UNIVERSITY OF Southampton

Romsey Town Centre Study

Professor Neil Wrigley, Ms Jen Li, Ms Katherine Cudworth,
Professor Michelle Lowe and Dr Dionysia Lambiri

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EXECUTIVE SUMMARY

- In-depth study of the town centre of Romsey, Hampshire designed and executed by a research team from the University of Southampton conducted during March and April 2011. It was commissioned by the Test Valley Borough Council and builds upon earlier findings from retail study research conducted in 1998 by Colliers Erdman Lewis.

- Over 400 consumer questionnaires and 100 trader questionnaires revealed that:

  - Romsey's convenience retail offer is adequate, indicated by its capacity to retain 63.2% of its 0-5 minute drive time catchment respondents who choose to do their main food shopping in Romsey (GVA study 2011 found a 55% retention rate). The town also serves the surrounding hinterlands, attracting 50% of 5-10 minute drive time respondents and 31.7% of 10-15 minute drive time respondents for their main food shopping. Retention rate of all 0-15 minute drive time respondents is 53.7%, and respondents choosing to undertake their main food shop elsewhere are doing so in centres such as Chandlers Ford and Totton. The lower rate for 0-15 minute drive time catchment respondents (compared to 63.2% for 0-5 minute drive time catchment respondents) is likely due to the fact that respondents who live further from Romsey town centre may have other foodstores that are more conveniently located.

  - In terms of non-food shopping Romsey attracts high proportion shoppers who wish to purchase chemist and pharmaceutical items but high order non-food products such as clothes, shoes and furnishings are sought elsewhere, in particular from the shopping centres and retail parks of Southampton and Winchester. On the whole there is a perception amongst consumers that products such as these are either too expensive from Romsey retailers or simply not available.

  - Romsey's service provision, whilst perceived by many respondents to the consumer surveys to be too high, in fact plays a significant role in attracting both main catchment residents and visitors to the town centre. Indeed, 29% of reasons given by main catchment respondents for visiting the town centre related to services.

  - All of Romsey's supermarkets generate a high level of trip linkage. Of the respondents that use them for their main food shop 68.3% will also combine their trip with town centre shops and services on an 'always' or 'frequently' basis, indicating that the trade that these foodstores attract is 'spilling over' and being felt by other Romsey retailers. Of the three supermarkets Waitrose generates the highest level of trip linkage, and the two main 'recipients' of trip linkages are Boots and Bradbeers.

  - Consumer perceptions of the town centre show that respondents are generally content with a number of aspects of Romsey's retail offer and were particularly positive about its attractiveness, the fact it covers their basic everyday shopping needs and its range of convenience stores. Respondents were less positive about the range of non-food shops and national chains within the centre. Overall visitors tended to be more positive than main catchment respondents.

  - Traders in Romsey believe the main strength or benefit of running a business in

Romsey is the loyalty of its customers and the town centre's attractiveness. Traders are generally optimistic about future sales; the majority reporting that compared to twelve months ago, sales at the time of survey were either up or remained the same. However 34% of traders have experienced a fall in trade over the 12 months prior to the survey, the majority of which blame the general economic climate for the fall.

- Results of the study confirm that Romsey is a well-used and well-functioning town centre with a reasonably high retention rate for food-shopping and levels of linked trips comparable with other market towns in the UK. Whilst is has some evident shortfalls in its provision of high order non-food products the majority of consumers believe the town centre is attractive and covers most of their everyday needs. The town offers a sufficient range of foodstores and non-food shops for residents and visitors and fulfils its role as a convenience shopping destination well.

Aims of the study

1. This report presents the results of an in-depth study of the town centre of Romsey, Hampshire – specifically how its facilities and services are used and how the centre functions. The study, conducted during March and April 2011, was commissioned following public tender by Test Valley Borough Council from an experienced retail research team at the University of Southampton led by Professor Neil Wrigley and involving members of the Schools of Geography and Management, together with the GeoData Institute. The Southampton research team had recently published the findings of a major 'before/after' study of the impacts of foodstore development on UK market towns and district centres – a study involving investigation of four market towns in South West England of not dissimilar size and characteristics to Romsey.

2. The ***objectives*** of the study were to provide analysis of how Romsey town centre operates - a decade into the 21st Century and at a time of considerable Government and media concern about the economic health of British town centres and high streets. To what extent were its retailers and service providers serving the needs of consumers in the town's main catchment area? How well was it catering for the requirements of visitors, and to what degree was it meeting the requirements and aspirations of both consumers and traders regarding the centre's vitality and viability?

3. More specifically, the brief for the study requested a focus on the relationship between main food shopping trips to Romsey and other visits to the town centre for retail and services, in particular:

    - frequency of visits and modes of travel
    - propensity to link trips and the structure of linked trips
    - the current extent of 'leakage' of catchment expenditure to competing retail centres, the potential for 'clawback' of that expenditure, and perceptions of what might encourage such clawback use of small and specialist stores

Design and conduct of the study

4. This research involved four components: questionnaires with consumers living within a 0-15 minute drive time of Romsey town centre ('main catchment' respondents), questionnaires with consumers who lived outside of the 15 minute drive time area ('visitors'), questionnaires with consumers at the monthly Farmers' Market, and questionnaires with town centre retailers and service providers ('traders').

5. The survey instrument was an interviewer-administered 'face-to-face' consumer questionnaire which took approximately seven minutes to complete. The questionnaire contained questions about shopping habits (for both food items and non-food items), and respondents were also asked about their perceptions of Romsey and their reasons for visiting the town centre on the day of the survey. Demographic and postcode data was also collected covering age range, gender, household size, household income and the number of cars available for use by members of the household.

6. The main consumer questionnaires were completed over eight days (including Saturdays) in March 2011. Very importantly, the local authority and university research team arranged for publicity to be given to the survey in the local newspaper (*Romsey Advertiser*) prior to the survey being conducted. In total, 423 'main catchment respondent' questionnaires were completed.

7. The survey information was subsequently 'cleaned' and coded to the highest possible standards at the University of Southampton. Descriptive analysis of the coded data using statistical analysis program SPSS was undertaken. Two researchers were involved in these processes to maximise accuracy.

Structure of the report

8. The report provides the main findings of the study – how its retailing, services and facilities are used and how well it meets the requirements and aspirations of both consumers and traders regarding its vitality and viability. More specifically, after outlining in Chapter 2 the way the University of Southampton research relates to previous retail structure and capacity studies of the town and its competing centres commissioned by Test Valley Borough Council in 1998, 2007/8, and 2011, and in Chapter 3 the design and methodology of the study, Chapters 4 to 10 discuss the findings of the 2011 research on Romsey town centre, while positioning it against the University of Southampton Market Towns and District Centres 2010 study where appropriate.

9. Chapter 4, examines how people *actually* use the town centre on the day of the survey, including how they travelled to the town centre, where they parked, what shops and services they intend on visiting (or already visited), and the length of time they spent in the UK.

10. Chapters 5 and 6 explore the use of Romsey as a shopping destination for food and non-food items. We analyse trip linkage, leakage to other centres, frequency of shopping, modes of travel, and use demographic data to determine which age groups are more likely to use Romsey town centre for shopping.

11. Chapter 7 discusses the role of services in Romsey and how they are used by consumers. Romsey has a high proportion of services in its town centre (higher than the national average in certain service categories), and they have an important function in the town.

12. Chapter 8 examines the results from the survey of traders in the town centre. In total 118 trader questionnaires were completed, and this chapter discusses those results. We look at traders' perceptions of the town and their business performance now compared to 12 months previous.

13. Chapter 9 reports on the perceived strengths and weaknesses of Romsey town centre by both consumers and traders. We also outline suggestions for improvements to the town centre as offered by consumers and traders.

14. Chapter 10 discusses visitors to Romsey and the monthly farmers' market. Visitors were defined as respondents who lived outside of the 0-15 minute drive time of Romsey town centre, and a shorter questionnaire was administered with visitor respondents, focusing on their perceptions of the town and their usual reasons for visiting Romsey. In total 84 questionnaires were completed with visitors and 43 during the monthly farmers' market, and they were an addendum to the main questionnaires to provide additional insight on Romsey as a tourist destination.

15. Finally, Chapter 11 summarises the findings of the research and draws out the highlights of the study.

Key findings

16. Previous studies indicated that Romsey was 'under-shopped', with food shopping expenditure retention of 56%, lower than expected for a centre of its size and location. This study showed that while there *is* leakage Romsey still has a reasonably high retention rate for food shopping: 63.2% of respondents who live in the 0-5 minute drive time catchment do their main food shopping in Romsey. The town also serves the surrounding hinterlands. When the base is broadened to include all main catchment respondents who live in the 0-15 minute drive time zone, 53.7% of respondents use Romsey for main food shopping.

17. In terms of non-food items, chemist and pharmaceutical items tend to be bought in Romsey, though most other non-food categories such as clothing and footwear, household luxuries, household furnishings, and electrical items are purchased elsewhere.

18. Significantly, services play an important role in the town. On the day of the survey, 29% of main catchment respondents stated their main reason for visiting the town centre was to use a service. Furthermore, banks and financial institutions are the third most common linked trip destination for main and secondary users of Romsey's supermarkets.

19. Cross-tabulation of demographic information with shopping data reveals that younger respondents (below 34 age segment) are more likely to do both food and non-food shopping elsewhere. Older people are more likely to shop in the town centre. The centre that captures the most main food shopping trade not completed in Romsey by main catchment respondents is Chandler's Ford, and the biggest competitors for non-food shopping are Southampton, Winchester and Salisbury.

20. Three main reasons were provided for *why* respondents shop elsewhere for particular non-food product categories: limited range, perceived expense and perceived unavailability.

Linked trips

21. Using data on consumer shopping behaviour, the study explored how the existing supermarkets in Romsey are used in combination with the town centre shops and attempted to determine the extent of the trade 'spill over' effects. Romsey has a high level of trip linkage: 68.3% of respondents that do their main food shopping in Romsey supermarkets combine their trips to other town centre shops.

22. Linked trip propensities were not uniform across all 3 supermarkets: Waitrose, the town's most frequented supermarket, seemed to generate the highest level of linked trips, with 69% of Waitrose shoppers 'always' or 'frequently' combining their trips to Waitrose with other shops or services in the town centre.

23. The two main 'recipients' of linked trips are Boots and Bradbeers, highlighting the importance of these two stores in the town centre. Other recipients of linked trips include banks and other financial services and independent foodstores. These linked trip findings, taken together with the 'anchor store' evidence, which reveals that food shopping is cited as the main reason for visiting Romsey by 34.2% respondents, emphasises the role that foodstores play in attracting shoppers to Romsey and the level of 'spillover' trade generated.

Consumer perceptions

24. The perceptions of the town centre are generally very positive, with 77.6% of respondents agreeing/strongly agreeing that Romsey is an attractive town centre, and 65% agreeing/strongly agreeing that Romsey covers their everyday shopping needs. Romsey's main strengths are its character and atmosphere, attractiveness, and compact town centre. In particular, visitors tended to be more positive than main catchment respondents - 38.7% of visitors said the town had no weaknesses (compared with the 14.7% of main catchment respondents who believed that).

25. In terms of Romsey's weaknesses as a retail centre, a large number of consumers (46.4%) perceived it to have a poor range of non-food shops, while the majority of respondents (53.5%) found the choice of national chains in the town very limited. Moreover, a significant number of respondents stated difficulty in finding a parking space as one of Romsey's key weaknesses. These observations suggest that while Romsey fulfils its role as a food shopping destination, there is potential for improvement in its non-food retail offer and non-retail areas such as parking provision.

26. Overall 10.3% of main catchment respondents were satisfied with the town and believe Romsey does not need improving. Suggested improvements included improving pavements, more independent shops, and more clothes shops. Non-retail improvements included more parking and cheaper parking. Retail categories that were most desired by respondents were children's clothes and toys (29.8% of respondents), music/media (28.0% of respondents) and general clothing (22.0%).

Performance and perceptions of Romsey traders

27. On the whole, the study findings suggest that traders in Romsey were divided on changes in Romsey's vitality and viability: almost half of traders interviewed (48%) stated that Romsey town centre has declined, while 43% believed this has not been the case.

28. The traders in Romsey were generally optimistic about the future. The majority of traders reported that sales at the time of survey were either up or remained the same compared to twelve months. Despite only 22% of traders experiencing higher sales now compared to 12 months ago, 46.2% of respondents stated that they expect sales to increase over the next 12 months. Traders within the ‘retail services’ category appeared to be most ‘optimistic’ about expected future sales. This finding is in line with the recently reported performance of retail services in the UK, where these seem to perform relatively better than other retail categories on the UK high streets.

29. In terms of traders’ perceived effects of the economic downturn, the study found that 39% of respondents suggested that the recession has been the main factor impacting upon their sales over the past 12 months. This percentage - which is lower than those observed in other UK towns - combined with information on reported current sales, suggests that despite the fact that Romsey traders were not ‘immune’ to the economic downturn, they could be more resilient to the effect of recession than other market towns previously studied.

30. In terms of perceptions of the town in general, traders were optimistic. The majority of traders believed that the strengths of the town included a loyal customer base and an attractive town centre, though there were also weaknesses in terms of high costs of running a business and expensive car parking. Additionally, 71% of traders indicated that they would support environmental enhancements to the town, with the condition of pavements being of highest concern.

Viability and vitality of the town

31. The results of the 2011 University of Southampton study confirm that Romsey is a well-used and well-functioning centre with a reasonably high retention rate for food shopping and levels of linked trips comparable with other market towns in the UK. Romsey’s low vacancy rate of 7.1% (May 2011) is below the national average, further indicating the centre’s health.

32. The town offers a range of foodstores and non-food shops for residents and visitors and fulfils its role as a convenience shopping destination well, although the evident leakage of non-food shopping shows there is scope for improved provision. Romsey maintains the features of its market town heritage which is recognised by consumers and traders alike who consider the centre attractive and of pleasant character, indicating that Romsey has strong sense of place and community as well as an adequate retail mix.

Chapter 1

INTRODUCTION

1.1. In this report we provide the findings of an in-depth study of the town centre of Romsey, Hampshire – specifically how its facilities and services are used and how the centre functions. The study, conducted during March and April 2011, was commissioned following public tender by Test Valley Borough Council from an experienced retail research team at the University of Southampton led by Professor Neil Wrigley and involving members of the Schools of Geography and Management, together with the GeoData Institute. The Southampton research team had recently published the findings of a major 'before/after' study of the impacts of foodstore development on UK market towns and district centres – a study involving investigation of four market towns in South West England of not dissimilar size and characteristics to Romsey.

1.2. The ***objectives*** of the study were to provide analysis of how Romsey town centre operates - a decade into the 21st Century and at a time of considerable Government and media concern about the economic health of British town centres and high streets. To what extent were its retailers and service providers serving the needs of consumers in the town's main catchment area? How well was it catering for the requirements of visitors, and to what degree was it meeting the requirements and aspirations of both consumers and traders regarding the centre's vitality and viability?

1.3. More specifically, the brief for the study requested a focus on the relationship between main food shopping trips to Romsey and other visits to the town centre for retail and services, in particular:

- frequency of visits and modes of travel
- propensity to link trips and the structure of linked trips
- the current extent of 'leakage' of catchment expenditure to competing retail centres, the potential for 'clawback' of that expenditure, and perceptions of what might encourage such clawback
- use of small and specialist stores (These points are covered in more detail in Chapters 5 and 6)

1.4. Related evidence and insights concerning shopping for non-food items in Romsey was also requested, together with usage of services. In these cases, the focus was to centre on the perceived strengths and weaknesses of Romsey's current retail and service offer, and on what additional shops, services or facilities might alter current levels of 'outshopping' - increasing the use of the town centre to the benefit of consumers in the town's main catchment area, traders in the centre, and visitors to the town.

1.5. Finally, the brief specified that the core questionnaire-based survey research used to provide the evidence required on food and non-food shopping and on the use of the services provided by the town centre, should document the views of as large a sample of town centre retailers and other businesses as it was possible to achieve. In other words, that sample should be as representative as possible of the sizes, types and ownership structures of those businesses.

1.6. The timing of the study was particularly appropriate. Shortly after completion of the consumer and trader surveys which provided the core of the evidence collected in the study, and amid growing public concerns about the economic health of town centres, the UK Government announced an 'independent review' into the future of the High Street aimed at identifying what could be done to promote and revitalise town centres and high streets across the UK[1]. Announcing that the high-profile review was to be led by Mary Portas - a well-known retail design/turnaround guru and host of TV's *'Mary Queen of Shops'* - Prime Minister David Cameron stressed the Government's view that:

> '*The High Street should be at the very heart of every community, bringing people together, providing essential services and creating jobs and investment – so it is vital that we do all that we can to ensure they thrive'.*

1.7. In that context the University of Southampton study provided a highly topical opportunity to make two contributions. Firstly, to understand the functioning of Romsey town centre on its own terms. Secondly, and more generally, to position and appreciate the centre's strengths and weaknesses - as perceived by its consumers, traders and visitors - within the context of the wider forces actively reshaping both the composition and future vitality and viability of town centres and high streets across the UK.

The challenges faced by UK town centres and high streets

(a)The shock wave of global economic crisis and its consequences.

1.8. The global financial crisis of 2007 sent a severe macroeconomic shock wave through UK town centres and high streets. A sharp deterioration in UK consumer confidence recorded during late 2007 and early 2008 was followed by a period of recession, a shallow and uncertain recovery during 2009/10, and the threat of 'double dip' economic slowdown in 2011 associated with the emerging reality of an 'Austerity Britain' of public-sector expenditure cuts, rising taxes, and declining household incomes. Iconic and cherished town centre retail chains - beginning with Woolworths in 2008 and continuing through to Habitat in 2011 - ceased to trade, and retail and service unit vacancy rates rose progressively. In the most extreme accounts (based on figures calculated by the *Local Data Company* and regularly used to supply headlines to the media) those vacancy rates were seen as almost tripling, from an average of under 5% in early 2008 to 14.5% by the end of 2010. Although other sources – for example leading UK property consultancies (e.g. Colliers, 2009) and academic studies (e.g. Wrigley and Dolega, 2011) have suggested a less steep rise – from an average vacancy rate of around 7.5% - 9% to over 14%, they nevertheless have painted a similar picture - a 'gathering storm' of crisis which began to overwhelm town centres and high streets at the end of the first decade of the 21st Century. That crisis was seen as being reflected in parts of the UK (particularly the more vulnerable regional economies of the 'North') by the emergence of blighted town centres and high streets where sometimes more retail units were vacant than occupied. Additionally, throughout the UK, it was reflected in certain types of town centre retailing that were particularly hard hit – notably 'comparison retailers' in categories such as 'department stores', 'music, video and photography' retailers, 'booksellers', 'furniture and furnishings' retailers, etc - together, and conversely, by rising numbers of 'household discounters' (pound shops, etc) and charity shops. However, it was equally clear that not all of these impacts and challenges could be ascribed to consequences of the shock of global economic crisis. Other forces – notably the progressive rise of online retailing, and a decade-long transformation of high street retailing resulting from the

[1] http://www.bis.gov.uk/highstreet

increasingly effective implementation of a '*town centres first'* approach to retail planning policy - were equally important.

(b)The progressive rise of online retailing

1.9. After the potentially transformative impacts of e-commerce on traditional town centre retailing had been significantly over-hyped at the time of its initial emergence during the dot com boom years of the late 1990s/early 2000s, UK online retail sales grew slowly but progressively in importance year-on-year over the next decade. As a result, the impact on UK town centres and high streets gradually became stronger and more important in retail compositional terms as significant processes of what Weltevreden (2007) refers to as *'substitution'*, '*complementarity', and 'modification'* began to take hold.

1.10. By *substitution* we mean online/e-shopping replacing trips to retail stores. By *complementarity* we mean e-shopping facilitating or enhancing physical shopping – perhaps generating additional trips via cross-promotion, provision of incentives (e.g. coupons), or by allowing consumers to pick up and pay for products ordered online in town centre stores. By *modification* we mean altering of the nature of physical shopping in town centre stores - for example, by changing the typical frequency or duration of physical shopping trips, the mode of travel to the town centre stores, and the destinations of the trips.

1.11. As a result, the consequences for UK town centres as they have adjusted to the internet age, have been that certain types of retailer/service-provider (notably retailers of 'music and film', 'computer hardware and software', 'booksellers' and 'travel agents') have experienced marked declines relating to 'substitution' impacts, whilst others have benefited from 'complementarity'. It follows, therefore, that it is important to distinguish and ascribe declines in the representation of some types of retailer in UK town centres appropriately to that which relates to the progressive increase in online/e-retail sales and that which relates to other factors.

(c) The 'town centres first' approach to retail planning policy and the rediscovery of the town centre by the major food retailers

1.12. Beginning in the mid 1990s, retail planning policy in the UK moved towards a 'town centres first' orientation in which obtaining planning permission for large stores on out-of-centre sites became increasingly difficult. The policy was implemented in a progressively more effective manner, and enjoyed strong cross-party political support. The leading retailers – albeit to different extents – responded to the realities of tightened planning regulation and its new orientation with important changes in their store development strategies. In essence, there was a marked shift towards development on 'in-centre' or, alternatively, 'edge-of-centre' sites. In turn, and reflecting the configuration/size constraints typical of those sites, many of the stores developed *'with the grain'* of the new orientation of planning policy were significantly smaller than the typical 'out-of-centre' stores of the 1980s/early 1990s. Over time, that shift to smaller stores progressively altered the organisational range and operating skills of some (albeit not all) of the major retailers who increasingly became multi-format operators. In turn, small store operating skills both facilitated, and were a consequence of, reassessment by the retailers of the development opportunities of locations (e.g. small market towns, town centres, high streets, deprived local authority housing estates) which they had previously largely side-stepped due to limited catchment potential, or had actively exited since the 1970s.

1.13. One perhaps unexpected consequence of the 'town centres first' policy during the late 1990s/early 2000s was to place 'in-centre' or 'edge-of-centre' development opportunities in small market towns at the forefront of the major food retailers' store development plans. The result was a highly visible - and in the view of many NGOs, small-trader associations and campaigning organisations who otherwise supported the thrust of the 'town centres first' approach - direct threat to the fragile ecologies of small, specialist, local shops found in many smaller market towns. Moreover, it was a threat which became increasingly more significant as the major food retailers first entered during the early 2000s, and then rapidly expanded within, the small-format neighbourhood/convenience store market. That is to say, a sector entry which produced a highly visible presence of thousands of small corporate (Express/Local type) foodstores in UK town centres and high streets - a development produced by the major food retailers responding *proactively* to what they had identified as the rise of *'convenience culture'* among their customers, and *reactively* to both tightening planning regulation and the opportunity for acquisition-driven growth in the convenience store sector created by the Competition Commission's (2000; 2003) controversial 'two market' ruling.

1.14. The challenge of dealing with what many NGOs and campaigning organisations represented as a '*supermarket onslaught'* to be resisted at all costs became a critical and difficult issue for many local authorities. In particular, it was contentious for those (officers or councillors) in local authorities who took the view (supported by a growing body of academic opinion, see Powe and Shaw, 2004 and Wrigley et al, 2009, 2010) that:

(a) appropriately integrated 'new generation' in-centre or edge-of-centre foodstore development was essential to the maintenance and enhancement of the role of a small market town;
(b) such development could provide an essential 'anchor' for other services in the town by 'clawing back' trade which would otherwise be lost to larger urban centres;
(c) *both* diversity/local distinctiveness – represented by the proportion of small independent local retailers – and corporate investment in 'anchor-role' foodstores were likely to be equally important elements in the sustainable development prospects of the town.

Structure of the report

1.15. The report which follows provides the main findings of the extensive empirical study conducted by the University of Southampton research team into the functioning of Romsey town centre – how its retailing, services and facilities are used and how well it meets the requirements and aspirations of both consumers and traders regarding its vitality and viability. More specifically, after outlining in Chapter 2 the way the University of Southampton research relates to previous retail structure and capacity studies of the town and its competing centres commissioned by Test Valley Borough Council in 1998, 2007/8, and 2011, and in Chapter 3 the design and methodology of the study, Chapters 4 to 10 discuss the findings of the 2011 research on Romsey town centre.

1.16. Chapters 4 to 6 report the study's findings on how Romsey currently functions in terms of the food and non-food shopping requirements of consumers in the town's main catchment area. Chapter 7 then considers the role and use of services - of several different types ('leisure', 'health & medical', 'financial & business', etc) – provided in the town centre. Chapter 8 details the views of the large and representative sample (78% response rate) of retailers and service providers in the town concerning their perceptions of the performance of their own businesses and how that performance relates to and might be strengthened by action to enhance the town's vitality. Finally, Chapters 9, 10 and 11 summarise the strengths and weaknesses of the town centre as perceived by both consumers and traders, draw together the suggestions made by these groups regarding the improvements which might enhance Romsey's vitality and viability, consider the opinions of visitors to the town and users' of the monthly farmers' market, and list the highlight findings of a highly topical study.

1.17. In the case of each distinct part of the evidence base provided in the report, it is vital to understand how Romsey is positioned within the national spectrum of economic health indicators for town centres. More generally it is also essential that the reader positions and appreciates the town centre's strengths and weaknesses – as perceived by its consumers, traders and visitors – within the context of the wider challenges outlined above. That is to say, in the context of challenges which are actively reshaping both the composition and future vitality and viability of town centres and high streets across the UK.

Exploiting the possibilities of regional comparison

1.18. Understanding how Romsey is positioned within the national spectrum of economic health indicators for town centres, and how its strengths and weaknesses relate to the wider challenges which provide the focus of Government concern in the post-crisis UK economy, is clearly of great importance. However, the University of Southampton study additionally offers important opportunities to add value by offering regional-based comparisons with a cluster of four South West market towns intensively studied during 2007-09 by the same research group (Wrigley et al, 2010).

1.19. Figure 1.1 locates that cluster of market towns - Ilminster, Crewkerne and Shepton Mallet in Somerset and Warminster in Wiltshire. As shown in Table 1.1, the populations of their immediate catchment areas (0-5 minute drive time) at the time of the 2001 Census varied from approximately 5,000 to 15,000. Extending that to the 0-10 minutes catchment gave population totals in the 15,000 -24,000 range approximately. The population and basic demographics of Romsey are positioned against this spectrum in Table 1.1. It can be seen that whilst Romsey's immediate catchment population places it within the spectrum of the other South West market towns – albeit at the upper end of the distribution – its proximity to Southampton results in a significantly larger population in its 10-minute drive time catchment (approximately 37,500 at the time of the 2001 Census) with those consumers being able to select from a range of competing centres with overlapping market areas.

1.20. In terms of the other basic demographic (2001 Census) and retail-structure/performance indicators in Table 1.1, Romsey can be seen to lie within the spectrum of the other four market towns in terms of centre size (as measured by number of retail/service units) and the proportion of older/retired residents and car-less households within its immediate catchment area, but to have indicators suggestive of a centre in better economic health. Notably, it has both an unemployment rate and a retail/service unit vacancy rate in the early 2000s of less than 2%.

1.21. In the subsequent chapters, as we report comparisons between Romsey and the other four South West market towns, we ask readers to keep in mind the positioning of Romsey within the demographic and retail structure/performance spectrum outlined in Table 1.1.

Figure 1.1: Market town cluster – University of Southampton 2010 study

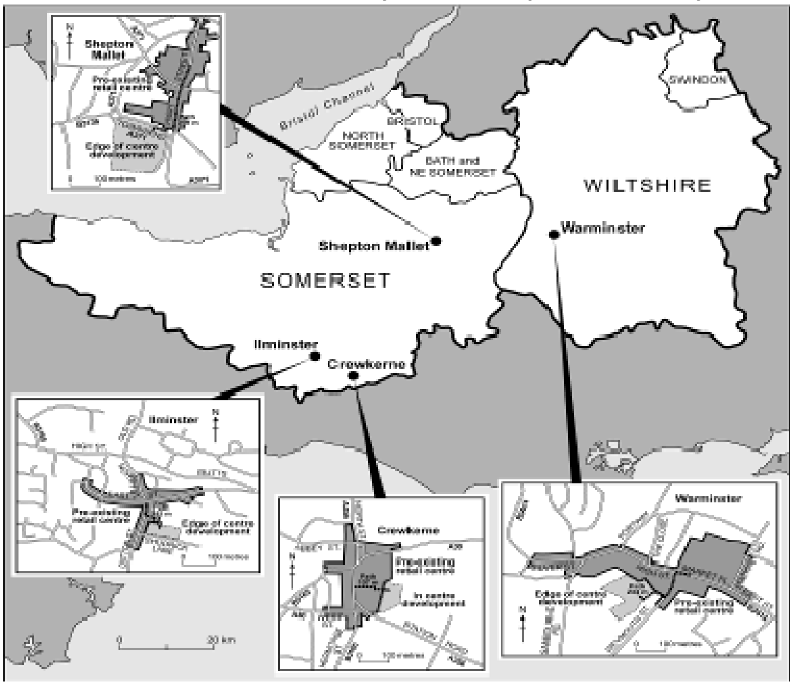


Table 1.1: 2001 Demographic and retail/service composition comparisons of four market towns from University of Southampton 2010 study and Romsey 2011

	2001 Pop	2001 Pop	Demographics for 0-5 minute drive time catchment area				Town centre composition	
Town	0-5 minute drive time catchment	0-10 minute drive time catchment	% Pop growth (2001-08)	% Unemployed (2001)	% retired aged > 65 (2001)	% car-less households (2001)	Number of retail/ service units	Vacancy rate 2007-09 (%)
Ilminster	4,451	16,157	24.1	2.3	12.6	19.5	134	0%
Crewkerne	7,266	16,554	7.7	2.2	11.6	19.1	74	10.6%
Shepton Mallet	9,272	14,393	16.8	3.5	6.9	18.9	123	12.7%
Warminster	15,825	23,816	5.7	2.2	9.4	21.1	218	8.3%
Romsey	12,395	37,509	7.7	1.4	11.1	20.0	110	1.9%

Chapter 2

PREVIOUS STUDIES AND BACKGROUND ON ROMSEY TOWN CENTRE

Highlights

- Test Valley Borough Council has commissioned a number of studies in order to assess the vitality and viability of Andover and Romsey town centres, as well as the need for potential additional retail provision in these towns. This chapter sums up the key findings of retail studies undertaken in 1998, 2007 (updated 2009), 2008 and 2011.

- All previous studies concluded that Romsey was a healthy and vibrant town, with a reasonable diversity of uses for a centre of its size. Vacancy rates in the town have been consistently low, and well below national average, reaching levels of less that 2% in October 2007.

- Romsey appeared to cover most of the day-to-day shopping requirements of its local population and its primary catchment. Both consumers and traders were reported to be happy with Romsey's overall retail mix. However, its proximity to bigger, higher order retail centres such as Southampton, Salisbury and Winchester, meant that Romsey experienced some expenditure leakage mainly in comparison goods, and clothing in particular.

- Romsey was reported to be well serviced in terms of convenience shopping, with a good range of supermarkets and independent convenience stores. In 1998, Waitrose was the main foodstore, also attracting shoppers from outside Romsey's immediate catchment.

- Romsey was reported to have an attractive town centre environment. Suggested town centre improvements by consumers and traders mainly revolved around parking and traffic flow improvements.

- In terms of future retail floorspace needs, previous studies reported that moderate increases both in convenience and comparison retail floorspace (in the latter case, in the bulky goods category) could contribute to the reduction in expenditure leakage in Romsey. However, the limited availability of town centre locations/floorspace was underlined.

Introduction

2.1. Government planning guidance requires that local policies and decisions relating to new retail developments are supported by reliable and up-to-date evidence on the quality and quantity of existing provision as well as the potential for growth. For this reason, in 1998, Test Valley Borough Council appointed Colliers Erdman Lewis to conduct a full study of retailing throughout the Borough, with the main emphasis placed on the town centres of Andover and Romsey.

2.2. The 1998 Colliers Erdman Lewis Retail Study had two primary aims:

- To provide 'health-checks' on the vitality and viability of the town centres of Andover and Romsey, based on the indicators set out in PPG6.

- To conduct an assessment of the retail capacity of the Borough and advise on the short, medium and longer term (up to 2016) need for additional shopping provision in the Borough, in particular taking into account the role/position of Andover and Romsey in the Borough's retail hierarchy.

