



Vale Market Town Users Survey 2014

Research Report

A summary of research undertaken in November and December 2014 which sought to establish the behaviour of visitors to the towns of Abingdon, Faringdon and Wantage and their attitudes towards the provision of two hours free parking

JANUARY 2015

CONTENTS

SUMMARY	3
INTRODUCTION	4
RESEARCH METHODOLOGY	4
FINDINGS	7
HOW WE ARE USING THIS EVIDENCE	18

SUMMARY

This report provides a summary of research undertaken in November and December 2014 which sought to establish the behaviour of visitors to the towns of Abingdon, Faringdon and Wantage and their attitudes towards the provision of two hours free parking.

MEL Research, on behalf of the council, undertook 100 on-street interviews, at random, with passers-by in each town centre.

We found that:

- **The main reason that people visit the market towns is shopping, but other reasons include business, leisure, and social activities.**
- **Visitors frequently explained that they liked the towns because of their ease of access, the independent shops on offer and the historic character of the built environment.**
- **The most frequent complaint about the town centres was an inadequate range of shops although traffic was cited as a problem in Abingdon and litter in Faringdon.**
- **Most people using the town centres are from that town.**
- **There is a high dependence on the use of cars to travel into the town centres with three quarters of respondents driving into the centre of Abingdon and Wantage. In Faringdon, just over half of town centre users arrived on foot.**
- **If the two free hours' car parking were no longer available, then this would have a significant impact on the number of people visiting the towns. Across all 3 towns, we estimate that 1 in 10 people would go elsewhere or not visit the towns as much. This would significantly reduce visitor spend, estimated to be £11,000 per day across all three towns, which is equivalent to £3.5 million p.a.**

The council is using information gained from the research to inform its strategy for promoting economic development in the Vale, including specific ideas for promoting the towns to increase the number of visitors and their spend in the town centre economic development action plans, and to inform the economic impact of the provision of free parking.

INTRODUCTION

Knowing who uses our market towns, why and how can help us to understand what drives business in these communities and be used to inform policies to promote economic development.

That's why Vale of White Horse District Council commissioned MEL Research to conduct a face to face, on street survey of passers-by in the market towns of Abingdon, Faringdon and Wantage.

In this report you will find information about the methodology used to undertake the research, the key things we found out, as well as how we are using this information to inform our work with communities.

RESEARCH METHODOLOGY

On behalf of the council, MEL Research conducted 100 face to face interviews with passers-by in each of the market towns of Abingdon, Faringdon and Wantage.

The interviews were carried out by trained market researchers and took place over two half-days in late November and early December including one weekend and one week-day. We tried to include one market day to understand the impact that hosting markets had on the town centres, but avoided significant events in case this skewed the results.

A range of questions were asked, from reasons for visiting, transport used to get into town, likely spend and whether the removal of two hours free parking would influence future trips. The questionnaire we used is shown in Appendix A.

Participants were selected at random and no purposive sampling was used. We did however record key characteristics of those people which responded, as shown below.

Figure 1 illustrates the age profile of the survey respondents. All age groups were surveyed. The age profile of respondents was younger in Faringdon; older in Abingdon; and in Wantage there were greater numbers of people aged 35-44. This age profile reflects the age profile of the visitors in the town at the time the surveys were undertaken.

Figures 2-4 show that more females than males responded to the surveys in Abingdon and Wantage, while in Faringdon there were more males than females, and these are more likely to be under 35. In Faringdon there tends to be a wide variety of uses in the town centre (e.g. cinema, Pump House, etc) that draw younger people into the town.

