St Edmundsbury
BOROUGH COUNCIL

C399

Haverhill Area Working Party
15 March 2012

'Destination Haverhill': Shopper Survey Results

1. Purpose of the Report

1.1 The purpose of this report is to provide the results from the Haverhill Shopper Survey and to recommend that Members note the findings.

2. Background

2.1 In the summer of 2010 (and following approval by the Working Party in April 2010: Minute 106(2) refers) work began to bring the independent shop owners in Haverhill together with Professor Andrew Fearne from the Kent Business School (KBS). Professor Fearne is an expert in retail related research and is interested in how small independent traders can learn lessons from the large retail chains. The independent traders felt that before they undertook any training or master classes they needed to better understand the behaviours and opinions of the existing customers.

2.2 In September 2010, the Haverhill Shopper Survey was launched. This first survey was designed by the independent businesses with input from some of the partners. One of the findings was that further survey work would be required in conjunction with other data collection such as a retail audit of the shops and footfall counts in the town.

2.3 On 10 March 2011, the Working Party noted the findings from the initial survey and agreed the recommendation that a second survey be undertaken by KBS (with a contribution of £1,000 from the Borough Council); and that a programme of actions be established following the initial findings (Minute: 58 refers).

2.4 On 9 June 2011, the Working Party recommended to Cabinet the allocation of a further £9,000 towards this project (in addition to the £1,000 already committed) to enable matched funding to be sought from the University of Kent's 'Innovation Fund'. Authority was also given for the recruitment of a project manager and for the Terms of Reference for the project to be agreed (Minute 10 refers).

2.5 Suffolk County Council allocated a further £10,000 and in October 2011, the University of Kent confirmed that match funding from the Innovation Fund had been successful and as a result, the total amount available to this project increased to £40,000.

2.6 Terms of reference were drawn up and incorporated into the legal agreement between the University of Kent and the Borough Council which was signed on 2 November 2011. The vision for the project was established as follows:-

*To ensure that the town centre of Haverhill attracts more visitors, shoppers and investment by providing a high quality **experience** for all and by providing a broad range of desired products and services such that visitors need not travel to other nearby local centres.*

2.7 It was also considered important that the project should have a specific identity and brand that would help with communicating and promoting the project. 'Destination Haverhill' was chosen as a title for the overall project and used in conjunction with the existing CB9 logo it gave the project a recognisable identity.

2.8 KBS appointed Debbie Kemp in November 2011: a project manager with considerable retail experience and a lecturer in retail theory. Debbie drew up the project timetable which divided the project into three phases.

2.9 The first phase was data collection and included a detailed shoppers' survey; focus groups; retail audits and footfall counts. This phase also included analysis of the information gathered and communication and promotion. The second phase looks to design interventions to address some of the gaps identified or issues raised in the data gathered in Phase one. These interventions could include master classes to provide local retailers with information about stock positioning in the shops, or customer care etc. Finally the last phase of the project will be to repeat the data gathering in Phase one to see if the project has been a success.

3. Phase One: The Shoppers' Survey

3.1 Three elements of work emerged for initial part of the first stage of the project. The first was to organise the retail survey; the second was to arrange focus groups and face to face interviews; and the last was to undertake a retail audit of the existing town centre.

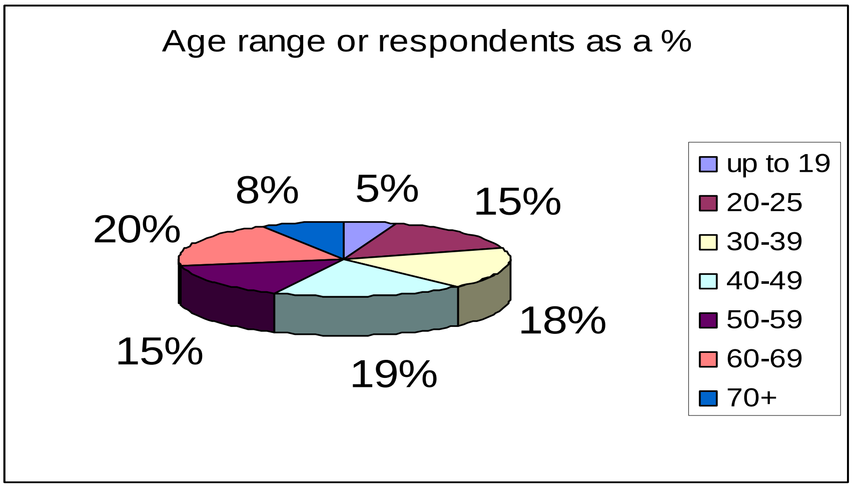
3.2 A copy of the questionnaire is attached as Appendix A to the report. As a part of the incentive for people to fill in their details, a £100 prize was provided with a winner to be drawn from the submissions. The questionnaire was hosted on the KBS website with a link from the Borough Council's website. It was also printed in both the Haverhill Weekly News and the Haverhill Echo and also on A4 sheets. There were 16 collection points located across the town.

