



Developing Darlington's Covered Market: Shopper Views

Prepared for

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1 Introduction

Building on recent successes including the award of Market of the Year at the National Association of British Market Authorities' (NABMA) awards in January, Darlington Town Centre Board wished to research shopper views on the development of the covered market in Darlington.

The main aims of the research were to:

1. Profile current usage of the covered market
2. Identify shoppers' views on how the market could be improved
3. Measure support for a range of improvement options.

An in-street shopper survey was conducted in the town centre, canvassing the opinion of 406 shoppers and providing a robust evidence base to inform future decisions¹.

Figures in the following report refer to numbers unless otherwise indicated.

¹ Based on this sample size we can be 95% confident that survey results will lie within plus or minus 5% of the results if all shoppers had been surveyed.

2 Usage of the Covered Market

Over four fifths of shoppers surveyed (86%) shopped in the covered market, indicating that the market is popular amongst town centre users.

The markets' customer base is broadly representative of Darlington's shopper base as shown in table one.

Table 1: Profile of Shoppers Using the Market

Characteristic	All %	Market %	Characteristic	All %	Market %
Are:			Aged:		
Male	39	36	16 to 25	11	9
Female	61	64	26 to 35	10	10
			36 to 45	19	18
Have a disability:			46 to 55	27	26
Yes	17	19	56 to 65	18	20
No	82	81	66 plus	16	17
Are:			Have dependent children:		
Single	20	19	No	68	64
Living with a partner	11	12	Aged up to 5	15	14
Married	51	51	6 to 12	14	13
Divorced	9	9	13 to 16	11	9
Widowed	7	8			
Other	1	1			
Are:			Have total household income of £:		
Self employed – staff	2	2	Under 9,999	23	24
Self employed no staff	4	4	10,000 to 14,999	13	15
Employed full time	36	34	15,000 to 19,999	12	12
Employed part time	15	14	20,000 to 24,999	7	7
Unemployed	4	4	25,000 to 29,999	9	9
Caring for home/family	8	9	30,000 to 34,999	6	6
Unable to work – sick	7	7	35,000 to 39,999	6	6
Student	2	2	40,000 to 44,999	6	6
Retired	24	26	45,000 to 49,999	3	3
			50,000 plus	16	13
Ethnicity					
White British	98	99			
Other Ethnicity	2	1			

As might be expected, the market predominantly draws shoppers from Darlington (80%). Other catchment areas include County Durham (9% of market shoppers) Yorkshire (5%) Tees Valley (3%) and Tyne and Wear (1%).

The main reasons given by shoppers for not using the market were:

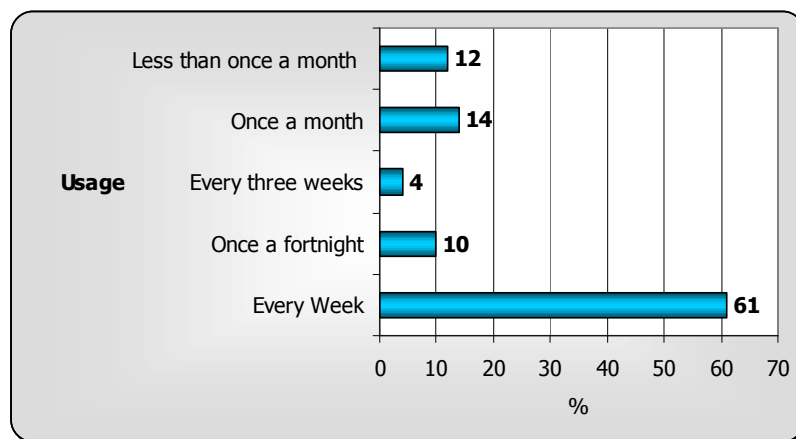
- Live outside the Darlington area (21%)
- Don't come into town very often (19%)
- Doesn't sell what I want (12%)
- Have no reason/need to shop there (25%)

Percentage base: shoppers not using the covered market

Other reasons included: can't park nearby (5%), don't know what it sells (2%), prefer to go elsewhere (5%), don't like markets (4%), the quality of the market is poor (5%) and the layout of the market is poor (2%).