Figure 1: Survey respondents by age

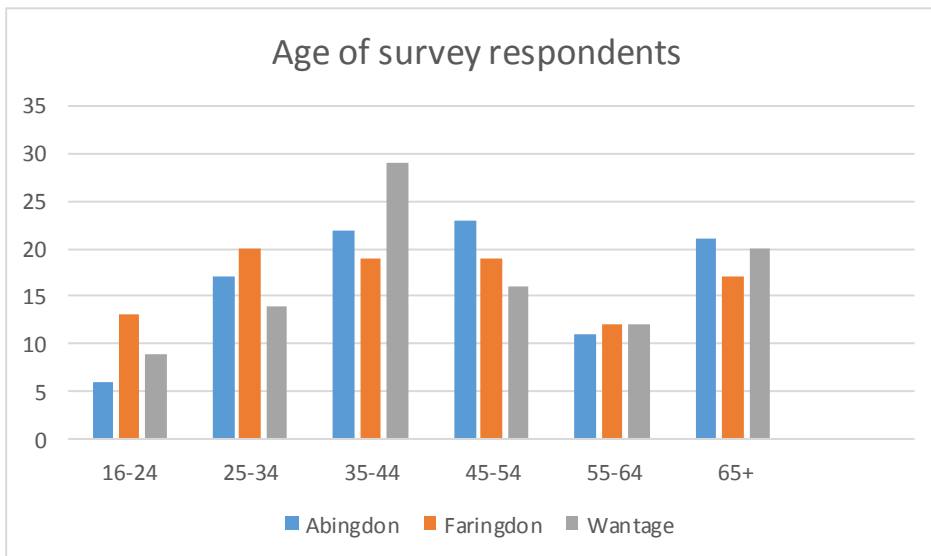


Figure 2: Gender of survey respondents in Abingdon

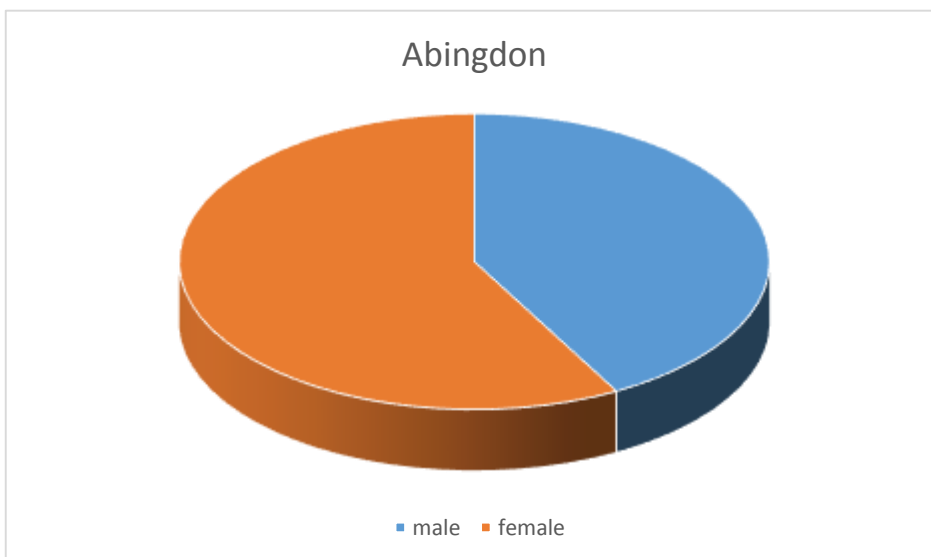


Figure 3: Gender of survey respondents in Faringdon

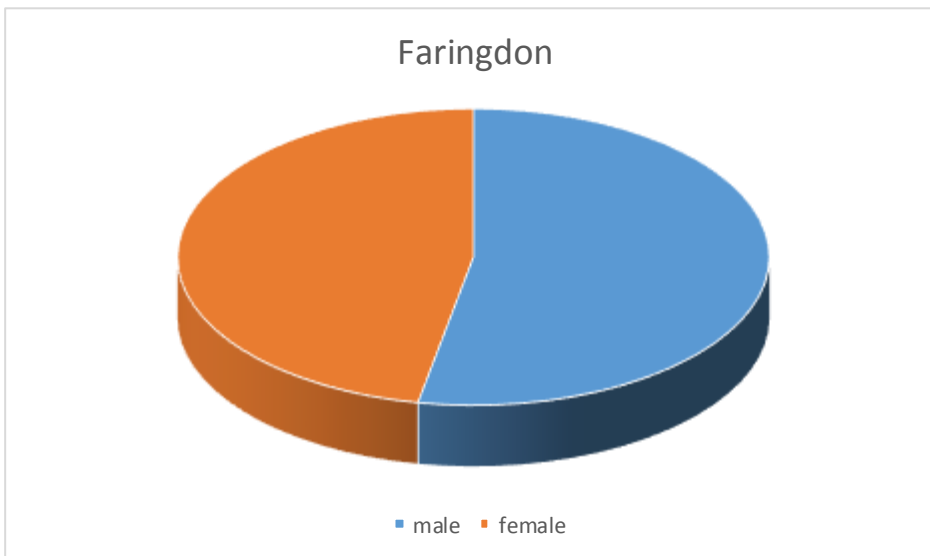
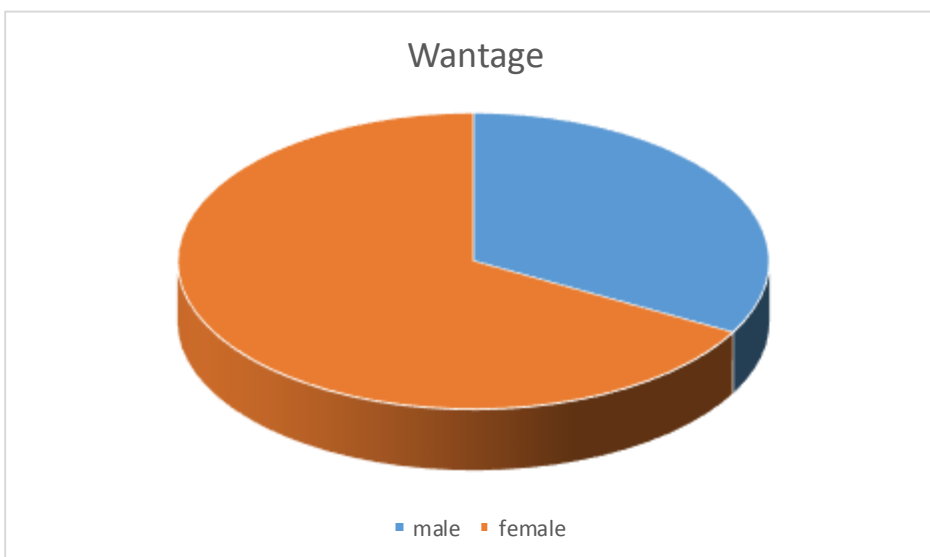


Figure 4: Gender of survey respondents in Wantage



Sixteen respondents told us that their day-to-day activities were limited because of a health problem or disability which has lasted or is expected to last at least 12 months.

