



Haverhill Area Working Party 24 March 2011

Haverhill Town Centre Management: Update on Haverhill Shopper Survey 2010

1. Purpose of the Report

- 1.1 The purpose of this report is to provide an update regarding the findings of the business led shopper survey launched in September 2010 which closed on 30 November 2010 and to recommend that:-
- (1) Members note the responses received from the Haverhill Shopper Survey 2010;
 - (2) the offer of a student placement from Kent Business School (KBS) to undertake a professionally designed and conducted survey by a specially selected student directed by KBS in Haverhill Town Centre be gratefully accepted with expenses (capped at £1,000) being funded from the existing Haverhill Town Centre Management budget; and
 - (3) Members authorise the Haverhill Town Centre Manager, in consultation with the Chairman and Vice-Chairman of the Haverhill Area Working Party, to establish a programme of actions resulting from the information gathered, such as, regular shopper consultation; training programmes; collective marketing initiatives etc.

2. Background

- 2.1 On 22 April 2010, the Working Party approved an initiative to develop a programme of 'Marketing Master Classes' for independent shop owners in Haverhill, with the help of Professor Andrew Fearne, Professor of Value Chain Research at KBS, the 'guru' of Tesco's Clubcard loyalty programme, (Report A646 and Minute 106 refers). Professor Fearne had been introduced via the Public Relations (PR) Manager for Tesco as a part of their work to support existing local businesses.
- 2.2 The first meeting of the small and medium sized businesses Master Classes Project was held in July 2010. The partners include ten independent businesses:-
- (a) Access Control Solutions;
 - (b) AmandaJuliaCouture;
 - (c) C&B Beautiful;
 - (d) Clarks;
 - (e) M J Pipe;
 - (f) Sonia's Salon;
 - (g) Specialized Print;

- (h) The Gallery;
- (i) Tony Strowger Jewellers; and
- (j) Quick Service Shoe Repairs.

In addition, the following partners are involved in the project:-

- (a) Haverhill Chamber of Commerce;
- (b) Abbeycroft Leisure;
- (c) The Best Of Haverhill;
- (d) Mid-Anglian Enterprise Agency (MENTA);
- (e) West Suffolk College;
- (f) Samuel Ward Academy;
- (g) Castle Manor Business and Enterprise College; and
- (h) Job Centre Plus.

Guidance is provided to the partners from Professor Fearne. The Association of Town Centre Management (ATCM) has also declared an interest in the project with a view to developing a model for other towns, based on the experience at Haverhill.

- 2.3 The independent traders acknowledged that their businesses would be helped by initiatives such as a customer loyalty marketing programme initiative; collective marketing of the town centre; and improving the skills of shop assistants. They decided that before any marketing or sales training was undertaken, they wanted to better understand the behaviour and opinions of existing customers.
- 2.4 It would have been possible to commission KBS to devise a professional survey for this project. This would have cost more than the budget allowed for the whole project and would have taken a lot longer. The partners decided that the priority was to proceed as soon as possible. The businesses did avail themselves of input from KBS to help produce the best questionnaire possible within the resources available. The partners acknowledge that this survey is seen as a first attempt and that over time a professional 'paid for' survey would be possible.
- 2.5 2,000 forms were printed 'in-house' and the survey form was uploaded onto the Borough Council's website. The survey was formally launched at '*TheBestofHaverhill*' business networking event on 16 September 2010. It was reported in the local newspapers and the survey was publicised by all partners. A copy of the survey form is attached at Appendix A to the report.
- 2.6 Copies of the paper questionnaire were available at the premises of all the business partners, the Borough Council's offices, the library, Haverhill Arts Centre, together with the Bistro, the two upper schools, during a Friday and a Saturday market, in the foyer of Tesco and also in Kedington, Linton and Steeple Bumpsted.
- 2.7 £100 in prize vouchers was on offer for those who chose to include their name and address or an email address. At the close of the survey, prizes totalled more than £180 in vouchers; this was won by Peter Harvey of Feltwell Place, Haverhill and a second prize of a Dimplex Heater offered by M J Pipe, was won by Mrs Jones of North Haverhill.

3. Results and Conclusions

- 3.1 KBS provided a senior lecturer to conduct an analysis of the survey data free of charge.
- 3.2 1,095 responses were recorded in total from both the 2,000 paper forms and the online completions. This included a higher than average return from young people under 18. Whilst the experts agree this is a large sample, they also point out that it is not possible to determine the extent to which the sample is representative of the people who shop in Haverhill.
- 3.3 The survey carried seven questions, as detailed in Appendix A and sought to understand:-
- (1) where the respondents mostly shopped;
 - (2) how often they shop in Haverhill;
 - (3) if they shop elsewhere what would it be to buy;
 - (4) how they would rate Haverhill (against a number of areas such as customer service);
 - (5) what one change would they suggest to improve the shopping experience in Haverhill;
 - (6) do they shop on Sundays now; and
 - (7) would they if more shops were to open.