3.3 In addition, questionnaires and ballot boxes were placed in some of the villages around the town including Sturmer and Great Wratting. The email link to the survey was sent to local employees such as Genzyme with a request for the survey to be completed online.

3.4 The survey was officially launched on 24 November 2011 following a press release and photo call. Full page advertisements were taken in the Haverhill Weekly News and Haverhill Echo. A number of direct emails were sent out on distribution lists to local councillors, local partners and via the Haverhill Business Directory.

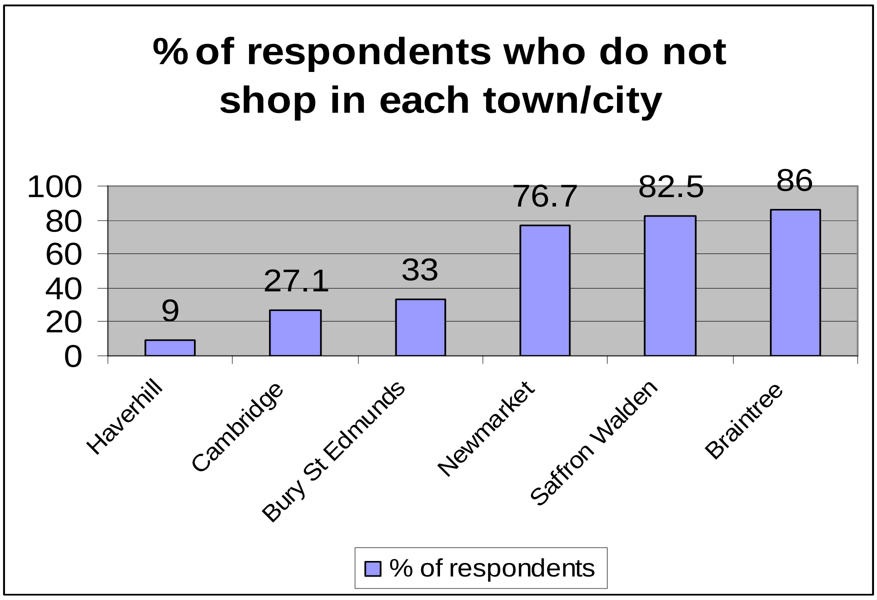
4. Survey and Focus Group Findings

4.1 The survey closed on 2 December 2011 and a total of 538 surveys have been received, which is considered by KBS to be acceptable as a sample size. Also, KBS considers the age range and gender split of the surveys completed to be representative of the people who use, and could use the town centre. 66% of the surveys were completed by females and 34% by males. The age range of the respondents is shown on the pie chart below.

