BEACON RESEARCH

Suite 3, The Resource Centre,
Bridge Street, Garstang,
Lancs. PR3 1YB.
Tel: 01995 606330
Fax: 01995 605336
Email: gurth@beaconresearch.idps.co.uk
VAT Reg No: 712347851

NAILSWORTH 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 Nailsworth 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.

Note :Sampling Error / Confidence Intervals

The respondents who complete this survey are only a sample of the total ‘population’. We cannot therefore be certain that the figures obtained are exactly those we would have obtained if everybody had been interviewed (A Census). However, we can predict the variation between the sample results and the ‘true’ values from the size of the samples on which the results are based and the number of respondents who give a particular answer. The confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 19 in 20 that the ‘true’ value will fall within a given range. The table below illustrates the predicted ranges for different sample sizes and percentages results at the ‘95% confidence interval’, based on a random sample.

	Confidence Limits		
Sample Size	**10% / 90%**	**30% / 70%**	**50%**
	±	**±**	**±**
100	5.9%	9.0%	9.8%
200	4.2%	6.4%	6.9%
300	3.4%	5.2%	5.7%
500	2.6%	4.0%	4.4%
1000	1.9%	2.8%	3.0%
1500	1.5%	2.3%	2.5%

Thus, the confidence interval (or margin of error) is by how much the survey result could vary and still be considered to reflect the ‘true’ result that would have been recorded if everyone in the population had been surveyed.

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 Nailsworth 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 Nailsworth Town Centre, two different interview locations were used, as follows:

1. Somerfield Car Park
2. Bus Station.

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. MAIN FINDINGS.

The key results from this survey are summarized 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 43% of shoppers are aged 55 or over and 39.5% are in the highest social groups.

4.2 Almost 75% of shoppers visit the Town Centre at least once a week including 28% who visit every day.

On average, the typical visitor makes 156 visits a year to the Town Centre, or 3 visits per week

4.3 A third (31.1%) of shoppers do **not** use any other Centre **in the area** (i.e. the six towns) on a regular basis.

The most popular alternative to Nailsworth within in the area is Stroud (59.0%). None of the other centres are used by more than 10% of shoppers.

.

4.5 **Outside** the area the most popular centres visited regularly, are Cheltenham (40%), Gloucester (29.1%) and Cirencester (26%).

4.6 Shoppers choose to visit other centres both in and out of the 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 Almost 36% of local shoppers do their main food shop in Nailsworth including 20% who shop at Somerfield and 11.4% who use Nailsworth Coop.

Almost 40% of shoppers choose the main stores in Stroud. The proximity of Stroud quite clearly impacts on local food retailing.

4.8 Safety and security in the town centre is described as good by almost 79% of shoppers (83% of those offering an opinion). Similarly, access on foot and by car, are generally good, but only 42% of shoppers describe access by public transport as good. The retail offer is seen as good by three quarters of shoppers despite their relatively high use of other centres.

.

4.9 Over 64% of shoppers, believe that there are enough public spaces in the area. Having said that, 61.6% 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

.

On all the features there are only a minority of shoppers who describe any as poor. In most cases over 70% describe them as good or average. In particular, the feeling of security, the cleanliness and the Internal and external signage is seen as good and 70.4% of shoppers describe the overall attractiveness of the town centre as good

4.11 Public toilets and Street cleaning would be the most popular improvements to the town centre, ahead of more litter bins and more planting.

Almost 70% of shoppers were able to nominate at least one possible improvement.

4.12 Only 42% of those interviewed and 21.5% of those aged 16-34 said that they visit the town at night.

The overwhelming reason for visiting the town centre was to visit places to eat/drink although 50% also mentioned socializing.

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 distance rather than any feeling of being unsafe

4.13 Almost two thirds (66.5%) of those interviewed said that their main reason for being in Nailsworth was to shop for goods. This includes 40% shopping for food. A further 5.3% work in the Town and 4.8% were visiting the Doctor/ Optician/ Chemist.

4.14 The majority (87.4%) of shoppers intended to stay no more than two hours in the town, including 63.2% staying an hour or less. This may reflect the current time limits for free parking.

The average dwell time was 74 minutes

4.15 On average, shoppers in the Town Centre spent £22.07. This increases to £27.20 on Saturday.

However since 5.8% of shoppers spent nothing, the actual average amongst spenders is £23.42. Over 40% of shoppers spent more than £20 during their visit

4.16 Over 67% of visitors to the Town Centre travelled by car, and a further 25.9% walked.
Amongst car borne shoppers, the Old Market Street Bays were the most popular places to park ahead of the Old Market Car Park.