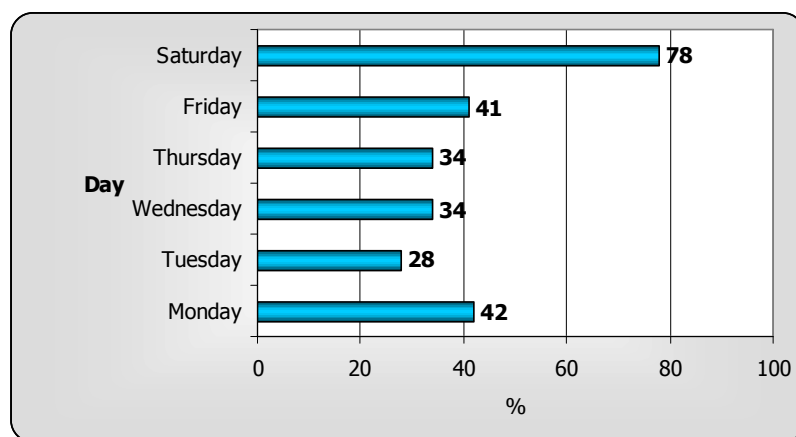
The majority of shoppers using the market shopped there every week (61%); one quarter (26%) shopped there once a month or less (see figure one).

Figure 1: Shopping Patterns – Frequency



Most shoppers used the market on Saturdays (78%); Fridays and Mondays were the busiest weekdays (41%).

Figure 2: Shopping Patterns - Days



Spend is shown in table two below. Over one in two market shoppers (55%) do not spend money on non-food items, indicating the importance of the food and drink sector to the success of the market.

Few shoppers spent in excess of £20 in a visit to the market with the average spend being £9.60 on non-food items and £11.24 on food.

Table 2: Shopper Spend

	Non Food Items %	Food Items %
Nil	55	11
£1.00 to £9.99	25	41
£10.00 to £19.99	13	32
£20.00 to £29.99	5	9
£30.00 plus	2	7

Encouragingly 37% of market shoppers said that their spend had increased in the last twelve months, 55% report no change and 8% said their spend at the market had declined.

Key reasons given for shopping at the market were the freshness of produce and good value for money. All reasons are shown below:

- Fresh produce (33%)
- Good value (27%)
- Convenience (18%)
- Variety of goods available (14%)
- Habit – always shopped there (11%)
- Like to support local traders (10%)
- Like/trust a particular trader (11%)
- Friendly service/nice atmosphere (9%)
- Like to browse (7%)
- Tradition/cultural heritage (2%)
- Quality of goods (3%)
- Nice place to shop (3%)

Shoppers were also asked about their use of the regular open market and specialist markets held at intervals during the year. One in two shoppers (50%) said they shopped at the regular outdoor market and 69% shopped at specialist markets such as the Christmas and French markets.

3 Improving the Market

All shoppers, including those not currently using the market, were asked for their spontaneous ideas and suggestions on how the market could be improved.

Two fifths of shoppers (39%) did not have any suggestions to make regarding potential improvements to the covered market. A further quarter had a negative reaction to change, saying they would like the market to remain as it is (25%). Almost one in ten (9%) felt that access for people with disabilities or pushchair users could be improved by changing the internal layout and 11% would like to see the building updated/modernised (11%).

Table three shows spontaneous suggestions made by at least 1% of shoppers. All comments are shown at appendix one.

Table 3: Spontaneous Suggestions for Improving the Market

Spontaneous Suggestion	%
Don't know/no opinion	39
Leave it as it is	25
Refurbish and update the building	11
Change layout to make it easier to get around	9
Change layout so there is room for more businesses	3
Increase the product range	3
Attract and retain more traders, reduce rents	3
More food stalls	3
Offer more speciality shops	2
Make it lighter	2
Improve quality of products	1
Improve the signage	1
Improve cleanliness	1
Get rid of unpleasant smell	1
Advertise more	1
More clothes stalls	1
Longer opening hours	1

Shoppers were then asked if they would like to see a number of improvements as shown in table four; figures include those shoppers mentioning the idea spontaneously.