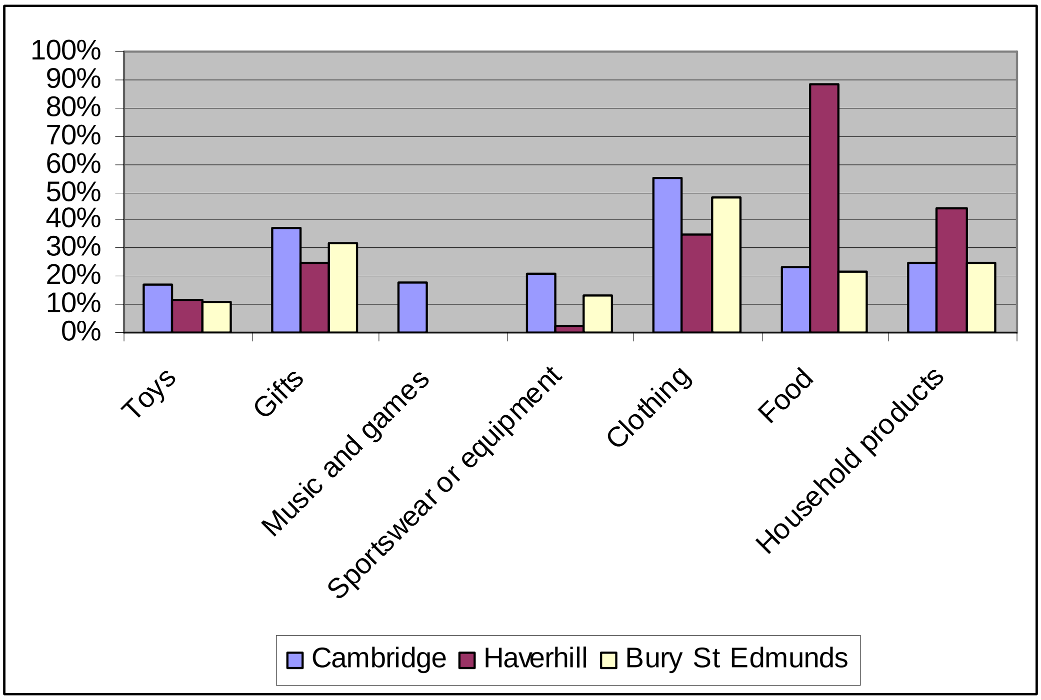


4.2 The full analysis of the results is available as a separate report upon request. However, the key findings are set out below in the following paragraphs and charts.

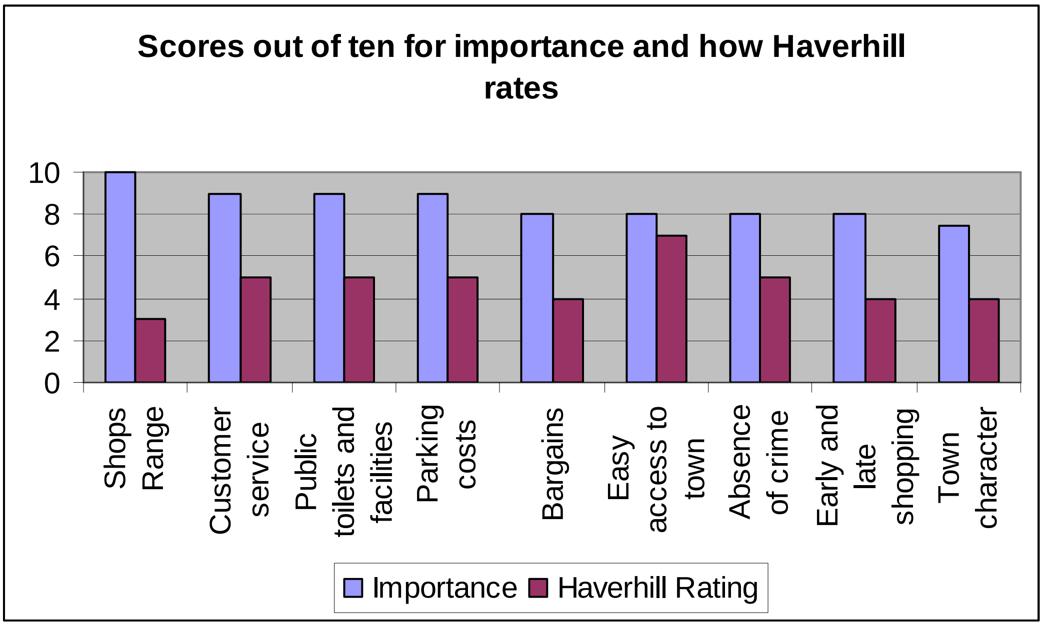
4.3 The majority of respondents shop locally in Haverhill. Cambridge and Bury St Edmunds are the main competing towns for Haverhill shopping. Over 76 % of the survey respondents do not travel to shop in Newmarket, Saffron Walden or Braintree. The chart below sets out the percentage of respondents who do not shop in each of the listed towns.

