Appendix 1

Leeds Outdooor Market

Shipping Container Proposal - Consultation Analysis

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Background

On 14th December 2022 Executive Board approved a consultation exercise around the potential for a food, beverage and entertainment container led offer which would involve a reduction in the number of stalls and re-orientation of the Open Market, which is felt to not be operating at its full capacity.

The consultation exercise was agreed following an analysis of reducing trader attendance and income and against a backdrop of commercial interest in Leeds for a food, beverage and entertainment offer as outlined in the report on 14th December.

The consultation ran from 14 December 2022 to 29 December 2022. It was issued to the Leeds Citizens' Panel (approx. 2000 members), launched on the Market Service's social media channels and also posted on the LCC staff website. The questionnaire was open to any respondent seeking views on the proposals

This report contains the analysis of the online consultation responses.

Response rates

A total of 2112 responses were received during the consultation. A breakdown of the groups who responded is as follows.

Respondent Type	Count
Member of the public	2060
LCC Employee	14
Market trader	12
Councillor (Ward Member)	10
Other	9
Not stated	7

Demographics

Respondents were asked to provide demographic information as part of their response. This was optional, however most respondents answered some or all of the questions.

The figures below compare the demographics of the survey respondents against the population of Leeds as identified through the recent census. Those who answered 'prefer not to say' are not included in the percentages.

Sex and gender identity

There were slightly more responses from females at 54% compared to 45% of males. Just over 1% of respondents were made by those who describe themselves as non-binary or another term.

Altogether 12 respondents (0.62%) stated that their gender identity is not the same as the sex they were assigned at birth.

	Count	As %	Leeds %	Coverage
Female	1057	54%	49%	110%
Male	874	45%	51%	88%
Non-Binary	16	1%	-	
Other	6	0.3%	-	

Sexual orientation

There was a higher representation from those from an LGB sexuality compared with the population of Leeds, with 12% of respondents stating they described themselves in this group.

	Count	As %	Leeds %	Coverage
Heterosexual / Straight	1610	88%	94%	93%
LGB	225	12%	6%	204%

Ethnicity

Responses from those from a minority ethnic background were in line with the population of Leeds.

	Count	As %	Leeds %	Coverage
BAME	418	20%	19%	107%
WB	1646	80%	81%	98%

Age groups

Turnout was much lower than the Leeds population from those under 30 years old, and slightly lower for those are over 65 years. We were over-represented by those aged between 45 and 64.

<table>
<tr><th></th><th>Count</th><th>As %</th><th>Leeds %</th><th>Coverage</th></tr>
<tr><td>18 - 29</td><td>264</td><td>13%</td><td>26%</td><td>51%</td></tr>
<tr><td>30 - 44</td><td>594</td><td>30%</td><td>26%</td><td>117%</td></tr>
<tr><td>45 - 54</td><td>419</td><td>21%</td><td rowspan="2">29%</td><td rowspan="2">142%</td></tr>
<tr><td>55 - 64</td><td>393</td><td>20%</td></tr>
<tr><td>65+</td><td>307</td><td>16%</td><td>19.2%</td><td>81%</td></tr>
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Disability

Responses from disabled people were slightly lower than the Leeds population, although this group still accounted from 12% of overall respondents.