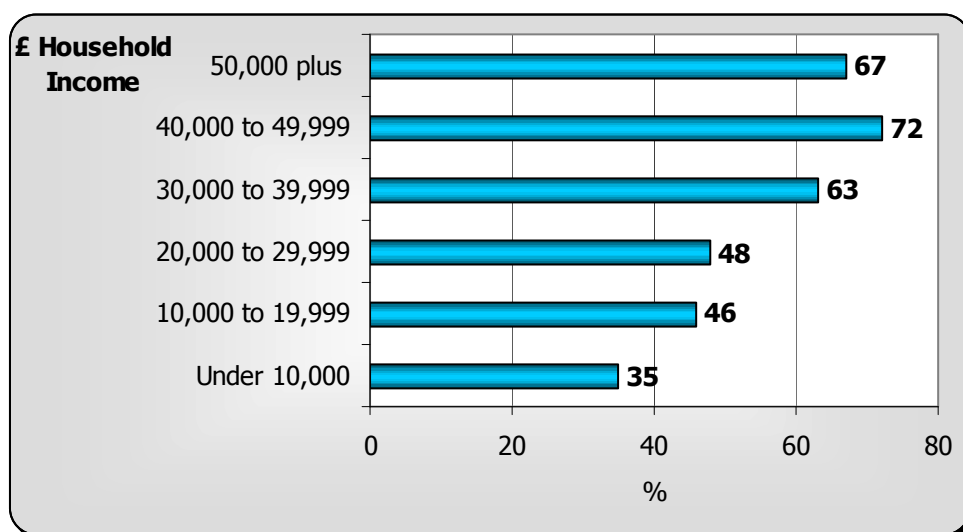
The majority of shoppers (57%) supported some form of change, disagreeing with the suggestion that the market should be left as it is. Over two thirds would like to see the market building refurbished and updated (67%). Interest in speciality shops was high (58%) and almost one in two support the idea of introducing a gourmet food hall (48%). Suggestions to change the internal layout of the building either to improve access or increase the volume of businesses in the market met with less support (35% and 39% respectively), suggesting that more detailed consultation will be required at the planning stage.

Table 4: Support for Potential Developments

Suggestion	Yes %	No %	DK %
Change layout to make it easier to get around	35	57	9
Change layout so there is room for more businesses	39	53	9
Introduce a gourmet food hall that sells a wide range of quality foods	48	45	8
Offer more speciality shops	58	32	10
Refurbish and update the building	67	26	7
Leave it as it is	38	57	5

Shoppers from higher income households were significantly more likely to support the introduction of a gourmet food hall, though demand spanned all income groups as shown in figure three.

Figure 3: Support Gourmet Food Hall by Household Income



4 Goods, Services and Facilities

Shoppers were asked which products and services they would like to see in the market. Over two thirds of the products demanded by at least one in ten shoppers were food products or services (*shown in bold in table five*). Fresh fruit and vegetables topped the list with 43% of shoppers expecting to see this offering, closely followed by a butchers (32%). The strong demand for food products would support the development of a 'food hall' concept.

The most popular non-food products were cards and stationary (17%), books (13%) floristry (13%) and women's clothing (11%).

Table 5: Demand for Products and Services

Product/Service	%	Product/Service	%
Fruit and vegetables	43%	Luxury chocolate/confectionary	7%
Butchers	32%	Cosmetics/beauty	6%
Patisserie/bakery	20%	Craft supplies	6%
Fishmongers	19%	Handbags and luggage	5%
Delicatessen	18%	Perfume	4%
Cards and stationary	17%	Special occasion foods	4%
Cheesemongers	17%	Sushi bar	4%
Cafe/bistro	14%	Vintage clothing	4%
Farmers produce	14%	Children's clothing	3%
Books	13%	Clothing repair and alteration	3%
Florist	13%	Cooking demonstrations	3%
Health and organic foods	11%	Dressmaking	3%
International foods	11%	Antiques	2%
Women's clothing	11%	Art	2%
Pet supplies	10%	DIY/Hardware	2%
Spices herbs	10%	Lingerie	2%
Footwear	9%	Local produce	2%
Men's clothing	9%	Milliner	2%
Music and entertainment	9%	Mobile phones	2%
Shoe repair	9%	Speciality foods – unspecified	2%
Jewellery	8%	Electrical goods	1%
Speciality tea and coffee	8%	Games and toys	1%
Wines and spirits	8%	Newsagents	1%
Cook shop	7%	Wedding goods	1%

4.1 Credit and Debit Cards

Many market traders currently trade in cash only. One third of shoppers (36%) said they would be more likely to use the market if more traders accepted debit and credit cards.

