose the three main Stroud stores and only 12% use the main Dursley Supermarket. The other category could include the smaller Dursley food stores

5.2.5 *Rating of Town Centre – Retail and facilities*

Shoppers were asked to rate 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	24.1	30.8	45.0	-
Choice and quality of Food Shops	20.8	40.2	39.0	-
Range of Services (e.g. Bank)	63.8	26.2	4.0	6.0
Public Toilets	8.1	22.2	25.5	44.2
Accessibility by public transport	13.4	16.1	20.1	50.4
Accessibility by car	68.7	21.7	5.5	4.1
Accessibility by foot / cycle	75.1	11.4	3.4	10.1
Security/personal safety	87.2	7.4	4.7	0.7

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 described as good by over 87% of shoppers (88% of those offering an opinion). Similarly, access on foot and by car, are both generally good, but 45% of shoppers describe the choice and quality of non-food shops as poor. The range of services are good rather than poor but 25.5% of shoppers describe the Public Toilets as poor.

When asked to describe the choice of retailers, services or products they would like to see in Dursley, over 90% of shoppers were able to make at least one suggestion.

	%
None / cant think of any	8.1
Greater choice of clothes / shoes	58.3
More chain stores	22.0
More specialist stores	38.8
More food shops	23.6
More places to eat / drink	19.4
Public toilets	2.7
Baby changing and feeding area	3.3
Street entertainment	2.0
More Police	3.3
More leisure/entertainment facilities (e.g. cinema, gym etc)	9.3
Other	17.5

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 58% of shoppers. A further 38.8% mentioned more specialist stores. In terms of services, more Leisure/ Entertainment facilities was the main priority

5.2.6 <u>Public Spaces</u>

More than 60% of all shoppers believe that there are enough public spaces in the area. Having said that, 61.7% of respondents make no use of any of the public spaces available locally. The main area used was the Recreation Ground.

Public Spaces used	**%**
None	61.7
The Recreation Ground	29.3
The Park / Highfield Park	5.0
Other	4.0

The main uses made of public spaces are ‘Take children to play’ ‘walk’ and ‘Exercise the dog’

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	16.9	49.1	33.9	-
Seating areas and benches	43.7	33.8	17.8	4.7
Amount of litter bins	30.7	41.5	21.6	6.2
Overall Attractiveness	18.5	31.5	49.2	0.8
Feeling of security	80.8	12.3	6.9	-
Signage (to and from town centre)	56.8	29.9	0.8	12.5
Signage (in around town centre)	57.6	28.4	2.3	11.7
Lighting	46.8	23.8	6.9	22.4

Note: DK/ NA includes all those offering no opinion on a feature.

Of all the features almost a half (49.2%) regard overall attractiveness as poor and a third (33.9%) say that cleanliness is poor. However, the feeling of security, seating areas and the Internal and external signage are all seen as good.

5.2.8 Improvements to the Town Centre – Environmental

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

	%
None / DK / Can't think of any	17.4
Public / toilets / Street cleaning	43.6
More seating areas and benches	16.2
More Planting	30.2
More Litter Bins	18.8
CCTV	11.5
More facilities for the disabled	7.4
Other	15.5

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

Public toilets / Street cleaning and more planting would be the most popular improvements, ahead of more litter bins and more seating areas.

Almost 80% of shoppers were able to nominate at least one possible improvement.

5.2.9 The Town Centre at night

Only 27.5% of those interviewed said that they visit the town at night This increases to 50% amongst those aged 16-34.

Main reason for visiting	**%**
To socialise	82.9
To visit places to eat/drink	46.4
To visit leisure/entertainment facilities	4.9
Other	7.3

Socialising and meeting friends is the most popular reason for visiting the town centre although 46.4% also visit places to eat/drink.

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 lack of facilities rather than any feeling of being unsafe.

	%
I don't go out in the evenings	39.5
Not enough places to eat or drink	12.4
Not enough entertainment/ leisure facilities	12.4
Too far away from home	1.9
Feels unsafe	5.7
Lack of public transport, Not enough cultural activities Nothing for my age group	12.4
Other	31.0

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 Dursley

Just over a half (55.6%) of those interviewed said that their main reason for being in Dursley was to shop for goods. This includes 34.3% shopping for food. A further 20.4% were paying bills / visiting services, 9.4% work in the Town and a further 9.4% were using health care services.