Over 63% of all motorists used the Car Parks, whilst a further 43.7% parked on the street.

4.17 Over 87% of car borne shoppers say that free parking is important to them in choosing to visit Nailsworth.

Perhaps because of this, only 34.6% were prepared to consider taking shuttle bus to the centre of the town

4.18 Again, only 41.7% of car borne shoppers say that they are willing to consider other forms of transport for traveling to Nailsworth

The overwhelming reason for rejecting any alterative to the car is that "*Buses are inconvenient*" (66%). This reflects the opinions expressed earlier in **4.8** on access by public transport.

4.19 When asked about local parking, the amount of car parking spaces and on-street parking spaces is regarded as good rather than poor. 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, mentioned by 24% of shoppers.

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 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 43% of shoppers are aged 55 or over and 40% are in the highest social groups.

		%	uk
AGE	16-24	7.8	15.1
	25-34	12.0	17.5
	35-44	21.5	18.4
	45-54	15.8	16.3
	55+	42.9	32.7
	Refused	-	
SEX	Male	46.3	48.6
	Female	53.7	51.4
SOCIAL GRADE	AB	39.5	25.2
	C1	34.0	28.0
	C2	14.1	20.8
	DE	12.4	26.0

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

Only 29% of shoppers work in the area, and amongst this group, 40% work in Nailsworth. A further 20% work in Stroud (Note: The base for these figures is all shoppers which includes those, not in employment)

Area of Work	**%**		**%**
Stroud	20.1	Stonehouse	9.0
Dursley	3.5	Berkeley	5.5
Wotton	3.7	Ebley	-
Nailsworth	39.9	Elsewhere	18.3

5.2 General Shopping Habits

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

5.2.1 Frequency of Visiting Nailsworth

Almost 75% of shoppers visit the Town Centre at least once a week including 28% who visit everyday.

On average, the typical visitor makes 156 visits a year to the Town Centre, or 3 visits per week.

	%
Every day	27.7
4-5 times a week	13.5
2 – 3 times a week	22.5
Once a week	11.1
Once a fortnight	6.8
Once a month	5.2
Less Often	13.2
Average	**156 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

A third (31.1%) of shoppers do **not** use any other Centre in the area (i.e. the six towns) on a regular basis.

The most popular alternative to Nailsworth within in the area is Stroud (59.0%). None of the other centres are used by more than 10% of shoppers

	% in area using regularly
Stroud	59.0
Dursley	7.2
Wotton	7.8
Berkeley	2.1
Stonehouse	9.3
None of these	31.1

Outside the area the most popular centres visited regularly, are Cheltenham (40%), Gloucester (29.1%) and Cirencester (26%)

	% outside area using regularly
Cribbs Causeway	22.0
Yate	2.1
Bristol	20.8
Gloucester	29.1
Thornbury	2.6
Cheltenham	40.0
Cirencester	26.3
Swindon Town centre	3.6
Swindon Outlet Village	2.6
Tewkesbury	2.6
None of these	28.2

These figures quite clearly demonstrate that the centres outside the local area are less of an alternative than Stroud for Nailsworth shoppers. Over 28% of Nailsworth shoppers do not visit at least one of these centres on a regular basis

Only 13.9% of shoppers do not regularly visit some other centre <u>either inside or outside the area</u>. This is the group for whom Nailsworth satisfies all their shopping needs

5.2.3 <u>Why Choose Other Centres</u>

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	14.0	5.2
Close to work / Convenient	10.8	11.9
Good range of food shops / specialist shops	29.1	29.1
Good range of non-food shops	33.9	**60.7**
Good range of services (Post Office, Bank etc)	10.0	5.8
Good range of places to eat and drink	3.9	10.1
Easy to get to by car	8.2	10.1
Easy to get to by public transport	3.8	*
Cheap /easy to park	2.3	4.3
Friend/ relative lives there	3.9	2.9
Other	13.3	5.2

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

5.2.4 *Main Centre- Food Shopping*

Almost a third (31.4%) of local shoppers do their main food shop in the two main local stores including 20% who shop at Somerfield and 11.4% who use Nailsworth Coop. A further 4.4% use other Nailsworth stores. Almost 40% of shoppers choose the main stores in Stroud