4.2 Public Toilets

A significant proportion of shoppers surveyed (65%) currently use the market toilets; any potential alternative use of this space will therefore need careful consideration.

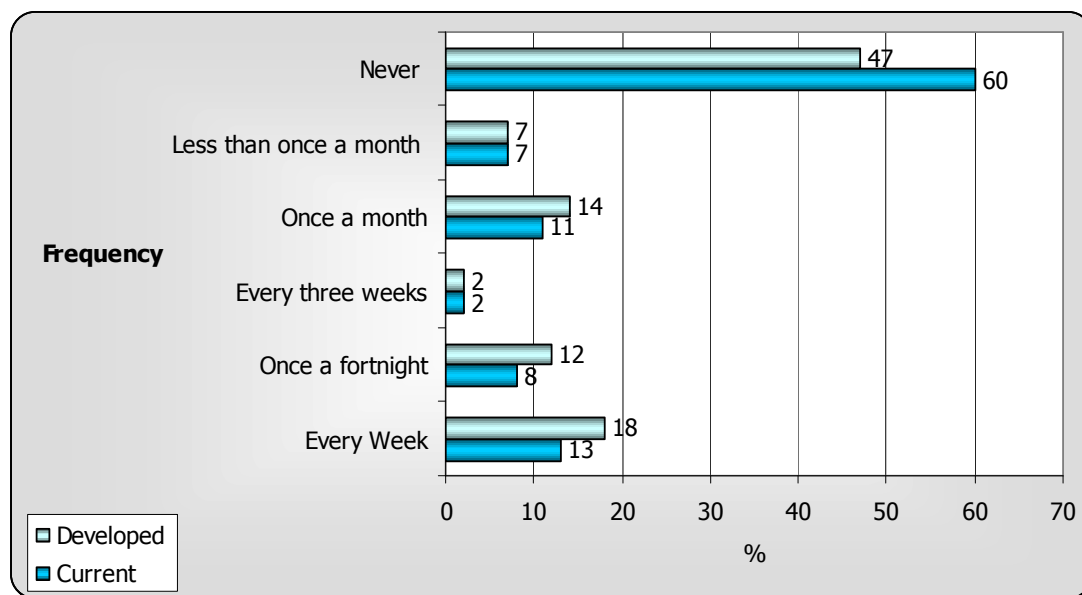
5 Sunday and Bank Holiday Trading

The covered market is currently closed on Sundays. Shoppers were asked how often they would use the market if it opened on Sundays: a) in its current form and b) if it was developed and improved.

Two fifths of shoppers (40%) would shop at the market on Sundays in its present form, rising to 53% if it was developed. These findings reinforce recent research into Sunday trading in the town centre², which suggested that a regular Sunday market could be an important lever in increasing Sunday trade.

Sunday shopping patterns are shown for the market in its current state and after development in figure four below. Almost one fifth of shoppers (18%) would shop at the market on Sundays every week if it was developed and 12% would do so every other week.

Figure 4: Sunday Shopping Patterns



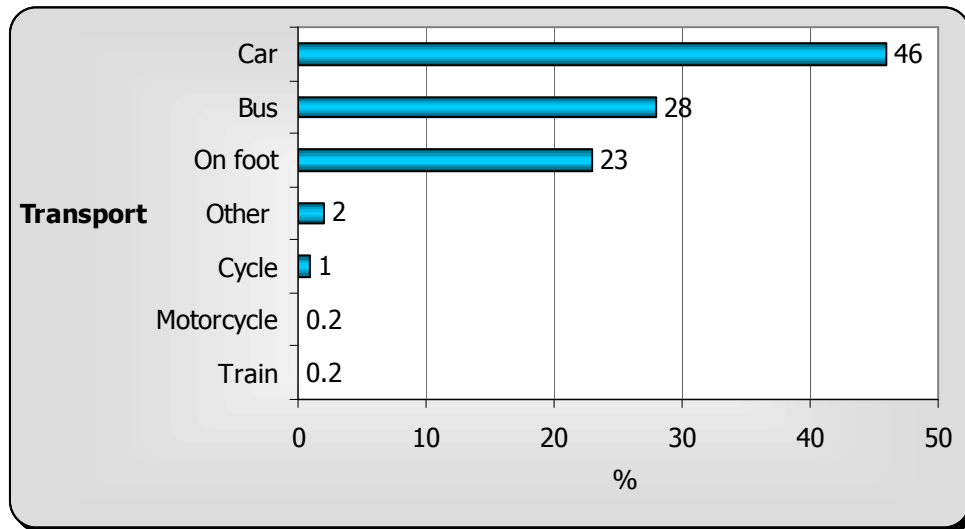
Almost one in two shoppers (47%) were aware that the market currently opens on bank holidays, 12% thought it did not open and 41% were unsure. This would suggest a need to improve communication of opening hours.