2.3. Nine years later, in 2007, Test Valley Borough Council commissioned Nathaniel Lichfield and Partners (NLP) to conduct a Retail Capacity Study for the Borough, with the key aims of assessing existing retail facilities and future retail needs in the Borough, identifying competition from other centres outside the Borough, and providing advice on spatial planning policies for Local Development Plans. In terms of future retail floorspace requirements, this was updated in 2009 to take account of the recession.

2.4. Additionally, in 2008, NLP was commissioned to undertake a further retail assessment analysis specifically for Romsey town centre, where the potential for additional convenience and comparison retail floorspace was assessed, as well as the potential/suitability of various in/out of town sites for retail development. Another study was commissioned in 2011 by Test Valley as an addendum to a larger retail study of Southampton and Eastleigh by GVA, examining convenience and comparison shopping in the region.

2.5. To process and contextualise the University of Southampton study of 2011 reported here, this chapter summarises the major findings of these previous studies, focusing primarily on what these studies suggested in relation to the vitality and viability of Romsey town centre.

Colliers Erdman Lewis Retail Study (1998)

2.6. The study was based on a telephone survey of 1,000 households within Test Valley and surrounding areas; postal questionnaire surveys of all town centre retail and service businesses in Andover and Romsey; pedestrian counts and questionnaire surveys of shoppers in these centres; retail floorspace counts in Andover and Romsey; meetings with local trader groups and representatives from Andover and Romsey.

a. Vitality and viability of Romsey: the Romsey 'Health Check'

2.7. Overall, the 1998 report indicated that Romsey was:

a. **a healthy centre** in economic terms
b. **a centre with stable and sustained level of retailer demand** and
c. **a centre that met most of the day to day** (**as well as the less frequent)** requirements of its catchment population, despite some leakage of consumer expenditure to competing centres (primarily Southampton).

2.8. In 1998 Romsey town centre contained around 9,569 sq m (103,000 sq ft) net of retail floorspace. Out of the 160 outlets in the town, 15 (9.4%) were convenience retail, 74 (46.3%) comparison, 61 (38.1%) were retail services, and 10 (6.3%) were vacant retail. This low vacancy rate was considerably less than both Andover and the UK average. Moreover, the report notes that the vacant units were mainly located in secondary roads, while there was high demand for vacant units in the prime trading locations of the town.

2.9. In 1998 the convenience food offer in Romsey was headed by Waitrose and the Co-op, while there were also 9 independent food shops (including 2 butchers and 2 greengrocers). The town had a good range of multiples, particularly non-food[2]. Financial services, and services overall were well represented and the centre had a good range of restaurants pubs and cafes and several leisure venues. The only retail category that Romsey was felt to be lacking was the bulky goods category; however, that was not felt top be problematic, due to Romsey's proximity to out of town retail parks.

b. Shopping Patterns and competing centres in 1998

2.10. A telephone survey of 1,000 households in Test Valley Borough and its hinterland revealed that the principal centres competing with Romsey for non food shopping (in descending order of importance) were Southampton, Salisbury, Eastleigh and Winchester. In relation to food shopping, Romsey was judged to be 'under-shopped', with expenditure leakage higher than expected for a centre of its size and location, suggesting that there could be potential for additional food store provision in the town.

Comparison goods:

2.11. In 1998 Romsey ranked 5th in the sub-region in terms of its share in comparison goods spend. The occupied comparison space available in Romsey was 72,501sq ft (96,735 sq m) net. The study calculated Romsey's retail efficiency and confirmed that the town centre was vital and viable in retail terms.

2.12. Figure 2.1 shows the comparison catchment area of Romsey[3]. As Table 2.1 indicates, Romsey retained 9% of the total available expenditure in the catchment area. The main competing centre was Southampton, which, as a whole (city centre and surrounding district centres combined) drew in nearly half of the comparison goods expenditure-even the majority of trade from the town centre of Romsey.

[2] A comparison with analogue centres of Buckingham and Thame confirms that observation: Romsey has 12 comparison multiples as opposed to 6 in each centre, and 4 convenience multiples, as opposed to 5 and 2 respectively.

[3] This includes the core, primary secondary and tertiary catchment areas

Figure 2.1: Romsey catchment area map for comparison goods shopping (Source: 1998 Colliers Erdman Lewis Retail Study, Volume 1, fig.4.6)

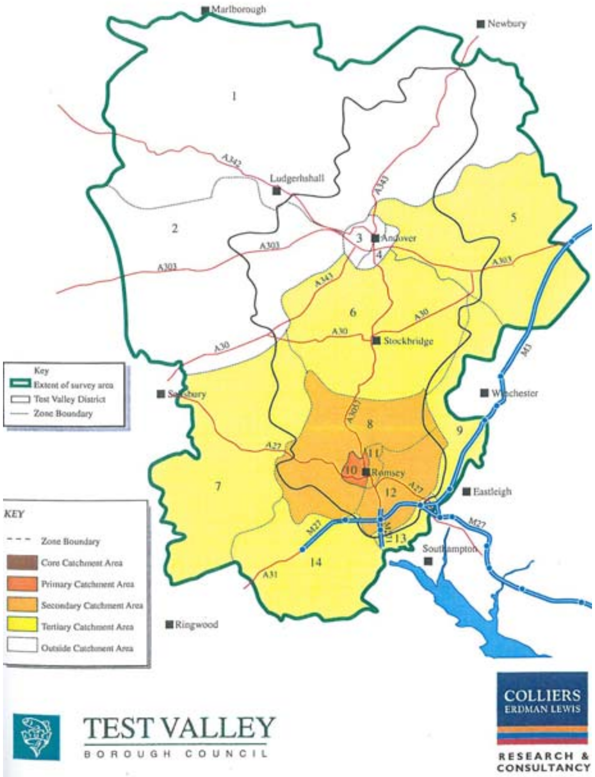


Table 2.1: Comparison Expenditure Retention and Leakage[4]

Town	% of expenditure retained in Romsey/ leaked in the sub-region
Romsey	9%
Southampton City Centre	33%
Southampton local district centres	14%
Salisbury	9%
Eastleigh	8%
Andover	5%
Winchester	5%
Hedge End Retail Park	5%
Other centres	12%

2.13. The category ‘suffering’ the most in terms of expenditure leakage in 1998 was reported to be clothing goods, while the absence of a warehouse in Romsey meant that most of the bulky goods purchases (furniture, electrical, DIY goods, etc) were also done elsewhere in the sub-region.

2.14. Overall, the report concludes that even though Romsey was perceived as a lower order centre by shoppers in the sub-region, it was also thought to a have a high quality of shopping offer.

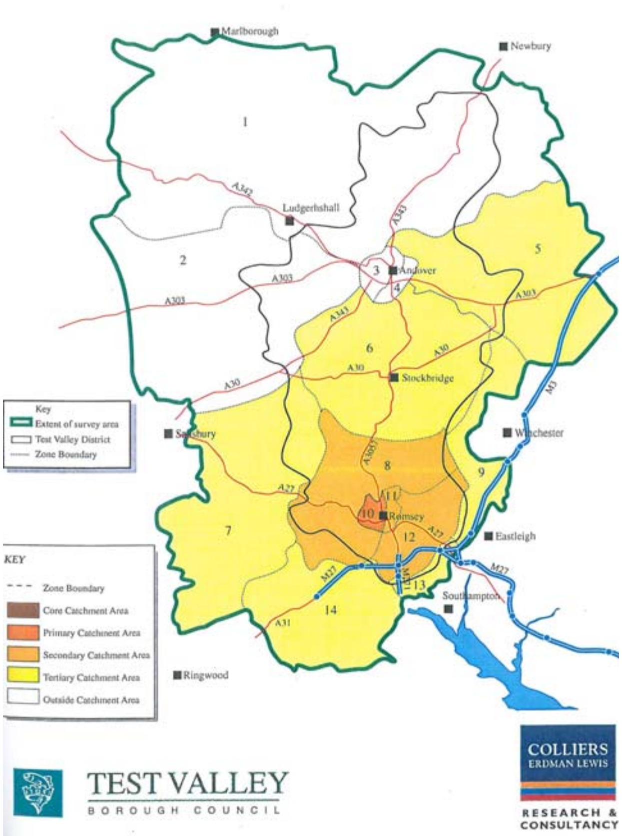
Convenience goods:

2.15. Figure 2.2 shows Romsey’s convenience catchment area for 1998. The study reported that Romsey retained 11% of its total pool of expenditure on convenience goods[5]; 56% of that expenditure was retained in Romsey’s core catchment (Figure 2.2, Zone 10).

[4] Figures based on 1,000 telephone surveys of households within the Test Valley Area.

[5] This includes the core, primary secondary and tertiary catchment areas-see Figure 2c.

Figure 2.2: Romsey catchment area map for convenience goods shopping (Source: 1998 Colliers Erdman Lewis Retail Study, Volume 1, fig.4.8)



2.16. In 1998, the convenience food offer in Romsey was headed by Waitrose (then located in the town centre where Aldi is now situated) which was reported to be used as a main foodstore by nearly 62% of shoppers interviewed in the town centre of Romsey. Moreover, the sub-regional household survey revealed that 65% of shoppers who visited the Romsey Waitrose linked their trips and used other town centre outlets.

2.17. Overall, shoppers in the sub-region rated highly Romsey in terms of the quality of its convenience goods provision (even though there were suggestions for a need to improve the supermarket provision in the town).

2.18. Based on an in-depth analysis of convenience goods turnover in Romsey, the 1998 report concluded that the town had a healthy level of floorspace efficiency.

2.19. Overall, the report concluded that Romsey town centre offers and attractive environment for shoppers[6]. Reference was made to an assessment survey by Hampshire County Council (1997 Town Centre Qualitative Assessment Survey), that awarded Romsey a score of 43 out of 50 for its environmental quality (compared to 37 for Andover).

c. Trader views and performance

2.20. Trader turnover findings in 1998 confirm the suggestion that Romsey was a healthy centre, as 47% of national or regional multiples reported levels of turnover above average (compared to 27% in Andover). On average respondents experienced a rise in turnover of 4.8% ahead of inflation in the year coming up to the survey (1997). Moreover, 47% of businesses reported an increase in their turnover in 1998.

2.21. When asked to comment on Romsey town centre's retail mix, the vast majority of traders stated that Romsey was fine as it is, echoing similar views expressed by Romsey shoppers. The most important issue in terms of town centre improvements form a trader perspective was the increase of car parking spaces, mentioned by the majority (54%) of respondents. Increase of

[6] Shoppers' responses reveal some perceived strengths and weaknesses of Romsey: the tidiness of the town and the ease of getting around are from the shoppers' perspective the strong points of Romsey compared to competing centres around. Weaknesses included choice and price of goods. Many shoppers indicated that there is a need for improvements in traffic circulation and car parking.

speciality retailers was mentioned (by a 46%) as another possible improvement of Romsey. Traders expressed concerns on the number of charity shops occupying prime locations in the town centre (5 charity shops in 1998).

d. 1998 Study Retail Floorspace Capacity Assessment and policy recommendations

2.22. The 1998 report estimated that by 2016 Romsey had the capacity for an extra 2,785 m^2 (gross) of bulky and 3,797m^2 of non-bulky comparison goods. For convenience goods, the report suggested that Romsey had the potential to increase its market share of locally generated expenditure for convenience goods, and therefore suggested that a new foodstore of up to 2,787 m^2 would 'soak up' additional available spending and would enhance consumer choice.

2.23. The report concluded that the aims of planning policy for Romsey should focus on enhancing the existing character of the town while maintaining the town's position in the retail hierarchy. In this context, the report suggests that rather than seeking to attract significantly more people living elsewhere, policies should focus on meeting the needs of the local residents and encourage them to use the town centre more. It concludes that new developments should be accommodated within the town centre and other locations should be resisted.

Nathaniel Lichfield and Partners, Test Valley Borough Council Retail Studies (May 2007 and June 2008)

2.24. In 2007, Test Valley Borough Council commissioned Nathaniel Lichfield and Partners (NLP), to conduct two studies (one in 2007 [figures updated 2009] and one in 2008, that was specific to Romsey) with the primary aim to assess the retail capacity of the Borough, as well as consider the future (up to 2026) retail floorspace needs. Moreover, the studies provided policy recommendations and advice on potential locations for retail development in the Borough. The 2007 report provided a Borough-wide retail capacity assessment; drawing upon this, and accounting for changes in retail space that took place in the meantime[7], a further in-depth analysis of Romsey was undertaken, that assessed future retail development scenarios (both for convenience and comparison retail developments) and, in each case, examined whether Romsey's market share could be improved.

[7] It is noted that since the 2007 report, new commitments were implemented at Latimer Walk, and an extension of Dukes Mill has been under construction. Also Waitrose had applied for an extension to their store.

a. 2007 and 2008 Studies: Retail Assessment of Test Valley Borough and the role of Romsey

TABLE 2.2: Management Horizons Shopping Index Ranking

Venue	MHE Index Score	Rank
Southampton	258	15
Basingstoke	181	47
Salisbury	176	53
Portsmouth	159	73
Bournemouth	155	78
Winchester	127	121
Newbury	110	161
Andover	101	187
Fareham	95	201
Eastleigh	79	236
Boscombe	74	251
Waterlooville	69	276
Gosport	65	296
Shirley	49	399
Southsea	48	404
Devizes	46	421
Christchurch	46	421
Lymington	46	421
Hedge End	45	435
Ringwood	38	502
Totton	33	575
Portswood	30	624
Romsey	28	664
Bitterne	23	800
Chandlers Ford	23	800

2.25. The 2007 study (figures updated 2009) concluded that in qualitative terms, convenience retail in Test Valley Borough overall, is satisfactory, with a good range of foodstores - both large and smaller supermarkets, and convenience stores. In terms of comparison shopping, the report suggested loss of trade and comparison goods expenditure to bigger shopping centres outside, such as Basingstoke, Southampton and Winchester. Reference was made to Management Horizons' Europe UK shopping index 2004[8] (see Table 2.2), where the relative position of Andover and Romsey in relation competing centres is shown, justifying the primacy of those centres as shopping destinations.

2.26. However, it is also noted that, overall, comparison retail in the Borough traded healthily, with consistently low vacancy rates. It concluded that Borough residents had access to a good choice of high street shopping destinations, both inside the Borough (Andover and Romsey) and outside (Southampton, Salisbury and Winchester).

[8] This is an index of retail centres based on a weighted score for multiple retailer representation in each centre.

2.27. The report notes that Romsey's role in the retail hierarchy was to serve primarily the day-to-day shopping and service needs of its local residents and its small rural catchment area. The report suggested that any future strategy of the Council should seek that the current position of Romsey should be maintained and enhanced. In particular, it is noted that:

'(…) given its position in the hierarchy below Southampton and Andover, the strategy should only seek development of an appropriate scale. Development in Romsey should not seek to serve residents in other towns or rural areas outside its primary catchment area' (p.7)

2.28. In terms of the vitality and viability of Romsey, and drawing upon the 2007 study, the subsequent 2008 NLP Romsey report noted that Romsey was trading healthily and above benchmark turnover levels, with retail vacancy rates below 2% in October 2007 (as opposed to the national average of 11%). In this context, the 2008 report underlined that any new development decision should ensure a good retail balance, so that sufficient expenditure leakage would be clawed back, while at the same time assuring that the vitality and viability of the centre was not undermined[9].

e. Test Valley retail needs and development potential

2.29. The 2007 study assessed the qualitative and quantitative scope for new retail floorspace in Test Valley up until 2026. Experian's local consumer expenditure estimates for comparison and convenience goods for 2005 were used together with Experian's national expenditure projections for 2026, in order to forecast expenditure in the study area. Moreover, the study estimated the total turnover of shops within the study area.

2.30. Based on these, the following suggestions were made for Romsey's retail capacity:

- ***Convenience retail recommendations for Romsey:*** Some scope for convenience retail development before 2016 was identified, under the assumption that Romsey needs to claw back some expenditure leakage from its local catchment area. It is underlined though that the scale of development should be determined based on the existing convenience provision of the town, for adverse impacts to be avoided. The 2008 report presents different development scenarios and their potential impacts on Romsey's existing convenience stores (these are presented in detail in Appendix 2A). The studies concluded that in the case of additional residential development implemented in Romsey (as proposed in the draft South East Plan) there could be scope for additional convenience retail floorspace provision by 2016.

- ***Comparison retail recommendations for Romsey:*** The two studies identified scope for a reasonable amount of comparison retail development in Romsey up to 2016, which could increase further if the residential development proposed in the draft South East Plan were to be implemented. For the short/medium term, the 2007 study suggests the development of a mixed occupier retail warehouse. It was suggested that this type of development would have the potential to claw back expenditure leakage from the town's catchment area, without harming the vitality and viability of the town centre. The 2008 NLP Romsey study presents different scenarios of comparison retail developments (this are presented in detail in Appendix 2B).

2.31. Finally, both studies highlighted problems of accommodating future retail developments in town centre sites, as Romsey lacked sufficient floorspace within the boundaries of its town

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[T]The report draws attention to the fact that projected expenditure (and consequently retail space needs) is based on forecast growth in per capita spending and as such, sensitive to changes in economic circumstances. For this reason the study recommends that the council should seek to meet only short-term (up to 2016) floorspace projections.

centre, while there was also very limited available (and suitable) edge of centre land. Consequently, it was concluded that, if the projected floorspace were to be accommodated, then this would have to be on an out-of-centre site, or as part of a major new residential development.

GVA Retail Addendum for Test Valley (2011)

2.32. Most recently, in April 2011, GVA conducted a Retail Study of convenience and comparison shopping habits for Southampton and Eastleigh, with an addendum for Test Valley. This study reported results specific to the Southern Test Valley area of a phone study of 2,600 households in Southampton and Eastleigh. It found that Romsey had the greatest influence over its immediate catchment, but also attracted shoppers from North Baddesley, and rural Romsey/Ampfield. This is mainly attributed to Waitrose, which draws 66% of available expenditure of the Southern Test Valley study area.

2.33. The study found that Romsey retains 55% of convenience expenditure in the study site (Zone 12) and 11.9% of available comparison goods expenditure, indicating a high level of leakage for non-food items.

2.34. Findings from the GVA study are also discussed throughout the report where relevant, though it should be noted that there were methodological differences in the way the GVA study and this current Southampton study reached their conclusions. Two important differences are study area and use of the term 'food shopping'. For the Southampton study, 'main catchment respondents' are those who live within a 0-15 minute drive time of the town centre, which includes North Baddesley to the east, Millbrook to the south, Braishfield to the north and Newton to the west. The study site in the GVA study (Zone 12) is smaller and covers what appears to be the 0-5 minute drive time catchment.

2.35. The other methodological difference is the use of the term 'food shopping'. In the Southampton study, there is a distinction between 'main' food shopping and 'secondary/top-up' shopping. The GVA study calculates figures whereby 'food shopping' refers to both main and secondary (main food shopping is weighted at 75% and secondary at 25% to give an overall food shopping figure).

Revisiting Romsey's vitality and Viability: the 2011 Southampton University Romsey Town Centre study

2.36. In prefacing the 2011 University of Southampton Romsey Town Centre study this chapter has presented the key findings of previous studies commissioned by Test Valley Borough Council to assess the vitality and viability of Romsey, as well as to examine the need for additional retail provision. The key messages coming out of these studies is that Romsey has consistently been a vibrant market town, with healthy commercial roads benefiting from a range of both independent specialist shops and national chains. Despite some expenditure leakage to bigger centres nearby, Romsey's reasonable retail mix seemed to service well the town's local population as well as cater for the day to day needs of its rural hinterland.

2.37. Current reported vacancy rates in Romsey (7.1% in May 2011) are well below the national average, giving an indication that Romsey continues to perform well as a retail centre. However, as the last in-depth study of Romsey's vitality and viability was the Colliers Erdman Lewis Retail Study, commissioned back in 1998 – over a decade ago - there was a feeling that more up-to-date information was long overdue, in order to gain an insight of how the town centre currently functions, what makes it attractive (or not) to shoppers, and what could attract more people to use its shops and facilities. Moreover, given the long standing challenges that high streets all over the UK are facing - especially under the current economic downturn - knowledge on how Romsey traders are currently performing also needed to be updated.

2.38. In that context, it is the belief of the Southampton research team that the research reported here will be seen to have a vital role to play in revisiting the vitality and viability of Romsey to gain valuable insight into the economic health and sustainability of Romsey as a retail centre.

Chapter 3

UNIVERSITY OF SOUTHAMPTON 2011 STUDY:

RESEARCH DESIGN AND METHODOLOGY

Highlights

- Outlines the research methodology employed in the University of Southampton (2011) study.
- Describes extensive consumer surveys completed with 'main catchment respondents' and 'visitors' and users of the monthly farmers' market.
- Describes trader survey of town centre retailers and service providers ('traders').
- Discusses form, content and administration of survey instruments (questionnaires) underpinning the study's findings relating to both consumers and traders surveys.
- Provides information on the segmentation of 423 questionnaires successfully completed with 'main catchment' respondents and 118 'traders'.
- Additionally outlines the surveys conducted with 'visitors' to the town and consumers at the farmers' market.

Introduction

3.1. This chapter outlines the research design and methodology of the 2011 University of Southampton study. This research involved four components: questionnaires with consumers who living within a 0-15 minute drive time of Romsey town centre ('main catchment' respondents), questionnaires with consumers who lived outside of the 15 minute drive time area ('visitors'), questionnaires with consumers at the monthly Farmers' Market, and questionnaires with town centre retailers and service providers ('traders').

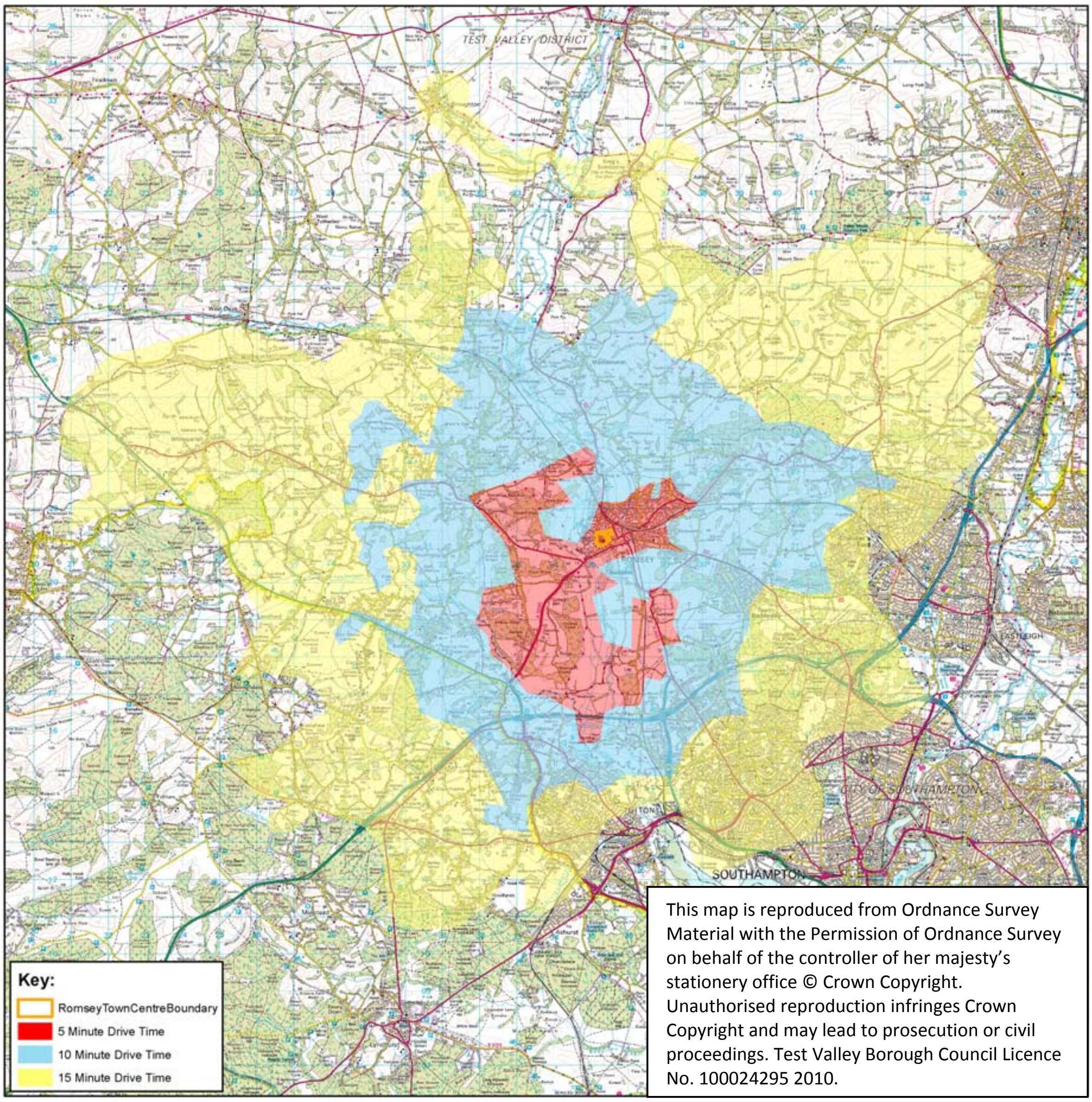
3.2. The survey information was subsequently 'cleaned' and coded to the highest possible standards at the University of Southampton. Descriptive analysis of the coded data using statistical analysis program SPSS was undertaken. Two researchers were involved in these processes to maximise accuracy.

Consumer surveys, sample segmentation and sizes, survey instruments

'Main catchment' consumer surveys

3.3. In order to achieve representation, a stratified quota sample design was adopted, with the sample being segmented across age groups and by location within the catchment area. A target of approximately 450 respondents was set both to ensure adequate representation and to facilitate analytical leverage. The sample was segmented by age group and by catchment zone with the 0 to 5 and 5 to 10 minutes drive time zones being assigned higher weighting. Figure 3.1 shows the map used to classify whether respondents were in the 0-5 minute drive time zone, 5-10 minute drive time zone, or 10-15 minute drive time zone. Respondents were asked to indicate on the map: red signifies 0-5 minute drive time, blue represents 5-10 minute drive time, and yellow represents 10-15 minute drive time. If a respondent's home location did not fall in the coloured zones, they were classified as a visitor.

Figure 3.1 Home location drive time map[10]



3.4. In practice, that meant in each segment of the sample an attempt was made to fill a quota of respondents. A total of 423 individual consumer questionnaires were completed, representing 94% of the target. Table 3.1 shows the segmentation results of the main catchment consumer surveys. The demographic most under-represented was the younger "under-34" age segment although it should be noted that 80% of the target (and an analytically tractable total number of 118 respondents) was obtained. Conversely, there was minor over-representation of the 34-59 age segment.

[10] Drive Time modelling based upon methodology used by Tesco Stores Limited.

Table 3.1 Segmentation results of main catchment consumer surveys

Catchment zone	Age segment of respondent						Achieved Total	Total Target	Achieved % of Total Target
	below 34		34 to 59		60 and over				
	Achieved	Target	Achieved	Target	Achieved	Target			
0-5 mins drive time	**75**	70	**77**	70	**79**	70	**230**	210	**109.5%**
5-10 mins drive time	**18**	50	**51**	50	**41**	50	**112**	150	**74.7%**
10-15 mins drive time	**25**	30	**35**	30	**22**	30	**85**	90	**94.4%**
Total	**118**	150	**163**	150	**142**	150	**423**	450	
Achieved % of Total Target	***79%***		***109%***		***95%***		***94%***		

3.5. The survey instrument was an interviewer-administered ‘face-to-face’ consumer questionnaire (see Appendix 3A for questionnaire) which took approximately seven minutes to complete. The questionnaire contained questions about shopping habits (for both food items and non-food items), including frequency of shopping, mode of travel, and linked-trip propensity. Respondents were also asked about their perceptions of Romsey and their reasons for visiting the town centre on the day of the survey. Demographic and postcode data was also collected covering age range, gender, household size, household income and the number of cars available for use by members of the household.

3.6. The consumer questionnaires were completed over eight days (including Saturdays) in March 2011. Three researchers were involved in administering the questionnaires on each day and six locations in the town centre were used for data collection. Each location was used an equal number of days to and coverage was systematically distributed across the survey period to minimise any location-specific response bias. Figure 3.2 shows the locations of where the questionnaires were administered, and Table 3.2 shows the data collection schedule. Very importantly, the local authority and university research team arranged for publicity to be given to the survey in the local newspaper (*Romsey Advertiser*) prior to the survey being conducted.

Figure 3.2 Locations where questionnaires were administered

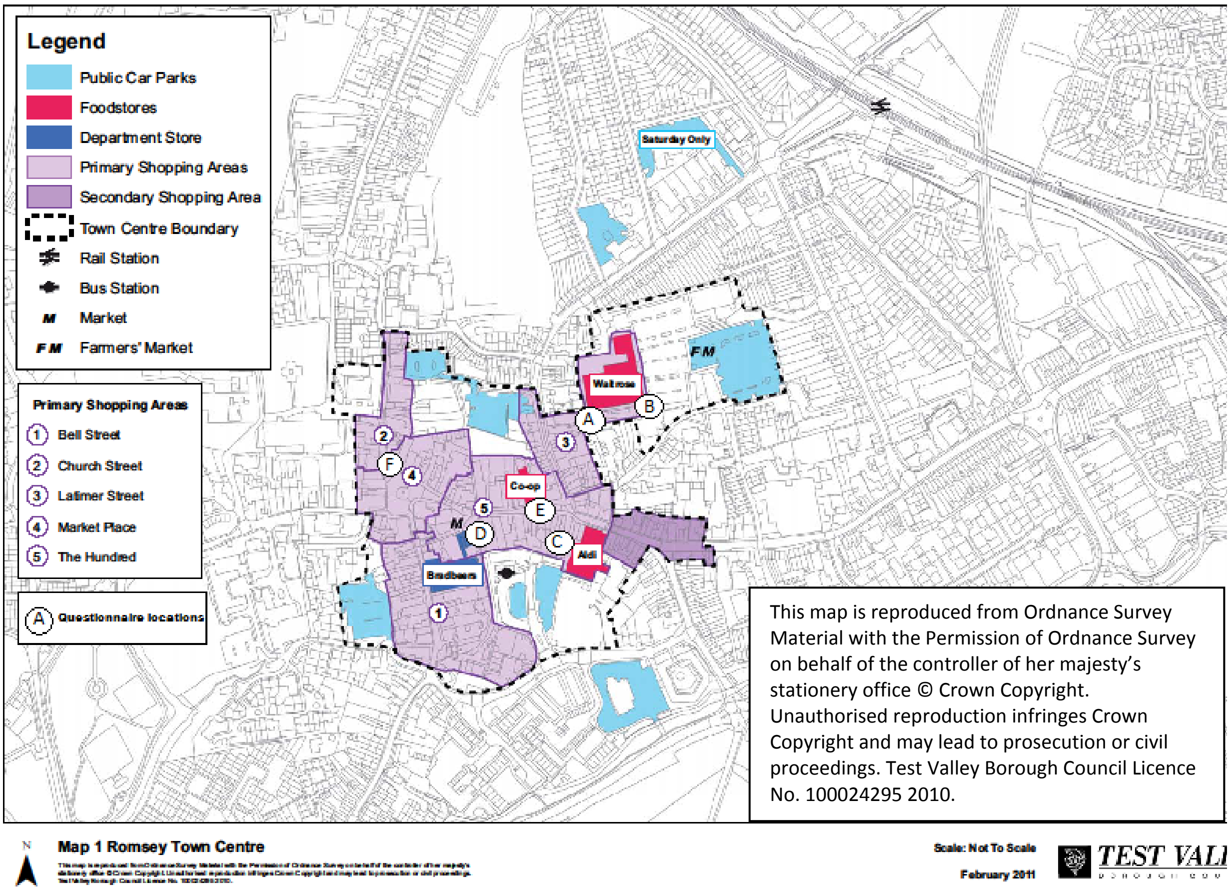


Table 3.2 Data collection schedule and locations

DATA COLLECTION SCHEDULE	
Key A. Waitrose – Latimer Walk west B. Waitrose car park – Latimer Walk east C. Aldi D. Bradbeers E. Co-op – The Hundred F. Romsey Working Men's Conservative Club	
DAY	*SURVEY LOCATION*
Friday	A, D, C
Saturday	B, F, E
Monday	A, D, C
Tuesday	B, F, E
Wednesday	A, D, C
Thursday	B, F, E
Friday	A, D, C
Saturday	B, F, E
***Bold** indicates market days	

'Visitor' survey

3.7. 'Visitors' were defined as respondents who lived outside the 0-15 minute drive time catchment, and a shorter questionnaire was completed with them, focusing on their usual reasons for visiting

Romsey, the purpose of visiting on the day of the survey, their mode of transport, their intended or actual length of stay in Romsey, and their perceptions of Romsey. Demographic and postcode data were also collected. However, unlike the main catchment respondents, visitors were not asked about their food and non-food shopping habits.

