

Leeds Markets Survey

For Leeds City Council

18 March 2011



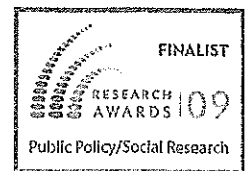
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I. Executive Summary

Methodology

- The research details findings from a consultation with residents about Kirkgate Market which was undertaken in early 2011.
- The findings in this report are based on results from two different surveys;
 - Panel Survey - 487 completed surveys with panellists from Leeds Citizens' Panel
 - Public Survey - 496 completed surveys from members of the public completed through a variety of methods.

Key Findings

NB: In the section below, summary findings and discussion are shown in italics, followed by supporting data from the surveys.

- Respondents tend not to have a set day for shopping, with 54% of respondents to the public survey and 47% of respondents to the panel survey indicating that it 'differs each time'. The most popular set day was Saturday, mentioned by 17% of public survey and 16% of panel respondents.
- Respondents to the panel survey were significantly more likely than those to the public survey to say they use 'car/van/minibus' (63% vs. 38%) to travel to their preferred shopping location. In contrast, respondents to the public survey had a more or less equal preference for a 'bus/coach/private bus' and 'car/van/minibus' (36% and 38% respectively).

Findings indicate that respondents to the public survey are heavier users of Kirkgate Market than panel survey respondents. Not only are they more likely to describe themselves as 'customers', they are also twice as likely to shop there every week. Consequently, public survey respondents are more likely to be directly affected by any changes to the operation of the market and in-turn may have stronger opinions about how it should be run and how it should evolve; evidence of this can be seen throughout this report;

- Almost three-quarters (74%) of respondents to the public survey said that they were 'a customer of Kirkgate Market', a significantly higher proportion than amongst respondents to the panel survey (49%).
- Respondents to the public survey were significantly more likely than those to the panel survey to say that they shop at Kirkgate Market 'once a week' or more often' (51% vs. 22%). In fact, a quarter (26%) of respondents to the public survey said they shop at the market 'twice a week' or more often, indicating a high degree of usage.
- Respondents were asked to indicate why they 'tend not to shop at Kirkgate Market', if that was the case. Given usage levels, only a few public survey respondents answered this question but a substantial number of respondents to the panel survey did and amongst them, the most frequently given reason for not shopping at the market was simply that they 'tend to shop somewhere else' (79%) or they 'struggle to find somewhere to park' (38%).



There is certainly no doubt that respondents to both surveys believe that markets need to respond to customers' needs and that Kirkgate Market is an intrinsic part of the fabric of the city centre;

- The majority of respondents to both the public survey and the panel survey agreed with the following statements;
 - 'Kirkgate Market needs to remain an intrinsic part of the Leeds city centre' - (public survey - 94%, panel survey - 87%)
 - 'Retail markets need to respond to customer needs' - (public survey - 90%, panel survey - 93%)
 - 'Kirkgate Market is vital in supporting start-up businesses and independent entrepreneurs' - (public survey - 82%, panel survey - 69%).
- Agreement that 'public money invested in Kirkgate Market since the 1990s has improved it significantly' was significantly higher amongst panel respondents than public survey respondents (47% vs. 35%).
- Public survey respondents were significantly more likely than panel respondents to agree that 'lack of investment is the only reason Kirkgate Market is in decline' (44% vs. 24%).
- Amongst public survey respondents, opinion was mixed that 'councils are best placed to manage a large commercial business such as Kirkgate Market', with 38% agreeing, 32% disagreeing and a further 30% saying that they 'neither agree nor disagree'. Amongst panel respondents, it was a similar story, with 37% agreeing, 24% disagreeing and 39% saying they 'neither agree nor disagree'.

Despite the majority of respondents to both surveys expressing satisfaction with opening hours, it is clear that the opening hours are seen as less suitable amongst some groups, particularly working age respondents. Interestingly, only around three-quarters of frequent users (defined as using at least twice a month) expressed satisfaction with the current opening hours;

- The majority of respondents to both the public survey and the panel survey said they were satisfied (either 'very satisfied' or 'satisfied') with the current opening hours, although satisfaction was significantly higher amongst public survey respondents than panel respondents (66% vs. 52%).
- Amongst respondents to the public survey, satisfaction was higher amongst older respondents (18-34 – 57%, 35-54 – 61%, 55+ – 83%). This was also the case amongst panel respondents (18-34 – 40%, 35-54 – 35%, 55+ – 60%).
- Respondents who said they were either 'very dissatisfied' or 'slightly dissatisfied' with the current opening hours were asked to explain why. Amongst respondents to the public survey, more than half indicated that they would like the opening hours to be 'extended beyond 9-5' (58%) and almost a third (29%) indicated that they would like 'Sunday opening' and a fifth would like to see 'late night shopping' (18%).