The vast majority of respondents were white; ten respondents were **Asian/Asian British**; four were **Mixed/multiple ethnic group** and there was one Japanese respondent.

FINDINGS

To aid comprehension, the results for each question are detailed below.

Q1: We asked shoppers “what is the purpose of your visit to the town today?”

Table 1 shows that shopping is the main reason that people make a trip into all three towns: Abingdon (54 per cent), Faringdon (45 per cent), Wantage (33 per cent). However there are a wide range of other reasons that people visit the town centre, including: visiting the markets, to enjoy leisure activities such as eating, drinking or sporting facilities, to attend events, work, business, and visiting family and friends.

The market is a strong draw in both Abingdon and Wantage – being the primary purpose for visiting the town centre for 14 per cent of people surveyed.

	Abingdon	Faringdon	Wantage
Shopping	54	45	33
Visit market	14	8	14
Leisure	8	6	6
Event	0	3	1
Work here	8	7	9
Business	0	0	1
Visiting family/ friends	7	7	13
Other (please specify)	9	24	23
	100	100	100

There were quite a large number of people who visited the town centre for ‘other reasons’, particularly in Faringdon and Wantage. This reflects the wide service ranges offered by the town centres, and the important role these activities play in town centre vitality. In Faringdon, the primary ‘other’ reasons were: use of bank or post office, bus service, taking child to sport activity (dancing or parkour in the Pump House) and going to / from school . In Wantage, reasons given include: baby and toddler groups, use of bank, visiting the museum, accessing clubs and classes at the Beacon and dental services. In Abingdon, ‘shopping’ was the primary reason for visiting the town centre and the primary ‘other’ reasons were: out for walk, live here, health services, mosque.

Q2: We asked shoppers “What do you like most about coming here?”

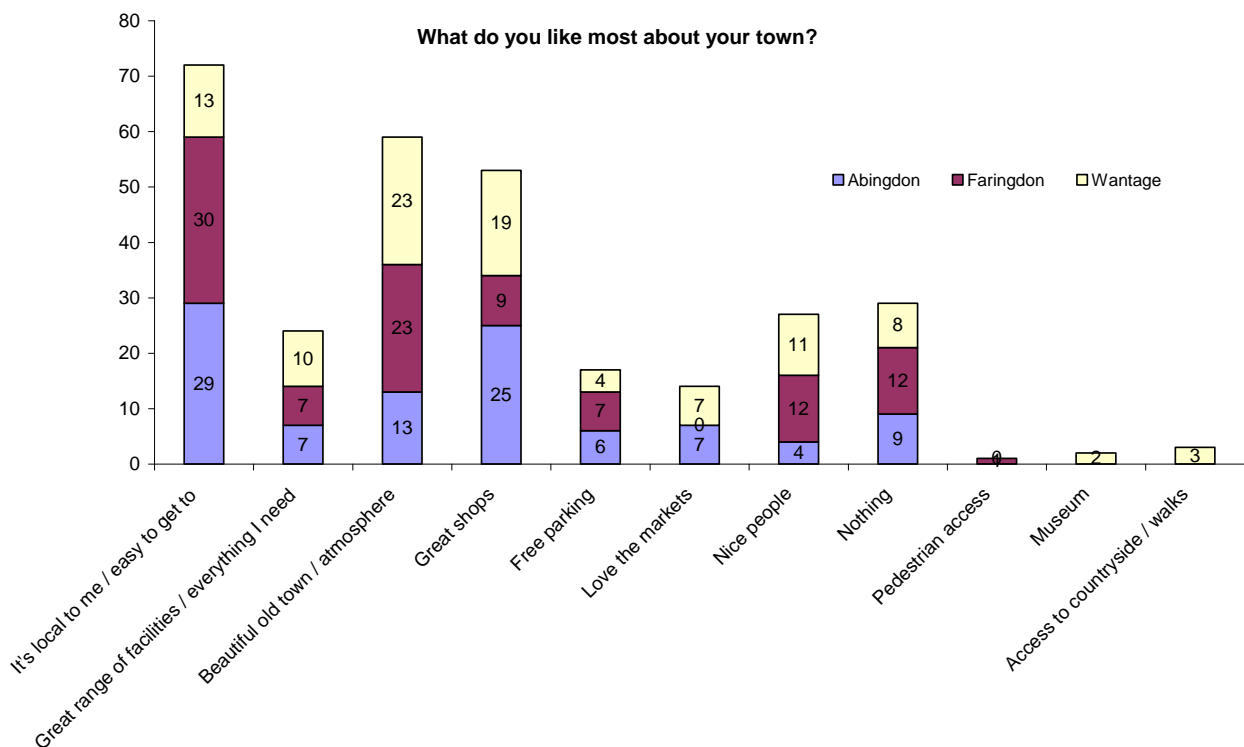
This was an open question, so visitors were able to respond in their own words and the responses were subsequently coded for the purposes of analysis. Figure 2 illustrates that the most popular response in Abingdon and Faringdon was “It’s local to me or easy to get