3.8. A target of approximately 100 visitor questionnaires was set and 84 questionnaires were completed.

Consumers using monthly farmers' market survey

3.9. Additional consumer questionnaires were undertaken by two researchers at the farmers' market held in the town of the first Sunday of the month (in this case 3rd April 2011). 43 questionnaires were completed, the primary focus of those questionnaires being to determine whether the Farmers' Market functioned to complement the town centre offer and the extent to which it attracted footfall to the town centre and spill-over trade on a traditionally quiet day.

3.10. Respondents were asked about their habits in relation to usage of farmers' markets, together with their usual food shopping patterns and perceptions of the strengths and weaknesses of Romsey. Demographic data were also collected.

Trader survey

3.11. A survey of all retailers and service providers ('traders') in Romsey was conducted concurrently with the 'main catchment' respondents in March 2011 (see Appendix 3B for trader questionnaire). 'Traders' were given the opportunity to complete the questionnaire, including retailers, leisure service providers (e.g. cafes, hotels), retail service providers (e.g. hair and beauty salons), financial and business service providers (e.g. banks, solicitors, and estate agents), and health and medical service providers (e.g. dentists). Importantly, the traders were informed by the local authority at a business meeting of the research prior to the surveys being conducted.

3.12. The publicity and 'face-to-face' questionnaire administration resulted in 118 questionnaires being successfully completed – 78% of the potential total of retailer and service providers in Romsey. Table 3.3 shows the classification of traders responding to the survey by business type and ownership e.g. national retailer, multiple retailer, and independent retailer.

TABLE 3.3 Trader survey respondents by business type and ownership in Romsey

	Business Classification					
	Independent retailer	Independent retailer/ member of a symbol group	Multiple retailer part of local/regional group	National multiple retailer	Total	*% of Total*
COMPARISON	22	3	2	17	44	*37.3*
CONVENIENCE	8	1	3	2	14	*11.9*
RETAIL SERVICE	20	0	3	2	25	*21.2*
FINANCIAL & BUSINESS SERVICES	7	2	1	4	14	*11.9*
LEISURE SERVICES	15	0	0	3	18	*15.3*
HEALTH & MEDICAL SERVICES	2	0	0	0	2	*1.7*
PUBLIC SERVICES	1	0	0	0	1	*0.8*
Total	75	6	9	28	118	*100.0*
% of Total	*63.6%*	*5.1%*	*7.6%*	*23.7%*	*100.0%*	

3.13. Like the consumers, the traders were asked about their perceptions of the strengths and weaknesses of Romsey as a town centre. They were also asked about Romsey's competitors. Finally, questions were posed related to their businesses – for example sales over the past year, predicted future sales, the changes in cost of running a business, and barriers to growth.

3.14. The questionnaires were conducted on a face-to-face basis by the Southampton researchers, with options of 'call back pick up' or 'mail back' of questionnaires in cases where the traders were too busy to complete the survey at the time of the researcher visit.

Day-of-survey information versus habits, propensities and perceptions

3.15. Prior to discussing the main findings of these surveys, it is important to clarify one important dimension of the 'main catchment respondents' survey. That consumer survey included two groups of questions.

a) Questions which focused on respondents' actual travel behaviour on the day of the survey – e.g. main reason for going to the town centre, how they travelled there, where they parked (if they travelled by car), how long they intended or actually stayed in the town centre, and what shops or services they used and in what order.
b) Questions which focused on respondents' shopping habits, propensities, and perceptions.

3.16. These two types of questions provide importantly different insights into consumers' use of the town centre, and we attempt to highlight and distinguish those insights in the subsequent chapters.

Chapter 4

UNIVERSITY OF SOUTHAMPTON 2011 STUDY:

TRAVEL AND SHOPPING BEHAVIOUR ON DAY OF SURVEY

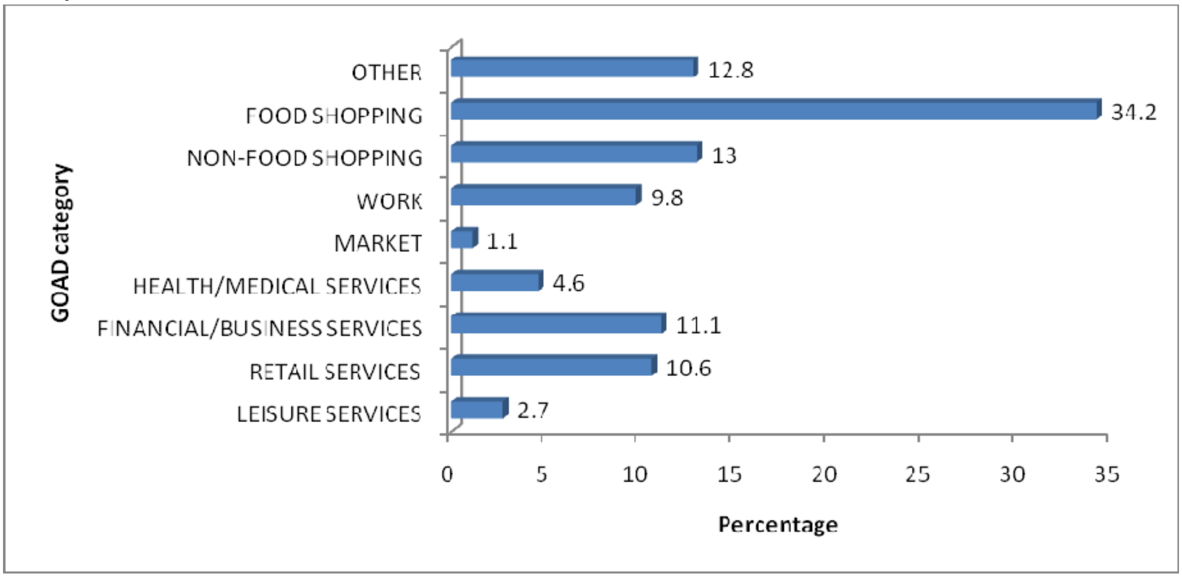
Highlights

- Summarises the way 'main catchment' respondents use the town centre on the day of the survey including main reasons for visiting the centre, mode of transport and length of stay.
- The most common reason for visiting the town centre was for food shopping, whether at a corporate foodstore or an independent foodstore.
- Most common mode of transport was car, and most respondents who drove parked in the Waitrose-owned car park.
- Most respondents stayed in the town for less than two hours.

4.1. As noted at the end of the previous chapter, it is important to distinguish between two types of information collected in the survey of consumers in Romsey's main catchment area: questions about *actual* behaviour on the day of the survey, and questions about consumers' habits, propensities and perceptions. These two types of questions provide importantly different insights into consumers' use of the town centre. This chapter discusses the first type of questions asked.

4.2. Consumer respondents were asked about their travel behaviour on the day of the survey: how they travelled to Romsey, where they parked (if they travelled by car), their main reason for visiting the town centre, what shops or services they either had or intended to visit, and how long they had spent or intend on spending in the town centre.

Figure 4.1 Main catchment respondents' primary reasons for visiting the town centre on the day of the survey



4.3. As shown in Figure 4.1, the most common reason for visiting the town centre reported by consumers on the day of survey was to visit a convenience retailer. 'Convenience' retailers are defined in accordance with the longstanding and widely-used Experian Goad shopping centre retail composition surveys and the list of retail types included in the category is provided in Table 4.1.

Table 4.1 Convenience retailers as defined by Goad

Bakers and confectioners
Butchers
Confectionery, tobacco and news (CTN)
Convenience stores
Fishmongers
Frozen foods
Greengrocers
Grocers and delicatessens
Health foods
Markets
Off licences
Supermarkets

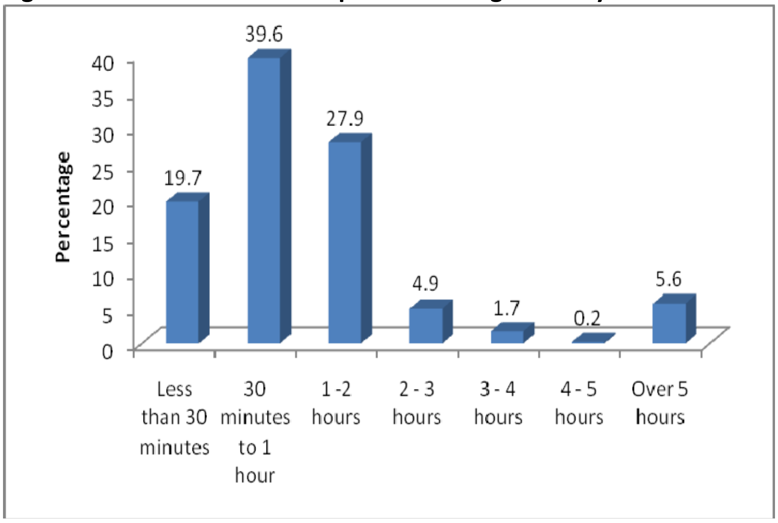
Trip sequences

4.4. Consumer respondents were asked what shops or services they had either already visited or planned to visit, and in what order. Table 4.2 shows the most common shopping sequences of main catchment respondents, revealing that the most commonly visited shops are high street shops and Waitrose.

Table 4.2 Top 5 most common shopping sequences of main catchment respondents

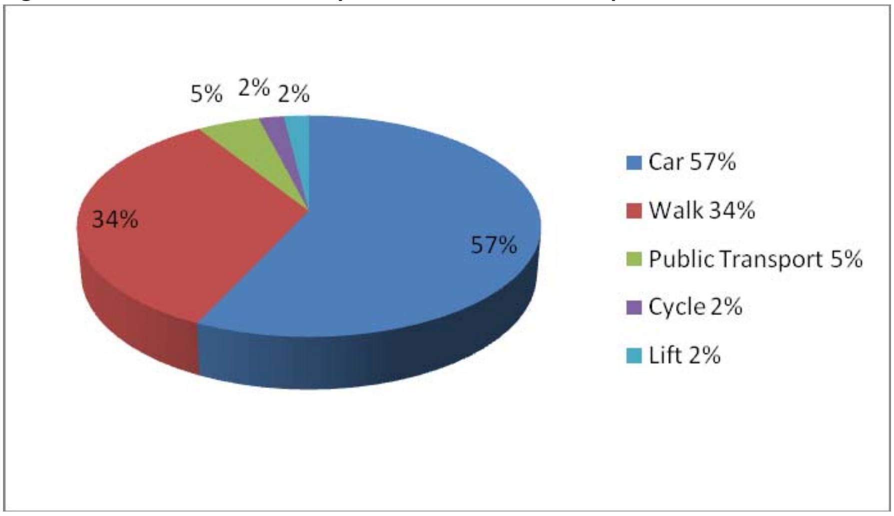
Sequence	N	%
High street shop(s) only	101	23.9%
High street shop(s) then Waitrose	58	13.7%
Waitrose then high street shop(s)	24	5.7%
Waitrose only	19	4.5%
Co-op only	14	3.3%

Figure 4.2 Main catchment respondents' length of stay in the town centre



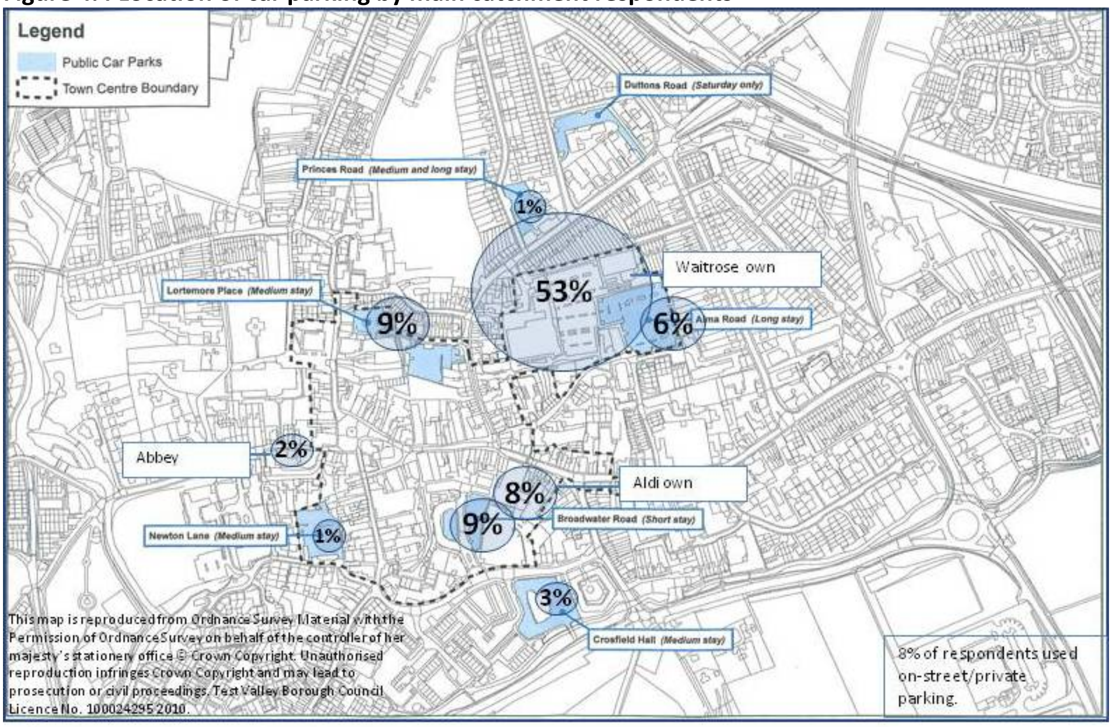
4.5. The most common length of stay is 30 minutes to an hour as seen in Figure 4.2. The majority of respondents spend under two hours in the town centre, and many of the respondents spending over 5 hours in the town centre are working.

Figure 4.3 Main catchment respondents' mode of transport to the town centre



4.6. Figure 4.3 shows the most common mode of transport to the town centre used by main catchment respondents. 57% of respondents travelled by car, and the next most common mode was walking at 34%. The respondents who indicated they travelled by car were also asked in which car park they parked. The most commonly used car park was the Waitrose-owned car park, used by 53% of respondents, followed by car parks at Broadwater Road and Lortmore Place (Figure 4.4).

Figure 4.4 Location of car parking by main catchment respondents



% based on respondents use of car parks on day of survey

Table 4.3 'Did you have any problems with parking today?'

Problems with parking?	Frequency (%)
Yes	16 (7.2%)
No	205 (92.8%)

4.7. Respondents who indicated they drove to the town centre on the day of the survey were also asked if they had any difficulties in obtaining a parking space. Table 4.3 reveals that the majority of respondents did not encounter any problems. Respondents who reported they had difficulties were asked what the problems were. Reasons given included queues to get into car park (4 respondents), limited spaces and hard to find a free space (8 respondents), and lack of disabled parking (2 respondents).

Chapter 5

UNIVERSITY OF SOUTHAMPTON 2011 STUDY:

FOOD SHOPPING IN ROMSEY

Highlights

- Romsey has a reasonably high retention rate for food shopping: 63.2% of respondents who live in the 0-5 minute drive time catchment do their main food shopping in Romsey. The town also serves the surrounding hinterlands. When the base is broadened to all main catchment respondents who live in the 0-15 minute drive time zone, 53.7% of respondents use Romsey for main food shopping.

- There is a reasonably high level of trip linkage though that varies between the different foodstores. 68.3% of respondents report they 'always' or 'frequently' link their main food shopping trip in Romsey with another shop or service in the town centre.

- Younger respondents (below 34 age segment) are more likely to do food shopping elsewhere. The centre that captures the most main food shopping trade not completed in Romsey by main catchment respondents is Chandler's Ford.

- The most commonly used foodstore in Romsey is Waitrose. Waitrose is primarily used as a main food shopping destination and it also generates the highest level of linked trips. The Co-op, Aldi and independent foodstores are used mainly as secondary foodstores.

Introduction

5.1. This chapter explores the role of foodstores in Romsey, examining how the foodstores, both corporate and independent, are used by respondents. Romsey town centre has a range of food shops, with a mixture of corporate foodstores and smaller independents. In the town centre is an Aldi and a recently opened (2009) Co-operative. On the north east side of the centre is a Waitrose, connected to the town by Latimer Walk. Smaller foodstores include Long's, a greengrocer; Peppercorns, a health food shop; and W. Stares and B. Drummond, both butchers.

5.2. Main catchment respondents were asked where they do their main and secondary ('top-up') food shopping, how they travel to their main and first named secondary food shop, and how often they do their main and secondary food shopping. From their responses, we were able to determine how the foodstores in Romsey are used, as well as which demographic groups stay in Romsey for food shopping and which groups do their food shopping elsewhere.

Frequency of food shopping in Romsey

Table 5.1 Frequency of food shopping in Romsey by main catchment respondents compared with University of Southampton Market Towns and District Centres 2010 study (market towns[11] only)

Food shopping visits	Frequency in Romsey 2011	Frequency in Market Towns 2010
Daily	47 (11.5%)	436 (14.5%)
Every few days	182 (44.5%)	642 (39.4%)
Weekly	97 (23.7%)	438 (26.9%)
Fortnightly	37 (9.0%)	121 (7.4%)
Monthly	19 (4.7%)	193 (11.8%)
Every few months	6 (1.5%)	NA
Never	21 (5.1%)	NA
TOTAL	409	1630

5.3. Table 5.1 shows that the majority of main catchment respondents do food shopping in Romsey every few days (44.5%) and very few never do their food shopping Romsey (5.1%). These results are comparable with those of the market towns in the University of Southampton Market Towns and District Centres 2010 study (MTDC 2010). As seen in Table 5.1, Romsey has a higher rate of respondents shopping 'every few days' (44.5% compared with 39.4%) but has a slightly lower rate of respondents shopping daily for food (11.5% in Romsey compared to the market town average of 14.5%). Most noticeably, the rate of respondents shopping less frequently is lower in Romsey than in the other market towns – 4.7% of respondents in Romsey undertake food shopping monthly, compared with 11.8% of respondents in the MTDC 2010 study.

Table 5.2 Food shopping in Romsey

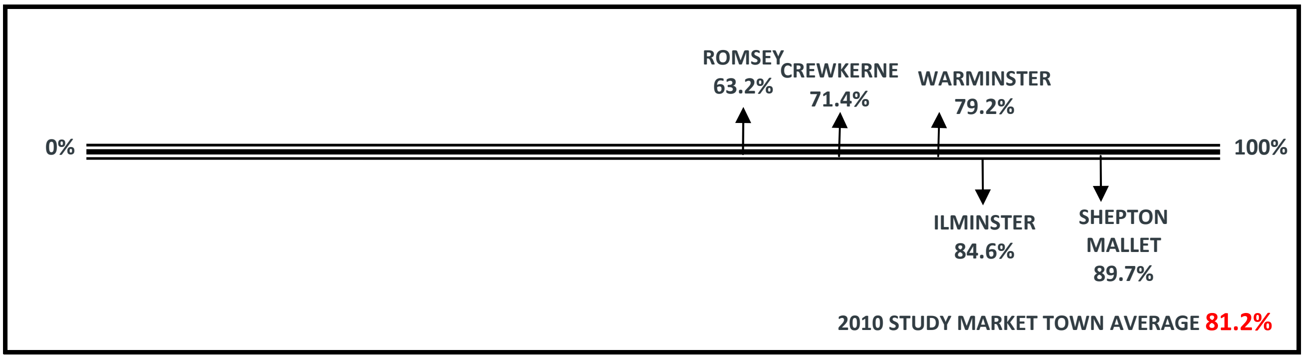
	Romsey as main food shop	Romsey as first named secondary food shop
0-5 minute drive time respondents	146 (63.2%)	158 (76.3%)
5-10 minute drive time respondents	55 (50.0%)	47 (47.0%)
10-15 minute drive time respondents	26 (31.7%)	29 (39.7%)
TOTAL	227 (53.7%)	234 (61.6%)

Food shopping retention

5.4. Retention rate is measured as the percentage of 0-5 minute drive time respondents who stay in the town for their main food shop. Romsey has a retention rate of 63.2%, as seen in Table 5.2. This is lower than the average rate found in the MTDC 2010 study, which was 81.2% across four market town locations. This difference may be due to the nature of the 2010 research which looked at the impact, 12 months on, of new large supermarket entry. Compared to Romsey which has seen no new major supermarket entry since 2005 (Aldi) it is to be expected that the towns in the 2010 study would, at least initially, experience higher retention levels. Furthermore it is to be expected that Romsey would experience lower retention levels due to its close proximity to the competing large centres of Southampton and Winchester; the four market towns in the 2010 study, however, are more rural isolated centres.

[11] Market towns referred to are Crewkerne, Warminster, Ilminster and Shepton Mallet

Figure 5.1 Retention rate of Romsey compared with towns in the Southampton 2010 study



Pull power

5.5. Also apparent in Table 5.4 is the level of 5-15 minute catchment respondents that travel to Romsey for their main and 1st named secondary food shopping – or Romsey's pull power. The pull-power argument looks at the ability of towns/centres to attract shoppers from the outer parts of their catchment area. Romsey serves the surrounding hinterland, attracting 50% of 5-10 minute drive time respondents and 31.7% of 10-15 minute drive time respondents for their main food shopping in Romsey. This is comparable with the average pull power of the market towns in the University of Southampton 2010 study of 57.9% for 5-15 minute drive time respondents.

5.6. Research by GVA Grimley supports our findings on retention and pull power. The retail addendum for Test Valley, as part of a Southampton and Eastleigh Retail Study was completed in April 2011. It found that Romsey town centre draws 38% of expenditure from the rural area between Romsey and North Baddesley (the area that lies in the 5-10 minute drive time catchment of our study). Additionally, the GVA study reveals that Romsey town centre attracts 55% of convenience expenditure generated in what they defined as Zone 12, which is similar to the Southampton definition of 0-5 minute drive time catchment. This figure of 55% is lower than the Southampton finding of 63.2%, but that is likely to be due to the methodological differences discussed in Chapter 2.

Food shopping leakage and competing centres

5.7. Of those 0-5 minute drive time respondents who do not do their main food shopping in Romsey, the majority go to Chandler's Ford (16% of 0-5 minute drive time respondents do their main food shopping there). This is congruent with findings in the GVA retail study: 15.8% of respondents in Romsey (and the surround 0-5 minute drive time zone) do their food shopping at ASDA on Bournemouth Road in Chandler's Ford (Eastleigh). In the Southampton 2011 study, other centres for main food shops by 0-5 minute drive time respondents include Millbrook, Totton, Winchester and Lordshill (see Figure 5.2). When asked to list the main reasons for their main foodstore retailer choice, the majority of 0-5 respondents that shopped outside of Romsey said their store choices offered 'good value for money' and a 'large product range'.

Figure 5.2 Main foodstore locations of 0-5 minute drive time respondents

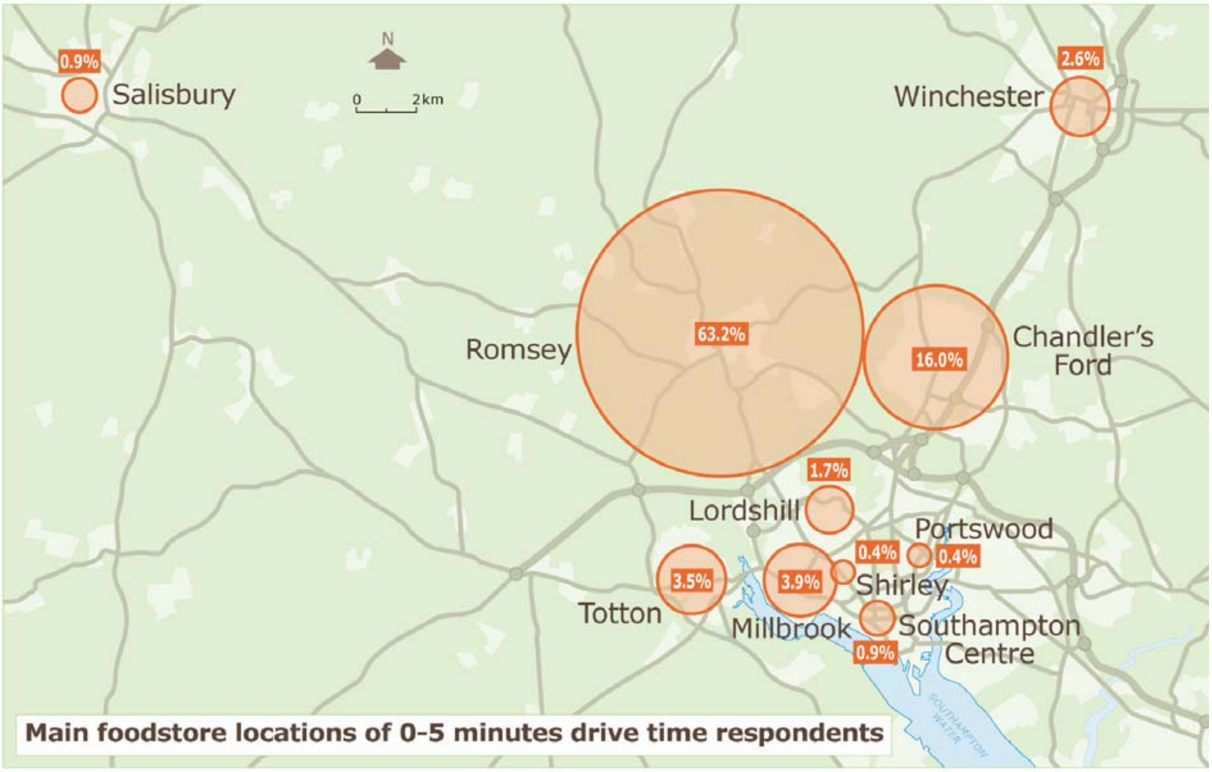
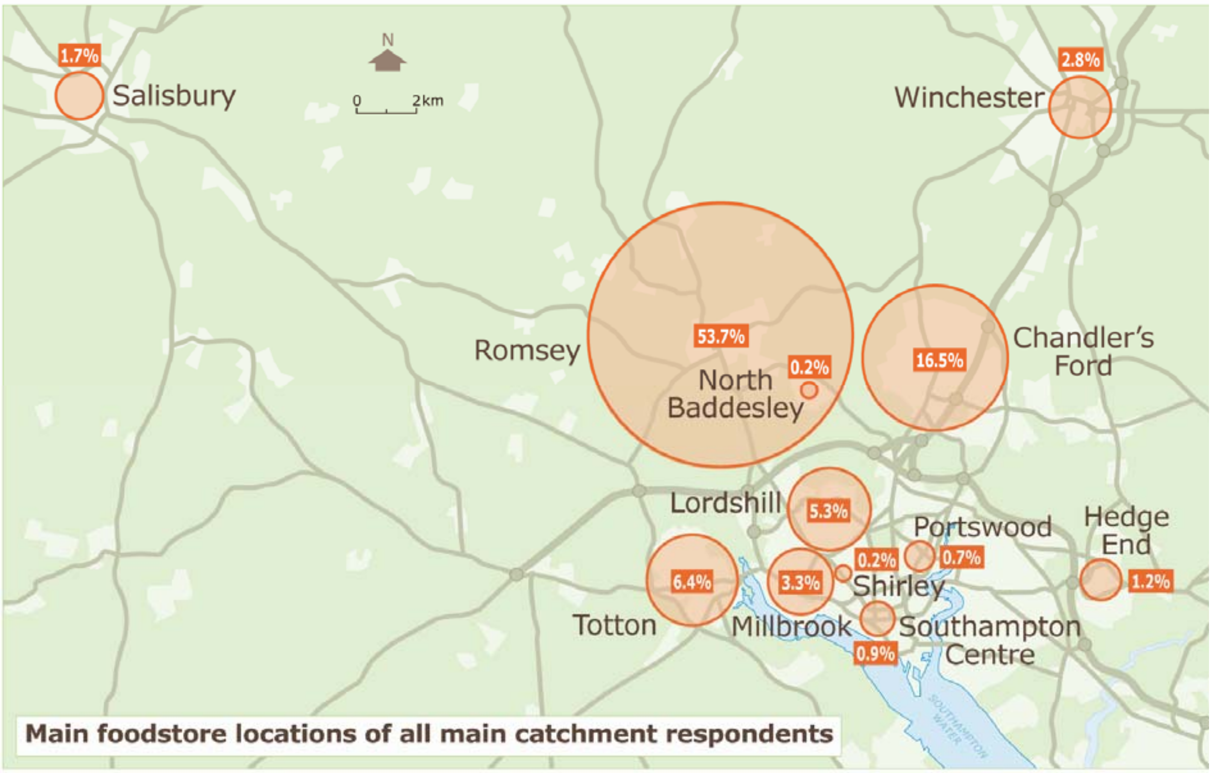


Figure 5.3 Main foodstore locations of all main catchment respondents



5.8. Main foodstore locations of all main catchment respondents are similar though with greater distribution to the surrounding towns. Figure 5.3 shows that 53.7% of all main catchment respondents (0-15 minute drive time) do their main food shopping in Romsey. Furthermore, Chandler's Ford, Totton, Lordshill and Millbrook are used more when looking at all main catchment respondents than just 0-5 minute drive time respondents (see Figure 5.3). This is unsurprising given that respondents from the 5-15 minute drive time catchment zones are likely to be residents in or near those towns.

Who is shopping elsewhere?

5.9. Using demographic information combined with information about shopping locations, an examination of who is using Romsey for their main food shopping is possible. Figure 5.4 reveals that those aged below 34 are more likely to *not* use Romsey for food shopping (58.0%) while those aged over 60 are most likely to use Romsey for food shopping (68.1%). This is supported by Figure 5.5, which shows the proportion of people using Romsey for food shopping based on work status. Unsurprisingly, retirees are more likely to use Romsey for food shopping (72.5%; comparable with the proportion of those aged over 60 who shop in Romsey). By contrast, only 43.1% of full-time workers do their food shopping in Romsey. This is consistent with demographic analysis in Chapter 6 which reveals that respondents in the 'over 60' age segment are also more likely to do non-food shopping in Romsey.