² Darlington Borough Council (2008) Sunday Trading in Darlington.

6 Transport

Almost one in two shoppers had travelled to Darlington by car on the day of the survey and 28% had travelled by bus. All modes of transport are shown in figure five.

Figure 5: Mode of Transport



One in four shoppers (24%) said that transport or parking issues limited their use of the town centre. Of those shoppers reporting problems, 37% said the issue was lack of parking and 48% said the cost of parking limited their use of the town centre. Other issues included lack of disabled parking (8%) and the frequency (4%) or reliability (7%) of buses.

7 Conclusions

This research has indicated that the market has a strong customer base and a reputation for friendly service. Shopper feedback would suggest that spend at the market is increasing following the recent improvements works in the town centre.

The market is strongly associated with fresh produce; the emphasis on food products and positive shopper response to the concept of a gourmet food hall would suggest this will be a successful route to increasing trade.

It is important to note however that the market is also strongly associated with 'good value' and a substantial proportion of the customer base have relatively low household incomes; achieving an appropriate mix of affordable and luxury goods will be important in retaining and extending the customer base.

There is strong support for Sunday trading at the market, a development which previous research has recommended as an effective lever in increasing footfall in the town centre on Sundays.

The majority of shoppers want to see improvements to the covered market and there is strong support for refurbishing and updating the building. This needs to be balanced, however, with concerns to retain the buildings character and a resistance to change amongst a significant minority of shoppers.

Annex One: Suggestions for Improving the Market

All comments

A bit hard when you have a pushchair
 All mixed up, hard to push a buggy in there
 Attention could be improved to roof - it leaks
 Better lighting, get rid of the unpleasant smell
 Better lighting needed, rents too high
 Better quality products needed
 Better signage for toilet internally
 Bigger product range to attract the younger element.
 Bigger Stalls
 Bring back Littlewoods
 Build a veranda on the outside of the building
 Building not inviting, so bring what's inside outside
 Clean inside
 Cleanliness and quick turnaround of stalls.
 Could make it bigger
 Could make it bigger and plenty of space for disabled people.
 Dark and dingy
 Darlington council are not to be trusted
 Different variety needed
 Easier to get into with a pushchair
 Encourage stall holders by keeping rent down. Keep the food stalls
 Fill empty stalls by reducing rents to attract more traders
 Fruit and veg stalls are coming down in quality.
 Get better quality fruit
 Get buses to stop outside it
 Get rid of book stalls
 Get rid of cheap clothes, get rid of the café, needs to be a food market only
 Get rid of foisty smell, improve the look of stalls
 Give it a facelift inside
 Got good variety now
 Have less cheap clothes stalls
 It is expensive
 It is gloomy, needs better lighting and cleaning up
 It needs to be a food emporium, farmers should be encouraged to sell there
 Make it a bit brighter
 Make it cleaner, advertise it more
 Make it more disabled friendly
 Make it more family friendly, café in the middle, better lit
 Make it more modern.
 Make the building bigger
 Make the isles a bit bigger
 More advertising
 More clothes stalls (3)
 More food stalls (2)
 More groceries and food outlets, less handbags
 More lighting inside
 More room for pushchairs in the shops.
 More stalls for people starting out
 More variety, fewer veg and meat stalls
 More variety in the fruit and veg – more exotic stuff
 More variety needed (2)
 More variety of food stalls, but not tacky ones
 More variety of goods