The questionnaire also captured information about the respondents themselves and asked disabled visitors how accessible the town was for them.

- 3.4 Non food shops were rated 'poor' by 45% of respondents. This correlates with the response to Question 5 which asked *'what one change would you suggest to improve the shopping experience in the town'* and the single biggest change that all shoppers, but particularly those who currently choose to shop elsewhere, said they would like to see an increase in the range and quality of non food shops. A small number of respondents stated a preference for a particular retailer (for example, Marks and Spencer, Primark, BHS, River Island) and clothing was the most frequently cited sector. However the majority of people simply expressed a desire to see more/different/better quality stores.
- 3.5 There were some significant differences between the perceptions of those who shop mainly at Haverhill (58%) and those who shopped mainly in Cambridge (21%) and Bury St Edmunds (19%). The results suggest that Haverhill is perceived less positively/more negatively by those who visit/shop the least often.
- 3.6 The analysis recommends that Haverhill needs to distinguish itself from the two major towns, Cambridge and Bury St Edmunds, with which it competes for shoppers. The survey results suggest that to do this, Haverhill needs to change the retail offer and find a value proposition that is distinctly different from (not the same as) those offered by its neighbours. A formal review of the current retail offer needs to be undertaken with a view to making provision for new (replacement or additional) retail units. These are unlikely to include national chains, given the size/location of the town and current economic climate but should include those sectors highlighted in the survey as currently under-represented, for example, fashion, sports shops, household goods and children's games.

- 3.7 The open air markets provide an opportunity to extend the retail offer and provide a mechanism for the promotion of 'special events'. The report suggests that the markets could be used as a test-bed for new retail offers, proactively seeking new stallholders to address the gaps identified and shouting about it through effective PR in neighbouring towns. Given the Borough Council's efforts in developing the markets, this is a helpful pointer.
- 3.8 Registered disabled respondents (17%) who commented on access by car, bus and on foot, and car parking give a modal (most frequent) rating of all four as 'good'.
- 3.9 A much higher share (47%) of respondents who shop mainly in Haverhill claimed to visit or shop in the town centre on Sundays than those (30%) who shop mainly elsewhere. However, when asked if they would visit more often if more shops open on Sundays, the responses from both groups was almost identical saying they would.
- 3.10. The analysis states that the shopper's voice is critically important and needs to be listened to on a systematic basis. It acknowledges that this survey is the first step on the journey of making Haverhill a more relevant place for more people to visit. Thus, says the report, 'serious consideration should be given to the development of a process that will provide stakeholders (that are willing and able to be more proactive in responding to consumer needs and wants), to capture the necessary information that will enable them to adapt their products and services'.
- 3.11 For residents, the analysis suggests regular listening forums and invitations to meet with town management or business managers to express their opinions about development in the High Street or specific stores. These could be held in different locations (held in stores, just before opening, but before they leave the town centre) with refreshments and product sampling offered as incentives. Visitors living outside the town will be more difficult to reach; they visit less regularly and feel less attached to the development of the town, so there needs to be a compelling reason to respond. In the short term, the markets provide the best opportunity to attract visitors and the systematic (but unobtrusive) surveying of visitors and would provide a cost-effective mechanism for capturing their views about the town.
- 3.12 In the long term, consideration might be given to the development of a loyalty programme for regular visitors, offering targeted incentives for shoppers to shop more frequently.
- 3.13 As a partner in the project, KBS has also offered the time of a supervised student on placement in Haverhill for two or three months in summer 2011, to conduct a shopper survey in the High Street. There will be no charge for the design of the survey (which will be devised in consultation with the ten Haverhill business partners and others); the student's time; or for the analysis of the survey results afterwards. Commercial rates for such a professional service would normally cost in excess of £3,500. The fees involved in this stage of the process would only be for the overnight accommodation, disbursements and public transport costs from time to time and is estimated to cost no more than £1,000. This can be covered within the existing Haverhill Town Centre Management budget approved for the Marketing Master Classes Project.

- 3.14 In addition to obtaining a robust survey and recommendations tailored for Haverhill at a greatly reduced cost, the benefit of the partnership continuing to work with Professor Fearne, is his willingness to channel his extensive knowledge and experience with major retailers, to help Haverhill town centre businesses to develop skills tailored to their specific need. There would also be the opportunity for the businesses to have his guidance in setting up Haverhill centric shopper focus groups, loyalty schemes and initiatives.
- 3.15 It is planned to roll out the outcomes/training initiatives from this programme with the ten pilot businesses, to other small Haverhill businesses who wish to take advantage of it. As a result of the work so far, there is the embryo of a town centre grouping of businesses. Widening participation from other businesses could lead to some of them joining with the pilot businesses to form a Haverhill Town Centre Business Group/Haverhill Town Traders Association (Haverhill-TTA) or something similar. As the Haverhill Chamber of Commerce is a partner, it will also greatly assist with liaison between the members of the Chamber and the retailers in the town centre.
- 3.16 In towns around the country, it is considered increasingly important that local authorities encourage such groups. Evidence shows that where such groups have been in existence for a while, attempts to deliver Business Improvement Districts have generally been successful. Since this project is also being keenly followed by the ATCM (with more than 500 Town Centre Manager members nationally), with a view to being able to roll it out in other, similar towns, Haverhill would be put on the map for its inventiveness and for being a change leader.