to,” (highlighting the importance of the ease of access) while in Wantage, the most popular responses were “it is a beautiful old town or has a great atmosphere” or “great shops.”

This suggests that currently the towns are predominantly catering for the needs of local residents, and suggests a need to promote the town centres more widely and further afield. Almost a quarter of respondents in Faringdon and Wantage remarked that they most liked the character of their town – suggesting that the historical features and attractive town centres could be one of the features that are promoted. In Abingdon and Wantage, one-fifth to one-quarter of respondents most liked the great range of independent shops; suggesting that these towns should be promoted as independent shopping destinations.

As previously mentioned, this was an open question which means that respondents could mention any feature they most valued. In Abingdon 6 per cent; in Wantage 4 per cent and in Faringdon 7 per cent of respondents said the one thing they most liked about their town was the two hours’ free car parking. This highlights the popularity of this policy amongst residents and visitors in the market towns.

Figure 2: What do you like most about your town?



Q3 We asked shoppers: “What do you dislike about coming here?”

It is important to note that this was a free-form, open question so shoppers were able to respond using their own words, and the responses were subsequently coded for the purposes of analysis.

Across all towns, the most common response was ‘nothing’ – meaning that shoppers could not think of anything they disliked about their town. This highlights a high level of satisfaction amongst visitors.

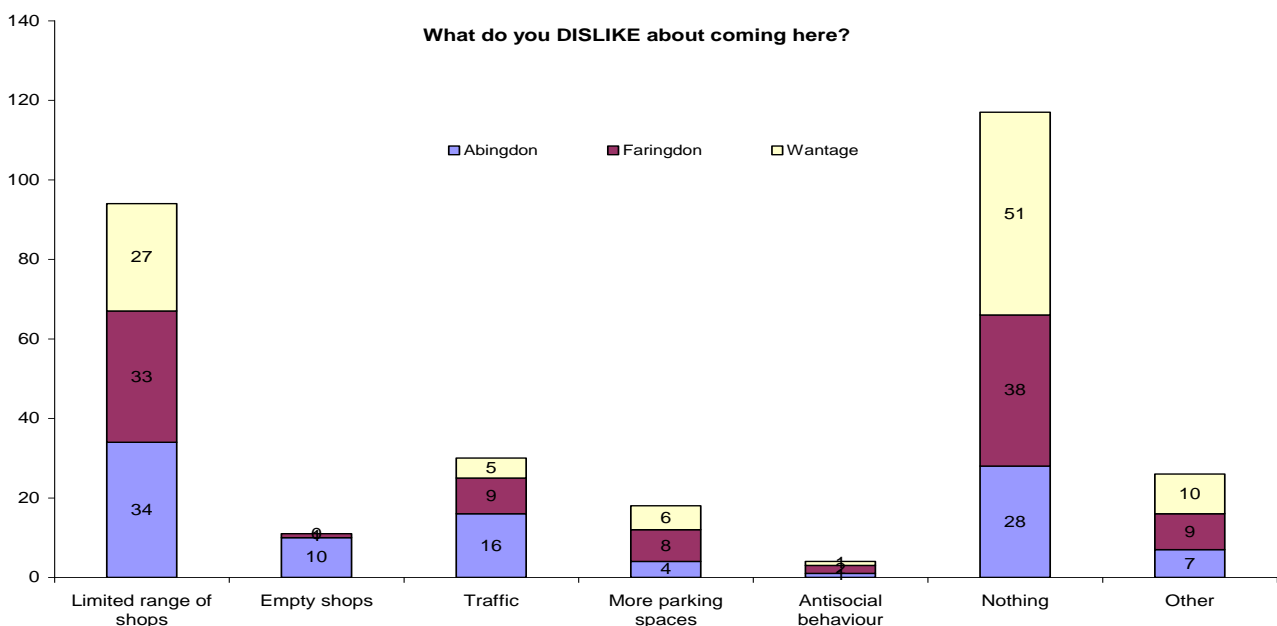
In Abingdon, the most common response was ‘limited range of shops’ (34 per cent), and, when asked for further information, respondents suggested a need for more shops for younger people, ethnic shops, ladies clothing shops, a better grocery shop and shops for men. A high number of empty shops was highlighted as an issue in Abingdon, and traffic issues were mentioned as the biggest issue for 16 per cent of respondents.