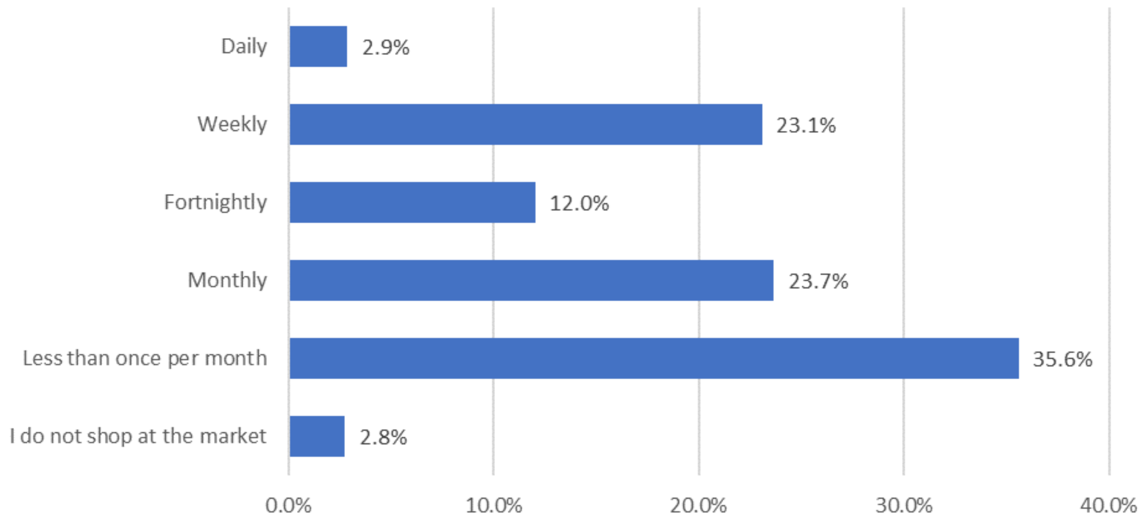
	Count	As %	Leeds %	Coverage
Not disabled	1711	88%	83%	105%
Disabled	243	12%	17%	74%

Visit frequency

A total of 75.7% of respondents stated that they visit the market to eat or drink. Those who said they did visit the market were asked how often they shop and eat there.

Shopping frequency

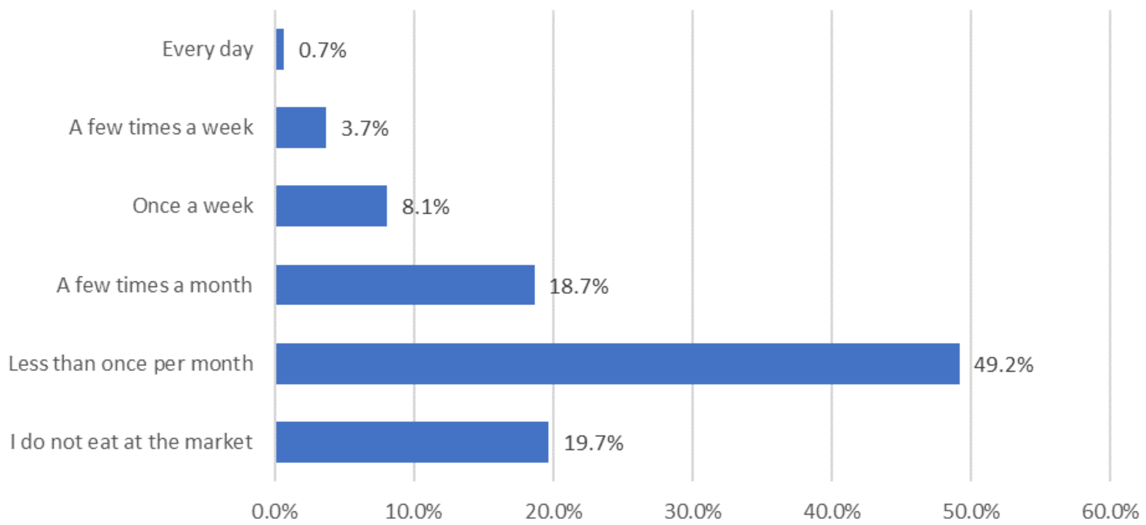
Most respondents (35.6%) stated that they visit the market to shop less than once per month. This was followed by monthly at 23.7% and weekly at 23.1%. Only 2.9% of respondents shop in the market on a daily basis.



Percentage of 1598 responses to this question

Eating frequency

Almost half of respondents (49.2%) stated that they eat at the market less than once per month, and 19.7% stated that they do not eat at the market at all. 18.7% state that they eat their a few times a month, and less than 1% of respondents eat there on a daily basis.