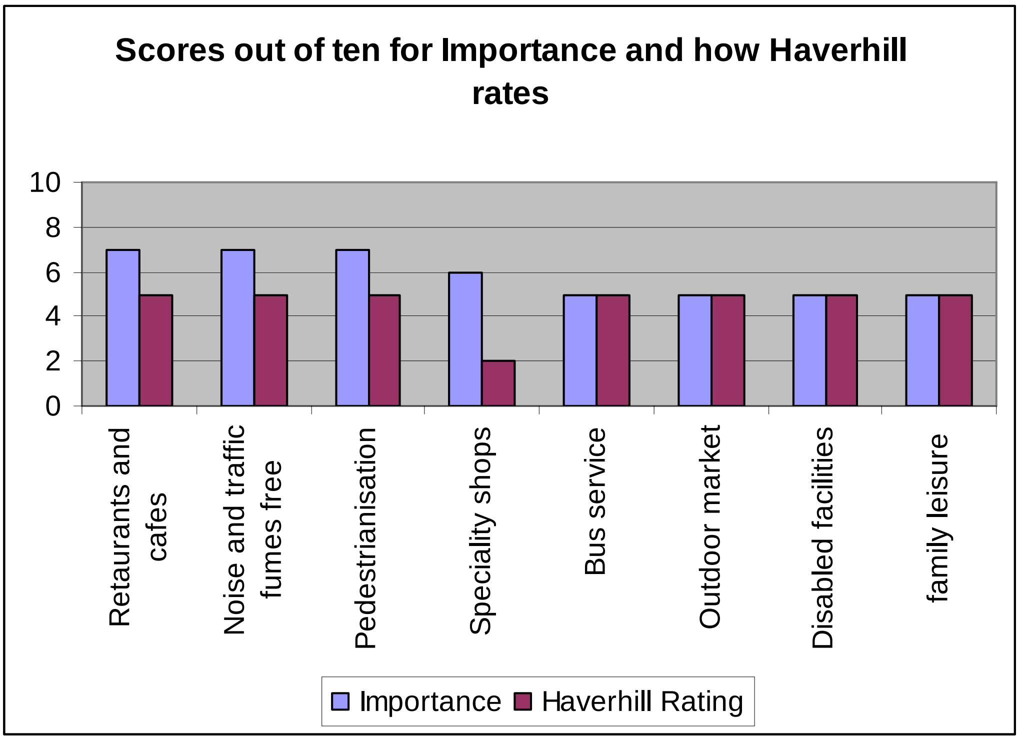


4.4 Respondents were asked what they shopped for and where. Haverhill came out top for food and household goods. Cambridge, followed by Bury St Edmunds were ahead in clothes and they also had more shopping activity. The table below shows the type of goods purchased from which town. There were some responses for Newmarket, Saffron Walden, Braintree and Sudbury but these were not significant in comparison to the three main towns shown.

