

# How Do You Feel About Ledbury Town Centre

21 December 2011

## Background and Context

An online survey was carried out between mid October and December 2011 using Survey Monkey. Responses were sought from a broad socio-economic and demographic range of the community. It was advertised via Facebook and Ledbury Portal and invitations were sent by email to mailing lists available to LOTS. A copy of the questionnaire is appended (A). 240 valid responses were recorded and exported via MS Excel to SPSS for analysis.

The research aims of the survey were in part designed to inform the Dept Business Innovation and Skills (BIS) Healthy High Street Checklist, which is appended (B). Some of the results of this survey have been fed into the 'Ledbury Health Check' report.

### Key research questions included:

- Perceptions of Ledbury town centre
- Sense of local pride
- Perceptions of choice and range in shops and facilities
- Investigating what 'changes would most improve Ledbury town centre'
- Shopping patterns – in terms of how often people shop within or outside Ledbury, and their reasons for doing so

An additional question was given which asked whether people supported an out of town superstore, currently the subject of a planning application by Sainsbury's.

The survey asked people optionally if they could explain why they are for or against the superstore development.

All the above information was cross-referenced against age and occupation (where given).

**It is important to note that the survey was not an opinion poll on the superstore question since the survey method could not achieve a representative sample of the local population. Nevertheless the survey does provide insights into the shopping habits and perceptions of local people which illuminate possible reasons why people support or oppose the superstore proposals.**

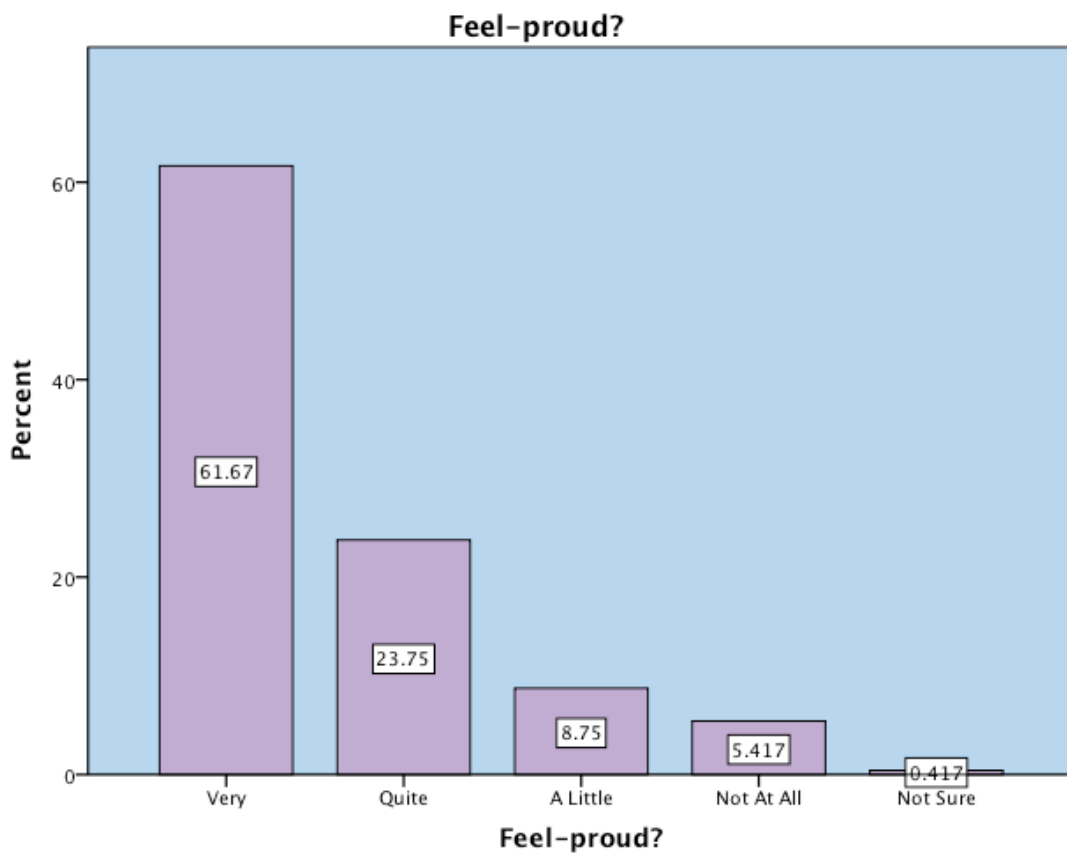
Given the sample size, the results of the survey do provide a robust analysis of broad attitudes, priorities, values and perceived deficiencies in Ledbury as a local shopping centre. It also sheds light on a range of social/economic/age groups and how these differ from the overall picture, although in certain of these cases, statistical validity is less due to smaller sub-sets of data which reduce confidence.