Percentage of 1596 responses to this question

Shopping and eating frequency compared

The table below cross-tabulates how often respondents eat at the market against how often they shop.

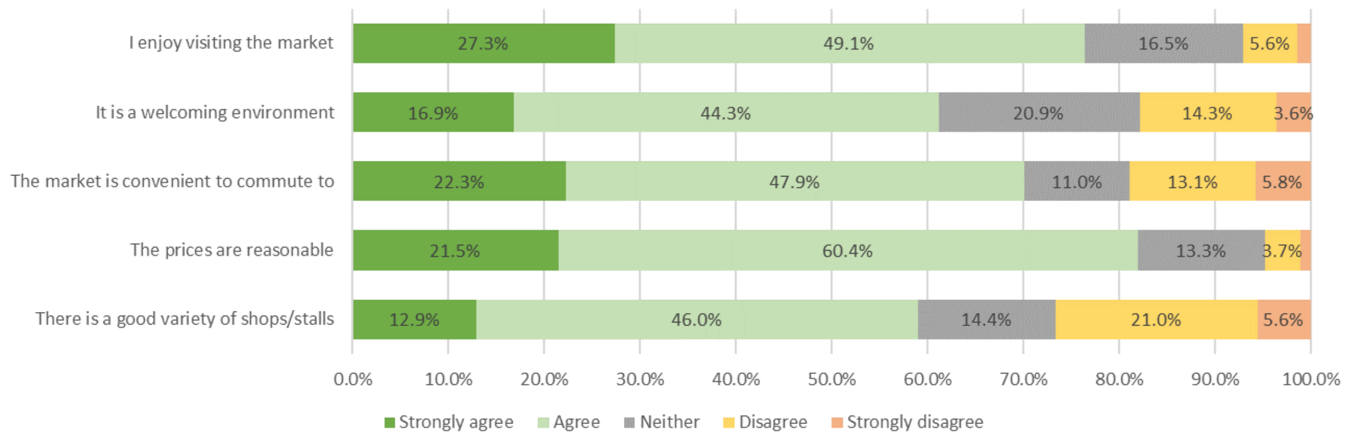
How often do you eat at the market?	How often do you shop at the market?					
	Daily	Weekly	Fortnightly	Monthly	Less than once per month	Do not shop
Every day	0.5%	0.1%	0.0%	0.0%	0.0%	0.1%
Few times a week	1.1%	2.3%	0.0%	0.1%	0.1%	0.1%
Once a week	0.4%	6.7%	0.3%	0.5%	0.1%	0.1%
Few times a month	0.3%	5.5%	5.9%	5.3%	1.5%	0.3%
Less once per month	0.1%	3.8%	4.3%	13.8%	25.5%	1.6%
Do not eat	0.4%	4.6%	1.6%	4.1%	8.3%	0.6%

Percentage of 1594 responses where both questions were answered

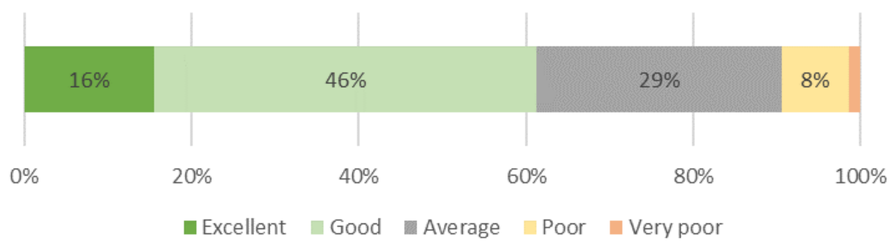
Experience at the market

Respondents were asked to state whether they agree or disagree with 5 statements relating to their experience at the market. This shows that:

- 76.4% of respondents agree or strongly agree that they enjoy visiting the market
- 81.8% agree or strongly agree that the prices are reasonable
- 59% of respondents agree or strongly agree that there is a good variety of stalls, however 26.6% do not agree with this statement.