4. Recommendations

4.1 It is **RECOMMENDED** that:-

- (1) the responses received from the Haverhill Shopper Survey 2010, as outlined in Sections 3.2 to 3.10 inclusive of Report B527, be noted;
- (2) (a) the offer of a student placement from Kent Business School (KBS) to undertake a professionally designed and conducted survey by a specially selected student directed by KBS in Haverhill Town Centre, as detailed in Section 3.13 of Report B527, be gratefully accepted; and
(b) any expenses incurred by the student be reclaimable up to a maximum of £1,000 and funded from the existing Haverhill Town Centre Management budget; and
- (3) the Haverhill Town Centre Manager be authorised, in consultation with the Chairman and Vice Chairman of the Haverhill Area Working Party to establish a programme of actions resulting from the information emanating from the survey, such as, regular shopper consultation; training programmes; collective marketing initiatives etc.

For further information, please contact:-

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Telephone: (01440) 765100 or email: Tina.Hanks@stedsbc.gov.uk

Appendix A – Questionnaire

Haverhill Shopper Survey – Autumn 2010

CLOSING DATE 30 NOVEMBER 2010



About this survey

For the first time in more than five years, a number of stakeholders in town – businesses, Haverhill Chamber of Commerce, West Suffolk College, Samuel Ward and Castle Manor Colleges, MENTA, the Job Centre, Abbeycroft Leisure and Town Centre Management have compiled a survey to find out what visitors and shoppers to Haverhill think about the shops and services on offer, and what they think could help them to spend more time – and money – in Haverhill, rather than travel to other towns. To get a wide range of views, we would like as many people as possible, of all ages, to fill out as much of the questionnaire as possible.

Town Centre Management, as a partner, will be receiving and processing the survey data and information; so any personal details which you provide will be kept confidential and treated in line with the Data Protection Act.

If you provide an email address, we can send you the results of the survey and enter your name into prize draws for £100 in shopping vouchers.

Your shopping habits

- 1) Do you shop mostly in: Haverhill Bury St Edmunds Cambridge
Newmarket Saffron Walden Other _____

- 2) How would you rate Haverhill as a place to shop, relative to the other town you choose to shop in, on the following:

	Very Good	Good	Poor	Very Poor
Customer Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Range of shops (food)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Range of shops (non food)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access by car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access by bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access on foot	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor market on Fridays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor market on Saturdays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leisure / recreation facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restaurant / café facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appearance / character	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Free of noise and traffic fumes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal safety / free from crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public toilets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shop opening hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities for the disabled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 3) How often do you shop in Haverhill?
Daily 2-3 times a week 3-5 times a week Weekly
Fortnightly Monthly Less than once a month

- 4) If you go elsewhere for any of your shopping, what is it usually for? _____

- 5) What one change would you suggest to improve the shopping experience in Haverhill town centre?

- 6) Do you visit and shop on Sundays? Yes No

- 7) If more shops opened on Sundays would you visit more often? Yes No

Please turn over the page

About You – if you provide your name and address, it will be entered into the prize draw for £100 in shopping vouchers!

Name (optional): _____

Email Address (optional): _____

Full Post Code: _____

Gender: Male Female

Household Composition: No. of adults _____, No. of children less than 5yrs _____, 5-11yrs _____, 12-18yrs _____

Employment Status: Full time employment Part time employment Student Carer
Retired Stay at home parent Unemployed

Household Income: up to £10,000 £10,000 – £20,000 £20,000 – £30,000
£30,000-£40,000 £40,000 to £50,000 over £50,000

Age range: 10-15 16-19 20-24 25-34 35-44
45-54 55-64 65-75 Over 75

Are you registered disabled? Yes No

If you answered yes, how would you rate Haverhill as a place to shop, relative to the other town you choose to shop in, on the following:

	Very Good	Good	Poor	Very Poor
Access by car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access by bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access on foot	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Thank you for contributing to this survey

You could hand this completed form to the shop or premises where you picked it up, or please post, fax, or scan and email that to:

Tina Hanks, Haverhill Town Centre Management, St Edmundsbury Borough Council,
Lower Downs Slade, Haverhill, CB9 9EE. Fax: 01440 765114

E: Tina.Hanks@stedsbc.gov.uk