Figure 5.4 Use of Romsey food shops by age segment (for main food shopping)

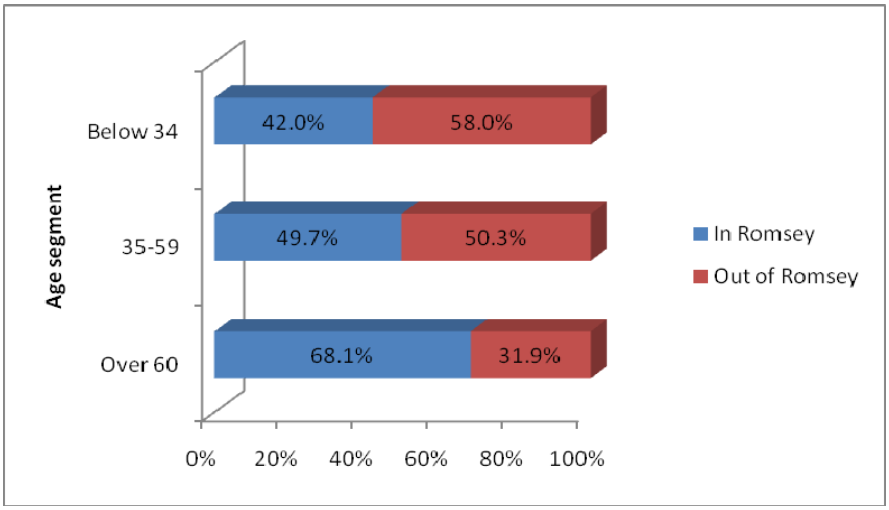
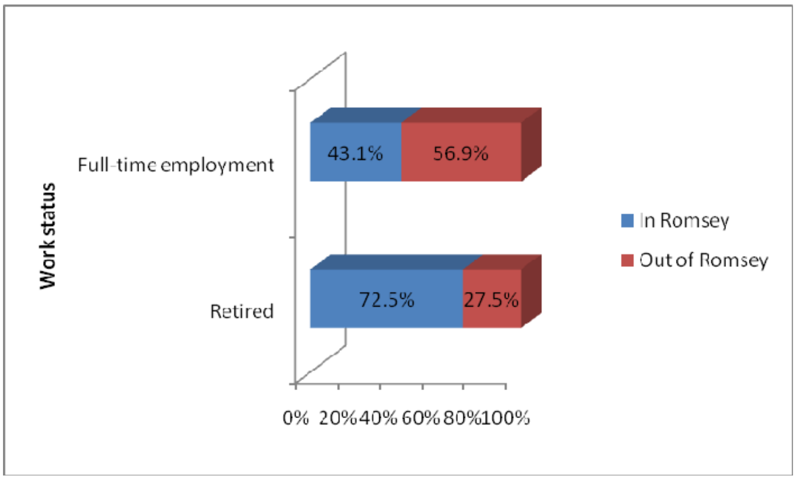


Figure 5.5 Use of Romsey food shops by employment status (for main food shopping)



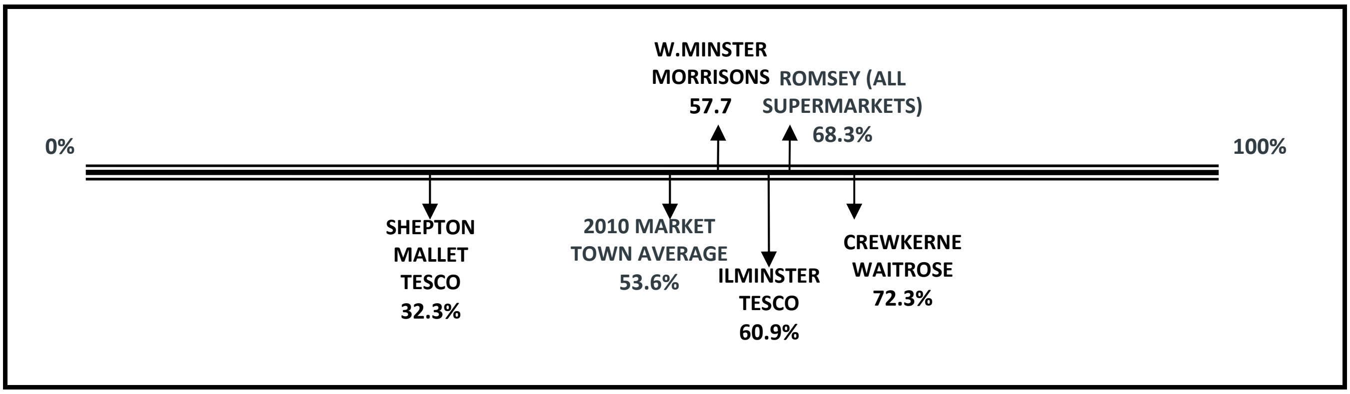
Linked trips

5.10. This section on linked trips discusses whether respondents combine their main or first named secondary food shopping with other shops and services in the town centre. Linked trips are of vital importance to the viability and vitality of town centres, reflecting the way the centre is used in combination with town centre foodstores which in the case of Romsey and many other town centres are the main anchors of the town (see Figure 4.1, p30). Respondents who indicated that their main or first named secondary food shop was undertaken in the Romsey town centre foodstores (Waitrose, Co-op, Aldi, or independent foodstores) were asked how often they combined that food shop with other shops or services in the town centre, and if they did combine, which named shops or services they normally combined their food shopping trips with.

Table 5.3 Linked trip propensity of main catchment respondents

	Main food shop	1st top-up shop
Always/frequently combine	151 (68.3%)	115 (69.7%)
Occasionally combine	54 (24.0%)	32 (19.4%)
Never combine	17 (7.7%)	18 (10.9%)
TOTAL	221	165

Figure 5.6 Linked trip propensity of respondents who 'always'/'frequently' combine their food shopping: a comparison with 2010 University of Southampton Market Towns and District Centres study



5.11. Table 5.3 shows that 68.3% of main catchment respondents 'always' or 'frequently' link their main food shopping trips. 69.7% 'always' or 'frequently' link their first secondary food shopping trips with other shops or services in the town centre. As seen in Figure 5.6, Romsey's linked trip propensity is comparable with results from the 2010 study. The linked propensity of Romsey respondents is higher than the 2010 average (The 2010 Market Town average in Figure 5.6 is based on the four market town cases 12 month/second wave survey results) and out of the three individual cases in the 2010 study, only Crewkerne Waitrose was higher at 72.3%.

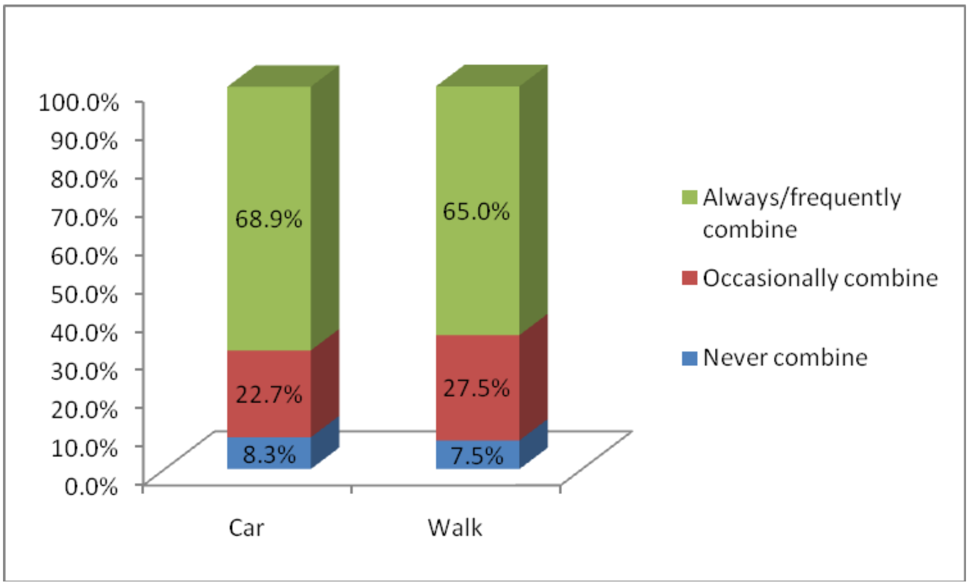
5.12. The most common linked trip destinations for main and first named secondary users of Romsey supermarkets (Waitrose, Co-op and Aldi) that link their shopping trip are:

1. Boots/other centre chemists – **37.8%**
2. Bradbeers – **27.6%**
3. Bank and financial services – **15.2%**
4. Other Romsey supermarket(s) - **12.9%**
5. Romsey independent convenience shops – **10.6%**

5.13. These linked trip destinations highlight the importance of chemists to the town. Bradbeers' role as an anchor store is also evident from the linked trip destinations, emphasising its role as an institution in the town.

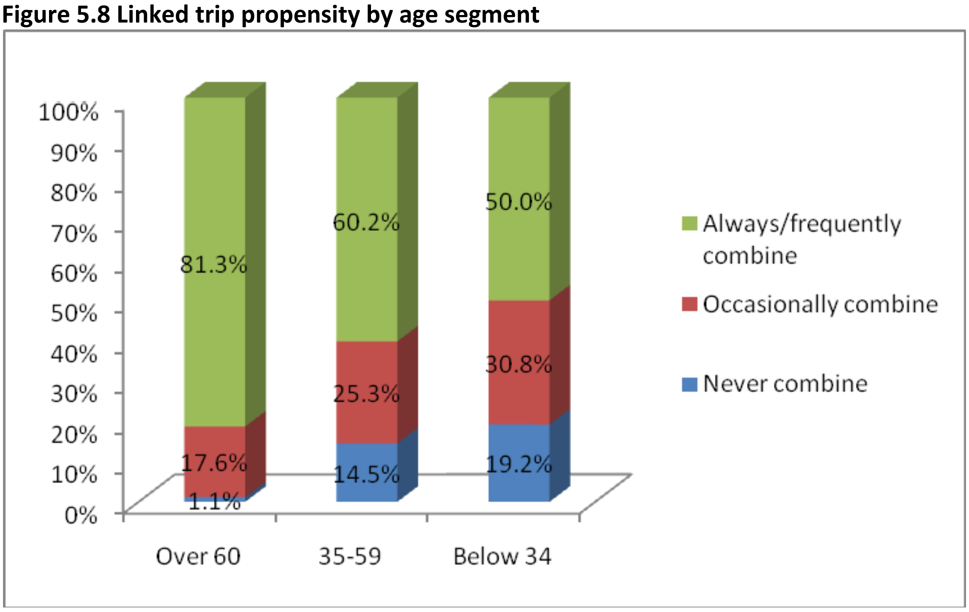
5.14. Factors affecting linked trip propensity was examined using demographic data, which was cross-tabulated with reported frequency of linked trips. Figure 5.7 depicts linked trip propensity by travel mode and reveals that 68.9% of respondents who travel by car 'always' or 'frequently' combine their food shopping trips, only marginally higher than the 65.0% of respondents who walk.

Figure 5.7 Linked trip propensity by travel mode



5.15. Older respondents are more likely to link their food shopping trips. 81.3% of respondents in the 'over 60' age segment report they 'always' or 'frequently' link their food shopping trips with other shops or services in the centre compared with only 50.0% of respondents in the 'below 34' age segment, as seen in Figure 5.8.

Figure 5.8 Linked trip propensity by age segment



5.16. Household size was also examined to determine whether it influenced linked trip propensity. There does not appear to be any significant trends: households with no persons aged 17 or under are more likely to ‘always’ or ‘frequently’ to link trips, but households with three or more children are the most likely to ‘always’ or ‘frequently’ link their food shopping trips (Figure 5.9). Similarly, there are no clear trends when examining linked trip propensity based on the number of persons aged 18 or over in a household. Households with one or two adults are more likely than households with three or more adults to ‘always’ or ‘frequently’ link their food shopping trips.

Figure 5.9 Linked trip propensity by number of children in household

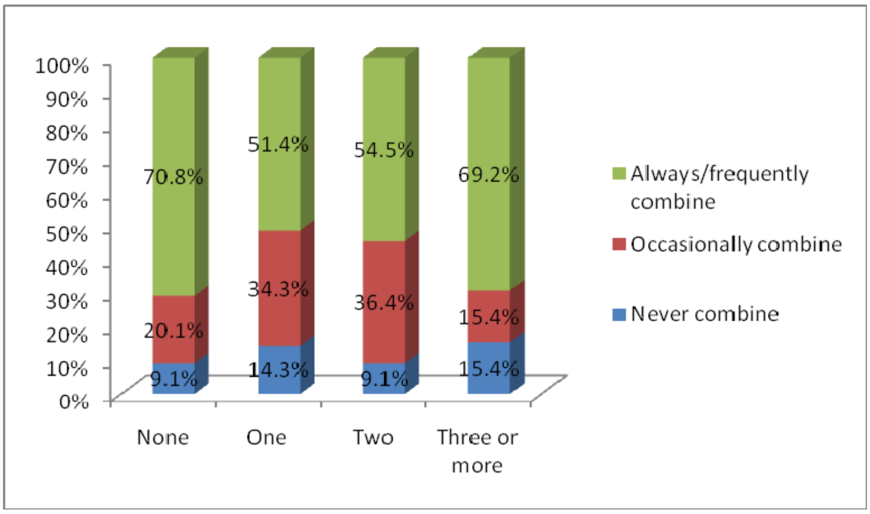


Figure 5.10 Linked trip propensity by number of adults in household[12]

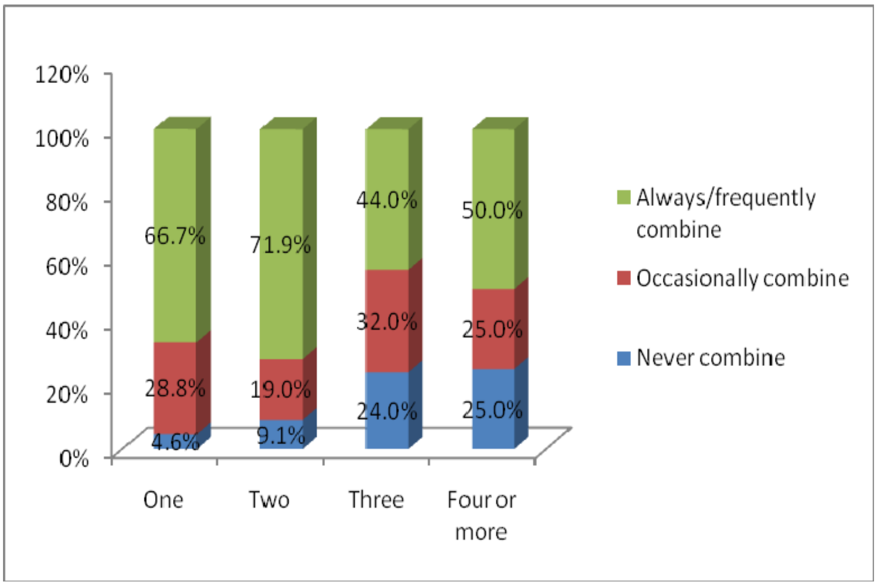


Table 5.5 Linked trip propensity by supermarket

Linked trip propensity for all Romsey supermarket shoppers				
	Always/frequently combine	Occasionally combine	Never combine	TOTAL
Waitrose	178 (69.0%)	58 (22.5%)	22 (8.5%)	258
Co-op	40 (65.5%)	15 23.4%)	9 (14.1%)	64
Aldi	38 (59.4%)	12 (18.8%)	4 (6.3%)	54

[12] Figures may not sum to 100% due to rounding.

5.17. Linked trip propensity also varies by foodstore. Table 5.5 shows linked trip propensity by foodstore, revealing that Waitrose has the highest proportion of users 'always' or 'combining' their trips with other shops or services in the town centre. Aldi has the lowest proportion of users linking their trips, with 59.4% of users 'always' or 'frequently' combining their trips. This is discussed further in the following sections.

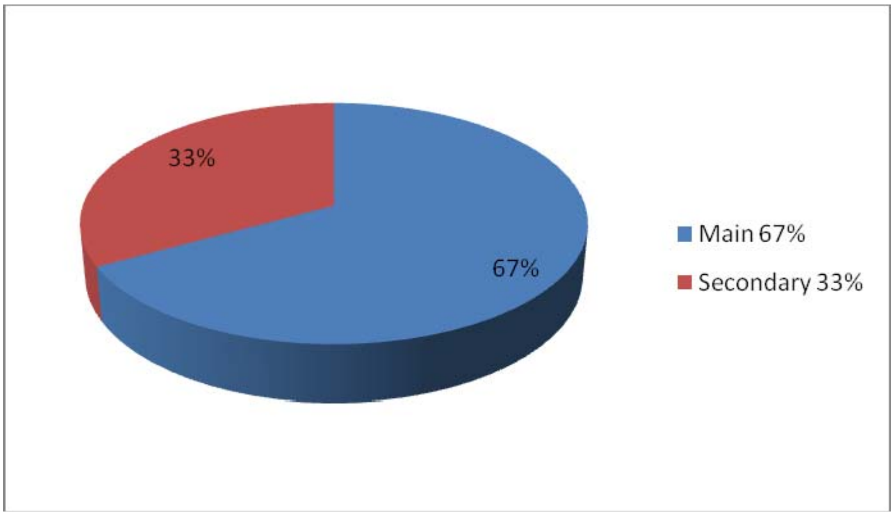
Usage of corporate food retailers

Waitrose

5.18. Waitrose is a new build store that opened in November 2003 located on the north east side of the town centre (the store was previously located in the Hundred [now Aldi]). It has its own car park where users can park for two hours at no charge if they spend over £5 in the store. It is linked to the town centre by Latimer Walk, a pedestrian pathway that opened in October 2008 and contains a range of retailers including a hairdresser, art gallery, estate agent, cafe, and sweet shop. The first two shops along Latimer Walk opened in October 2008 and the most recent opening is a cafe which opened in April 2011. Waitrose shoppers (main and first named secondary) were asked about the effectiveness of Latimer Walk in linking Waitrose to the town, and the respondents were positive, with 81.7% (n201) saying Waitrose is either well or very well integrated into the town centre.

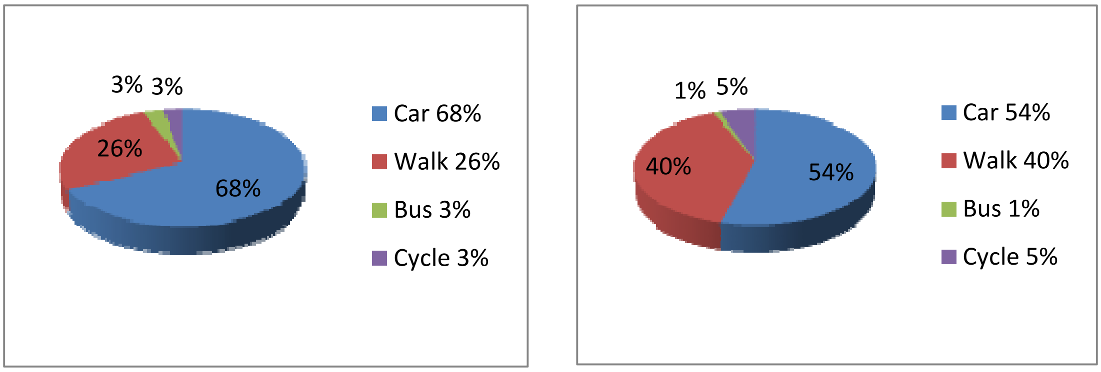
5.19. Waitrose is the largest of the three town centre supermarkets and is the most frequently used foodstore in Romsey. 58.6% of respondents use the store for either main or secondary food shopping. Of those who use Waitrose, 67% use it as their main foodstore and 33% use it as their first named secondary shop (Figure 5.11). This is consistent with findings in the GVA report, where 45.1% of respondents in Romsey's 0-5 minute catchment use Waitrose for their main food shopping and 30.7% use it for top-up shopping.

Figure 5.11 Use of Waitrose by main catchment respondents



5.20. The most common mode of transport to Waitrose is car: 68% of main shoppers and 54% of first named secondary shoppers of Waitrose travel there by car (Figures 5.12a and 5.12b).

Figure 5.12 Modes of transport to Waitrose
(a) As main shop **(b) As first named secondary shop**



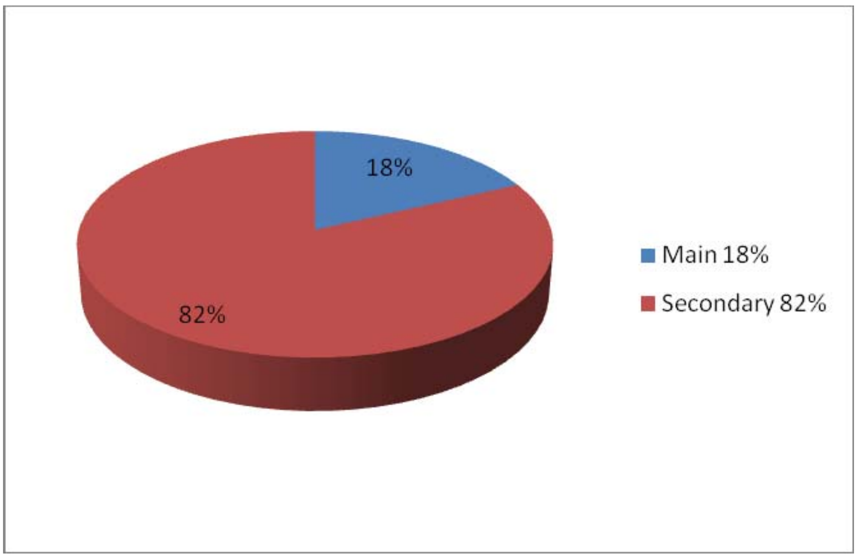
5.21. The high proportion respondents who drive to Waitrose is reflective of the high number of people who use it as a main foodstore, and perhaps also indicates the popularity of the Waitrose car park.

5.22. Despite its location on the north east side of the centre, Waitrose also has the highest percentage of respondents who 'always' or 'frequently' combine their main food shopping with other shops or services in the town centre. A total of 69.0% of Waitrose shoppers 'always' or 'frequently' link their trips, rising to 92.7% if a wider definition of linked trip propensity that includes those who 'occasionally' combine is used (Table 5.5).

The Co-operative

5.23. A Co-operative (Co-op) store was previously located on a town centre site near the bus station, Dukes Mill, which closed in October 2010. The current Co-op store on The Hundred opened in July 2009 (the site of the old Woolworths store) and is one of the new format Co-ops. It is used by 18.2% of respondents for either main or first named secondary food shopping trips. Unlike Waitrose, most Co-op shoppers use it as a secondary shop rather than as a main food shop. Figure 5.13 shows that 82% of Co-op users are doing their secondary food shop there.

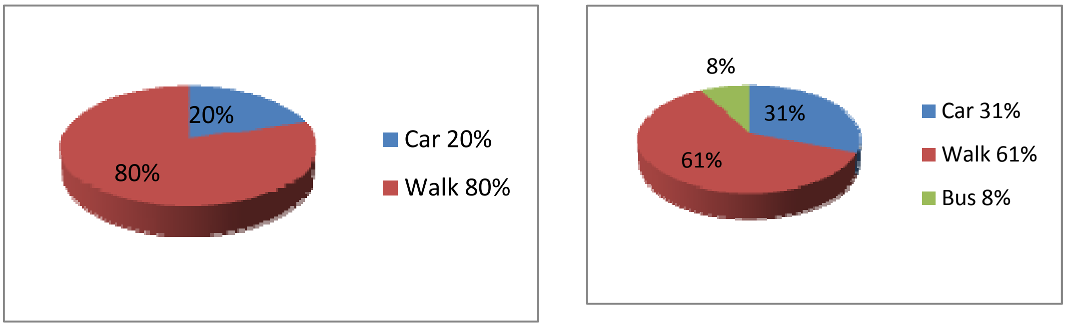
Figure 5.13 Use of Co-op by main catchment respondents



5.24. Perhaps because food shopping trips to the Co-op tend to be for secondary shopping, and given its location on The Hundred without easily accessible parking, walking was the most common mode of transport to the Co-op. 80% of respondents who used the Co-op as their main foodstore walked there (n15; see Figure 5.14a). Likewise, 61% of respondents using the Co-op as their first named secondary foodstore walked there (Figure 5.14b).

Figure 5.14 Modes of transport to Co-op

(a) As main shop **(b) As first named secondary shop**



5.25. The Co-op had the highest percentage of respondents who reported to 'never' combine their trips to Co-op with other shops or services in the town centre (14.1%), though 65.5% 'always' or 'frequently' linked their trips (refer to Table 5.5).

Aldi

5.26. Aldi is situated in the town centre, though the entrance faces its own car park (behind The Hundred) rather than the town itself. Aldi opened in April 2005, on the previous Waitrose site. It is the least used corporate foodstore in Romsey: only 16.1% of respondents use it for either main or first named secondary food shopping. Like the Co-op, Aldi is primarily used as a secondary shop. Figure 5.15 shows that 61% of respondents who use Aldi do so for their secondary shopping. While this is not as high as the Co-op at 82%, it is still significantly higher than the proportion of respondents who use Aldi as a main foodstore.

Figure 5.15Use of Aldi by main catchment respondents

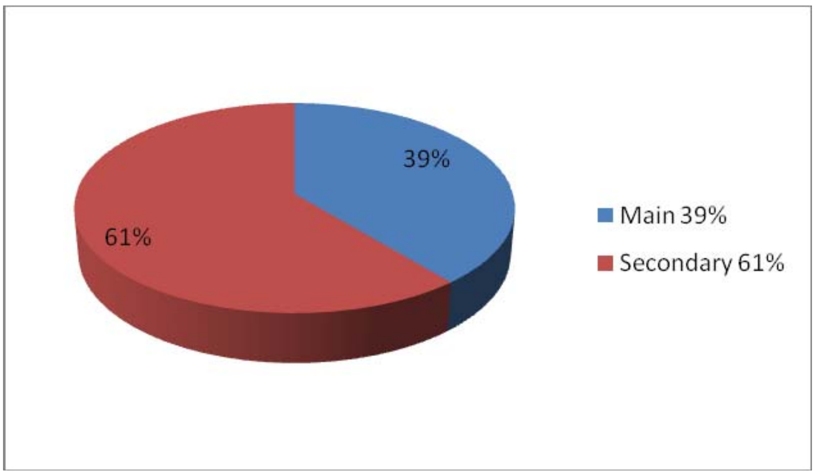
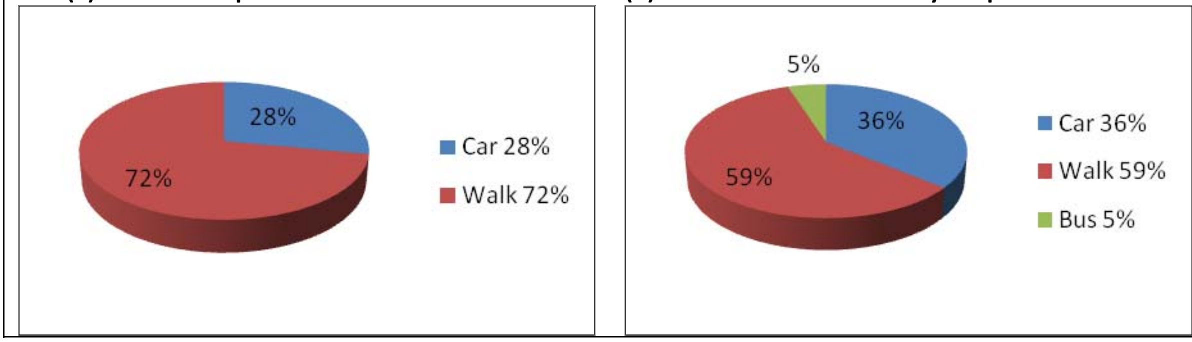


Figure 5.16 Modes of transport to Aldi

(a) As main shop **(b) As first named secondary shop**



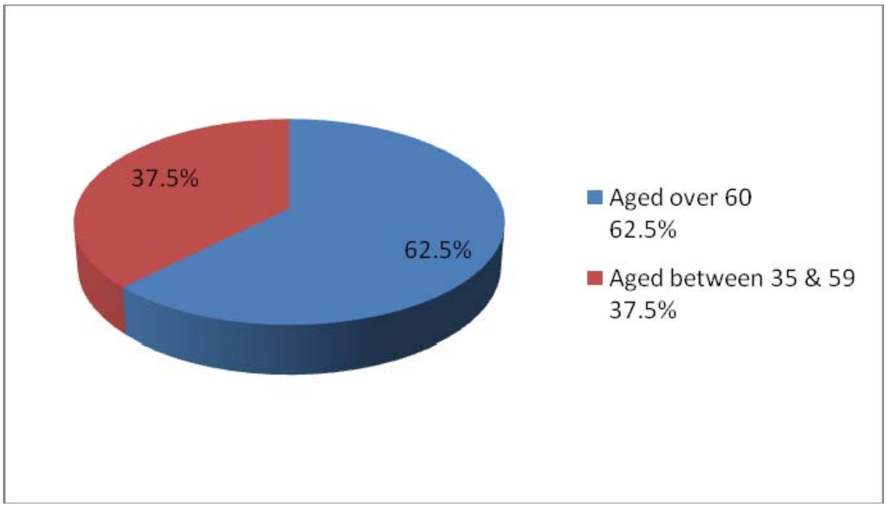
5.27. Again, like the Co-op, the majority of respondents walk to Aldi, whether for their main shopping (Figure 5.16a) or as a first named secondary shopping destination (Figure 5.16b). 72% of respondents walk to Aldi for their main shop, and 59% walk when it is a secondary food shopping trip.

5.28. Surprisingly, despite Aldi being located in the town centre, it has the lowest proportion of respondents who 'always' or 'frequently' combine their food shopping trips with other shops or services in the town centre. This may be due to the location of the stores entrance which effectively has its 'back' to the high street. 59.4% of Aldi shoppers 'always' or 'frequently' link their trips (compared with 69.0% and 65.5% for Waitrose and Co-op, respectively). However, Aldi also has the lowest level of respondents 'never' combining their trips – 6.5% compared with 8.5% and 14.1% for Waitrose and Co-op respectively (refer to Table 5.5).

Independent foodstores in Romsey

5.29. There are four independent food shops in Romsey: Long's, Peppercorns, W. Stares and B. Drummond. Less than 1% of respondents used them for their main food shopping, though 13% of respondents used them as their first named secondary food shops. Approximately 10% of respondents link their main or first named secondary food shop at one of the corporate foodstores with an independent food shop. The proportion of respondents who use an independent foodstore for their main food shopping is also low in the MTDC 2010 study, though not as low as in Romsey at 3.2%. However, use of an independent foodstore as a first named secondary shop is higher in Romsey than in the MTDC 2010 research – 13% in Romsey compared with 8.2% in the MTDC study. The majority of independent foodstore users are aged over 60, as seen in Figure 5.17.

Figure 5.17 All users of local independent foodstores by age segment



Chapter 6

UNIVERSITY OF SOUTHAMPTON 2011 STUDY:

NON-FOOD SHOPPING IN ROMSEY

Highlights

- Chemist and pharmaceutical items tend to be bought in Romsey. This indicates the importance of chemists in the town centre, which can also be seen in the analysis of purpose of visits to the town centre and trip linkages. Chemists are arguably the next most important retail units in the town centre after foodstores.

- Younger respondents are more likely to undertake non-food shopping elsewhere. This is perhaps due to the image of Romsey as a town for older people and the shops and services are perceived to not have an offering aimed at younger shoppers.

- Three main reasons were provided for *why* respondents shop elsewhere for particular product categories: limited range, perceived expense, and perceived unavailability were the top three reasons offered by respondents who purchase non-food items elsewhere.

- Southampton is Romsey's biggest competitor for non-food items. Winchester and Salisbury also competitors for non-food items, as well as online retailing for certain product categories.

Introduction

6.1. This chapter examines the role of non-food shops in Romsey. A table of non-food (or 'comparison') retailers as defined by Goad is available in Appendix 6A (Table 6a).

6.2. Respondents were asked which town or centre they use to purchase a variety of non-food items. These included pharmaceutical items; household luxuries such as books, CDs, DVDs and jewellery; small electrical items; large electrical items; household furnishings; and leisure facilities such as pubs, restaurants, the theatre, and the cinema. If respondents named a centre that was not Romsey, they were asked why they did not purchase those particular goods or services in Romsey.

6.3. The information was then analysed to determine where respondents go to purchase non-food items, and importantly which groups are leaving Romsey for what category of products.

Frequency of non-food shopping in Romsey

Table 6.1: Frequency of non-food shopping in Romsey by main catchment respondents compared with MTDC 2010 study

	Non-food shopping in Romsey	Non-food shopping in MTDC
Daily	38 (9.3%)	120 (7.4%)
Every few days	127 (31.1%)	295 (18.1%)
Weekly	115 (28.2%)	435 (26.7%)
Fortnightly	60 (14.7%)	211 (13.0%)
Monthly	36 (8.8%)	566 (34.8%)
Every few months	12 (2.9%)	NA
Never	20 (4.9%)	NA
TOTAL	408	1627

6.4. Like food shopping, most main catchment respondents undertook non-food shopping in Romsey either every few days or weekly (31.1% and 28.2% respectively, as seen in Table 6.1). There were a low proportion of respondents who never do their non-food shopping in Romsey (4.9%), which indicates that Romsey was reasonably well used for both food and non-food shopping, albeit on a low order purchase status.

6.5. Respondents in Romsey also tended to do non-food shopping in the town more frequently than respondents in the MTDC 2010 study. As shown in Table 6.1. Romsey had a higher proportion of respondents undertaking non-food shopping 'daily', 'every few days', 'weekly' and 'fortnightly' than in the MTDC research. Furthermore, only 8.8% of respondents in Romsey undertake non-food shopping monthly, compared with the significantly higher 34.8% in MTDC 2010.