Respondents were asked ‘Taking everything into account, how would you rate your experience at the market?’. Altogether 61% of respondents rated this as either good or excellent. Approximately 1 in 10 respondents (9.5%) rated this as poor or very poor.

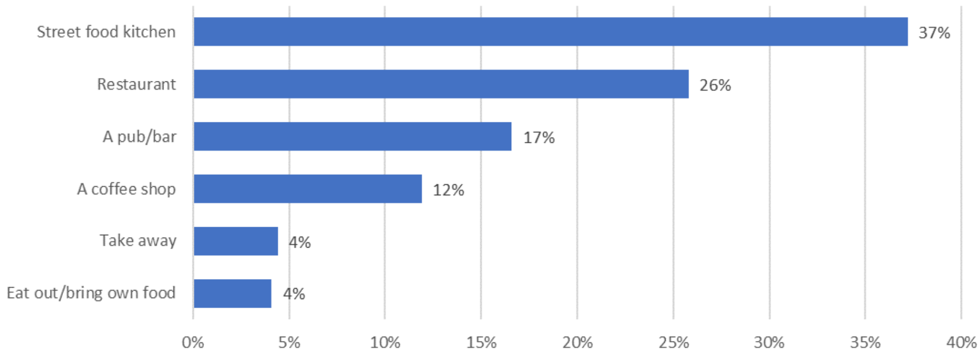


A key driver analysis was carried out, using multiple linear regression to identify how the factors in the previous statements influenced how people felt about their experience of the market overall. (‘Enjoy visiting the market’ was excluded due to the high correlation with how people felt about their experience). This analysis showed that these factors have a high level of influence on people's experience. It was found that 'a welcoming environment' and 'a good variety of shops/stalls' had the strongest effect on how people felt overall about their experience, followed by a lesser extent by the 'prices are reasonable'.

Locations most likely to eat

Respondents were asked where they are **most** likely to eat when visiting the city centre. This was a single choice question. Overall, 4.1% of respondents stated that they wouldn't eat out or would bring their own food to Leeds.

The most popular location was at a Street Food Kitchen at 37.2%, followed by restaurants at 25.8%. The least popular location was take-aways at 4.4%.



Percentage of 2091 responses to this question

As part of this question, respondents were asked to state why they choose to eat at the location they selected. In total there were 1231 comments made against their selection.

Due to the large number of comments with relatively short statements, we were able to use text-mining software to understand the overall opinion of why respondents choose a specific venue. Text-mining involves extracting the nouns and adjectives from statements, whilst excluding words that have little relevance, and determining common words that appear close together in a sentence (known as bi-grams and tri-grams). This can give an understanding of the key themes that are being referred to.

The following sections consider the responses to why respondents liked street food and restaurants, since these would be most relevant to the proposal and were the largest groups of responses, by analysing the most common bi-grams found. Note that obvious or unhelpful bi-grams (such as 'leeds market') have also been removed.

Street food kitchen

The most common words are listed below and have been grouped into similar statements. This shows that the main reason respondents choose to eat at street food venues are the wide variety of choice, value for money the food and the atmosphere.

Statement	Occurrences
good/wide variety	98
value for money	33
good food	28
good atmosphere	18
small/independent businesses	12
something different	6
good service	5
fast food	5
whole family	2
central location	2

Restaurants

The most common theme referred to regarding why respondents eat at restaurants is due to the quality of the food, followed by the nice environment and references to special occasions.

The terms ‘coffee shop’ and ‘street food’ also came up frequently in the analysis. Upon further investigation people mentioning these terms are referring to:

- Respondents stating that they also like street food/coffee shops
- Respondents stating that they do not like street food and prefer restaurant options

The table below shows the most popular words found together in a sentence, which have been grouped into statements with similar context.

Statement	Occurrences
good food	20
nice environment	11
special occasions	11
other options	6
quick service	4
nice atmosphere	3
safe environment	2
good variety	2
better experience	2
good service	2

Other shipping container sites

Respondents were asked if they had ever visited another shipping container site. Altogether 42.7% say they had. This was followed up with a question to this group that asked what their experience was like. Altogether 778 people responded to this open-text question.