In Faringdon, the most common response was ‘nothing’ highlighting a high level of satisfaction amongst visitors. However around 35 respondents mentioned ‘limited range of shops’ and, in particular, highlighted a need for more comparison shopping (clothing, toys and gifts).

In Wantage, the most common response was ‘nothing,’ again highlighting high levels of satisfaction amongst visitors, with a large number also saying “the shopping is really good now, and the markets are great”. However 27 respondents highlighted the ‘limited range of shops’ and when asked for further information, specifically mentioned the need for shops that appeal to young people, request for ‘more chains’, shoe shops, dress shops, fashion outlets and ‘too many fast food takeaways’, too many charity shops. Five percent of people said the town needed a better cinema.

The need for more parking spaces was highlighted in all three towns. Anti-social behaviour was very infrequently mentioned (by one or two respondents in each town), highlighting that the town centres were viewed as very safe places.

Figure 3: What do you dislike about coming here?



Q4: We asked respondents “Where did you travel from today?”

Generally speaking, visitors live in the town in which they were surveyed, highlighting that the towns cater for quite a local catchment. So, 62 per cent of people surveyed in Wantage already live in the town (figure 4c); compared to 59 per cent in Faringdon (figure 4b) and 50 per cent in Abingdon (figure 4a).

There is also a surprisingly limited overlap in the catchment area for all three towns. For example, none of the respondents in Abingdon had travelled from Faringdon. Only one person surveyed in Wantage had travelled from Abingdon.

Figure 4a: Where did Abingdon respondents travel from?

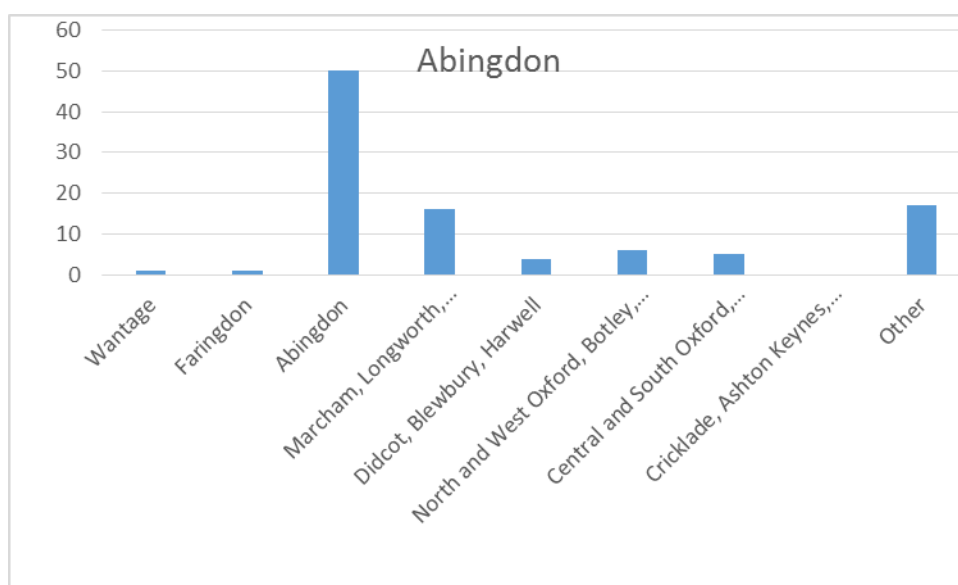


Figure 4a illustrates that in Abingdon, 16 per cent of visitors came from nearby villages including: Marcham, Longworth, Sunningwell, Frilford, Cothill or Appleton; while 11 per cent of visitors to the town came from Oxford. Some 17 per cent of respondents came from ‘other’ places including West Berkshire, Cardiff and Bath.

Figure 4b: Where did Faringdon respondents travel from?