The role of anchor stores

6.6. Based on the frequency of visits, the two non-food anchor stores in Romsey are identified as Boots the chemist, and Bradbeers, the independent department store. 37.8% of all linked trips from food stores in the town centre are to Boots or other town centre chemists, and 27.6% of linked trips are to Bradbeers.

6.7. On the day of the survey, 4.6% of main catchment respondents said their main reason for going to the town centre was Boots, and 1.2% said their main reason was to go to Bradbeers (see Figure 6b in Appendix 6B for list of main reasons for visiting the town centre). The frequent usage of Bradbeers signifies its position as an institution in the town. It sells a range of non-food products such as clothing and homeware and it is also the only retailer in Romsey to sell certain product categories.

6.8. This highlights the importance of Boots and other chemists to the Romsey town centre, a point further reinforced when we look at *what* non-food items are purchased in Romsey and what is purchased elsewhere.

Purchase of non-food items in Romsey

Table 6.2 If categories of non-food items are purchased in Romsey (base: variable)

	Yes	No
Chemist and pharmaceutical	87.3%	12.8%
Books and DVDs	19.9%	80.2%
Clothes and shoes	29.3%	70.3%
Small electrical items	18.9%	81.1%
Large electrical items	3.4%	96.6%
Household furnishings	11.8%	88.2%
Leisure services	44.7%	55.3%

6.9. As seen in Table 6.2, the most commonly bought non-food items in Romsey are 'chemist and pharmaceutical' items, with 87.3% of main catchment respondents purchasing them in Romsey. The high proportion of respondents purchasing chemist and pharmaceutical items as well as the high number of linked trips from foodstores in the town centre to Boots and other town centre chemists highlights the importance of chemists to Romsey.

6.10. The next highest category is 'leisure services', with many respondents using pubs and restaurants in Romsey. Bulky high order goods such as 'electrical goods' and 'household furnishings' tended to be bought outside of Romsey. The low proportion of other non-food items purchased in is consistent with the results of the GVA study, which found that Romsey draws 11.9% of available comparison goods expenditure generated in its 0-15 minute drive time catchment, a relatively low rate of retention.

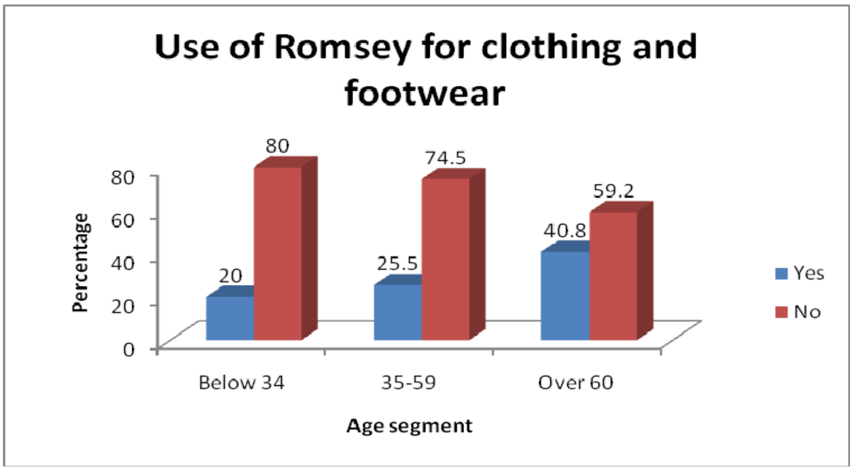
Table 6.3 Purchase of non-food items in MTDC 2010 study

	Yes	No
Chemist and pharmaceutical	79.6%	20.4%
Books and DVDs	23.0%	77.0%
Clothes and shoes	22.4%	77.6%
Electrical items	30.1%	69.9%
Household furnishings	24.3%	75.7%

6.11. Table 6.3 shows the purchase of non-food items in the MTDC 2010 study. Romsey has a higher proportion of respondents purchasing 'chemist and other pharmaceutical' items in the town (87.3% compared with 79.6% in MTDC 2010), as well as 'clothing and footwear' (29.3% compared with 22.4%). However, the figures for 'electrical items' and 'household furnishings' are not as directly comparable between the two studies. The percentage of respondents purchasing 'electrical items' in town in the MTDC 2010 study is boosted by Warminster, which had the national retailer Currys at the time of survey. A town with a more comparable composition is Crewkerne, where 13.0% of respondents bought electrical items in the town. Similarly, the percentage of respondents answering 'yes' for purchasing 'household furnishings' in the MTDC 2010 study is skewed by Shepton Mallet, which had a large furniture store at the time of survey. Again, a more comparable town is Crewkerne, where 9.8% of respondents bought 'household furnishings' in town. In fact, Crewkerne has a lower proportion of respondents purchasing '(small) electrical items' and 'household furnishings' than Romsey.

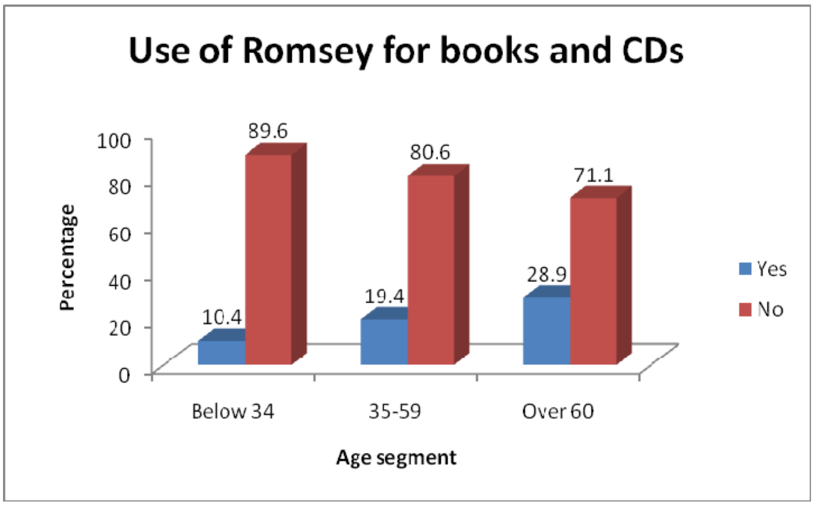
6.12. Additionally, from the demographic data collected, we were able to cross tabulate the results and see which respondents are *not* shopping in Romsey. An age breakdown of who shops elsewhere for certain goods is revealing.

Figure 6.1 Use of Romsey for 'clothing and footwear' by age segment



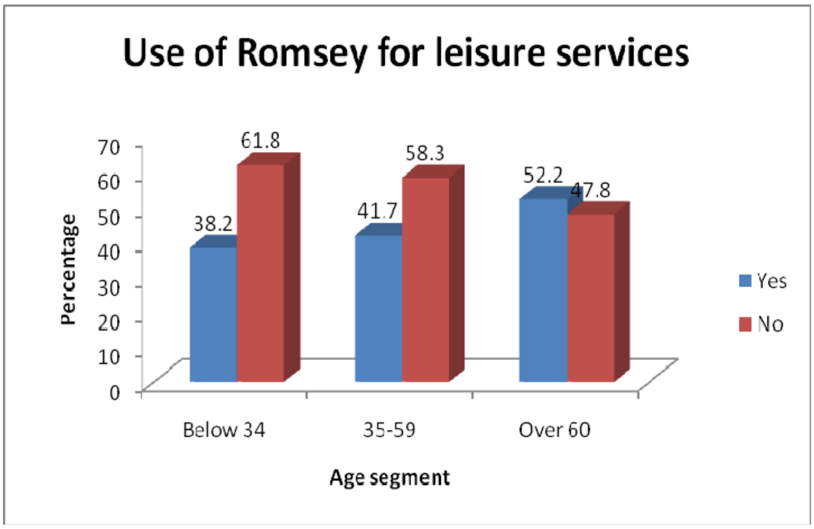
6.13. Table 6.2 shows that 70.3% of main catchment respondents shop elsewhere for 'clothing and footwear', and Figure 6.1 indicates that the majority of respondents using alternative centres for 'clothing and footwear' are those aged below 34. The 'clothing and footwear' category is where the biggest difference in age segment shopping habits can be seen. Only 20% of respondents aged below 34 purchase clothing and footwear in Romsey, and the proportion of respondents aged over 60 purchasing clothing and footwear in Romsey is more than two times that figure at 40.8%. This is perhaps reflective of the image of Romsey being for older people and the shops catering to an older target market.

Figure 6.2 Use of Romsey for 'books and CDs' by age segment



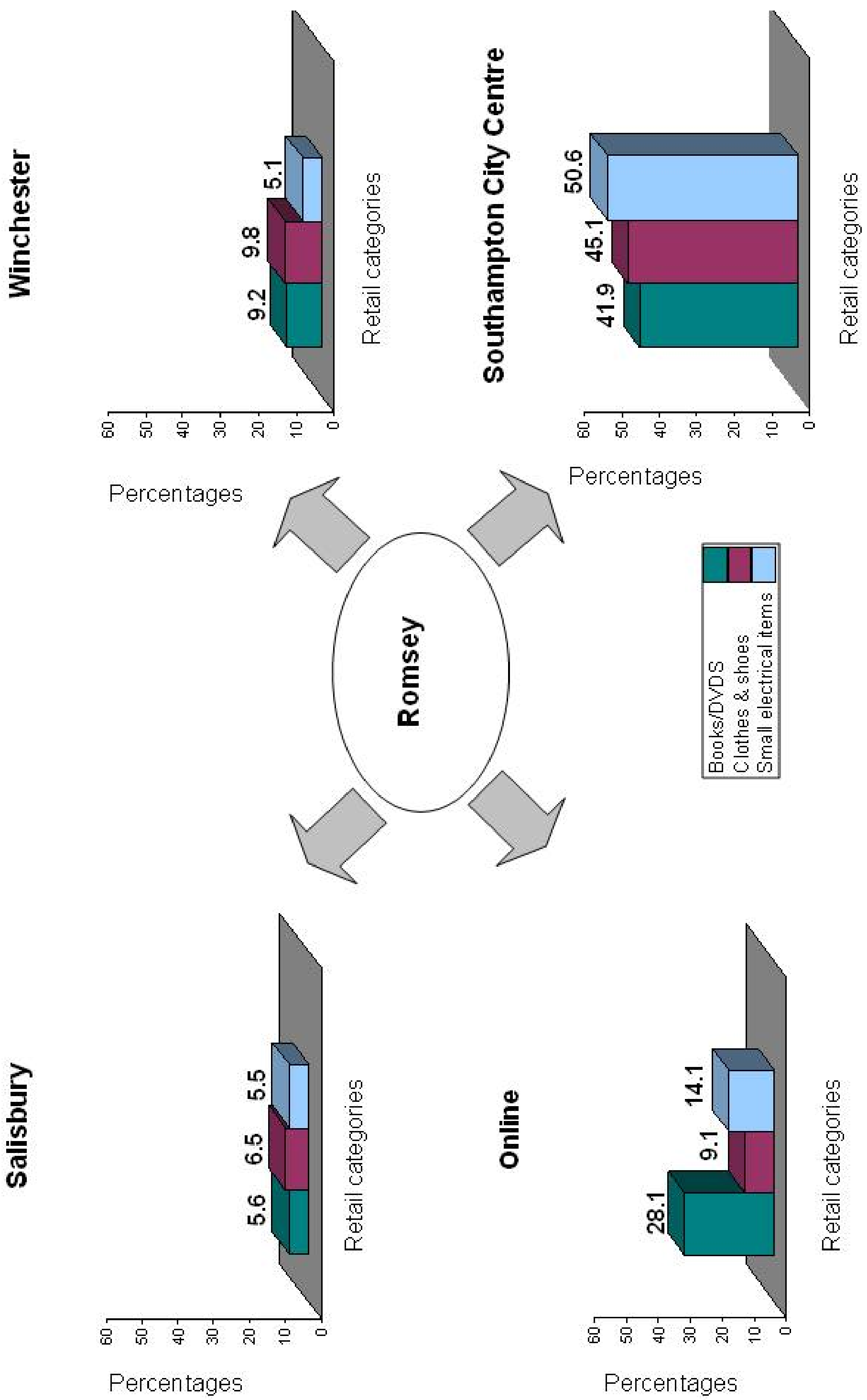
6.14. The differences in usage between age segment of other non-food categories is not as pronounced, though there is still a trend of younger respondents having a greater tendency to undertake non-food shopping outside of Romsey. Figures 6.2 and 6.3 also show that respondents aged below 34 are most likely to use alternative centres for non-food shopping and those aged over 60 are more likely to use Romsey, which is similar to the figures for food shopping. In particular, those aged below 34 are more likely to use alternative centres for 'leisure services' which support respondents' observations that there are not enough facilities in Romsey for young people: 11.5% (of valid responses) suggested 'more for younger people' when asked what facilities in the town could be provided or improved (see Table 6c in Appendix 6C). Additionally, four respondents suggested 'more shops for young people' when asked what shops or services were under-represented in the town.

Figure 6.3 Use of Romsey for 'leisure services' by age segment



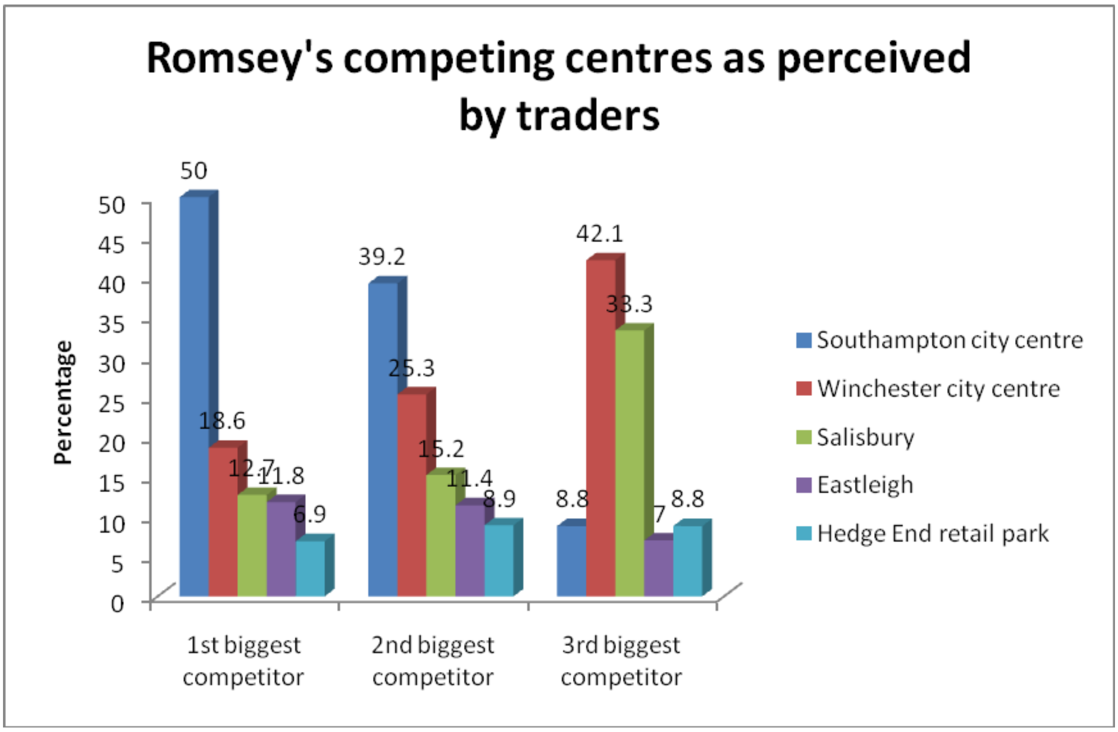
Competing Centres

Figure 6.4 Where main catchment respondents are going for non-food shopping



6.15. Figure 6.4 reveals that 28.1% of respondents normally purchase 'books, CDs and DVDs' online. The percentages of online sales in this study are comparable with results of the MTDC 2010 study: 26.6% of books and CDs, 5.3% of clothing, and 10.4% of electrical items were purchased online. For 'clothing and footwear' purchases, the two most popular locations are Southampton and Winchester, and Southampton is the most commonly used centre for 'small electrical goods'.

Figure 6.5 Romsey's competing centres as perceived by traders



6.16. The out-shopping locations as reported by consumer respondents are supported by the traders' views. The traders were asked which centres they thought were Romsey's biggest competitors. Unsurprisingly, Southampton city centre was named as the biggest competitor by the majority of traders, as seen in Figure 6.5.

6.17. The biggest competitors for Romsey as perceived by traders are Southampton, Winchester and Salisbury. Figure 6.4 shows that 50% of traders believe Southampton is Romsey's biggest competitor, while 25.3% believe Winchester is its second largest competitor and 42.1% consider Winchester to be its third biggest competitor.

Reasons for shopping elsewhere

6.18. In addition to being asked where they purchased non-food items, respondents were also asked to provide reasons for not shopping in Romsey when their answers indicated they went elsewhere.

Table 6.3 Reasons for shopping elsewhere

	Books, CDs and DVDs	Clothing and footwear	Small electrical items	Leisure services
Poor range	147 (43.4%)	146 (48.5%)	161 (45.9%)	80 (40.4%)
Too expensive	37 (10.9%)	36 (11.0%)	57 (16.2%)	18 (9.1%)
Not available	103 (30.4%)	82 (27.2%)	92 (26.2%)	39 (19.7%)

6.19. Table 6.3 shows the most common reasons for using alternative centres for non-food shopping. Firstly, there is perception that Romsey has a poor range of shops selling those particular products or services. The goods in each of the categories in Table 7 *are* available in Romsey though the choice is not as extensive compared to larger centres like Southampton or Winchester.

6.20. Secondly, the specific items desired by the respondent are perceived to be not available. For example, while Romsey does have clothes shops, the clothes tend to be targeted at an older demographic. Likewise, while there is a discount bookshop and a charity bookshop, the town is missing a comprehensively stocked bookshop, whether it is a chain like Waterstone’s or an independent, an independent bookshop having closed in early 2010.

6.21. Thirdly, Romsey is perceived to be more expensive than larger centres. This is perhaps partly due to the small range and limited competition within certain categories of shops and a number of high end gift shops and boutiques.

Chapter 7

UNIVERSITY OF SOUTHAMPTON 2011 STUDY:

SERVICES IN ROMSEY TOWN CENTRE

Highlights

- Provides a brief contextual background on the structural change in UK town centres and high streets towards a greater proportion of service units.
- Outlines the types of services in the categorise of 'business and financial services', 'retail services', 'leisure services' and 'health and medical services' as recognised by the Experian Goad classification.
- Shows that the amount of 'retail service' units and 'financial and business service' units in Romsey is higher than the national average but the proportion of 'leisure service' units is lower than the national average.
- Demonstrates that service provision, whilst perceived by many respondents to the consumer surveys to be too high, in fact play a very important role in attracting both main catchment residents and visitors to the town centre. Indeed, 29% of reasons given by main catchment respondents for visiting the town centre related to services.

Introduction

7.1. There has been a long-term structural shift on British high streets away from comparison and convenience retail and towards service provision, a trend that has continued throughout the first decade of the 2000s. Wrigley and Dolega (2011) in their research on the resilience and fragility of UK high streets examined different retail and service categories before and within the global economic crisis. They found that despite the macroeconomic shock of the global financial crisis, leisure services and retail services (see Table 7.1) showed evidence of continued growth both in terms of relative change in retail units and in square feet of floor space. In particular, almost all types of leisure services showed significant gains during the period of economic crisis, with a substantial increase of 13% in cafes, for example.

7.2. Furthermore, a recent survey by a business insurance group (Simply Business, 2011) of 75,000 UK businesses in 2008 and 2010 found that beauty salons were the top fastest growing business on high streets, and hairdressers were the fourth fastest growing (excluding food and drink shops)

Table 7.1 Goad categories for services

Financial & Business Services	Health and medical services	Leisure services	Retail Services	Other services
Building Supplies & Services (Cleaning, Plumbing, Heating)	Chiropodists	Bars & Wine Bars	Clothing & Fancy Dress Hire	Information & Advice Centres (public services)
Employment & Careers	Dental Surgeries	Bingo & Amusements	Dry Cleaners & Launderettes	Emergency Services (public services)
Financial Services	Doctors Surgeries	Cafes	Filling Stations	Educational Institutions (public services)
Legal Services	Health Centres	Casinos & Betting Offices	Health & Beauty	Libraries, Museums & Art Galleries (public services)
Printing & Copying	Homeopathic Services	Cinemas, Theatres & Concert Halls	Opticians	Religious services
Property Services	Hospitals and Clinics	Clubs	Photo Processing and photo studios	Taxis and minicabs (transport services)
	Nursing Homes	Disco, Dance & Nightclubs	Post Offices	
	Osteopaths	Fast Food & Take Away	Repairs, Alterations & Restoration	
	Rest Home	Hotels & Guest Houses	Travel Agents	
	Veterinary surgeries	Public Houses	TV, Cable & Video Rental	
		Restaurants	Vehicle Rental	
		Sports & Leisure Facilities	Vehicle Repairs & Services	
			Video Tape Rental	

Service unit representation in Romsey

7.3. In Romsey, the proportion of service units is higher than the national average for 'financial/business service' categories and 'retail service' categories. These proportions are also higher than the market towns surveyed in the MTDC 2010 research. 'Retail service' units in Romsey as a proportion of total units in the town centre amounted to 18.4%. Indeed, 5.4% higher than the national average of 13.0% in 2009. Additionally, 'financial and business service' units made up 15.5% of the total in Romsey, compared with the national average of 11.2% in 2009. This can be seen in Table 7.2. However, the proportion of 'leisure services' units, despite the perceptions of some respondents in the Southampton consumer and trader surveys, is lower in Romsey than both market towns in the MTDC study and the national average. This is somewhat unexpected given Romsey's role as a tourist destination.

Table 7.2 Service units as a proportion of total units in a town centre

Category	2009 National average (Source: Experian Goad)	MTDC 2010	Romsey 2011
Leisure services	21.5%	16.8%	14.9%
Retail services	13.0%	13.7%	18.4%
Financial and business services	11.2%	13.1%	15.5%

7.4. The amount of services in Romsey could be considered as a strength *or* a weakness. Expanding service provision reduces the number of vacant retail units in the town centre, and generates footfall and custom. However, the level of service provision is perceived to be a problem by some survey respondents. Table 7.3 lists the shops or services consumers believed were over-represented in the town centre. Respondents were asked to provide up to three answers - the percentages in the Table 7.3 are based on a total number of responses. It can be seen that while 'charity shops' are mentioned most frequently as being over-represented, estate agents and hairdressers are also singled out by large numbers of respondents.

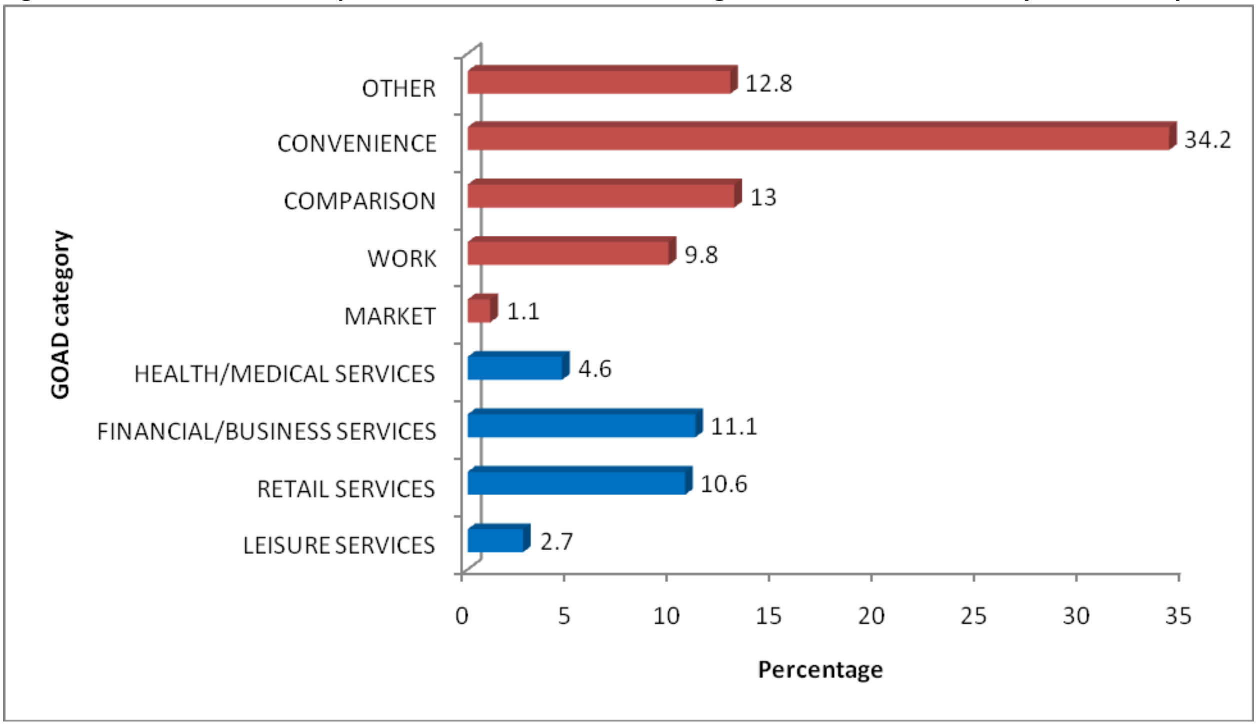
Table 7.3 Shops or services over-represented in Romsey[13]

Shop/service	N (%)
Charity shops	214 (43.0%)
Estate Agents	79 (16.2%)
Hairdressers	49 (9.8%)
Cafes	19 (3.8%)
Banks/financial institutions	11 (2.2%)

7.5. Despite the fact that many respondents believe these services are over-represented, they are frequently used by both residents and visitors. This is reflected in linked trip destination results: 'banks and financial services' are the third most common linked trip destination for main and secondary food shoppers in Romsey. Furthermore, on the day of the survey, 10.1% of 0-15 minute drive time catchment respondents said their main reason for visiting the town centre was for to visit a bank or other financial institution. The reasons for visiting the town centre by main catchment respondents are listed in Figure 7.1, below and it can be seen that 29% of consumers name visits to service categories as their main reason for visiting the town centre.

[13] Percentages based on total number of responses

Figure 7.1 Main catchment respondents' main reasons for visiting the town centre on the day of the survey



7.6. Within the separate visitor survey, 15.5% of visitors explicitly named a specific service for visiting Romsey – these included 'medical services' such as dentist and chiropractor, 'financial services' such as the bank, and 'retail services', specifically hairdressers. We take this to indicate that whilst respondents to our consumer surveys might suggest an over-presence of services such as hairdressers and estate agents, these services draw to the town not only main catchment residents but also visitors.

Chapter 8

UNIVERSITY OF SOUTHAMPTON 2011 STUDY:

TRADER RESULTS

Highlights

- The trader survey of the current study reflects the opinions of 78% of traders in Romsey - the highest response rate achieved in retail studies on Romsey so far.
- Traders seem divided on changes in the vitality and viability of Romsey over the last year: 48% state that Romsey town centre has declined while 43% state in has not declined.
- Despite only 22% of traders experiencing higher sales now compared to 12 months ago, 46.2% of respondents expect sales to increase over the next 12 months. 'Retail services' is the category that appears to be most 'optimistic' about expected future sales.
- 39% of respondents state the recession as the main factor that has affected their sales over the past 12 months. This percentage - which is lower than those observed in other UK towns - combined with information on reported current sales, could suggest that, despite traders concerns, Romsey seems to be more resilient to the recession than other centres.

Introduction

8.1. This chapter outlines the key findings which emerge from the 118 trader surveys in Romsey. It should be noted that this constitutes a response rate of 78% of the businesses that currently operate in the town centre of Romsey. Additional trader results are available in Appendix 8A.

8.2. Table 8.1 presents in detail the types of traders interviewed based on the Goad business classification.

TABLE 8.1: Traders interviewed in Romsey

	Business Classification					
	Independent retailer	Independent retailer/ member of a symbol group	Multiple retailer part of local/regional group	National multiple retailer	Total	*% of Total*
COMPARISON	22	3	2	17	44	*37.3%*
CONVENIENCE	8	1	3	2	14	*11.9%*
RETAIL SERVICE	20	0	3	2	25	*21.2%*
FINANCIAL & BUSINESS SERVICES	7	2	1	4	14	*11.9%*
LEISURE SERVICES	15	0	0	3	18	*15.3%*
HEALTH & MEDICAL SERVICES	2	0	0	0	2	*1.7%*
PUBLIC SERVICES	1	0	0	0	1	*0.8%*
Total	75	6	9	28	118	*100.0%*
% of Total	*63.6%*	*5.1%*	*7.6%*	*23.7%*	*100.0%*	

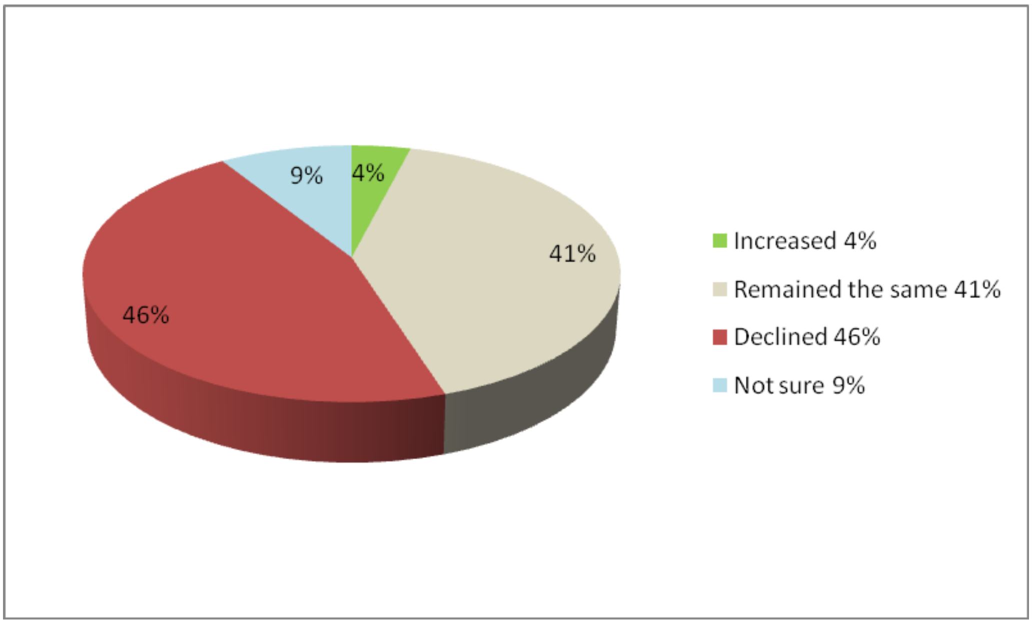
8.3. The aim of the traders surveys is twofold: firstly, it attempts to explore traders' perceptions on Romsey in terms of the town's strengths and weaknesses as a shopping destination, and to capture their views on how the town centre could be improved in order to encourage more people to visit and shop in Romsey[14]; secondly, the study tries to get an insight into traders' performance in terms of sales and footfall, as well as to examine trader perceptions on the key local and national factors that may be affecting their business performance. In this context, the study aims to provide some evidence of the increasing impact of the deepening recession on local traders' attitudes.

Perceived vitality and viability of Romsey

8.4. One of the key aims of the study was to examine the vitality of the town centre of Romsey and whether or not this has changed over the past year. In addition, the study was interested in the factors that may have caused changes in the vitality of Romsey as a retail centre, both from a customer and trader perspective.

[14] Results on trader perceptions of the town centre are discussed in Chapter 9.

Figure 8.2: 'Would you say that over the past 12 months the footfall in Romsey town centre has increased, remained the same or declined?