Many of the comments were brief, one-line answers with the vast majority stating a positive experience. Text Mining software was used to extract the nouns and adjectives to present the most popular theses. The table below shows the most popular words found together in a sentence, which have been grouped into statements with similar context.

The majority of bi-grams appeared to be positive and mention that they had a great experience, was a good atmosphere and like the variety. Though there were a small number that referred to concerns about colder weather and the cost of food.

Statement	Occurrences
good/great experience	24
good atmosphere	19
good variety	18
good idea	15
food court/stalls	14
good food	10
good fun	7
small/independent businesses	7
different things/places	5
value for money	5
good place	4
colder months	4
limited space	2
market traditions	2
young people	2

bit expensive	2
good weather	2

The word cloud below shows the most popular nouns and adjectives found in the responses. The size of the word denotes how often each work was used, and the colour is purely for aesthetics. As you can see there are very few negative words other than ‘expensive’, ‘overpriced’ and ‘cold’.

Leeds markets shipping container site

A total of 71.5% of respondents stated that they would visit the shipping container site at Leeds Markets if it was built. The most popular time to visit was between 1pm and 5pm with almost half of respondents selecting this period.

The table below compares the day(s) and time(s) respondents selected. This shows that popular times would be between 1pm and 5pm on most days, getting busier towards the weekend, with weekend afternoons and evenings being the most popular.

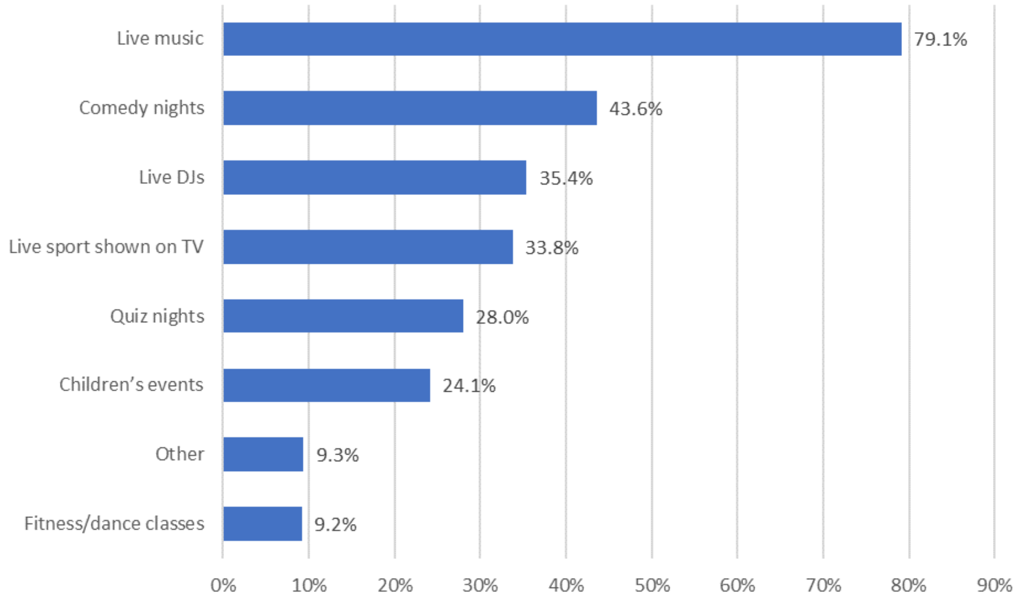
	9am – 1pm	1pm – 5pm	5pm – 12am	
Monday	2.5%	8.7%	3.9%	**5.5%**
Tuesday	3.3%	10.4%	4.9%	**6.8%**
Wednesday	2.5%	12.3%	6.6%	**7.8%**
Thursday	4.0%	16.5%	15.0%	**13.0%**
Friday	4.4%	23.5%	31.7%	**21.7%**
Saturday	6.3%	36.8%	33.9%	**28.1%**
Sunday	1.9%	23.6%	21.2%	**17.0%**
	9.1%	**48.1%**	**42.8%**	

Percentage of 1505 responses to timeframe question. Figures in bold are the overall totals for that choice.