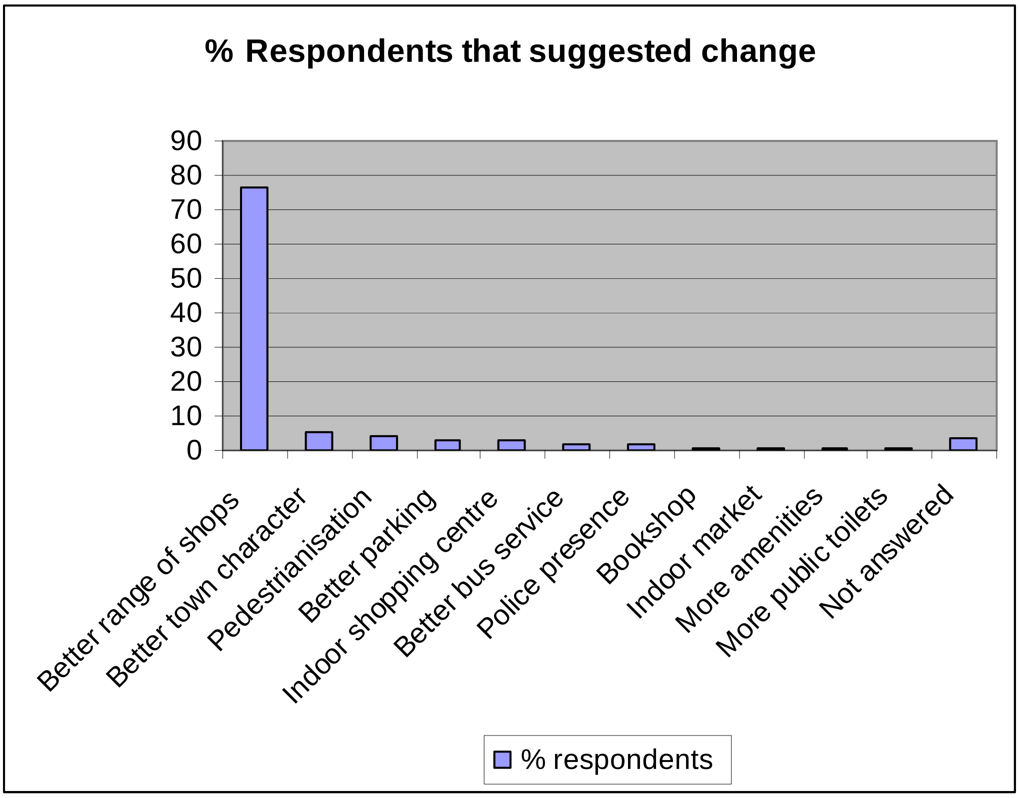


4.5 The questionnaire asked people to define the important features for shopping in Haverhill and then rate Haverhill against these features. The range of shops emerged as the most important feature when shopping and Haverhill was given rating of 3 out of 10 for its range of shops. The graphs below set out the features of a town centre and shows firstly how important these are considered to be and secondly, how Haverhill rates in each case.





4.6 People were asked to state what is the ‘one’ thing they would like to see changed in Haverhill in order to improve their shopping experience. The overwhelming majority (76.3%) stated that the one thing they would like to see is a better range of shops. The number one change for a further 5.3% of respondents was a better town character and with 4.3% stating that pedestrianisation was their favoured change. The graph below shows all of the responses by percentage.



4.7 Three focus groups were held which were designed to gather more information about the town centre experience in more detail than can be achieved by a questionnaire. The first group was older adults; the second was young adults; and the third was working age couples. Each group was asked a series of questions to stimulate their opinions such as: what do you associate with Haverhill?; what would get people into the town to shop?; when you shop outside of Haverhill do you shop at independent stores or large chain stores?; how do you feel about things like customer service and the look of Haverhill?

4.8 When the focus group transcripts were analysed the suggested improvement areas identified were very similar to the shopping survey results. Although the feedback from the focus groups was negative and could be read as a lack of confidence in the town there was also recognition that the town had potential and there was a desire for change.

5. Retail Mix

5.1 An independent audit of the types of shops in the town was undertaken in December 2011. This collected information from 93 shops in total in High Street, Queen Street, Peas Hill and Jubilee Walk. At this time four of the shops were unoccupied and the Co-op was about to close. 60% of the shops were independent and this suggests a lack of confidence to invest in Haverhill from the Chain retailers that dominate Cambridge and Bury St Edmunds.

5.2 Clothing retailers represent only 16% of the total number of retail outlets. Within this, children's clothing is a particular weakness with only a limited range of value merchandise in M&Co and Peacocks. There is no work wear or occasion wear clothing for any age/gender group and only two specialist clothing retailers. There are no sportswear or gaming shops which are all trending well in the retail environment generally and therefore this is a potential opportunity.

5.3 Similarly within food retailing there are only two specialist retailers selling food products (butchers and a chocolate shop). 10% of the retail outlets are low price point takeaways and there are no restaurants in the centre of the town – all new developments such as Prezzo, Frankie & Benny's and Subway have been located on edge of centre sites. Tesco is situated within a five minute walk of the town centre and offers free car parking. As with all Tesco Extra's, it offers a one stop shop in food, clothing, home ware and electrical. There is also a limited range of toys and gifts.

5.4 The market is held on Fridays and Saturday and offers a range of products, again at the lower price points. Standards are mixed on the current stalls and the number of stalls has reduced over the last year. This is a concern for the local retailers who see a benefit from the footfall the market generates for their businesses.

5.5 The conclusion of the retail audit is that there are opportunities to provide goods and services in the following categories: Clothing (33-55 age group); children's wear; sportswear and equipment; mobile phones; toys and gaming; gifts and home accessories; family friendly restaurants; community activities such as an Art and Crafts market, Buskers and Street Entertainers.