8.5. In this context, traders were asked a range of questions relating directly and indirectly to the vitality and viability of Romsey[15]. In particular, traders were asked to give their opinion about footfall in Romsey and whether this has changed in the twelve months leading to the study (Figure 7.2). 46% of respondents stated that footfall had declined, while 41% that footfall had remained the same over the last 12 months. Only 5 traders (4%) found footfall to have increased in the town. However, pedestrian counts by Test Valley Borough Council on the Hundred (movements in each direction past the counter) reveal that footfall actually *increased* in that period. In March 2010, the pedestrian count was 138,289. That figure increased during the summer months, peaking in July 2010 at 186,786, and falling back down to 136,341 in October 2010. It picked up in December with 164,132. In March 2011, when we surveyed the traders about how they believed footfall to change over the past 12 months, the pedestrian count was 149,307, which was higher than the count for March 2010 (see Table 8.2).

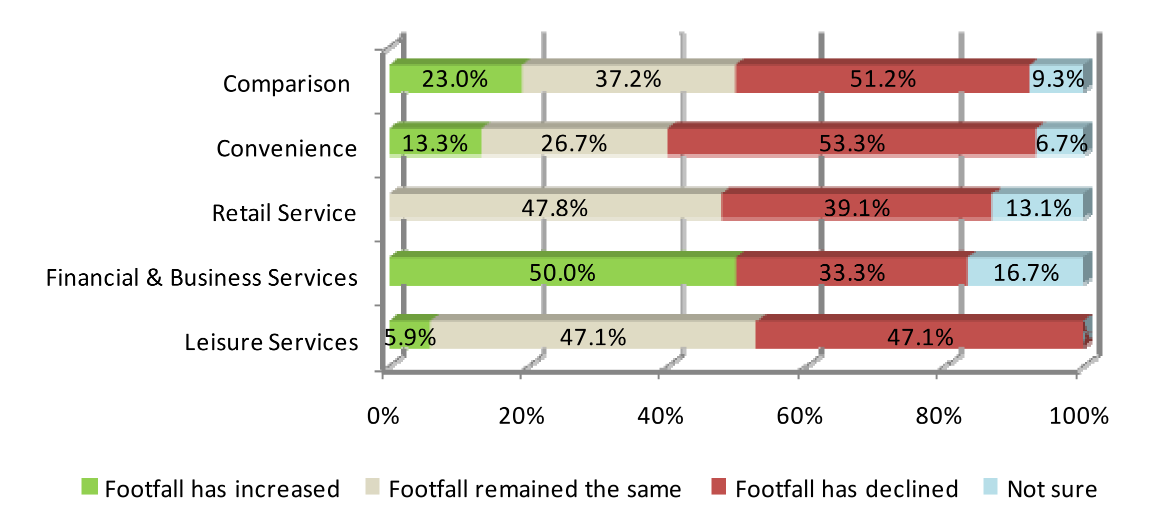
Table 8.2: Pedestrian Counts – The Hundred, Romsey (March 2010 – March 2011)

Month /Year	Number
Mar 2010	138289
Apr 2010	169067
May 2010	168645
Jun 2010	175082
Jul 2010	186786
Aug 2010	162825
Sep 2010	154091
Oct 2010	136341
Nov 2010	137132
Dec 2010	164132
Jan 2011	134309
Feb 2011	127252
Mar 2011	149307

[15] The traders' questionnaire is shown in Appendix 3B p99.

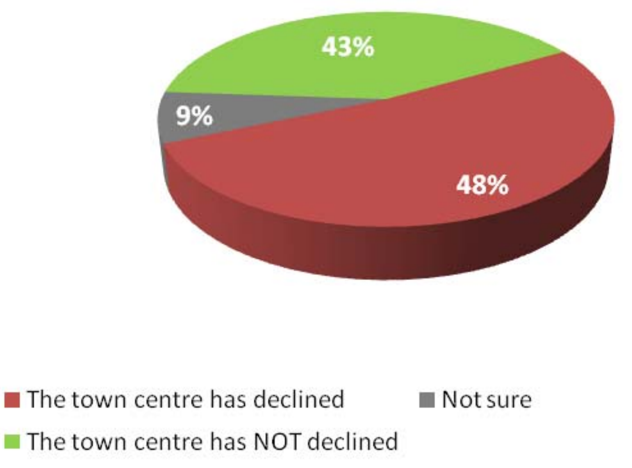
8.6. Comparisons of different retail categories suggest that non-food (comparison goods) businesses seem to report higher decreases in footfall (Figure 7.3). Financial and businesses services seem to be the businesses that observe the least change in footfall.

Figure 8.3 Comparison of reported changes in Romsey's footfall



8.7. In addition, traders were asked specifically whether they thought Romsey town centre had declined over the last year (Figure 8.4). This was a broad question where 'declined' referred to a combination of footfall, consumer spending, retail unit vacancies, new store openings, and the general environment and atmosphere of the town. Here, traders' opinion appears more divided, with 48% stating that the town centre has declined and 43% that Romsey has not declined. Out of the 55 traders that noticed a decline in Romsey, 40% feel that the retail mix/range in the town centre has declined, while 32.7% state the increase in the number of shop closures and vacant units as a sign of decline of the town centre. Related, 18.2% mention the current recession as the main cause of Romsey's decline.

Figure 8.4: 'Would you say that over the past 12 months Romsey town centre has declined? Please give reasons for your answer'



	% Traders that think Romsey is in decline (N=55)
The range of shops has declined	**40.0**
The number of empty/closed shops has increased	**32.7**
Recession/economic climate	**18.2**
Falling visitor numbers	**10.9**
The town centre is unkempt	**5.5**
Online shopping	**3.6**

Traders' perceptions on the performance of their own business

8.8. Traders were asked about the performance of their business over the year leading to the survey, as well as to express their expectations in terms of future sales a year after the survey. The results are shown in Figure 8.5.

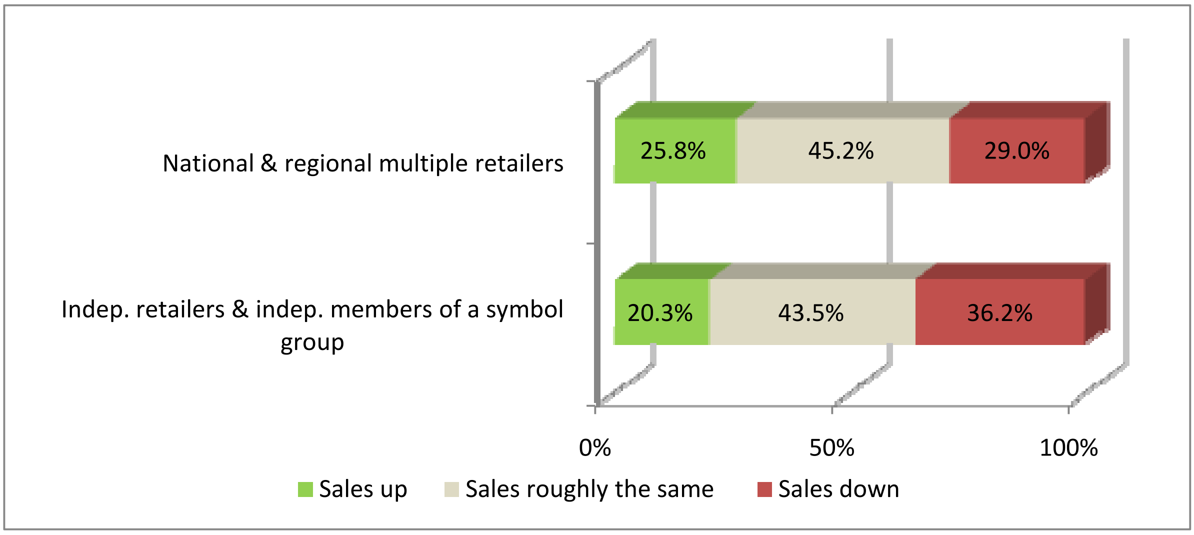
8.9. A significant 44% of traders reported that their sales have not changed over the last year, while a 34% report decrease in sales and a 22% report an increase in sales compared to 12 month prior to the study. When comparing the Romsey trader results to the findings of the MTDC 2010 study, we see a lower percentage of traders experienced fall in sales – 34.0% of Romsey traders experienced a drop in sales compared with 47.4% in the MTDC 2010 study. This suggests that traders in Romsey present an overall more stable picture. The traders in Romsey are also more positive about future sales compared with those in the MTDC 2010 study, with more traders expecting sales to be up or the same, and fewer traders expecting sales to be down. This supports the image of Romsey being a vibrant and resilient town.

Figure 8.5: Current and expected sales of traders in the Southampton (2011) study (based on % of valid responses) compared with the MTDC 2010 study

	Sales now compared to 1 year previous		Expected sales 1 year ahead	
	2011 Romsey study	2008/9 Market town cluster	2011 Romsey study	2008/09 Market town cluster
↑	**22.0%**	**25.8%**	**46.0%**	**42.0%**
↔	**44.0%**	**26.8%**	**38.5%**	**33.0%**
↓	**34.0%**	**47.4%**	**15.4%**	**25.0%**

8.10. When looking at the different business types-independent retailers/independent retailers members of a symbol group as opposed to multiple retailers-both national and regional/local, what is observed is that multiple retailers seem to be slightly more positive in terms of changes in their reported sales over the last year, since 29% of them state they experienced a reduction in sales - as opposed to 36.2% of the independent traders (see Figure 8.6 below).

Figure 8.6: Current sales compared to 12 months ago: a comparison of business types



8.11. When looking specifically at the reported performance of different retail categories over the past year (see Figure 8.7), what can be observed is that 'financial and business services' are the category that seems to perform best. This is similar to what was found in the MTDC 2010 study, where 'financial and business services' and 'leisure services' were the categories that saw the highest percentages of traders reporting higher sales levels at the time of survey than 12 months previously (see Figure 8.8).

Figure 8.7: Sales compared to 12 months ago: comparison of retail categories[16]

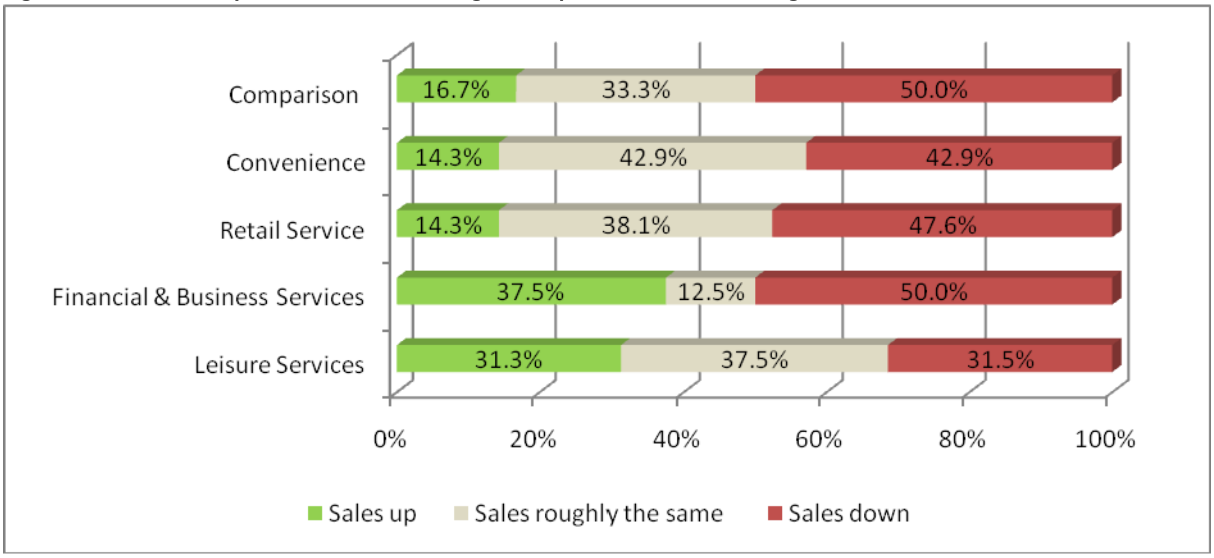
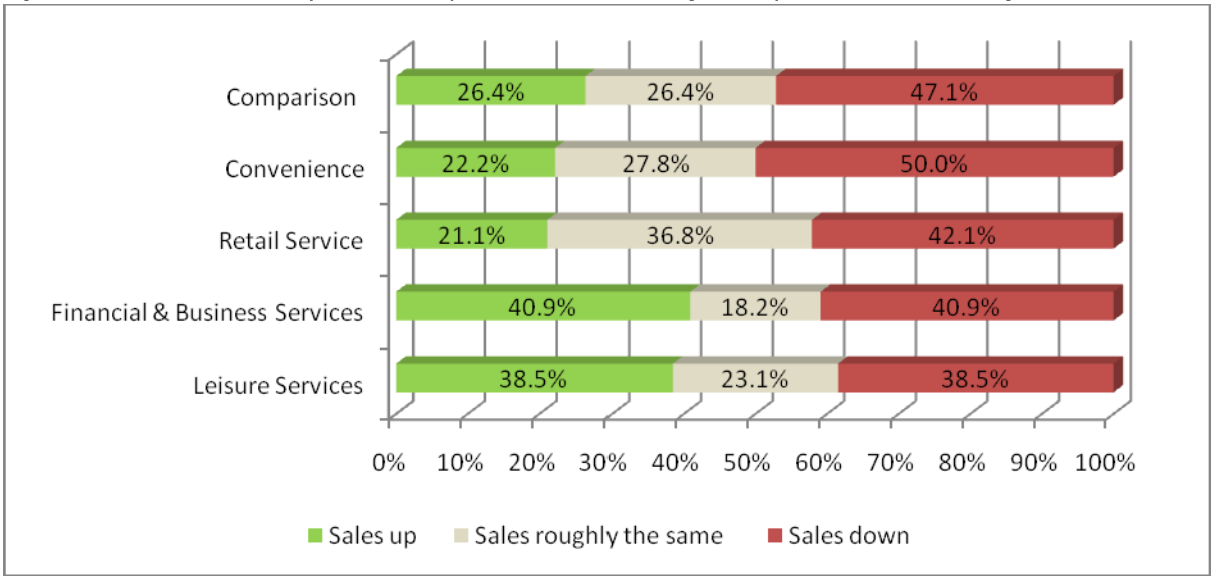


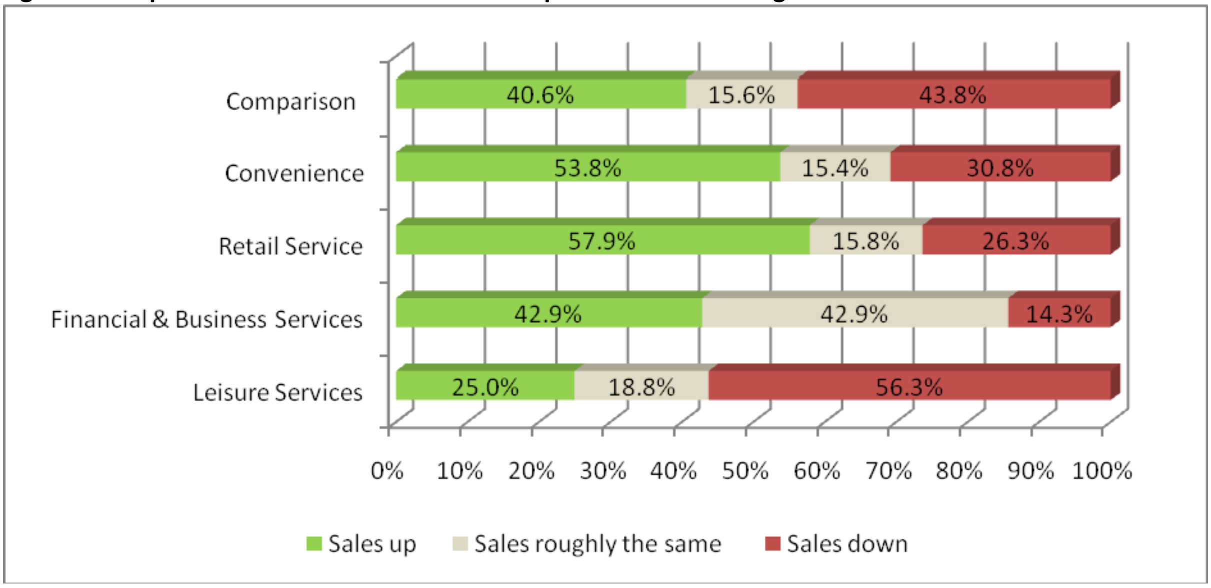
Figure 8.8: MTDC 2010 study - Sales compared to 12 months ago: comparison of retail categories



8.12. However, despite only 22% of traders in the Romsey study experiencing higher sales now compared to 12 months ago, 46.2% of respondents expect sales to increase over the next 12 months. 'Retail services' is the retail category that appears to be most optimistic about expected future sales.

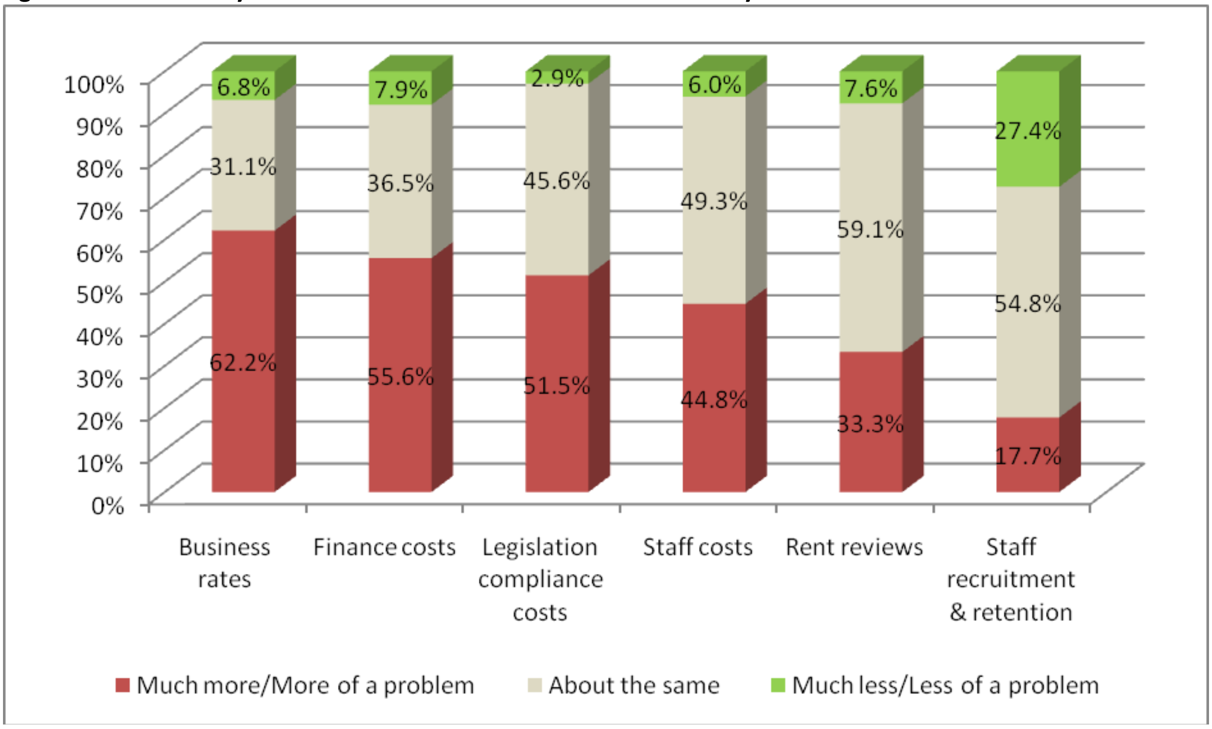
[16] Due to small numbers, health services are not shown in this graph.

Figure 8.9: Expected sales 12 months ahead: comparison of retail categories[6]



8.13. In order to identify whether various costs such as business rates, rents or finance costs have been more (or less) of a problem for Romsey's traders, traders were asked to state how they felt about the burden of various costs on their business over the past three years[17]. Results are presented in Figure 8.10 below.

Figure 8.10: 'How do you feel about the burden of various costs on your business?'



8.14. Clearly, the burden of business rates, finance costs and legislation compliance costs (red tape) has been felt by the majority of respondents, whereas the majority of traders report no significant change in costs related to rent reviews or problems of staff recruitment and staff retention.

[17] Note that questions on the burden of various costs had an average response rate of 57%, mainly due to the fact that multiple retailers did not have information on costs, as those were dealt directly in their Head offices.

8.15. The study was particularly interested in identifying the extent to which traders have been affected by the economic recession that has been widely reported to have hit the high streets of cities and towns. Indeed, when asked about the main factors that have affected their sales over the last year, a significant 39% of retailers confirm that recession has been a main factor having a negative influence on their sales over the year leading to the study (see Table 8.2 below). Again, when comparing Romsey with the results obtained from the MTDC 2010 study, it appears that Romsey traders are more resilient to the crisis: in the last wave of the study, 43.5% and 49.3% of traders interviewed - in the development and control cases respectively - report that recession has been the main factor to affect their sales. Moreover, the difference is even bigger when comparing Romsey with the market town of Crewkerne, South Somerset - one of the cases studies examined in the 2010 Southampton study - where an overwhelming 50% of traders reported sales to have been hit by the recession.

TABLE 8.2: Factors that have affected sales (positively or negatively) over the last 12 months

	N	% (all traders interviewed)
The general economic climate (-)	46	39.0
Own business initiatives (+)	14	11.9
Low visitor numbers (-)	7	5.9
VAT increases (-)	6	5.1
The overall decline of Romsey as a retail centre(-)	4	3.4
The opening of the new supermarket (-)	2	1.7
Internet shopping (-)	2	1.7
Opening of competing businesses in the town centre (-)	2	1.7
Weather (+/-)	2	1.7
High visitor numbers (+)	1	0.8

8.16. Traders in Romsey were also asked to identify particular national as well as local factors that they felt were creating barriers to the growth of their businesses. These are shown in Table 8.3. Low consumer spending combined with high running costs (transport, stock supply, utilities), and limited opportunities for financial lending sum up the barriers to growth as reported by the traders, which are not specific to Romsey itself. Main local (specific to Romsey) factors that inhibit business growth as reported by the traders are either related to weaknesses of Romsey as a shopping destination (for instance low footfall, poor and expensive parking), or to weaknesses of Romsey from the perspective of running a business (e.g. high business rates, high rents).

TABLE 8.3: Perceived barriers to growth

Barriers to Growth (all traders interviewed)

(a) National factors

	N	%
Reduced consumer spending	77	65.3
High VAT	41	34.7
High fuel costs	40	33.9
High cost of suppliers/goods	36	30.5
High utility costs	36	30.5
Limited financial lending	24	20.3

(b) Local factors

	N	%
Low footfall	42	35.6
Expensive parking	41	34.7
High business rates	38	32.2
Competition from larger centres	38	32.2
High rents	29	24.6
Poor parking facilities[18]	28	23.7
Lack of investment from council	14	11.9
Unattractive centre	5	4.2

[18] See Table 9.7 in Chapter 9 on perceived weaknesses of Romsey town centre by traders.

Romsey Traders: key observations

8.17. This chapter has provided up-to-date information on how Romsey traders are currently performing in terms of trade and footfall; moreover it has highlighted trader perceptions on the key local and national factors that may be affecting their business performance.

8.18. The findings suggest that, overall, traders in Romsey seem divided on changes in the vitality and viability of Romsey over the last year, as almost half of traders interviewed (48%) state that Romsey town centre has declined while 43% state this has not been the case. However, and despite only 22% of traders experiencing higher sales now compared to 12 months ago, 46.2% of respondents expect sales to increase over the next 12 months. 'Retail services' is the category that appears to be most optimistic about expected future sales. This finding is in line with the recently reported performance of retail services in the UK, where these seem to perform relatively better than other retail categories on the UK high streets.

8.19. In terms of traders' perceived effects of the economic downturn, the study found that 39% of respondents suggested that the recession has been the main factor impacting upon their sales over the past 12 months. This percentage - which is lower than those observed in other UK towns - combined with information on reported current sales, could suggest that, despite traders' concerns, Romsey seems to be more resilient to the recession than other centres.

Chapter 9

UNIVERSITY OF SOUTHAMPTON 2011 STUDY:

PERCEIVED STRENGTHS AND WEAKNESSES AND SUGGESTIONS FOR IMPROVEMENTS OF ROMSEY TOWN CENTRE

Highlights

- From the consumers' perspective, the main strengths of Romsey are its character and atmosphere, attractiveness, and the compact town centre. Romsey's main weaknesses are poor range of shops and poor range of national chains.
- Consumers' most commonly suggested improvements include improved pavements, fewer charity shops, more shops for young people, and more shops for men.
- Traders view Romsey as an attractive town centre, with a strong and loyal customer base.
- Romsey traders perceived that Romsey's main weakness, from a business perspective, is the high cost of running a business. From a customer point of view, the lack of national multiple retailers and the expensive parking are viewed as the key weaknesses of Romsey.
- The majority of traders felt that Romsey's current retail mix in not satisfactory and would like to see more clothes shops on the centre of Romsey. Additionally, they stated that charity shops and beauty salons are over-represented on Romsey's commercial roads.

Introduction

9.1. This chapter outlines what respondents (both main catchment consumer respondents and traders) thought of the Romsey town centre. There were two sections in the questionnaire that asked consumer respondents their views of Romsey. Firstly, they were given a series of statements and asked whether they strongly agree, agree, disagree, strongly disagree, or neither agree nor disagree with the statement. Secondly, respondents were asked for three characteristics of Romsey they liked, three they disliked, and three suggestions for improvements. Additionally, they were asked what shops or services they believed to be under-represented, and whether they were satisfied with the existing facilities in the town. They were also asked what facilities they believe are missing or if they think any existing facilities in need of improvement.

9.2. Trader respondents were asked what they believed were the strengths and weaknesses of Romsey from both a trader's perspective and a customer's perspective. They were also able to suggest improvements they believed would benefit the town centre, and what shops or services they thought were over-represented or under-represented.

9.3. The response is largely positive from both respondents and traders, and Romsey is generally considered to be an attractive and quaint town, though limited in its range of shops.

Main catchment respondents' perceptions

Table 9.1 'Do you agree or disagree with the following statements?'

	Agree/Agree strongly	No opinion	Disagree/Disagree strongly
Romsey is an attractive centre for shopping	326 (77.6%)	37 (8.8%)	56 (13.3%)
Romsey is in decline	170 (40.9%)	51 (12.3%)	186 (44.9%)
Romsey covers my everyday shopping needs	269 (65.0%)	19 (4.6%)	121 (29.2%)
Romsey has a good range of convenience stores	301 (72.4%)	22 (5.3%)	87 (20.9%)
Romsey has a good range of non-food shops	184 (44.7%)	32 (7.8%)	191 (46.4%)
There is a good range of local independents	243 (58.7%)	39 (9.4%)	125 (30.1%)
There is a good range of national chains	145 (34.9%)	39 (9.4%)	222 (53.5%)
The three-day market is thriving	250 (60.2%)	26 (6.3%)	79 (19.0%)
The monthly farmers' market is thriving	216 (52.8%)	10 (2.4%)	33 (8.0%)
It is easy to park in Romsey	233 (56.4%)	23 (5.6%)	114 (27.6%)

9.4. Table 9.1 depicts the statements that consumer respondents were asked if they agreed or disagreed with. The percentages are calculated as a total of all valid responses, including a 'don't know' option which was omitted from the table. Generally, consumers were very positive about many aspects of the town centre and its retail offer. As seen, 77.6% of consumer respondents agreed or strongly agreed that Romsey is an attractive town. This is significantly higher than the MTDC 2010 average, where only 47.5% of respondents agreed or agreed strongly that the town centre is attractive (see Table 9a in Appendix 9A). Romsey also only had 13.3% of respondents disagree or disagree strongly that the town centre is attractive, while 34.7% disagreed in the MTDC study. The percentage of respondents who believed the town centre is in decline is, however, comparable: 40.9% of respondents in Romsey agreed or agreed strongly that the town centre is in decline, which is marginally less than the MTDC 2010 figure of 42.1% (see Table 9b in Appendix 9A).

9.5. The majority of respondents also believed that the town covered their everyday shopping needs (65% agreed or strongly agreed) and that Romsey has a good range of convenience stores (72.4% agreed or strongly disagreed). Consumer respondents are more divided on whether there is a good range of non-food shops (44.7% agreed or strongly agreed and 46.4% disagreed or strongly disagreed), and are more negative about the range of national chains in the town centre (53.5% disagreed or disagreed strongly). These results support the findings on the food and non-food shopping habits of respondents which show that Romsey fulfils its role as convenience and low order non-food shopping destination for local residents and its hinterland population.

9.6. On a less positive note, car parking is seen as a problem in Romsey. In the MTDC study, 74.9% of respondents agreed or agreed strongly that 'it is easy to park in [the town]' (see Table 9c in Appendix 9A). That percentage is much lower in Romsey at 56.4%, suggesting that perhaps the gripes about parking is not necessarily just dissatisfaction that is common to all market towns.

9.7. The results in Table 9.1 are supported by questions in relation to the strengths and weaknesses of Romsey. As shown in Table 9.2, the main strengths of Romsey are thought to be its character and atmosphere (indicated by 18.2% of main catchment respondents), attractive town centre (15.1%) and compact centre (13.4%). To clarify, there *is* a distinction between character/atmosphere and attractiveness: character/atmosphere generally refers to the way Romsey is a quaint town with a village 'feel', whereas attractiveness refers to how it is aesthetically pleasing or 'pretty'.

Table 9.2 Consumer respondents' perceived strengths of Romsey

Strength	%
Character and atmosphere	18.2%
Attractive town centre	15.1%
Compact centre	13.4%
Good range of independent shops	1.7%
Good quality of shops	1.3%

9.8. Other strengths of Romsey included the Abbey, the quietness, the clean streets, and the respondents feel safe and secure, and there is a good quality of shops.

9.9. When main catchment respondents were asked what they disliked about Romsey, 14.7% said they did not dislike anything. Table 9.3 shows consumer respondents' main perceived weaknesses of Romsey.

Table 9.3 Consumer respondents' perceived weaknesses of Romsey

Weakness	%
Poor range of shops	8.9%
Poor range of national chains	6.7%
Difficult to find parking spaces	6.1%
Empty shop units	5.1%
Expensive to park	4.9%

9.10. The three main weaknesses given by main catchment respondents were poor range of shops (8.9% of respondents), poor range of national chains (6.7%) and difficult to find parking spaces (6.1%). Other weaknesses included the high number of charity shops, the number of empty shop units, and the cost of parking.

9.11. In terms of improvements to Romsey, 10.3% of main catchment respondents believed Romsey does not need improving. The top desired improvement offered was improved pavements (9.5%), followed by more independent shops (8.4%) and more clothes shops (6.9%), as seen in Table 9.4. Other non-retail improvements included more parking (5.1%) and cheaper parking (4.5%).

Table 9.4 Consumer respondents' suggested improvements to Romsey town centre

Improved pavements	9.5%
More independent shops	8.4%
More parking	5.1%
Cheaper parking	4.5%

9.12. As shown in Table 9.5, the retail categories most desired by main catchment respondents (or shops they believed were under-represented) are children's clothes and toys (29.8% of respondents), music/media (28.0% of respondents), and clothes general (22.0%). Other categories often mentioned were electrical goods and men's clothing. Specific shops named that were desired include ASDA, HMV, Iceland, Poundland, M&S, Woolworths, Primark, Waterstone's, Starbucks, Wilkinson's and Tesco Express.

Table 9.5 Consumer respondents' desired retail categories

Children's clothes and toys	29.8%
Music/media	28.0%
Clothes (general)	22.0%
Men's clothes	16.1%
Electrical goods	15.1%
Bookshop	15.1%

9.13. Overall, respondents were satisfied with the facilities in the town centre, with only 8.8% of main catchment respondents saying they were not satisfied with existing community facilities. The most commonly provided suggestion was to improve facilities for younger people (suggested by 11.5% of respondents). In comparison with the towns in the MTDC 2010 study, the consumer respondents in Romsey were generally positive about the town.

Traders' perceptions

9.14. All traders interviewed were asked to state what they thought were the three main strengths of Romsey as a retail centre, first from a traders, and then from a customer's point of view. Table 9.6 below illustrates the 10 most common answers as given by the traders interviewed, ranked in descending order.