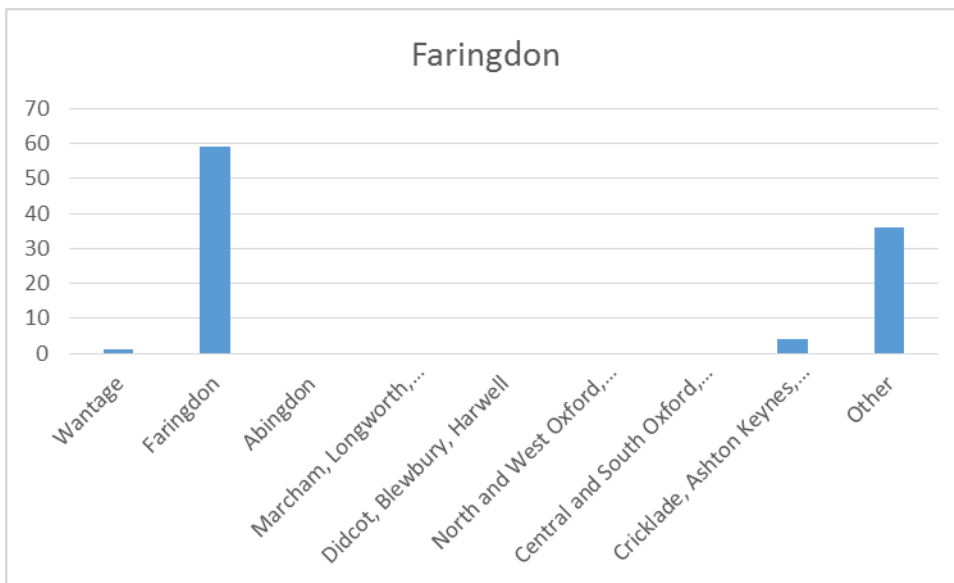


Figure 4b illustrates that almost 60 per cent of Faringdon visitors were from the town, and around 5 per cent from nearby Cricklade, Ashton Keynes, Lechlade. However, it is interesting that Faringdon had the highest number of visitors (36 per cent) from outside of Oxfordshire, including visitors from Spain, Italy, Germany as well as Gloucestershire and Berkshire. As Faringdon borders Swindon, Gloucestershire and Berkshire it is therefore unsurprising that it attracts a high proportion of visitors from other counties. Staff in the Visitor Information Centre in Faringdon mention that there is a high number of visitors who are ‘visiting friends and relatives’.

Figure 4c: Where did Wantage respondents travel from?

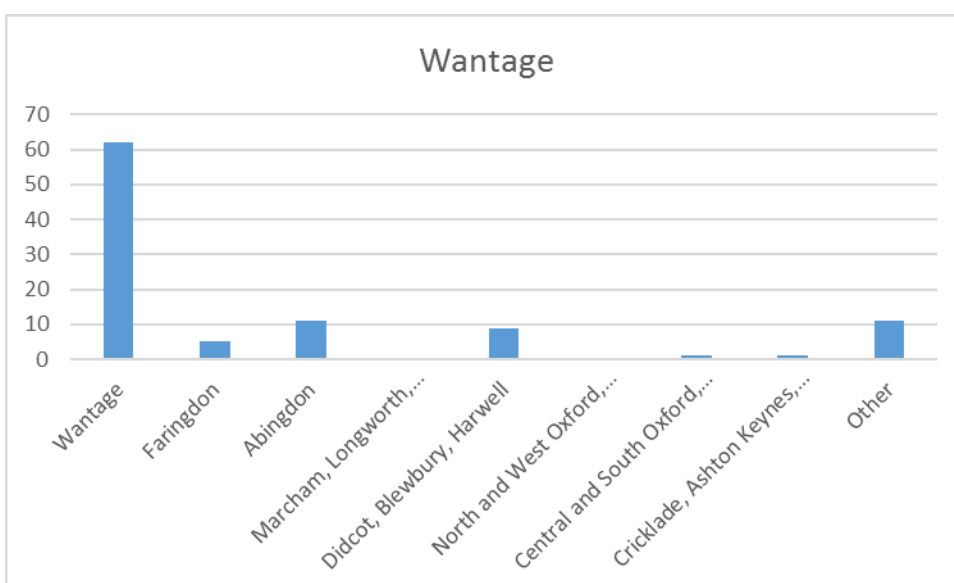


Figure 4c shows that in Wantage, over 60 per cent of visitors lived in the town, around 10 per cent came from Abingdon, another 10 per cent from Didcot/Blewbury/Harwell and 5 per cent from Faringdon. Over 10 per cent of visitors came from 'other' postcode areas including OX14 (Culham, Clifton Hampden, Sutton Courtenay) and OX11 (Didcot, Blewbury and Harwell).

Q 5. How did you get here?

Table 5 shows that in Abingdon and Wantage, three-quarters of those surveyed travelled to the town centres by car, however in Faringdon less than half (44 per cent) used this mode of transport.

Most people walked into Faringdon which is unsurprising, because, as the smallest of the three towns the shopping centre is within easy walking distance of most of the residential areas. In Abingdon and Wantage around one-fifth of people surveyed walked into the town centre. In Abingdon, 7 per cent of people arrived by bus.

Table 5 How did you get here?			
	Abingdon	Faringdon	Wantage
car	75	44	73
walk	17	51	21
bus	7	0	4
bicycle	1	1	1
other	0	1	1
motorcycle		3	0
	100	100	100

Q6. If you travelled by car, have you made use of the 2 hours' free car parking?

In Abingdon, 66 per cent of all those surveyed travelled by car and made use of 2 hours' free car parking; in Wantage this was 44 per cent and in Faringdon it was only 36 per cent.

Table 6: Respondents who travelled by car <u>and</u> made use of the 2 hours' free car parking		
Abingdon	Faringdon	Wantage
66	36	44

Q7. In question 7, we asked people to consider 'if the two free hours' car parking was no longer available' how would it affect their shopping decision.