6. Phase One Conclusions and Recommendations

6.1 The findings show that Haverhill is a place with potential; it has good accessibility, high number of car parking spaces, partial pedestrianisation and low shop vacancy rates. The town has plans to expand with additional housing and a science/research park. The research also identified the overall support of the residents who are keen to see improvements to the High Street and a desire to shop locally if their needs can be met.

6.2 Younger people showed an entrepreneurial focus and some good ideas for small businesses, however they lacked start-up capital. These younger people could be engaged and encouraged and could prove a valuable asset to the town.

6.3 The poor range of shops in Haverhill is the biggest singular issue faced by the town centre. The mix of shops poor with an over-domination of takeaways, betting shops and charity shops. National retailers are tending to contract rather than expand in the current economic climate and therefore a compelling incentive scheme will need to be considered to encourage new stores to open.

6.4 Customer service was seen as being average and in the current competitive climate this is not good enough to attract and keep customers.

6.5 KBS made several clear recommendations following their analysis including:-

- (a) more product choice locally for shoppers;
- (b) current independent shops encouraged to up their game;
- (c) go back to the basic principles of a market town and create a ‘Meeting Place’ where the community can come together;
- (d) improve the visual appeal of the town centre;
- (e) encourage restaurants to open in the centre of town; and
- (f) more positive marketing and publicity.

7. Next Steps: Phase Two

7.1 The main priorities for Phase Two of the project are to improve the performance of the current retailers. This relies on the co-operation of local retailers and aims to improve their performance and enhance their customers shopping experience.

7.2 Phase Two will include identifying Key Performance Indicators (KPIs) regarding for example, stock availability, waiting times etc; and organising Master Classes to address the training needs identified by the retailers themselves. Also, this work will include the identification of individuals/businesses that could provide under represented products/services to improve the retail mix.

8. Related projects

8.1 There is co-ordination between this project and other projects that are happening in the town at the same time. Most notably is the project to pedestrianise/improve the High Street. Officers aim to ensure there is not over consultation of businesses and that all projects are aware of the aims and timescales of each others projects.

8.2 The Government has announced the possibility for 12 towns to bid for £100,000 under its ‘Portas Pilots’ initiative. This requires towns to establish ‘Town Teams’ who are visionary and strategic and have innovative ideas to halt the decline of the high street (in general). As Haverhill has already established ONE Haverhill; has engaged with KBS on this project; and is investing in the appearance of the town centre it is exactly the kind of ‘pilot’ town the Government is looking for. Therefore, an application for the £100,000 and the status of ‘Portas Pilot’ will be made by the deadline on 30 March 2012. The ‘Town Team’ includes partners from the different organisations in Haverhill and is being co-ordinated by the Borough Council’s Economic Development Manager.

8.3 One of the benefits to retailers is the ability to share experiences and issues with fellow retailers. In addition, some may recognise the considerable opportunity afforded when they consider pooling resources, for example for marketing. ONE Haverhill has established a Task and Finish Group responsible for promoting Haverhill and there is the will to work with the traders, when the time is right, to maximise the impact of any marketing/promotional activity.

9. Conclusions

9.1 The data collected in the first phase of the project has provided a sound foundation for the future stages of the project which include designing interventions to address some of the gaps identified or issues raised and repeating the data gathering to see if the project has been a success.

9.2 Opportunities will be taken to relate this project to other initiatives in and around the town centre.

10. Recommendation

10.1 The Working Party is requested to **NOTE** the findings from Phase One of the ‘Destination Haverhill’ project.

For further information, please contact:-
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HAVERHILL SHOPPERS' SURVEY

We need your help! This survey aims to understand what residents, visitors and local businesses think about the shops and services on offer in Haverhill and how these can be improved. Any personal information you provide will be kept confidential and treated in line with the Data Protection Act.

1. What is your postcode____

2. How many times in the past month have you visited the following towns to go shopping? (tick the appropriate circle)

	Number of visits											
Town	0	1	2	3	4	5	6	7	8	9	10	10 +
Haverhill	○	○	○	○	○	○	○	○	○	○	○	○
Bury St Edmunds	○	○	○	○	○	○	○	○	○	○	○	○
Newmarket	○	○	○	○	○	○	○	○	○	○	○	○
Saffron Walden	○	○	○	○	○	○	○	○	○	○	○	○
Cambridge	○	○	○	○	○	○	○	○	○	○	○	○
Braintree	○	○	○	○	○	○	○	○	○	○	○	○
Sudbury	○	○	○	○	○	○	○	○	○	○	○	○