	Main reason %	**Other reason %**
Food shopping (Supermarket)	10.0	12.8
Food shopping (Other)	24.3	26.8
To shop for non-food goods	21.3	34.8
Work here	9.4	-
Pay bills / visit services	20.4	4.1
Visiting places to eat or drink	-	0.7
Visit Doctor / Optician / Chemist	9.4	1.4
Meet friends / Relatives	1.2	1.3
Other	3.0	12.0

On Saturday, the numbers shopping for goods increases to 72%.

Similarly, the 'other' reasons given for being in Dursley were dominated by shopping for goods, although 5.5% were paying bills / visiting services.

5.3.2 Length of visit

The majority (92.5%) of shoppers intended to stay no more than two hours in the town, including 78.4% staying an hour or less. The average dwell time was 66 minutes

	%
Less than 30 minutes	42.9
30 minutes to 1 hour	35.5
1 – 2 hours	14.1
2 – 3 hours	0.7
3 – 4 hours	-
4 – 8 hours	2.7
8 hours or more	4.1
Average Visit	**66.1 mins**

5.3.3 Average Spend

On average, shoppers in the Town Centre spent £17.35. This increases to £19.58 on Saturday.

Amount Spent	%
Nothing	10.2
Less than £10	34.2
£10 - £19.99	22.8
£20 - £49.99	22.1
£50+	10.7

However since 10.2% of shoppers spent nothing, the actual average amongst spenders is £19.32. Almost 33% of shoppers spent more than £20 during their visit

5.3.4 Mode of transport

Over 59% of visitors to the Town Centre travelled by car and 34.9% walked.

	%
Car – Driver	52.0
Car – Passenger	7.6
Bus	3.4
Walked	34.9

This pattern is reasonably typical of a Town the size of Dursley 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 Dursley Castle Street car park was the most popular car park, by some considerable margin, ahead of May Lane .

	%		%
Car Park – Castle St	67.8	Car Park– May Lane	10.3
Car Park – Broadwell	3.4	On the Street	9.3
Car Park – Rackfield	3.4	Dropped off	3.5
Other	2.3		

Over 84% of all motorists used the Car Parks, whilst only 9.3% parked on the street.

5.4.2 Free Parking / Park and Ride

Over 95% of car borne shoppers say that free parking is important to them in choosing to visit Dursley.

	%
Very Important	88.4
Quite Important	6.9
Not very important	2.3
Not important at all	2.3

Perhaps because of this, only 28.6% were prepared to take a shuttle bus to the centre of the town

5.4.3 *Alternative Transport*

Once again, only 39.6% of car borne shoppers say that they would be willing to consider other forms of transport.
The overwhelming reason for rejecting any alterative to the car is that "*Buses are inconvenient*" (78.7%)

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 may be summarized as follows:

	Good %	**Average %**	**Poor %**	**DK / NA**
Amount of on-street parking spaces	44.4	25.0	24.5	6.2
Amount of car parking spaces	60.1	29.7	7.4	2.7
Price of Council car parks	21.8	1.7	-	76.6
Frequency of patrols in Council car parks	2.4	1.6	4.0	92.0
Friendliness and helpfulness of staff in Coun car parks	0.8	2.4	1.6	95.2
Location	74.4	19.5	3.4	2.7
Design / layout	58.7	22.3	14.9	4.1
Safety / Security	35.3	25.8	11.7	27.2
Quality of service	9.7	7.4	2.5	80.5

Note: DK/ NA includes all those offering no opinion on a feature or service.

The amount of on-street parking spaces is regarded as poor by 24.5% of shoppers. Location, design and safety are all good or average but very few shoppers could comment on the service features.

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	51.4
More Car Parks	15.7
More / better disabled parking	8.2
Free / cheaper parking	10.9
Better Access (roads)	8.9
More/ better mother and child parking	3.4

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

The most notable requirement is for more Car Parks, mentioned by 15.7% of shoppers. The small numbers mentioning cheaper / free parking are, presumably amongst those not aware of the current situation.

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Appendices