Table 7 illustrates that, in Abingdon, 44 per cent of visitors would still continue to drive to the town. In other words, whilst they would probably miss the availability of free car parking, it would not materially affect their decision to come to the town centre. However if free car parking were no longer available in Abingdon, then 5 per cent of respondents would use another form of transport. However 8 per cent of respondents said they would 'not come here as much' and 9 per cent of respondents said they would 'go somewhere else'.

Table 7: If 2 free hours was no longer available, would you?			
	Abingdon	Faringdon	Wantage
Still drive here	44	18	35
Use another form of transport	5	4	3
Not come here as much	8	7	4
Go somewhere else	9	7	2
	66	36	44

To summarise the conclusion from questions 5, 6 and 7:

In Abingdon, car parking is very important to town centre users as 75 per cent of visitors arrive by car and 66 per cent of all visitors make use of the 2 hours' free car parking. If the free 2 hours' car parking was no longer available, then a high proportion of users (17 per cent) would go elsewhere or not visit as much, and, we believe that is most likely because the only other 'free' car parking in the town centre is at Waitrose.

In Faringdon, far fewer visitors drive into the town centre (44 per cent) but almost all of these (36 per cent) make use of the 2 hours' free car parking. If the free 2 hours' car parking was no longer available, then a high proportion of users (14 per cent) would go elsewhere or not visit as much, and that is probably because there is no other 'free' car parking in the town centre.

In Wantage, car parking is very important to town centre users as 73 per cent of visitors arrive by car but only 44 per cent of all visitors make use of the 2 hours' free car parking. If the free 2 hours' car parking was no longer available, then a low proportion of users (6 per cent) would go elsewhere or not visit as much, and that is most likely because there is quite a lot of free car parking available in the town at Waitrose and Sainsbury's on Limborough Road. However we do caution that while drivers assume they would be able to use alternative free car parks, this may not be possible. Anecdotal evidence suggests it can be difficult to find parking spaces in the town and this is borne out by the Vale Council's car park usage data which shows that car park usage has trebled in some car parks in

Wantage since the introduction of the free car parking policy in 2011. The Vale are working with the Town Council to look at options to expand parking provision in Wantage town centre.

Economic impact of free two hours' car parking

From table 7, we know that if the 2 free hours' car parking was no longer available, this would reduce the number of town centre users¹ by:

- 9 per cent to 17 per cent in Abingdon;
- 7 per cent to 14 per cent in Faringdon
- 2 per cent to 6 per cent in Wantage

Of those respondents that said they would “go somewhere else”, we asked them to tell us where. In Abingdon, the most commonly cited places were: Oxford (by bus), Didcot and Witney (they have free parking all day). In Faringdon, the most common shopping destinations cited as alternatives include: Swindon, Witney and in Wantage they cited: Reading, Didcot, Oxford or ‘unsure’.

Considering the average reduction in town centre users across all 3 towns, this survey suggests that approximately one in ten visitors would go elsewhere if the 2 free hours car parking in the councils car parks did not exist.

In question 8, we asked respondents “How much do you think you will spend on the following things during your visit to town today?”

Table 8 presents the planned expenditure of visitors, aggregated across all respondents and as average expenditure per visit. All 300 respondents planned to spend just over £6,500 on shopping, £2,600 on food and drink, £1,000 on leisure activities and £800 on ‘other activities’ including the post office, physiotherapy etc.

The total expected spend of the sample of 300 shoppers amounted to just over £11,000 on the day they were surveyed.

The average expenditure per shopper is just under £40. This is around the expected level of day trip expenditure for the Vale as a whole. Tourism South East conduct a tourism survey each year “The Economic Impact of Tourism on Oxfordshire” and, the average day visitor expenditure is £35 per day per day visitor.

¹ Including those that would ‘not come here as much’ and ‘go somewhere else’

Table 8: How much do you plan to spend in town today?					
	Shopping	Food and drink	Leisure	Other	Total
	£	£	£	£	£
All respondents	6,596.10	2,659.25	1,039.79	846.10	11,141.24
Average spend per shopper	£21.99	£8.86	£3.47	£2.82	£37.14

The number of car parking tickets issued by the car parking machines in the Vale car parks on the date that the survey was carried out are shown in Table 9:

Table 9: Car park tickets issued in Vale care parks on day of survey	
Abingdon	1,701
Faringdon	543
Wantage	706
Total number of tickets issued across 3 towns:	2,950

If the two hours free car parking did not exist, this survey suggests we would lose one in ten visitors, or approximately 300 visitors per day across the three towns. On the basis that each person spends £37.14 per day, this is equivalent to £11,000 per day across the 3 towns.

Assuming six trading days per week, this is equivalent to a possible loss of £3.5 million in sales per year.

Readers are advised that this is an inferred figure, based on the small number of people who responded to this survey who said they would likely go elsewhere if the free 2 hours parking were no longer available.

In question 9, we asked **“What would make the town centre more attractive?”**

One of the common themes across all 3 towns is that visitors would prefer a better range of shops with fewer charity shops. A significant number of respondents would like to see ‘more retail chains.’ [Research](#) commissioned by South Oxfordshire District Council to examine factors which enhance the ‘distinctiveness’ of town centres highlight that it is important to maintain a mix of chainstores and independent retail and leisure operators as well as high quality public realm and physical environment in order to retain healthy and distinctive town centres.