3. What kind of shopping did you do when you visited these towns (tick one or more for each of the towns you visited this month)

Town	Food	Clothes	House-hold	Toys	Gifts	Music & Gaming	Sportswear & Equipment
Haverhill	○	○	○	○	○	○	○
Bury St Edmunds	○	○	○	○	○	○	○
Newmarket	○	○	○	○	○	○	○
Saffron Walden	○	○	○	○	○	○	○
Cambridge	○	○	○	○	○	○	○
Braintree	○	○	○	○	○	○	○
Sudbury	○	○	○	○	○	○	○

4. How important are the following features when you are considering which town to visit for the purpose of shopping? (1=not at all important, 10=extremely important)

Feature	1	2	3	4	5	6	7	8	9	10
Good customer service	○	○	○	○	○	○	○	○	○	○
Wide range of shops	○	○	○	○	○	○	○	○	○	○
Good for bargains	○	○	○	○	○	○	○	○	○	○
Lots of speciality shops	○	○	○	○	○	○	○	○	○	○
Good bus service	○	○	○	○	○	○	○	○	○	○
Easy access to main shopping area	○	○	○	○	○	○	○	○	○	○
Pedestrianisation	○	○	○	○	○	○	○	○	○	○
Cost of car parking	○	○	○	○	○	○	○	○	○	○
Outdoor markets	○	○	○	○	○	○	○	○	○	○
Leisure activities for the family	○	○	○	○	○	○	○	○	○	○
Good choice of restaurants/cafes	○	○	○	○	○	○	○	○	○	○

Please Turn Over

4. Continued

Feature	1	2	3	4	5	6	7	8	9	10
Appearance/character	O	O	O	O	O	O	O	O	O	O
Free of noise and traffic fumes	O	O	O	O	O	O	O	O	O	O
No fear of crime	O	O	O	O	O	O	O	O	O	O
Adequate public toilets	O	O	O	O	O	O	O	O	O	O
Early/Late opening times	O	O	O	O	O	O	O	O	O	O
Good facilities for the disabled	O	O	O	O	O	O	O	O	O	O

5. How would you rate Haverhill for each of these shopping features (1 = very poor, 10 = exceptional)

Feature	1	2	3	4	5	6	7	8	9	10
Wide range of shops	O	O	O	O	O	O	O	O	O	O
Good for bargains	O	O	O	O	O	O	O	O	O	O
Lots of speciality shops	O	O	O	O	O	O	O	O	O	O
Good bus service	O	O	O	O	O	O	O	O	O	O
Easy access to main shopping area	O	O	O	O	O	O	O	O	O	O
Pedestrianisation	O	O	O	O	O	O	O	O	O	O
Cost of car parking	O	O	O	O	O	O	O	O	O	O
Outdoor markets	O	O	O	O	O	O	O	O	O	O
Leisure activities for the family	O	O	O	O	O	O	O	O	O	O
Good choice of restaurants/cafes	O	O	O	O	O	O	O	O	O	O
Appearance/character	O	O	O	O	O	O	O	O	O	O
Free of noise and traffic fumes	O	O	O	O	O	O	O	O	O	O
No fear of crime	O	O	O	O	O	O	O	O	O	O
Adequate public toilets	O	O	O	O	O	O	O	O	O	O
Early/Late opening times	O	O	O	O	O	O	O	O	O	O
Good facilities for the disabled	O	O	O	O	O	O	O	O	O	O

6. What is the **one change** that you would like to see in Haverhill that would make you visit more often for shopping?

____

____

____

Gender: Male ☐ Female ☐

What is your age? ________________ years

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

Occupation of main income earner in the household ____

Household composition: No. of adults ☐ No. of children under 5 yrs ☐ 6-11 yrs ☐ 12-18 yrs ☐

Do you consider yourself to be disabled? Yes ☐ No ☐

PRIZE DRAW £100 CASH

Thank you for your help with this survey. Please post your completed form in the ballot boxes in shops and public offices in the town centre. If you would like to be entered in a £100 prize draw, please give a contact name and number, or email address here:

Name: Email / phone:

Closing date Friday 2 December 2011

Destination Haverhill project director: Dr Luca Cacciolatti, Kent Business School, email l.Cacciolatti@kent.ac.uk