	%
Nailsworth, Somerfield	20.0
Nailsworth Co-op	11.4
Nailsworth - Other	4.4
Stroud, Sainsbury	14.6
Stroud, Tesco	14.5
Stroud, Waitrose	9.4
Stroud, Iceland	1.0
Dursley, Somerfield	2.6
Cirencester – Waitrose / Tesco	3.2
Tetbury(Any)	2.5
Internet	1.5
Other	8.9
None in particular / varies	7.9

5.2.5 *Rating of 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	74.8	17.8	3.6	3.7
Choice and quality of Food Shops	76.9	16.3	3.1	3.7
Range of Services (e.g. Bank)	53.1	26.7	6.3	13.8
Public Toilets	27.9	22.0	12.7	37.4
Accessibility by public transport	42.4	10.5	10.5	36.5
Accessibility by car	69.7	19.3	8.9	2.1
Accessibility by foot / cycle	67.6	14.0	3.1	15.3
Security/personal safety	78.6	14.5	1.5	5.3

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 almost 79% of shoppers (83% of those offering an opinion). Similarly, access on foot and by car, are generally good, but only 42% of shoppers describe access by public transport as good. The retail offer is seen as good by three quarters of shoppers despite their relatively high use of other centres

When asked, which types of retailers, services or products they would like to see in Nailsworth, over 70% of shoppers were able to make at least one suggestion.

	%
None / cant think of any	30.0
Greater choice of clothes / shoes	27.7
More chain stores	8.2
More specialist stores	11.5
More food shops	7.2
More places to eat / drink	7.2
Public toilets	4.3
Baby changing and feeding area	3.1
Street entertainment	1.1
More Police	8.3
More leisure/entertainment facilities (e.g. cinema, gym etc)	27.7
Other	16.1

The first point to make is that a 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 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 27.7% of shoppers. A further 11.5% mentioned more specialist stores. Excluding multiple responses, 40.5% of shoppers mentioned some aspect of the retail mix. We could conclude therefore, that 60% are satisfied with the current mix. In terms of services, more Police was the main priority, but at a lower level than elsewhere

5.2.6 Public Spaces

Over 64% of shoppers believe that there are enough public spaces in the area. Despite this fact, 61.6% of respondents make no use of any of the public spaces available locally.

Public Spaces used	**%**
None	61.6
Nailsworth - Mortimer Gardens	32.6
King George V playing fields	4.4
Shortwood Park	1.9
Other	1.6

The main uses made of public spaces are ‘Take children to play’ (33.9%) and ‘Walk’ (46.7%).

5.2.7 Rating of 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	63.3	33.2	3.5	*
Seating areas and benches	48.5	35.2	6.4	10.0
Amount of litter bins	42.4	38.7	6.3	11.5
Overall Attractiveness	70.4	23.3	6.3	*
Feeling of security	85.3	11.2	3.5	*
Signage (to and from town centre)	51.3	23.1	2.9	22.6
Signage (in around town centre)	47.0	25.3	4.3	23.4
Lighting	53.3	26.2	4.2	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 all the features there are only a minority of shoppers who describe any as poor. In most cases over 70% describe them as good or average. In particular, the feeling of security, the cleanliness and the Internal and external signage is seen as good and 70.4% of shoppers describe the overall attractiveness of the town centre as good

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.

	%
None / DK / Cant think of any	27.7
Public / toilets / Street cleaning	18.4
More seating areas and benches	12.6
More Planting	17.4
More Litter Bins	16.7
CCTV	9.9
More facilities for the disabled	4.7
Other	19.5

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

Public toilets and Street cleaning would be the most popular improvement, ahead of more Litter bins and more planting.

Almost 70% of shoppers were able to nominate at least one possible improvement.

5.2.8 The Town Centre at night

Only 42% of those interviewed said that they visit the town at night.

Main reason for visiting	**%**
To socialise	49.7
To visit places to eat/drink	75.0
To visit leisure/entertainment facilities	7.5
Other	10.0

The overwhelming reason for visiting the town centre was to visit places to eat/drink although 50% also mentioned socializing.

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 distance rather than any feeling of being unsafe.