Types of activities

Respondents were asked what types of activities would appeal to them when visiting the venue and were presented with a list of activities.

The most popular activity was live music with 79.1% of respondents selecting this option. This was followed by comedy nights (43.6%), live DJ's (35.4%) and live sports shown of TV (33.8%). The least popular was fitness/dance classes.



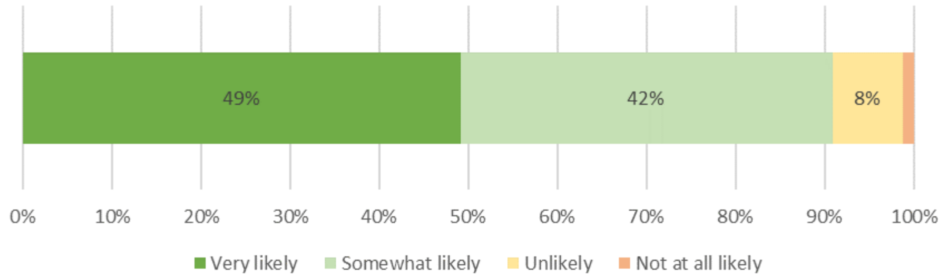
Percentage of 1427 responses to this question

Common themes from the 'other' options include:

- Food festivals
- Food only – without distractions
- Place to socialises/meet friends
- Arts/Craft/Community workshops

Would you also visit the market as part of your visit?

Altogether 91% of respondents stated that they would also visit the market as part of their visit. Only 9% said they were unlikely or not at all likely to visit.



Percentage of 1503 responses to this question

Effect on current visitors

We can compare the questions 'Do you currently visit the market?' with 'If a shipping container site was built, would you visit?' to understand how this proposal would affect current or potential visitors.

This shows that:

- Of the respondents who do not currently use the market, 66.1% said they would the container site
- Of the respondents who use the market, 26.7% said they would not visit the shipping container site.

		Would you visit the Shipping Container site?	
		Yes	No
Do you visit the market to eat or shop?	Yes	73.3%	26.7%
	No	66.1%	33.9%

Percentage of 2112 responses

If we include the question 'How likely is it that you would also visit the market as part of your visit?' we can understand how many of these visitors would be likely to actually use the market. it can be seen that:

- Of the respondents who do not currently use the market, just over half 52.7% said they would be likely to visit the market when visiting the shipping container site.

		How likely is it that you would also visit the market as part of your visit?		Wouldn't visit the shipping container site	No response
		Likely	Unlikely		
Do you visit the market to eat or shop?	Yes	68.5%	4.4%	26.7%	0.4%
	No	52.7%	13.0%	33.9%	0.4%