Need a seating area for the elderly. There are too many clothes shops
Needs to be fruit and veg, home grown stuff, grown locally
Need less fruit shops and more variety
Need more butchers and fruit and veg stalls
Need more choice
Need more food shops
Need more food stalls
Need more variety
Need to fill the empty stalls
Need to lower the rent on the stalls
Need to stop the smell of fish
Need better opening hours
Need better quality food stalls
Need better variety
Need more occupancy
Needs to be advertised more
Needs to be bigger.
Needs to be brighter
Needs to be brighter, its not a logical throughway
Needs to be brought up to date, more modern
Needs to be cleaned
Needs to be lighter and brighter looking
Needs to be more choice
Needs to be returned to its original state
Needs to stay open later and a few more clothes shops
Needs updating
Needs updating, group the same types of stalls together and have a plan on the wall showing where various stalls are, make it more of an attraction.
Needs wheelchair access
Rates are too high
Parking is too far away
Poor quality stalls
Provide more baby changing facilities and disabled toilets
Reduce number of stalls
Replace the closed stalls
Seem to be more people going there now
Show a plan outside to show what the market has to offer.
Some stalls don't open on Wednesdays
Stalls should be set out to create a nice square in centre for a café area
Stalls turn over too quickly
Steps outside to front are need of attention.
Stop smokers standing outside
Stop stalls closing down
Struggle to get around with the narrow isles with the buggy - would be better if they made them wider.
There's quite a few empty stalls
There are too many empty stalls
To make it a little bit bigger so there's more space.
You can get all you want in the market

Annex Two: Suggestions for Products and Services

Albright as it is like little family businesses.
 Alternative women's clothing
 and to make the cafe bigger.
 Battery stall
 Better produce everything now is very dated needs bringing up to date
 Better quality goods
 Better range of unusual/exotic fruit and veg
 Ceramics
 Children's clothes (5)
 Children's clothing and bedding
 Children's clothes (socks) and toys
 Children's clothing
 Computers
 Designer clothes
 DIY (2)
 DIY and kids clothes
 Don't need specialist stalls just regular goods and reduce the rents so they stay
 Electrical items, tools
 Electrical Items (4)
 Everything that is supplies now.
 Everything is there anyway.
 Fabric shop
 Fabrics and knitting. Speciality foods
 Food (3)
 Food stalls, non regular stuff
 For traders to accept Healthy Start vouchers.
 Gadgets stall
 Games
 Games, Children's clothes
 General local produce
 Gift stall
 Grocers
 Haberdashery (2)
 Haberdashery and dried flowers
 Hardware (3)
 Home made foods
 Household goods
 Ironmongers
 Its got everything already
 Its already got everything.
 Just go to look around
 Leather shops
 Leather work
 Local ice cream
 Local produce (2)
 Locally sourced goods
 Magazine stalls, hardware stalls
 Magazines
 Make it more upmarket, not so tacky
 Its ok as it is now
 Its ok as it is now just need more of it
 More children's clothing otherwise leave it as it is with the choice that's there.
 More children's clothing.
 More clothes shops
 More food cafe's - Nice place to go and sit.
 More food services - i.e. cafes

More food stalls needed
 More food stuffs
 More individual stalls across the range
 More local farm foods
 More local produce
 More out of town shops like those in the metro centre
 More specialist food stalls not found anywhere else
 More variety
 Need a general selection
 Need a gourmet hall, book stall takes up too much room
 Needs more good value goods and haberdashery
 Need more range
 Need quality shops and need to keep open later
 Need seating area
 Need to sell more gourmet foods
 Needs a good shoe shop. Too many meat stalls.
 Needs a seating area inside
 Needs alternative types of shops
 Needs more than just food stalls
 Newsagents (5)
 No everything is there maybe made bigger.
 not quite sure because I have not been in there.
 Nothing more than there is now.
 Ok as it is need to keep its heritage
 OK as it is (7)
 Ornaments/curiosity shop
 Outdoor sports
 Place to buy drinks
 Plants (2)
 Plenty of choice as it is now.
 Rover Island
 Same as it is now.
 Sandwiches and trinkets
 Sells what we need now so just on similar basis.
 Somewhere to buy milk
 Special Trainers and more variety.
 Specialist foods, pubs and cafes
 Specialist shops
 Speciality food shops (3)
 Speciality stalls (2)
 Quality stalls
 Sports equipment
 Sports goods
 Market has no place
 Market is OK
 The market is OK as it is
 There is a good selection there already
 Tobacconists and travel shop
 Tourist information point
 Toys (3)
 What is there is OK