The visitor survey also revealed a number of differences in visitor responses between the towns as identified below:

In Abingdon, the most popular responses were:

- more shops, larger shops, better green-grocer, cover the retail centre to make it an indoor shopping experience
- make more of the history of Abingdon
- better entertainment or cinema
- needs to be more festive, with better Christmas lights
- better traffic flow (the one-way system needs to be changed)

In Faringdon, the most popular responses were:

- better shops, attract more 'chains', better supermarkets, better eating places, more independent and character shops, Saturday market, bigger market
- improved signage and refurbishment of town centre, improve cleanliness of town centre
- better disability, improve access, redesign and layout change, fewer A-boards and billboards
- more parking

In Wantage, the most popular responses were:

- more variety of shops, better high street brands, shops for younger people, keep smaller shops and attract more of them
- improve external appearance of shops (shop-frontages)
- more parking spaces, all-day free car parking,
- improve leisure offer, more activities for younger people, make more of the history of the town
- pedestrianisation and improve public transport

Q11. In question 11, we asked respondents whether they **were aware of the Beacon in Wantage**, and what they used it for.

In Wantage, we asked a number of supplementary questions in order to understand whether visitors were aware of the council-owned facility known as 'the Beacon' and whether or not visitors used the facilities on offer.

In question 11 we asked **“do you know Wantage Civic Hall is now called the Beacon?”**

Sixty four per cent of respondents said 'yes' and 34 per cent said they were not aware of the change in name.

Respondents were asked whether they had used any of the facilities at The Beacon, and which ones. The responses below highlight the wide range of activities and events at the Beacon. Of those who did use the Beacon, they gave the following reasons:

- To use the café (8)
- To go to the cinema (9)
- Play or concert (6)
- Children's activities (6)
- Exams (5)
- Concerts (5)
- Events / special events with speaker (4)
- Dance classes for child (3)
- Meetings (4)
- School assembly or exams(2)
- Parties (2)
- Pilates (1)
- Yoga (1)
- Choir (1)
- X factor (1)
- Blood donor (1)
- Weight watchers (1)
- Weddings (1)
- Flower club (1)

- To pray (1)
- To listen to the brass band (1)
- Babygroups (1)

*Note: some respondents gave more than 1 use

As previously mentioned, some 36 people did not use the Beacon. 32 persons gave us a reason for this, and the majority stated that they did not know which facilities were at the Beacon. This highlights a need to do more work around marketing / promotion. All the issues mentioned included:

- Don't know which facilities are there (17)
- No buses to the Beacon (1)
- Too far away (3)
- Council stopped Morris Men from using it (1)
- Nothing there for me (6)
- Didn't know it was there (4)

HOW WE ARE USING THIS EVIDENCE

The council will use this evidence to:

- Inform policies and projects that will help to improve town centre vitality in Abingdon, Faringdon and Wantage, through the production of the council's economic development action plans.
- To inform the Council's management and promotion of the Beacon
- Inform councillors about the economic benefits of the free car parking policy.

APPENDIX A

Vale Market Town Users Survey 2014

1. What is the purpose of your visit to [Name of town] today?

- Shopping
- Visit market
- Leisure
- Event
- Work here
- Business
- Visiting family/ friends
- Other (please specify)

2. What do like about coming here?

3. What do you dislike about coming here?

4. Where have you travelled from today? (Ask for first part of postcode)

5. How did you get here? (If car, go to Q6, 7. All other responses go to Q8)

- Walk
- Car
- Bus
- Cycle
- Other (Please specify)

6. If you travelled by car, have you made use of the 2 hour free car parking?

- Yes
- No

7. If the 2 hour free car parking were no longer available, would you...

- Still drive here
- Use another form of transport

- Not come here as much
- Go somewhere else

8. How much do you think you will spend on the following things during your visit to [name of town] today?

	£
Shopping	
Eating & drinking	
Leisure	
Anything else (please specify)	

9. What shops/ businesses do you intend to visit today?

- Bank
- Post office
- Clothes shops
- Charity shops
- Restaurant/ café
- Travel agents
- Supermarket/ food store
- Library
- Doctors
- Other (please specify)

10. What would make [name of town] more attractive to shoppers and visitors?

11. Do you know Wantage Civic Hall is now called the Beacon

- Yes
- No

12. Have you used any facilities at the Beacon?

- Yes
- No

13. If yes, which ones?

14. Are you...

- Male
- Female

15. What is your age?

- 16-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

16. Are your day to day activities limited because of a health problem or disability which has lasted or is expected to last at least 12 months?

- Yes
- No

17. Please tick which group you consider best describes your ethnic origin?

- White British
- Asian/ Asian British
- Black/ African/ Caribbean/ Black British
- Any other white
- Mixed/ multiple ethnic
- Any other background