	%
I don't go out in the evenings	43.2
Too far away from home	29.9
Feels unsafe	1.9
Lack of public transport, Not enough cultural activities Nothing for my age group	7.5
Not enough places to eat and drink	4.6
Not enough entertainment / leisure facilities	7.4
Other	14.7

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 Nailsworth

Almost two thirds (66.5%) of those interviewed said that their main reason for being in Nailsworth was to shop for goods. This includes 40% shopping for food (not necessarily main food shopping). A further 5.3% work in the Town and 4.8%% were visiting the Doctor / Optician / Chemist. In total, 36% gave Food shopping (Supermarket) as a reason for being in Nailsworth, almost exactly the same number as say they do their main food shop in the town.

	Main reason	**Other reason**
	%	**%**
Food shopping (Supermarket)	22.4	13.6
Food shopping (Other)	18.1	20.4
To shop for non-food goods	26.0	18.1
Work here	5.3	2.6
Pay bills / visit services	3.8	7.3
Visiting places to eat or drink	2.2	4.8
Visit Doctor / Optician / Chemist	4.8	2.0
Meet friends / Relatives	6.4	3.1
Other	10.7	21.3

Similarly, the ‘other’ reasons given for being in Nailsworth were dominated by shopping for goods, although 7.3% were paying bills / visiting services.

5.3.2 Length of visit

The majority (87.4%) of shoppers intended to stay no more than two hours in the town, including 63.2% staying an hour or less. The average dwell time was 74 minutes

	%
Less than 30 minutes	29.2
30 minutes to 1 hour	34.0
1 – 2 hours	24.2
2 – 3 hours	7.3
3 – 4 hours	1.1
4 – 8 hours	1.1
8 hours or more	3.1
Average Visit	**74 mins**

.

5.3.3 Average Spend

On average, shoppers in the Town Centre spent £22.07. This increases to £27.20 on Saturday.

Amount Spent	%
Nothing	5.8
Less than £10	30.0
£10 - £19.99	24.0
£20 - £49.99	24.9
£50+	15.3

However since 5.8% of shoppers spent nothing, the actual average amongst spenders is £23.42. Over 40% of shoppers spent more than £20 during their visit

5.3.4 Mode of transport

Over 67% of visitors to the Town Centre travelled by car, and a further 25.9% walked.

	%
Car – Driver	54.8
Car – Passenger	12.5
Bus	6.2
Walked	25.9
Other	0.5

This pattern is reasonably typical of a Town the size of Nailsworth 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 Old Market Street Bays were the most popular places to park, ahead of the Old Market Car Park. These figures may not be a true reflection of the parking situation as they are influenced by interview location.

	%		%
Old Market Street Bays	31.0	Newmarket	7.2
Old Market Car Park	19.8	Other car Parks	12.7
Old Market Bus Station	10.8	On the Street	4.7
Somerfield	13.1	Dropped off	0.8

Note: Multiple answers

Over 63% of all motorists used the Car Parks, whilst a further 43.7% parked on the street (including the bays)

5.4.2 Free Parking / Park and Ride

Over 87% of car borne shoppers say that free parking is important to them in choosing to visit Nailsworth.

	%
Very Important	70.0
Quite Important	17.3
Not very important	7.9
Not important at all	9.2

Perhaps because of this, only 34.6% were prepared to take a shuttle bus to the centre of the town

5.4.3 *Alternative Transport*

Whilst 41.7% of car borne shoppers say that they are willing to consider other forms of transport, 58.3% are not.
The overwhelming reason for rejecting any alterative to the car is that "*Buses are inconvenient*" (66%)

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	41.9	26.7	27.1	4.2
Amount of car parking spaces	47.6	30.4	17.8	4.2
Price of Council car parks	61.9	7.3	2.0	28.7
Frequency of patrols in Council car parks	11.3	7.2	9.3	72.2
Friendliness and helpfulness of staff in Coun car parks	10.8	5.7	6.2	77.2
Location	73.6	16.6	2.6	7.2
Design / layout	43.4	36.8	9.4	10.4
Safety / Security	58.1	22.1	6.2	13.6
Quality of service	22.5	17.5	4.7	55.3

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 car parking spaces and on-street parking spaces is regarded as good rather than poor. Location, design and safety are all good or average and very few shoppers could comment on 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	48.8
More Car Parks	23.7
More / better disabled parking	2.7
Free / cheaper parking	6.4
Convenient for the main roads	23.6

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

The most notable requirement is for more Car Parks, mentioned by 24% of shoppers. The small numbers mentioning cheaper / free parking are, presumably amongst those not aware of the current situation.

INDEX