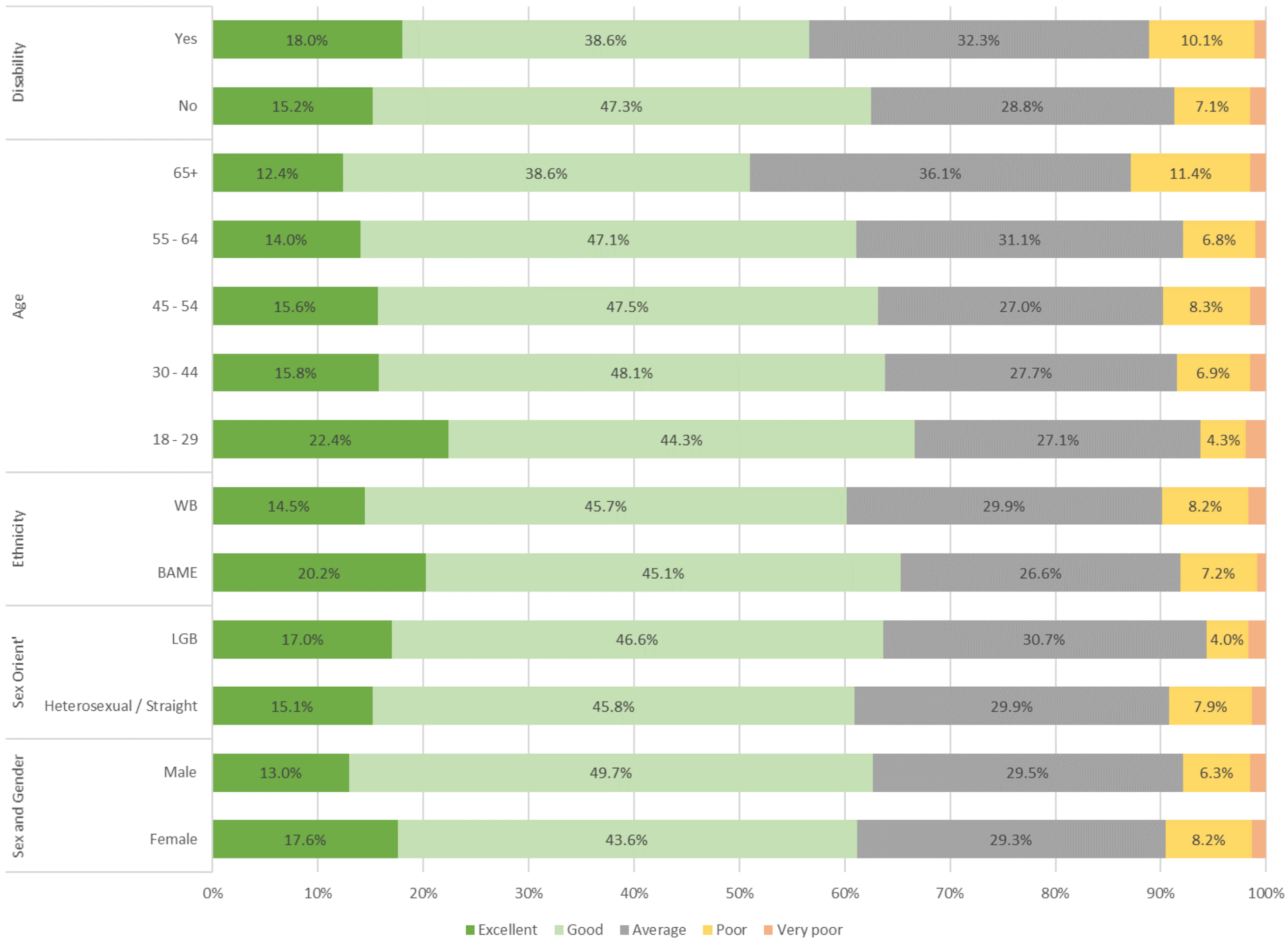
Percentage of 2112 responses

Responses by different groups

The following charts break down key questions by different characteristics.