9.15. The majority of traders (61%) considered the existence of a loyal customer base in Romsey as a key strength for their business. 46.6% of traders interviewed viewed the attractiveness of the town centre as a strong point from a traders' perspective; the majority of traders (54.2%) viewed Romsey's attractiveness and pleasant shopping environment as a key strength from a customer's perspective as well. Almost 29% stated the good range of independent shops as a key strength of Romsey (this was rated even higher when viewed from a customers' perspective - 32.2%). The fact that Romsey has an affluent population was also one of the key factors mentioned by the traders as a strength of the town, while good quality of shops also ranked quite high (20.3% and 28.8% for traders and customers respectively).

TABLE 9.6 Strengths of Romsey as perceived by local traders

STRENGTHS OF ROMSEY AS RETAIL CENTRE…					
…from a TRADER'S point of view			…from a CUSTOMER'S point of view		
STRENGTHS	*N*	*% (all traders interviewed)*	*STRENGTHS*	*N*	*% (all traders interviewed)*
Loyal customer base	**72**	**61.0**	**Attractive town centre**	**64**	**54.2**
Town centre attractiveness	**55**	**46.6**	**Good range of independent shops**	**38**	**32.2**
Good range of independent shops	**34**	**28.8**	**Good quality of shops**	**34**	**28.8**
Population affluence	**27**	**22.9**	**Good range of food shops**	**28**	**23.7**
Good quality of shops	**24**	**20.3**	**Compact centre**	**26**	**22.0**
Compact centre	**24**	**20.3**	**Good transport links**	**21**	**17.8**
Town is easily accessible	**24**	**20.3**	**Good range of services/ Facilities**	**13**	**11.0**
Ease of parking in the centre	**19**	**16.1**	**Car parks in good locations**	**12**	**10.2**
High passing trade	**9**	**7.6**	**Ease of parking in the centre**	**12**	**10.2**
Not expensive to park	**7**	**5.9**	**Town centre is vibrant**	**7**	**5.9**

9.16. Traders were also questioned on what they perceived to be Romsey's main weaknesses, again both from a trader and customer perspective. The ten most common weaknesses as reported by the traders are presented in Table 9.7 below.

TABLE 9.7 Weaknesses of Romsey as perceived by local traders

WEAKNESSES OF ROMSEY AS RETAIL CENTRE…					
…from a TRADER'S point of view			…from a CUSTOMER'S point of view		
WEAKNESSES	*N*	*% (all traders interviewed)*	*WEAKNESSES*	*N*	*% (all traders interviewed)*
It is expensive to run a business here	59	50.0	Poor range of national chains	49	41.5
Expensive to park	53	44.9	Expensive to park	47	39.8
Poor range of national chains	37	31.4	Poor range of independent shops	30	25.4
Difficult to find parking spaces in the centre	35	29.7	Difficult to find parking spaces in the centre	29	24.6
Poor range of independent shops	30	25.4	Poor range of shops/services (general)	22	18.6
Too many vacant units	16	13.6	Poor parking length of stay	21	17.8
Lack of support/ investment from local authorities	13	11.0	Too many vacant retail units	19	16.1
Poor range of shops/services (general)	12	10.2	Poor range of non food shops	12	10.2
Town is losing trade to larger centres	11	9.3	Car parks in poor locations	6	5.1
Too many charity shops	5	4.2	Poor range of services/facilities	5	4.2

9.17. High costs of running a business, was the main weakness reported by half of the traders interviewed[19]. The lack of a good range of national chains was mentioned by 41.5% of the traders as a key weakness for people going to shop in Romsey, and it also scored high (31.4%) as a weakness for traders as well, as it is believed to be one of the factors that drives people away from Romsey to shop in competing centres like Southampton. High cost of parking also ranked highly (mentioned by almost 45% of traders as a weakness from a trader perspective and of 40% of traders as a weakness for Romsey customers. Other key perceived weaknesses included difficulty of finding parking spaces in the town centre, and poor range of shops and retail services.

Traders' suggested improvements

9.18. The above results are confirmed further, when traders express their views regarding the improvements that according to them could be made to Romsey town centre (see Table 9.3 for a list of the top fifteen improvements suggested).

TABLE 9.8 Top 15 suggested improvements to Romsey town centre

	N	% (all traders interviewed)
cheaper parking	60	50.8
improved pavements	45	38.1
more national chains	43	36.4
more clothes shops	41	34.7
more parking	35	29.7
more independent shops	34	28.8
longer length of stay	33	28.0
greater town centre publicity/promotion	31	26.3
improved safety (CCTV cameras)	24	20.3
a cinema	24	20.3
more support from local council	23	19.5
more frequent farmers market	21	17.8
better quality of shops	21	17.8
improved 3x week market	20	16.9
more leisure facilities	20	16.9

9.19. Parking improvements - both in terms of cost and availability - seem to be, according to traders, a key issue for Romsey town centre: more than half of the traders interviewed mentioned cheaper parking as a key improvement that would benefit the town as a shopping destination; in addition longer length of stay and increase in the parking spaces available was mentioned by almost 30% and 28% of traders respectively. Moreover the range and type of shops and services currently available in the town could be improved according to the traders. More specifically, 36.4% of traders stated that a stronger presence of national chains in Romsey, as well as a wider range of clothes shops would enhance Romsey as a retail centre[20]. Moreover a 29% of traders stated that Romsey would benefit from more independent shops. In terms of town centre facilities, 'leisure services' (and a cinema in particular) are also mentioned by many traders. Furthermore, and in relation to the overall attractiveness/accessibility of the town, a very high 38.1% of traders stated the improvement of the town centre's pavements as something that would enhance Romsey. Interestingly, a significant number of traders also mentioned that the town would benefit from greater promotion/advertising of the town centre. A smaller number of traders expressed the need for more support from the local council and the need for investment in town centre safety (with increase in the number of CCTV cameras in the town centre).

9.20. When asked specifically about what they thought would attract more visitors into Romsey, 33% of traders said that an overall improved range of shops would make the town more attractive, while smaller number of traders[21] suggested that more fairs/events, a better promotion of the town and a bigger and improved market would enhance the attractiveness of Romsey to visitors.

[20] When asked which shop in particular they thought would significantly enhance the retail mix of the town, 7 traders said a NEXT clothes shop, while 7 mentioned a Marks and Spencer's.

[21] Less than 10% of respondents.

9.21. In terms of the Romsey's existing retail/services mix, traders were specifically asked whether they thought this to be adequate. As Figure 9.1 illustrates, the majority of respondents (56%) thought this to be unsatisfactory, while 39% were satisfied with the town's balance of shops and services.

9.22. In relation to the town's retail mix, traders were also asked to comment specifically on the shops and services that they felt the town needed more of as well as the shops/services they thought were overrepresented in the town. These are shown in Table 9.9 below.

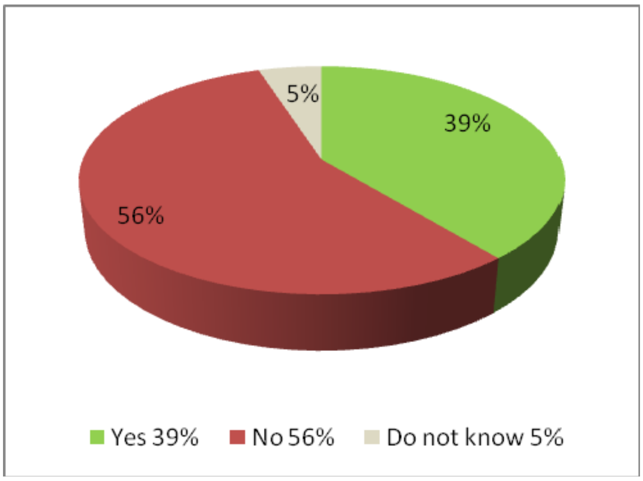


Figure 9.1 'Do you think there is a good mix of retail and services/facilities in the town centre?'

9.23. As can be seen, the shops that traders stated Romsey lacks most of, are children's clothes and toy shops, music and media shops and clothes shops - especially men's. Conversely, the majority of traders (67.8%) think that Romsey has too many charity shops, hair and beauty salons and estate agents[22].

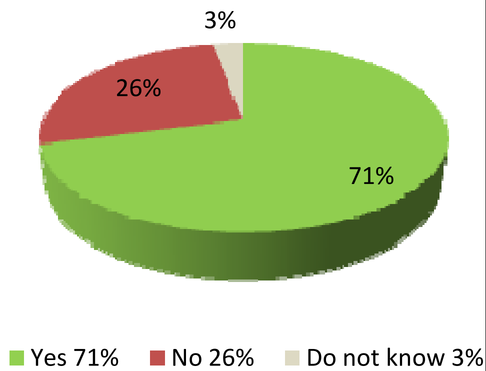
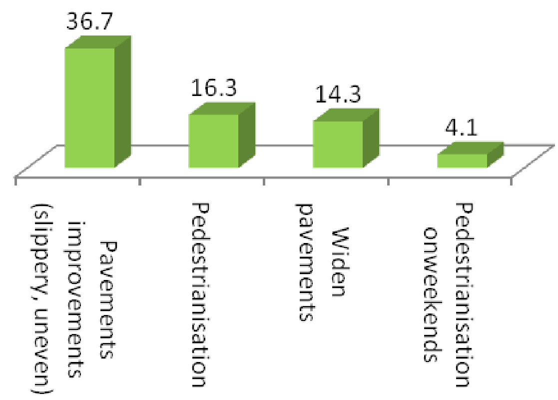
TABLE 9.9 Traders' perceptions on Romsey's current retail mix

'Are there any types of shops/services that…'					
…you would like to see MORE OF in the town centre?			…you would like to see LESS OF in the town centre?		
Underrepresented shops (Top 5)	*N*	*% (all traders interviewed)*	*Overrepresented shops (Top 5)*	*N*	*% (all traders interviewed)*
children's clothes/toys	32	27.1	charity shops	80	67.8
music/media	30	25.4	hairdressers/ beauty salons	37	31.4
men's clothes	21	17.8	estate agents	33	28.0
Clothes general	14	11.9	cafes	16	13.6
Electrical goods	13	11.0	banks/building societies	4	3.4

9.24. In addition to sharing their views on the town's retail mix, traders were also asked to give their opinion on whether further investment was needed order to enhance the town centre environment of Romsey - in particular with regards to the town's streets and pavements.

9.25. As Figure 9.2.11[23] illustrates, the majority of respondents (71%) thought that further environmental enhancements were needed in Romsey's town centre. Of the respondents that were in favour of town centre improvements, 18 (Figure 9.2.2) stated that investment needed to be directed towards pavement improvements in the town centre, as they stated that current uneven and slippery pavements were dangerous for pedestrians - especially the elderly. A smaller number of traders suggested the pedestrianisation of the town centre of Romsey, and the widening of existing pavements.

[22] Romsey currently has 10 charity shops, 17 hair and beauty salons, and 13 estate agents.
[23] The figures (%) are based on valid responses. 69 traders answered this question.

Figure 9.2.1: Would you support further environmental enhancement of the town centre streets and pavements	*Figure 9.2.2: ' If YES, please specify the type of works that would enhance the town centre environment'.*
	

9.26. These results, combined with the fact that 'pavement improvements' topped the list of overall suggested improvements for the town centre of Romsey (see Table 9.8), suggests that this is an issue of clear concern for traders. The location that traders think would benefit the most from an investment on pavement improvements and overall environmental enhancements is The Hundred, followed by Bell Street and Market Place.

Chapter 10

UNIVERSITY OF SOUTHAMPTON 2011 STUDY:

VISITORS TO ROMSEY TOWN CENTRE AND THE FARMERS' MARKET

Highlights

- Outlines results of the shorter questionnaires completed by visitors (84 total) and the questionnaires completed during the Farmers' Market (43 total).
- For visitors, most common duration of visit is 1-2 hours and the most common transport mode was by car.
- Visitors tended to be more positive about the town than main catchment respondents, with a higher percentage saying they do not dislike anything and think the town does not need improvements.
- Majority of respondents at the farmers' market live within a 0-5 minute drive time of Romsey town centre and will only go to the farmers' market or go to the farmers' market and Waitrose, demonstrating a limited flow-on effect from the market to the rest of the town centre businesses.

Introduction

10.1. This chapter discusses the results of questionnaires with 84 visitors to Romsey as well as the surveys conducted at the farmers' market in April.

10.2. Visitors are defined as those respondents who live outside of the 0-15 minute drive time catchment and they were surveyed to provide an extra angle on the research: how effective is Romsey town centre in attracting visitors? The visitor questionnaire was shorter than the main catchment consumers' questionnaires. Visitors were not asked about their food and non-food shopping habits, but were asked about their usual reasons for visiting the town, their perceptions of the town, and the same "on-the-day of survey" questions. Demographic and postcode data was collected.

10.3. Postcode data reveals that visitors tend to come from Southampton, Winchester, Eastleigh and Salisbury, though there are also visitors that come from further afield. Out of the visitor respondents with valid postcode information, the furthest travelled was from North Yorkshire, and other locations included Portsmouth, Bristol and Bournemouth. The average miles travelled by visitors were 25.6 miles (of valid responses).

10.4. Visitors were generally quite positive about the town (more than main catchment respondents). They were not asked about their shopping habits but they were asked about their perceptions of Romsey.

10.5. Additional surveys were completed at the monthly farmers' market in April to supplement the surveys done in the main survey period. Respondents were asked their views on Romsey as well as the market itself.

Visitors

10.6. The usual reasons for visitors coming to Romsey were non-food shopping (29.5%), working in the town (14.1%) and visiting or meeting friends or family (14.1%). 26.9% of visitors surveyed were aged between 35 and 59, 63.4% were female and 38.5% were in full-time employment. This highlights that Romsey is used as a destination for some visitors as a place for meeting friends and family, and as a shopping destination for others (though those two uses are not mutually exclusive). A number of visitors are also in Romsey for work, which reveals the role of Romsey as not merely a residence or tourist destination but also a workplace.

10.7. On the day of the survey, 80.5% of visitors drove to Romsey, mainly parking in either the Waitrose car park or in a private parking space (24% parked in Waitrose; 27% parked in a private space). The most common reasons for visiting Romsey on the day of the survey was work, walk/browse, or visit town centre attractions. The most commonly visited foodstore was Waitrose, with 9.5% saying that was their main reason for visiting Romsey. The most common duration of visit was 1-2 hours, with 39% of visitors staying in Romsey for that length of time.

10.8. Visitors have a fairly positive impression of Romsey. The characteristics they like most are the same as those of the main catchment respondents. As shown in Table 10.1, 18.1% of visitors liked its character and atmosphere, 16.7% liked the attractive town centre, and 9.5% liked the compact town centre.

Table 10.1 Top 3 visitors' perceived strengths of Romsey

Strength	%
Character and atmosphere	18.1%
Attractive town centre	16.7%
Compact town centre	9.5%

10.9. In terms of weaknesses, visitors tended to be more positive than main catchment respondents. 38.7% of visitors said the town had no weaknesses (compared with the 14.7% of main catchment respondents who believed that). For those visitors who did mention weaknesses they included poor range of national chains (9.2%), difficult to find parking spaces (10.5%) and expensive to park (6.6%) (see Table 10.2).

Table 10.2 Top 3 visitors' perceived weaknesses of Romsey

Weakness	%
Difficult to find parking spaces	10.5%
Poor range of national chains	9.2%
Expensive to park	6.6%

10.10. In terms of improvements, 54.0% of visitors believed no retail categories are under-represented, though the nominated categories are similar to what main catchment respondents and traders thought: music/media, electrical goods, clothes general and children's clothes and toys. Other improvements suggested by visitors include more parking (9.1%), improved pavements (6.8%) and cheaper parking (2.3%).

10.11. Both main catchment respondents and visitors were asked what they thought Romsey needed to do to attract more visitors. Main catchment respondents suggested better range of shops (17.7%), more parking (12.0%) and better promotion and advertising (11.4%). Visitors also suggested better promotion and advertising of the town (27.7%).

Farmers' Market

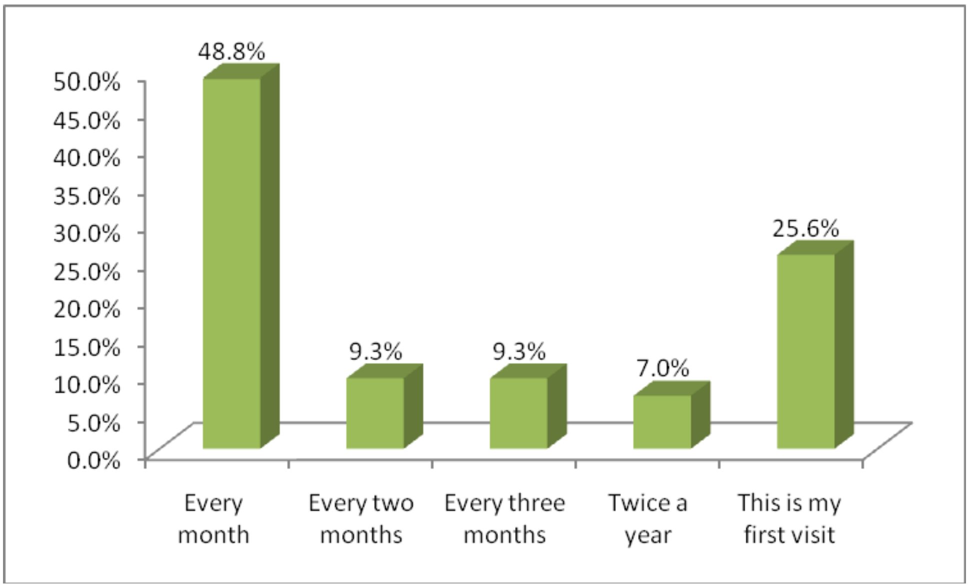
10.12. Surveys were completed at the monthly farmers' market in April. 43 surveys were done with both main catchment and visitor respondents. 41.9% (n18) respondents on market day were visitors travelling on average 18.9 miles from home to Romsey; 58.1% (n25) of respondents lived within a 0-15 minute drive time. 68.3% of respondent drove and the two main car parks used were the Waitrose car park (46.4%) and the Alma Road car park (39.3%). The age of market day respondents varied. 41.9% were aged between 35 and 59, 32.6% were over 60, and 25.6% were below 34.

10.13. The majority (67.4%) of the respondents said their main reason for visiting Romsey on the day of survey was to use the Farmers' Market; other reasons include Waitrose and walking/browsing around Romsey.

10.14. On market day, 46.5% of survey respondents were intending to only go to the market and leave Romsey. Of the respondents that do intend to combine their visit to the market with other shopping locations the most common trip sequence was Waitrose then market (11.6%) followed by market then Waitrose (9.3%). Only 4.6% of respondents intended to visit a town centre shop other than Waitrose, possibly due to the low number of shops open for trading in Romsey on Sundays. The low number of linked trips on market day may also explain why a large majority of respondents will only be in Romsey town centre for up to 1 hour - 65.1% of farmers' market respondents compared to 55.6% of main survey (conducted Monday – Saturday) respondents.

10.15. For approximately a quarter of the respondents, the day of the survey was their first visit to the market (25.6%), as shown in Figure 10.1.

Figure 10.1 Frequency of visits to the Romsey farmers' market



10.16. Whether or not they visit other farmers' markets in the region was fairly evenly split: 44.2% did and 55.8% did not. Of those who do go to other markets, Winchester is the most common (63.6%), followed by Andover (13.6%). Other markets visited included Alton, Hythe and Petersfield.

10.17. The market was considered to be thriving by a sizable majority, 81% of respondents. When asked how the farmers' market could be improved 21 responses were given: 42.9% would like more stalls, 14.3% desired live music, and 9.5% suggested improved location, greater promotion, public seating and a cafe stall.

Chapter 11

UNIVERSITY OF SOUTHAMPTON 2011 STUDY:

REPORT HIGHLIGHTS AND CONCLUSIONS

11.1. The aim of this study was to investigate how successful the town centre of Romsey is at meeting the shopping and service needs of its local residents, its wider catchment area and also those visiting the town. The 423 consumer, 118 trader and 84 visitor surveys provided the University of Southampton researchers with a detailed database on shopping habits, linked trip behaviour and town centre perceptions, allowing for a detailed picture of how the town centre functions, and how its shops, services and facilities are used by the public. As a result, it was possible to update the existing knowledge base previously explored in the 1998 study, and through the addition of more comprehensive trader results, to revisit the vitality and viability of Romsey as a retail centre.

11.2. The key findings of the 2011 UoS Romsey Town Centre study can be summarised as follows:

Food and non food shopping retention

11.3. Previous studies indicated that Romsey was 'under-shopped', with food shopping expenditure retention of 56% (Colliers 1998), lower than expected for a centre of its size and location. Similarly, the GVA 2011 study found a convenience shopping retention rate of 55%. The 2011 UoS Study finds that Romsey has a current retention rate of 63.2% for food shopping within its immediate 0-5 minute catchment area. Even though this comparison should be viewed with some caution due to slight differences in catchment area definitions between past studies and the present one, the observed increase in retention could possibly reflect the increase in convenience floorspace area as a result of the extension of the relocated Waitrose as well as Aldi's entry to Romsey.

11.4. Analysis of demographic data revealed that it is mainly younger respondents (aged below 34) who are more likely to use alternative centres for their food shopping: 42.0% of respondents aged below 34 do their food shopping in Romsey compared with 68.1% of respondents aged over 60. Outshopping is most commonly conducted in Chandler's Ford: 16% of respondents in the immediate catchment area (0-5 minute drive-time) do their main food shopping at Chandler's Ford and 16.5% of the wider catchment respondents (0-15 minute drive-time) do their main food shopping there. Other competing centres include Millbrook, Totton and Winchester.

11.5. In terms of non food shopping expenditure leakage, the findings of the 2011 University of Southampton support the previous studies which found a significant level of leakage particularly in the bulky goods category (such as white electrical goods and furnishings). A significant number of respondents also use alternative centres for more commonly purchased items such as clothes, books, DVDs and CDs. However the town is used by many respondents for lower order items such as 'chemist and pharmaceutical' items and 'leisure services'.

11.6. Similar to food shopping, the 2011 study found that younger respondents were more likely to do non-food shopping outside of Romsey. The three main reasons for not undertaking non-food shopping in Romsey were limited choice of products; perception that Romsey was more expensive than larger centres or the internet; and the belief that certain goods and services were not available in Romsey. Consumer shopping habit information and trader perception data both showed that Romsey's biggest non-food shopping competitors are Southampton city centre, Winchester, Salisbury, and the internet.

Linked trips

11.7. Using data on consumer shopping behaviour, the study explored how the existing supermarkets in Romsey are used in combination with the town centre shops and attempted to determine the extent of the trade ‘spill over’ effects. Romsey has a high level of trip linkage: 68.3% of respondents that do their main food shopping in Romsey supermarkets combine their trips to other town centre shops. These results are comparable to the University of Southampton (2010) Market Towns and District Centres study, where it was found that average linked trip propensities in market towns was 53.6%.

11.8. Linked trip propensities were not uniform across all 3 supermarkets: Waitrose, the town’s most frequented supermarket seems to generate the highest level of linked trips, with 69% of Waitrose shoppers ‘always’ or ‘frequently’ combining their trips to Waitrose with other shops or services in the town; this is despite Waitrose being located on the north east side of the centre, indicating the effectiveness of Latimer Walk in successfully integrating Waitrose into the town centre. This is supported further by the fact that 81.7% of Waitrose shoppers believe that Waitrose is ‘well’/’very well’ integrated into the town centre.

11.9. The two main ‘recipients’ of linked trips are Boots and Bradbeers. Other recipients of linked trips include banks and other financial services and independent foodstores. These linked trip findings, taken together with the ‘anchor store’ evidence, which reveals that food shopping is cited as the main reason for visiting Romsey by 34.2% respondents, emphasises the role that foodstores play in attracting shoppers to Romsey and the level of ‘spill over’ trade generated .

Consumer perceptions

11.10. The perceptions of the town centre are generally very positive, with 77.6% of respondents agreeing/strongly agreeing that Romsey is an attractive town centre, and 65% agreeing/strongly agreeing that Romsey covers their everyday shopping needs. Romsey’s main strengths are its character and atmosphere, attractiveness, and compact town centre.

11.11. In terms of Romsey’s weaknesses as a retail centre, a large number of consumers (46.4%) perceived it to have a poor range of non-food shops, while the majority of respondents (53.5%) found the choice of national chains in the town very limited. Moreover, a significant number of respondents stated difficulties to park as one of Romsey’s key weaknesses. These observations suggest that while Romsey fulfils its role as a food shopping destination, improvements could be made to its non-food retail offer.

11.12. Overall 10.3% of main catchment respondents are satisfied with the town and believe Romsey does not need improving. Suggested improvements included improving pavements, more independent shops, and more clothes shops. Non-retail improvements included more parking and cheaper parking. Retail categories that were most desired by respondents were children’s clothes and toys (29.8% of respondents), music/media (28.0% of respondents) and general clothing (22.0%).

Performance of Romsey traders and the effect of recession

11.13. The UoS study provided a very detailed and representative (78% response rate) outlook of how traders in Romsey currently perceive the performance of Romsey as a retail centre, and of their own business in particular, in terms of sales and footfall. On the whole, the study findings suggest that traders in Romsey are divided on changes in Romsey's vitality and viability: almost half of traders interviewed (48%) state that Romsey town centre has declined, while 43% state this has not been the case.

11.14. The majority of traders reported that sales at the time of survey were either up or remained the same compared to twelve months previous. Despite only 22% of traders experiencing higher sales now compared to 12 months ago, 46.2% of respondents stated that they expect sales to increase over the next 12 months. Traders within the 'retail services' category appear to be most optimistic about expected future sales. This finding is in line with the recently reported performance of retail services in the UK, where these seem to perform relatively better than other retail categories on the UK high streets.

11.15. In terms of traders' perceived effects of the economic downturn, the study found that 39% of respondents suggested that the recession has been the main factor impacting upon their sales over the past 12 months. This percentage - which is lower than those observed in other UK towns - combined with information on reported current sales, could suggest that, despite the fact that Romsey traders are not 'immune' to the economic downturn, they could be more resilient to the effect of recession than other market towns previously studied.

The vitality and viability of Romsey town centre

11.16. Overall, the results of the 2011 University of Southampton study seem to confirm that Romsey town centre is a well-used and well-functioning centre with a reasonably high retention rate for food-shopping and levels of linked trips comparable with other market towns in the U.K. Additionally, the vacancy rate of 7.1% (May 2011) is lower than the national average. The town offers a range of foodstores and non-food shops for residents and visitors and fulfils its role as a convenience shopping destination well.

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Appendix contents

2A. *Nathaniel Lichfield and Partners, Test Valley Borough Council Retail Development Potential in Romsey (June 2008)*

Convenience retail: development recommendations

Scenario 1 – 1,200 sq m net Food Store
If a food store of 1,200 sq m net is developed, it is expected that, in total, two thirds of the new store's turnover would be diverted from other facilities in Romsey. By 2016, existing convenience facilities in Romsey (including the extended Waitrose) will be trading about 7% below benchmark turnover.

The report concludes that, in the short term, there is not an over-riding need for a food store of this size in Romsey, although the development of an edge-of-centre store between 2011 and 2016 is unlikely to harm the vitality and viability of the town centre, or cause the closure of existing town centre shops, and most of the impact is likely to fall on the three main stores (Waitrose, Aldi and Co-op). In addition, the expenditure clawback of a store of this size in 2016 could benefit other non-convenience shops and non-retail services within the town centre, through the generation of additional linked shopping trips.

A store of this size could be supported based on higher draft South East Plan housing figures by 2016.

Scenario 2 – 2,000 sq m net Food Store
If a foodstore of 2,000 sq m net is developed, it is expected to cause a reduction of approximately 35% in the turnover of existing facilities in Romsey of in 2011. By 2016, existing convenience facilities in Romsey (including the extended Waitrose) will be trading about 13.5% below the benchmark turnover. Figures suggest a food store of this size could harm existing convenience shopping provision in Romsey, particularly if opened around 2011.

The report therefore suggests that there is no over-riding need for a food store of this size in Romsey for the foreseeable future. However, an edge-of-centre store would help to claw back convenience expenditure in 2016, which would benefit other non-convenience and non-retail services within the town centre.

If the higher draft South East Plan population figures were achieved, then a food store approaching 2,000 sq m net could be achieved by (or after 2016) However, the report underlines that the impact on the town centre would need to be carefully considered.

Scenario 3 – 2,500 sq m net Food Store
If developed, a food store of 2,500 sq m net is expected to cause convenience stores in Romsey trading at 255 below benchmark by 2016. This suggests that a store of 2,500 sq m net would harm existing convenience shopping provision in Romsey, and is not recommended, even if the draft South East Plan population projections were to be adopted.

2B. *Nathaniel Lichfield and Partners, Test Valley Borough Council Retail Development Potential in Romsey (June 2008)*

Comparison retail
As concluded in the 2007 report, due to Romsey's limited town centre floorspace availability, there appears to be limited scope to improve Romsey's market share of comparison expenditure through the implementation of developments in the town centre, implying that some warehouse floorspace

may be required. The 2008 report examined 3 different scenarios of warehouse developments in Romsey[24].

Scenario 1 – 4,000 sq m Gross of Retail Warehousing

If developed, a retail warehouse development of 4,000 sq m gross would have a small impact on the turnover of existing businesses which would allow them to still trade well above base year trading levels.

Scenario 2 – 6,000 Sq M Gross of Retail Warehousing

If developed, a warehouse of that size would have some impact on retail turnover of existing businesses in Romsey, but these would be still trading well above base year trading levels. Therefore the report concludes that this scale of development is also unlikely to harm the vitality and viability of the town centre.

Scenario 3 – 8,000 Sq M Gross of Retail Warehousing

If developed, a warehouse of that size would have an impact on retail turnover of existing businesses in Romsey, but these would be still trading well above base year trading levels. Therefore the report again concludes that this scale of development is also unlikely to harm the vitality and viability of the town centre. However, it is noted that there could be an issue in relation to the scale of development and Romsey's existing role and position within the shopping hierarchy. It is also noted that the South East Plan suggests Romsey is not a suitable location for large scale retail development. It is therefore concluded that this level of development (8,000 sq m gross), particularly in the short term, may limit the potential for other comparison development within the town centre.

[24] It is noted that this form of development is most likely to include traditional retail warehouse operators, such as DIY, carpet, furniture, electrical, pet shops etc

3A. Consumer questionnaire

Questionnaire No…………………………

So we can classify the answers, could I ask you to indicate approximately where you live on this map

Red ☐ Blue ☐ Yellow ☐

Could I ask you for your postcode? This is in order to establish shopping travel distances and will not be used to contact you.

………………

Could you also indicate which of the following age brackets you fit into?

18 - 24 ☐ 25 - 34 ☐ 35 - 44 ☐ 45 - 59 ☐ 60 - 69 ☐ 70 & over ☐

Age Seg 1 ☐ Age Seg 2 ☐ Age Seg 3 ☐

1) **If** respondent resides **outside** of the 0-15 min drive time zones – For what reason do you normally visit Romsey town centre?

Shopping (non food)	☐	Leisure/cafes/restaurants	☐	This is my first visit to Romsey	☐
Working in the town	☐	Visit abbey/centre attractions	☐		
Meeting friends	☐	For a walk	☐	Other please specify	☐

2) How did you travel to Romsey town centre today?

Private motor vehicle	☐	Bus	☐	Taxi	☐
Walked	☐	Bicycle	☐	Train	☐
				Other please specify	☐

2)a *If answered* ***private motor vehicle*** – Which car park have you used today? (map 2)

1) Aldi own	☐	4) Crosfield Hall	☐	7) Princes Rd	☐
2) Alma Rd	☐	5) Lortemore Place	☐	8) Waitrose own	☐
3) Broadwater Rd	☐	6) Newton Lane	☐	9) Other please specify	☐

3) Have you had any issues/problems with parking in Romsey today?