Respondents clearly want to see a sustainable market where the markets' success is recycled into improvements. There was a notable preference, through much stronger agreement, that profits should be reinvested rather than used to support priority council services and this was true of both public survey respondents and panel survey respondents, even though respondents to the public survey are much heavier users of the market.

- 'The Council should reinvest a proportion of the profit generated by Kirkgate Market to make sure Kirkgate Market is sustainable' has the highest level of agreement of any statement at Q15, with 89% of respondents to the panel survey agreeing and 90% of those who responded to the public survey.
- In contrast, the majority of respondents disagreed that 'the Council should use all the profit from the Market to help support priority Council services' amongst both public survey respondents (61%) and panel survey respondents (63%).

There is also a clear desire to expand the market by increasing niche products (both food and non-food) and there may also be value in improving the temperature, as agreement that it always provides a 'comfortable shopping experience' was only around 50%;

- The majority of respondents to the public survey disagreed that 'Kirkgate Market is too large an area' (68%) compared to just short of half of the panel survey respondents (49%).
- Agreement that 'Kirkgate Market is at the right temperature for a comfortable shopping experience all year round' was comparable between the panel survey and the public survey (52% vs. 52%).
- Respondents to the public survey were significantly more likely than panel survey respondents to agree 'the space within Kirkgate Market could be used more effectively' (59% vs. 45%).
- Agreement was significantly higher that 'Kirkgate Market should offer more speciality or niche food products' amongst respondents to the public survey compared to those from the panel survey (62% vs. 53%). But almost two-fifths (37%) of panel respondents said they 'neither agree nor disagree' with this statement.
- Agreement that 'Kirkgate Market should offer more speciality or niche non-food products' was significantly higher amongst respondents to the public survey compared to those from the panel survey (61% vs. 46%). Again, almost two-fifths (45%) of panel respondents said they 'neither agree nor disagree' with this statement.
- Almost two-thirds of public survey respondents agreed that 'I am happy with the level of customer service currently provided at Kirkgate Market' (63%), significantly more than amongst panel respondents (48%).
- A broad range of additional comments regarding Kirkgate Market were given, and respondents to both the panel survey and public survey were most likely to make comments relating to 'improving the quality or range of goods' (20% vs. 18% respectively) and 'reduce rents for stallholders' (15% and 17% respectively) and 'improve upkeep of market area or buildings' (13% and 16% respectively). Additionally, 13% of respondents from the panel survey who answered this question mentioned 'provide free or cheaper car parking'.



Conclusions

- Few respondents said they never use the market, particularly amongst those who responded to the public survey where only one-in-twenty never used it. As a result, the opinions expressed in this research can be viewed as an informed assessment of Kirkgate Market and a good evaluation of the views of users.
- Generally, respondents are positive about Kirkgate Market and the market is clearly seen as an intrinsic part of the city centre. It is also seen as offering an important space for new businesses to make a start in retail.
- However, there is also a clear recognition that the market needs to respond to customer needs and that it will need to evolve to meet the requirements of the city's population. The most crucial elements of this are as follows;
 - *Opening hours* – for working respondents in particular there is evidence here that opening times are incompatible with working in the city centre and using the market. Extending opening hours in the evening in particular was seen as the most attractive, as this allows people to shop on the way home from work, rather than before work when they would then have to store food at work. There was also an appetite amongst some for Sunday opening
 - *Car parking* – this is clearly a barrier for many, especially amongst panel respondents who tended to be older than those who completed the public survey
 - *Temperature* – agreement that the current temperature provides a comfortable shopping experience all year round is relatively low, with only half agreeing and there is scope to improve satisfaction with this
 - *Products* – around a fifth of respondents spontaneously mentioned that they want to see an improvement in quality and range of products and both food and non-food niche products were attractive to many.
- It is evident that respondents want to see a sustainable market and want the profits to be used to improve the market rather than used to fund other council services. Although they were not asked to make a direct choice between these two propositions, agreement was significantly higher for the statement *'the Council should reinvest a proportion of the profit generated by Kirkgate Market to make sure Kirkgate Market is sustainable'* than for the statement *'the Council should use all the profit from the Market to help support priority Council services'*.