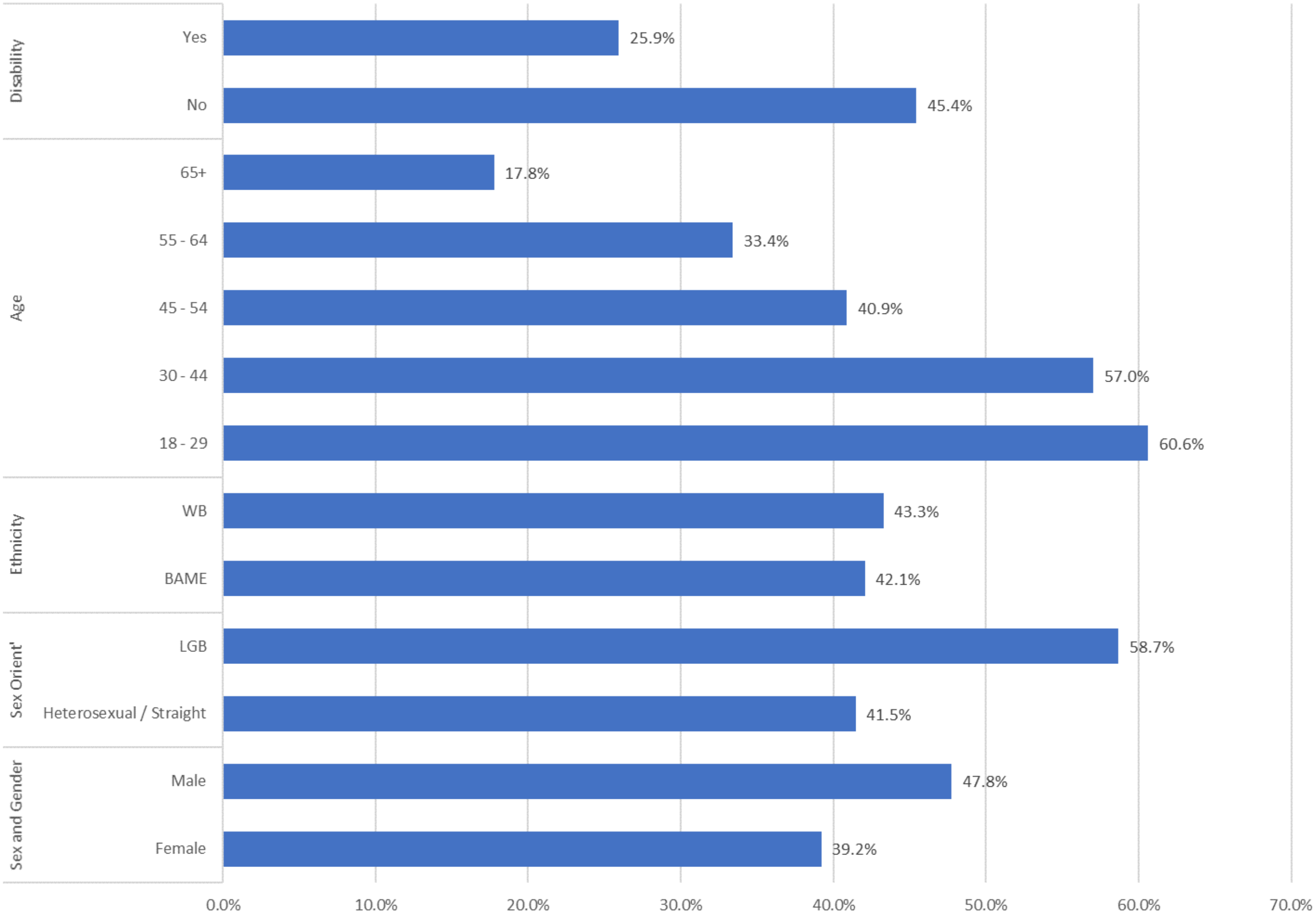
Taking everything into account, how would you rate your experience at the market?

- Those with a disability were slightly less positive than those without a disability
- Younger people rate their experience higher than older people and there is a trend as the age increases
- BAME respondents gave a slightly higher rating than those from a White:British background.



Have you ever visited a shipping container food and beverage venue?

- Disabled respondents were much less likely to have attended a shipping container site compared to non-disabled respondents.
- Younger respondents were much more likely to have visited a container site than older people, and there is a clear trend as the age increases.
- LGB respondents were much more likely to have visited a site than heterosexual respondents.
- Female respondents were less likely to have visited a site than Male respondents.



If a shipping container venue was built on part of the outdoor market offering street food, bars and entertainment would this be something you would visit?

- Respondents with a disability are much less likely to visit the shipping container site than those without a disability.
- Younger respondents are much more likely to visit than those over the age of 55, and there is a clear trend as the age increases.
- LGB respondents are more likely to visit than heterosexual respondents