Yes ☐ No ☐

3) a) (*If Yes*) What were those issues?

page 1

If respondent is a visitor (resides outside the red-yellow boundary) go straight to **qu.19, pg 8**

4) Where do you currently do your main and your secondary/top up shopping?
Interviewer mark current choices with M for main and 1-3 for secondary shops

EASTLEIGH (& CHANDLER'S FORD)

Asda	☐	Sainsbury's	☐	Waitrose	☐
Iceland	☐	Tesco Express (Valley Park)	☐		☐
Lidl	☐		☐	Small town centre shops	☐

MILBROOK

Tesco ☐

LORDSHILL

Sainsbury's ☐

NORTH BADDESLEY

Co-op	☐	Small local shops	☐

NURSLING

Co-op	☐	Small local shops	☐

ROMSEY

Aldi	☐	Small town centre shops	☐
Co-op (The Hundred)	☐	Please specify stores…………………………………………	
Waitrose	☐		
Small local shops outside the town centre	☐	…………………………………………………………………	

SHIRLEY

Lidl	☐	Sainsbury's	☐	Small town centre shops	☐
Iceland	☐	Tesco Express	☐		

CENTRAL SOUTHAMPTON

Asda	☐	M&S	☐
Lidl	☐	Tesco Express	☐

TOTTON

Asda	☐	Lidl	☐	Tesco Express	☐
Co-op	☐	Morrisons	☐	Small town centre shops	☐

WINCHESTER

Iceland	☐	Sainsburys (Badgers Farm)	☐	Small city centre shops	☐
M&S	☐	Tesco Express (Andover Rd)	☐		
Sainsburys (City Centre)	☐	Waitrose	☐		

OTHER STORE please specify

INTERNET FOOD RETAILER please specify

page 2

MAIN FOODSTORE SHOPPING HABITS

5) In the case of your first main (*interviewer recall* **M**) how often do you shop there?

More than daily	☐	Weekly	☐
Daily	☐	Fortnightly	☐
Every few days	☐	Monthly/less frequently	☐

(*interviewer please ask respondent to specify frequency*)

6) And how do you travel to this store?

Private motor vehicle	☐	Bus	☐	Taxi	☐
Walked	☐	Bicycle	☐	Train	☐
				9) Other please specify	☐

6)a) Do you return from this store the same way? (IF **NO**, ask how they return

7) What are the main reasons for using your main foodstore? (*interviewer if more than one reason given please specify order*)

My main foodstore:

a) Is quick/easy/handy to get to from home………………………………….. ☐

b) Is quick/easy/handy to get to from my workplace……………………….. ☐

c) Is good value for money…………………………………………………. ☐

d) Has a large range of food products available …………………… ☐

e) Has good quality food products available …………………….. ☐

f) Has good parking facilities …………………………………… ☐

g) Has convenient opening hours………………………………. ☐

h) I am able to combine my food shopping with trips to other shops ….. ☐

i) Any other reason please specify…………………………………………………. ☐

page 3

8) You specify that your main store is (*interviewer recall*) – Do you typically undertake this shopping trip from home or as part of another journey?

From home	☐	From/To work	☐	From/to School run	☐
Other please specify	☐				

9) **IF** Romsey Waitrose/Co-op/Aldi given as main **(M)** store: How often do you combine this foodstore with other shops in Romsey town centre?

Always combine the town centre and store ….. ... ☐
Frequently combine the town centre and store...... ☐
Occasionally combine the town centre and store ☐
Never combine the town centre and store ………. ☐

9) a) (**IF** combine the store) Which town centre shops/services/facilities/activities do you most frequently combine your shopping trip with?

…………………………………………………………………………………………

10) If Waitrose is **(m)** store:

How well do you feel Waitrose is integrated into the town centre?

Very well integrated	☐	Poorly integrated	☐	Don't know	☐
Well integrated	☐	Very poorly integrated	☐		

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FIRST NAMED SECONDARY FOODSTORE SHOPPING HABITS

11) In the case of your first named secondary food store (*interviewer recall* **1**) how often do you shop there?

More than daily	☐	Weekly	☐
Daily	☐	Fortnightly	☐
Every few days	☐	Monthly/less frequently	☐

(*interviewer please ask respondent to specify frequency*)

12) And how do you travel to this store?

Private motor vehicle	☐	Bus	☐	Taxi	☐
Walked	☐	Bicycle	☐	Train	☐
				9) Other please specify	☐

12)a) Do you return from this store the same way? (IF **NO**, ask how they return

13) What are the main reasons for using your first named secondary? (*interviewer if more than one reason given please specify order*)

My first named secondary foodstore:

a) Is quick/easy/handy to get to from home………………………………….. ☐

b) Is quick/easy/handy to get to from my workplace…………………………. ☐

c) Is good value for money…………………………………………………… ☐

d) Has a large range of food products available …………………… ☐

e) Has good quality food products available …………………….. ☐

f) Has good parking facilities …………………………………….. ☐

g) Has convenient opening hours………………………………… ☐

h) I am able to combine my food shopping with trips to other shops ….. ☐

i) Any other reason please specify…………………………………………….. ☐

page 5

14) You specify that your secondary foodstore is (*interviewer recall*) – Do you typically undertake this shopping trip from home or as part of another journey?

From home	☐	From/To work	☐	From/to School run	☐
Other please specify	☐				

15) **IF** Romsey Waitrose/Co-op/Aldi given as first named secondary **(1)** foodstore: How often do you combine this foodstore with other shops in Romsey town centre?

Always combine the town centre and store …. ... ☐
Frequently combine the town centre and store..... ☐
Occasionally combine the town centre and store ☐
Never combine the town centre and store ………. ☐

15)a) (**IF** combine the store) Which town centre shops/services/facilities/activities do you most frequently combine your shopping trip with?

……………………………………………………………………………………

16) If Waitrose is **(1)** store:

How well do you feel Waitrose is integrated into the town centre?

Very well integrated	☐	Poorly integrated	☐	Don't know	☐
Well integrated	☐	Very poorly integrated	☐		

page 6

17) Could you please tell me in **which town centre, internet store or other location** you would normally buy/access the following items/services;

Chemist / pharmaceutical items

Luxury household goods and gifts (CDs, DVDs, books, jewellery)

Clothing and footwear

Small domestic electrical items (TVs, kettle etc)

Large domestic electrical items (white goods)

Household furnishings and textiles

Retail/leisure services – (Cinema, restaurants)

18) For all items where Romsey town centre is NOT given as a location ask if there is any particular reason that these products are not normally purchased/accessed in Romsey

Luxury household goods and gifts (CDs, DVDs, books, jewellery)	………………………………………………
Chemist / pharmaceutical items	………………………………………………
Clothing and footwear	………………………………………………
Small domestic electrical items (TVs, kettle etc)	………………………………………………
Large domestic electrical items (white goods)	………………………………………………
Household furnishings and textiles	………………………………………………
Retail services (cinema etc)	……………………………………………

page 7

19) On average how often do you visit Romsey town centre for:

A. Food shopping (both main and top up)		**B. Non food shopping**	
Daily	☐	Daily	☐
Every few days (specify) …………..	☐	Every few days (specify) …………	☐ ☐
Weekly	☐	Weekly	☐
Fortnightly	☐	Fortnightly	☐
Monthly	☐	Monthly	☐
Every few months (specify) …………	☐	Every few months (specify) …………	☐
Never	☐	Never	☐

20) Now I'd like you to tell me if you agree strongly, agree, neither agree nor disagree, disagree, or disagree strongly with the following statements about Romsey shopping centre

	Agree strongly	Agree	Neither agree nor disagree	Disagree	Disagree strongly	Don't know
a) Romsey is an attractive centre for shopping	☐	☐	☐	☐	☐	☐
b) Romsey centre is in decline	☐	☐	☐	☐	☐	☐
c) Romsey centre covers my everyday shopping needs	☐	☐	☐	☐	☐	☐
d) There is a good range of convenience stores in Romsey	☐	☐	☐	☐	☐	☐
e) There is a good range of non-food shops in Romsey	☐	☐	☐	☐	☐	☐
f) There is a good range of local independent/specialist shops in Romsey	☐	☐	☐	☐	☐	☐
g) There is a good range of national retail chains in Romsey	☐	☐	☐	☐	☐	☐
h) There is a thriving 3 day market in Romsey	☐	☐	☐	☐	☐	☐
i) There is a thriving monthly farmers market in Romsey	☐	☐	☐	☐	☐	☐
j) It is easy to park in Romsey	☐	☐	☐	☐	☐	☐

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21) What are the TOP 3 things do you like most about Romsey town centre?

Parking/Access		Environmental		Attractions	
Good parking provision		Clean streets		Wide range of national chains	
Good car park locations		Feel safe/secure		Wide range of non food shops	
Cheap parking		Attractive/pretty centre		Wide range of independent shops	
Good parking (length of stay)		Character/atmosphere		Good quality of shops	
Compact centre		Green space availability		Good quality of 3x week market	
Disabled access		Other (please specify)		Good quality of farmers market	
Good bus service/ public transport				Good range of facilities/services	
Good signage				Rapids leisure centre	
Other please specify				Other (please specify)	

22) What are the TOP 3 things you dislike most about Romsey town centre?

Parking/Access		Environmental		Attractions	
Expensive parking		Dirty/untidy streets		Empty shop units	
Insufficient parking provision		Feel unsafe		Poor range of national chains	
Poor parking quality		Unattractive centre		Poor range of non food shops	
Poor parking (length of stay)		Character/atmosphere		Poor range of independent shops	
Poor parking locations		Green space availability		Poor quality of shops	
Poorly defined centre		Boarded up premises		Poor quality of 3x week market	
Poor disabled access		Green space availability		Poor quality of farmers market	
Poor bus service/ public transport		Other (please specify)		Poor range of facilities/services	
Poor signage				No cinema	
Condition of pavements					
Width of pavements					
Other (please specify)				Other (please specify)	

23) a) Are there any types of shops/services that are **underrepresented** and you would like to see **more** of in the town centre?

23) b) Are there any types of shops/services that are **overrepresented** and you would like to see **less** of in the town centre?

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24) a) What 3 improvements could be made to Romsey town centre?

Parking/Access		Environmental		Attractions	
More parking		Cleaner streets		More national chains	
Cheaper parking		Improved security/ surveillance		More clothes shops	
Better parking locations		Improved appearance (please specify what and location)		More independent shops	
Better parking length of stay		Improved pavements		Additional supermarket	
More reliable buses		Improved public toilets		Better quality of shops	
Poor disabled access		Other (please specify)		Improved 3x weekly market	
Better disabled access				Improved farmers market	
Better signage				A cinema	
Improved pavements/ Environmental enhancements				Need a particular name/type of store here (please specify)	
Wider pavements					
Other (please specify)				Other (please specify)	
Any other comments					

24) b) IF '**Improved appearance**' selected ask for further details (type of work, location etc)

And/Or

24) c) IF **'environmental enhancements/ Improved pavements/wider pavements'** selected ask where would you like to see these improvements?

IF **NOT** A VISITOR ASK:

25) Do you think the existing community facilities/spaces in the town are adequate?

Yes ☐ No ☐ Don't know ☐

25)a) What existing facilities could be improved upon? Or new facilities could be provided?

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ALL

26) What would encourage more visitors to the town centre/ **OR** As a visitor to the town centre, what do you feel would encourage you to visit more often?

(if attractions/events/shops/services given as an answer ask for details)

……………………………………………………………………………………………

27) What was your MAIN reason for visiting Romsey today?

28(a) Can you now tell where else you plan to visit in the town centre and the order of your shopping trip:

	Visit	Order
High street shops/services		
Aldi		
Co-op		
Waitrose		
Bradbeers		
Rapids		
Other (please specify)		

28(b) (IF High Street shops/services, other is mentioned above) **Which shops/ services** are you planning to visit/have you used on this trip?

29) How long do you intend to stay in Romsey today on this visit?

Less than 30 mins	☐	2 hours	☐	5 hours or more	☐
30 mins – 1 hour	☐	3 hours	☐	Don't know	☐

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Demographics

30) How many children – that is persons aged 17 or under, live in your household?

0 ☐ 2 ☐ 4+ ☐
1 ☐ 3 ☐

31) Including yourself, how many persons aged 18 or over live in your household

0 ☐ 2 ☐ 4+ ☐
1 ☐ 3 ☐

33) Could you please indicate your current work status

1) Full time work ☐ 3) Unemployed ☐ 5) Full time education ☐
2) Part time work ☐ 4) Retired ☐ 6) Housewife/husband ☐

34) Could you please indicate the approximate total gross (pre-tax) yearly income of the entire household

1) Under £5000 ☐
2) £5,000 - £9,999 ☐
3) £10,000 - £14,999 ☐
4) £15,000 - £24,999 ☐
5) £25,000 - £39,999 ☐
6) £40,000 – £54,999 ☐
7) £55,000 - £69,999 ☐
8)£70,000 - £85,000 ☐
9)£85,000 or more ☐

(10) Respondent declined to answer ☐

35) INTERVIEWER please note **sex of respondent** Male ☐ Female ☐

OK, many thanks for your time and the information you've given. If you have any questions about the survey please contact us at the University of Southampton. Thank you for your time and co-operation with this survey

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3B. Trader questionnaire

UNIVERSITY OF Southampton
School of Geography

To the proprietor/manager

The School of Geography at the University of Southampton has been commissioned by Test Valley Borough Council to conduct a survey in Romsey to investigate how successful the town centre is at meeting the needs of residents and visitors. We wish to build up a detailed picture of how the town centre functions and how its shops, services and facilities are used by the public. You contribution to this study, as a business operating within the town centre and which directly serves the public, would be greatly appreciated.

As part of the research a separate complementary survey is also being undertaken with a representative sample of shoppers and visitors to the town centre.

The survey will take approximately ten minutes to complete. The validity of the results for this study depends on obtaining a high response rate from businesses by the end of April 2011. I would greatly appreciate your completing the enclosed survey and returning it using the freepost self addressed envelope provided.

No individual responses from this survey are identifiable. Please feel free to add any further comments if you wish (on separate sheet if necessary). We would like to assure you that all information from this survey will remain totally confidential.

Many thanks for your time.

Yours sincerely,

Professor Neil Wrigley

School of Geography,
University of Southampton,
Southampton, SO17 1BJ
Direct tel: +44 (0)23 80592215
email: n.wrigley@soton.ac.uk

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TEST VALLEY
BOROUGH COUNCIL

Council Offices, Duttons Road
Romsey, Hants SO51 8XG
Telephone 01794 527700
Fax 01794 527723
Minicom 01264 368052
Web site www.testvalley.gov.uk

TRADER QUESTIONNAIRE

TO WHOM IT MAY CONCERN

Date:	11 March 2011	**Contact:**	David Bibby
Your ref:		**Telephone:**	01794 527817
Our ref:	DB/ES/pt11.9	**E-mail:**	planningpolicy@testvalley.gov.uk

Dear Sir / Madam

Romsey Town Centre Study

The Council has appointed the University of Southampton to investigate how Romsey town centre functions and how its shops, facilities and services are used by the public. The researchers from the University undertaking the study are conducting questionnaire interviews with town centre businesses directly serving the public on the Council's behalf.

Your participation in the research would be appreciated as we are keen to know the views of businesses operating in the town centre and it is important that the research includes as many businesses as possible. Please be reassured that the personal details of all businesses taking part will remain confidential.

The research also includes seeking the views of a representative sample of the public using the town centre, both shoppers and visitors. The results of the study are expected to be published in the autumn and will inform the Council's future strategy and policies for the town centre.

If you have further questions regarding the study please contact Planning Policy and Transport telephone 01794 527816 or email planningpolicy@testvalley.gov.uk

Yours faithfully

S. P. Lees

Steve Lees
Head of Planning Policy and Transport Service

INVESTORS IN PEOPLE

Printed on environmentally friendly paper

page 2

Romsey survey of town centre traders (March 2011)

Survey no………………This survey will be collected on……………………….

1) Please indicate the main type of goods and/or services sold at these premises

2) Please indicate the classification of your business

Independent retailer………………………………………………………………….... ☐

Independent retailer who is member of a symbol (franchise) group…. ☐

Multiple retailer part of local / regional group……………………………….. ☐

National multiple retailer………………….………………………….…………….. ☐

3) What do you think attracts customers to your shop/business?

4(a) How long has **this business** been operating as a retailer anywhere within Romsey?

4(b) How long has **this business** been operating from these particular premises in Romsey?

5) How many employees (full and part-time) currently work at these premises? Please indicate how many are female and how many are male.

Number of employees	Full time (35 or more hours a week)	Part time (under 35 hours a week)
Male		
Female		

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6(a) Thinking about Romsey as a retail centre, from a **TRADER'S** point of view, what do you think are its **three main strengths**? (please select up to **three** from the options given below)

a. There is a good range of independently owned and specialised shops here………………… ☐

b. There is a good range of national retailers here…………………………………………….. ☐

c. Existing businesses in the town centre offer high quality goods and services……………… ☐

d. There is a lot of passing trade……………………………………………………………. ☐

e. I have a loyal customer base/friendly relations with clients……………………………… ☐

f. The town centre is attractive/pleasant for customers……………………………………… ☐

g. It is not expensive to run a business here (rents, business rates etc)……………………… ☐

h. There is support and investment from local authorities…………………………………… ☐

i. There is a compact/ clearly defined town centre…………………………………………… ☐

j. It is easy to park in the town centre………………………………………………………. ☐

k. It is not expensive to park in the town centre……………………………………………… ☐

l. The car parks are in a good location ………………………………………………………. ☐

m. The local population is affluent……………………………………………………………… ☐

n. The town is easily accessible (proximity to bigger centres and good transport links)………. ☐

o. Other strengths (please specify)……………………………………………………………...

6(b) Thinking about Romsey as a retail centre, from a **TRADER'S** point of view, what do you think are its **three main weaknesses**? (please select up to **three** from the options given below)

a. There is a poor range of independently owned and specialised shops here………………… ☐

b. There is a poor range of national retailers here…………………………………………… ☐

c. Existing businesses in the town centre offer poor quality goods and services……………… ☐

d. The town centre is unkempt/run down……………………………………………………. ☐

e. It is expensive to run a business here (rents, business rates etc)…………………………. ☐

f. There is lack of support and investment from local authorities ………………………….. ☐

g. The town centre is spread out/not clearly defined………………………………………… ☐

h. It is difficult to park in the town centre…………………………………………………… ☐

i. It is expensive to park in the town centre…………………………………………………. ☐

j The car parks are in a good location ………………………………………………………. ☐

k. The local population has low disposable income…………………………………………. ☐

l. There are many vacant retail units in the town centre…………………………………….. ☐

m. Vandalism is a problem in the town centre………………………………………………… ☐

n. The town is losing trade due to proximity to bigger centres (bigger town or city and/or out-of-town retail development nearby) ……………………………………………………… ☐

o. Other weaknesses (please specify)………………………………………………………….. ☐

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7(a) Thinking about Romsey as a retail centre, from a **CUSTOMER'S** point of view, what do you think are its **three main strengths**? (please select up to **three** from the options given below)

a. There is a good range of independently owned and specialised shops here………………… ☐

b. There is a good range of national retailers here…………………………………………….. ☐

c. There is a good range of facilities/services in the town centre……………………………. ☐

d. Shops/services in the town centre offer high quality goods and service……………… ☐

e. There is a good range of convenience shops in the town centre ………………………….. ☐

f. There is a good range of non – food shops in the town centre …………………………… ☐

g. The town centre is vibrant ……………………………………………………………….. ☐

h. The town centre is attractive/pleasant for customers……………………………………….. ☐

i. There is a compact/ clearly defined town centre…………………………………………….. ☐

j. The town has good public transport links………………………………………………….. ☐

k It is easy to park in the town centre…………………………………………………………. ☐

l. It is not expensive to park in the town centre……………………………………………….. ☐

m. The car parks are in a good location …………………………………………………......... ☐

n. The car parks' length of stay periods are good ……………………………………......... ☐

o. Other strengths (please specify)……………………………………………………………......

7(b) Thinking about Romsey as a retail centre, from a **CUSTOMER'S** point of view, what do you think are its **three main weaknesses**? (please select up to **three** from the options given below)

a. There is a poor range of independently owned and specialised shops here………………… ☐

b. There is a poor range of national retailers here…………………………………………… ☐

c. There is a poor range of facilities/services in the town centre……………………………. ☐

d. Shops/services in the town centre offer poor quality goods and services…………………… ☐

e. There is a poor range of convenience shops in the town centre ………………………….. ☐

f. There is a poor range of non – food shops in the town centre …………………………… ☐

g. The town centre is unkempt/run down……………………………………………………. ☐

h. The town centre is spread out/not clearly defined…………………………………………… ☐

i. The town has poor public transport links………………………………………………….. ☐

j It is difficult to park in the town centre……………………………………………………… ☐

k. It is expensive to park in the town centre………………………………………………….. ☐

l. The car parks are in a poor location ………………………………………………........... ☐

m. The car parks' length of stay periods are poor….. ………………………………………...... ☐

n. There are many vacant retail units in the town centre………………………………………. ☐

o. Personal safety/ crime is a problem in the town centre………………………… ☐

p. Other weaknesses (please specify)……………………………………………………….. ☐

8) What improvements could be made to Romsey town centre?

Parking/Access	Environmental/Investment	Attractions
More parking ☐ Cheaper parking ☐ More convenient parking locations ☐ Longer 'length of stay' parking provision ☐ More reliable buses ☐ Better disabled access ☐ Environmental enhancement ☐ Improved pavements ☐	Cleaner streets ☐ Improved security/CCTV ☐ Improved public toilets ☐ Greater promotion of the centre/advertising ☐ More support from local council ☐ Improve appearance ☐ (please specify details/location) …………………………… …………………………… ……………………………	More national chains ☐ More clothes shops ☐ More independent shops ☐ Additional supermarket ☐ More leisure facilities ☐ A cinema ☐ Better quality of shops ☐ Improved 3x weekly market ☐ More frequent farmers market ☐ Longer shop opening hours ☐ Need a particular name/type of store here ☐ (please specify) …………………………

8)a) Other improvements (please specify)

……………………………………………………………………………………..

……………………………………………………………………………………

9) Would you support further environmental enhancement of the town centre streets/pavements? If so please specify type of works and which location would benefit from this investment.

10) What do you think would encourage more visitors to the town centre?

………………………………………………………………………………………………..

………………………………………………………………………………………………..

11) Do you think there is a good mix of retail and services/facilities in the town centre?

Yes ☐ No ☐ Don't know ☐

12) a) Are there any types of shops/services that are **underrepresented** and you would like to see **more** of in the town centre?

…………………………………………………………………………………………

12) b) Are there any types of shops/services that are **overrepresented** and you would like to see **less** of in the town centre?

…………………………………………………………………………………………

13) Would you say that over the past 12 months the footfall in Romsey town centre has:

Increased	☐
Stayed the same	☐
Declined	☐
Don't know	☐

14) Would you say that over the past 12 months Romsey town centre has declined?

Yes	☐
No	☐
Don't know	☐

Please give reasons for you answer

…………………………………………………………………………………………………..

…………………………………………………………………………………………………

15) Which centre(s)/location(s) would you consider to be Romsey town centre's biggest competitor? (please select up to three, with the biggest competitor as number 1)

Andover	☐	Other out-of-town retail parks (please specify)
Eastleigh	☐	
Hedge End retail park	☐	……………………………………………
Salisbury	☐	
Shirley	☐	Other centre (please specify)
Southampton city centre	☐	
Totton	☐	………………………………………………
Winchester city centre	☐	

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If you don't mind us asking……

16) How do you feel about the burden of various costs on your business? For each of the following items, could you please say whether you think it has become more or less of a problem for your business **over the past three years**.

	Much more of a problem	More of a problem	About the same	Less of a problem	Much less of a problem
Business rates	☐	☐	☐	☐	☐
Rent reviews	☐	☐	☐	☐	☐
Staff costs	☐	☐	☐	☐	☐
Staff recruitment & retention	☐	☐	☐	☐	☐
Legislation compliance costs (red tape)	☐	☐	☐	☐	☐
Finance costs	☐	☐	☐	☐	☐
Other costs, please specify	☐	☐	☐	☐	☐

17) Could you now compare your current sales with those over the past 12 months, and also tell us your expectations for sales in a year's time?

	Up	Roughly the same (less than + 5% change)	Down
a. Compared to **12 months ago (March 2010)**, are your sales	☐	☐	☐
b Looking forward to **this time next year**, do you expect sales to be	☐	☐	☐

18) Looking back over the 12 months, what do you feel are the **main factors that have affected your sales**? (positively or negatively)

19) What do you feel are the biggest barriers to the growth of your business? Please mark in order of importance

Local barriers to growth

High business rates	☐	Unattractive centre	☐	Expensive parking	☐
High rents	☐	Lack of council investment	☐	Competition from larger centres	☐
Low footfall	☐	Poor parking facilities	☐		

National barriers to growth

Reduced consumer spending	☐	High cost of suppliers/goods	☐
High VAT	☐	High cost of utilities	☐
Limited financial lending	☐	High fuel costs	☐

Other barriers (please specify)

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End of survey, many thanks for your time.

Please add any further comments if you wish (on separate sheet if necessary). Many thanks for your help with this survey.

Neil Wrigley, Geography Building 44, University of Southampton, Highfield, Southampton, SO17 1BJ

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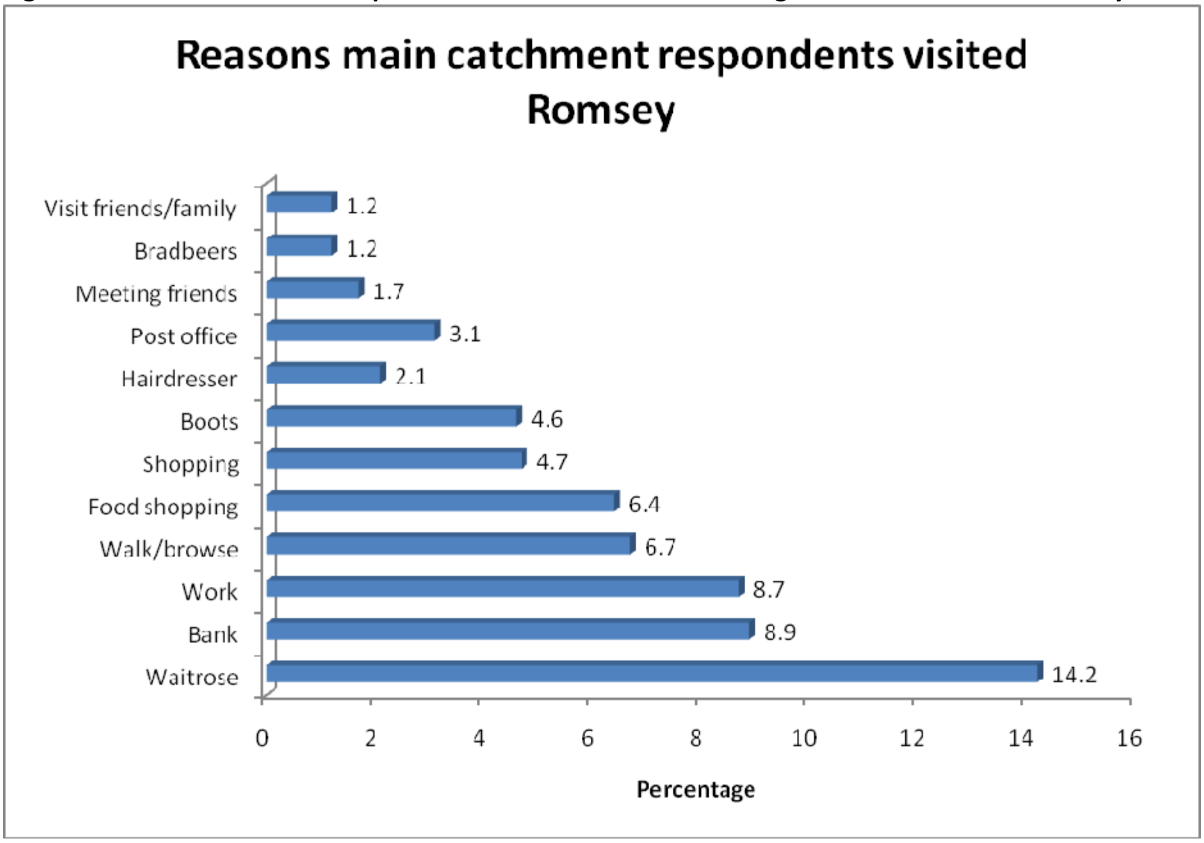
6A. Comparison retailers as defined by Experian Goad

Table 6a. Comparison retailers as defined by Experian Goad

Antique shops
Art and art dealers
Booksellers
Carpets and flooring
Catalogue showrooms
Charity shops
Chemist and drugstores
Childrens and infants wear
Clothing general
Crafts, gifts, china and glass
Cycles and accessories
Department and variety stores
DIY and home improvement
Electrical and durable goods
Florists
Footwear
Furniture fitted
Furniture general
Gardens and equipment
Greeting cards
Hardware and household goods
Jewellery, watches and silver
Ladies and men wear and accessories
Ladies wear and accessories
Leather and travel goods
Mens' wear and accessories
Music and musical instruments
Music and video recordings
Newsagents and stationers
Office supplies
Other comparison goods
Photographic and optical
Secondhand goods, books etc
Sports, camping and leisure goods
Telephones and accessories
Textiles and soft furnishings
Toiletries, cosmetics and beauty products
Toys, games and hobbies
Vehicle and motorcycle sales
Vehicle accessories
Shoe repairs etc

6B. Main reasons for visiting the town centre on the day of survey

Figure 6b. Main catchment respondents' main reason for visiting the town centre on the day of the survey



6C. More facilities desired for young people

Table 6c. 'What facilities could be improved or provided?'

Facility	N (%)
More for younger people	33 (11.5%)
More for elderly	3 (1.0%)
More for young families/mothers	1 (0.3%)
None, am happy with existing facilities	196 (8.3%)

8A. Additional trader results

Almost half of the traders interviewed (45.8%) state that what attracts customers in their business is the high quality of goods and services they provide. Reputation and friendly and knowledgeable customer service scored high as well (almost 40% of respondents) as a reason attracting customers in Romsey, followed by good value for money and convenience.

Table 8a. 'What do you think attracts customers to your shop/business?'

	N	% (all traders interviewed)
good quality products/services	54	45.8%
reputation/good customer service	47	39.8%
value for money	17	14.4%
local/convenience	15	12.7%
clean/attractive interior/exterior	14	11.9%

Figure 8a. 2010 Southampton Study results on current and expected sales

6 Development Cases (% traders)

	Expected Sales 1 year ahead (Pre opening)	Sales 1 year back (12 months post opening)
↑	65.0	28.3
↔	20.9	26.8
↓	14.1	44.9

2 Control Cases (% traders)

	Expected Sales 1 year ahead (Wave 1)	Sales 1 year back (Wave 2)
↑	52.3	27.1
↔	30.6	25.6
↓	17.1	47.4

Table 8b. 'How do you feel about the burden of various costs on your business over the past three years?'

	Business rates		Rent reviews		Staff costs		Staff recruitment and retention		Legislation compliance costs		Finance costs	
	N	Valid %	N	Valid %	N	Valid %	N	Valid %	N	Valid %	N	Valid %
Much more of a problem	19	25.7	6	9.1	5	7.5	1	1.6	13	19.1	8	12.7
More of a problem	27	36.5	16	24.2	25	37.3	10	16.1	22	32.4	27	42.9
About the same	23	31.1	39	59.1	33	49.3	34	54.8	31	45.6	23	36.5
Less of a problem	3	4.1	3	4.5	4	6.0	9	14.5	2	2.9	3	4.8
Much less of a problem	2	2.7	2	3.0	0	.0	8	12.9	0	.0	2	3.2
Valid Total	74	100.0	66	100.0	67	100.0	62	100.0	68	100.0	63	100.0
Not applicable/declined to answer	*44*		*52*		*51*		*56*		*50*		*55*	
Total	*118*		*118*		*118*		*118*		*118*		*118*	

9A. Consumer perceptions on the town centre MTDC 2010 study

Table 9a 'The town centre is an attractive centre for shopping'

Town centre is an attractive centre for shopping		
Agree/agree strongly	760	47.5%
No opinion	286	17.9%
Disagree/disagree strongly	555	34.7%
	1601	

Table 9b 'The town centre is in decline'

Town centre is in decline		
Agree/agree strongly	661	42.1%
No opinion	165	10.5%
Disagree/disagree strongly	744	47.4%
	1570	

Table 9c 'It is easy to park in the town centre'

It is easy to park		
Agree/agree strongly	1110	74.9%
No opinion	89	6.0%
Disagree/disagree strongly	283	19.1%
	1482	