## Perceptions of Ledbury Town Centre – Overview

### Local Pride in the High Street/Town Centre

Are You Proud of Ledbury?	Frequency	Percent	Cumulative Percent
Valid 1 Very	148	61.7	61.7
2 Quite	57	23.8	85.4
3 A Little	21	8.8	94.2
4 Not At All	13	5.4	99.6
5 Not Sure	1	.4	100.0
Total	240	100.0	

A large majority of local people are proud of their town centre. 60% of people say they are very proud, while a further 24% say they are 'quite proud'. Just 15% felt not proud or unsure.



## In A Word

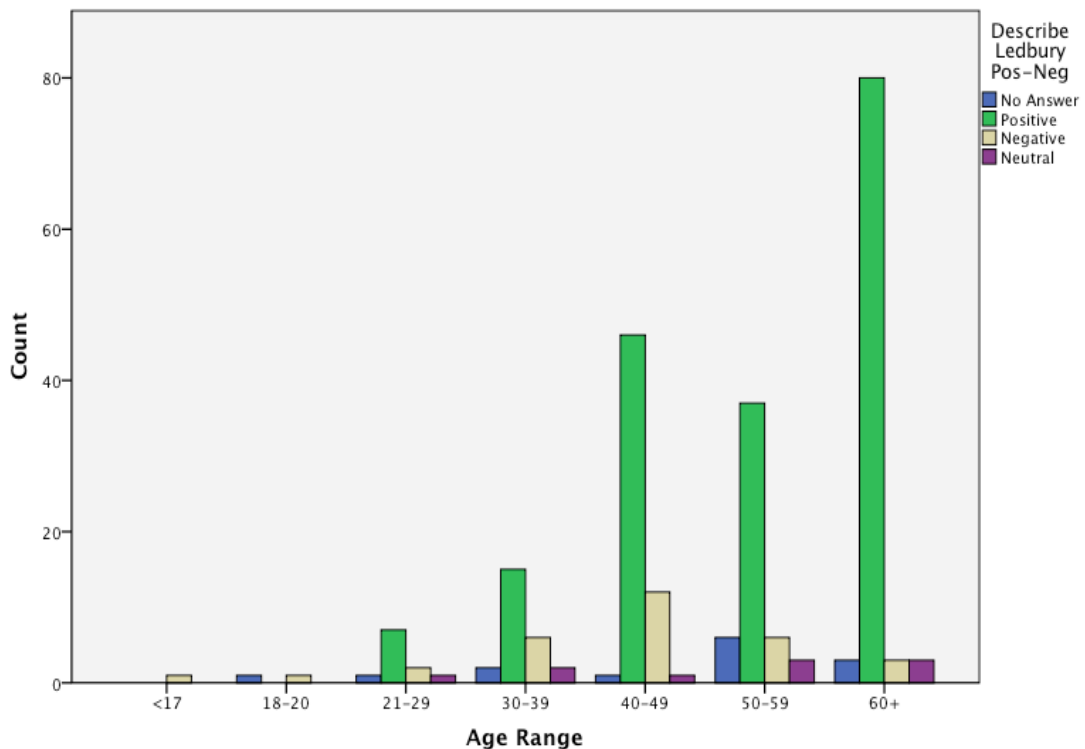
Respondents were asked optionally to describe Ledbury 'in a word' of which 95% chose to respond. The full range of responses is appended (C). The words volunteered have been manually coded into Positive, Negative and Neutral words.

		Frequency	Percent	Cumulative Percent
Valid	0 No Answer	14	5.8	5.8
	1 Positive	185	77.1	82.9
	2 Negative	31	12.9	95.8
	3 Neutral	10	4.2	100.0
	Total	240	100.0	

80% of people suggested positive words including Vibrant, Unique, Interesting, Attractive, Welcoming, Friendly, Excellent, Good represented in the word cloud:



Positive descriptions of Ledbury are registered across all age ranges although there appears to be a slightly higher number of 40 somethings with negative views of the town:



### Would You Go Back?

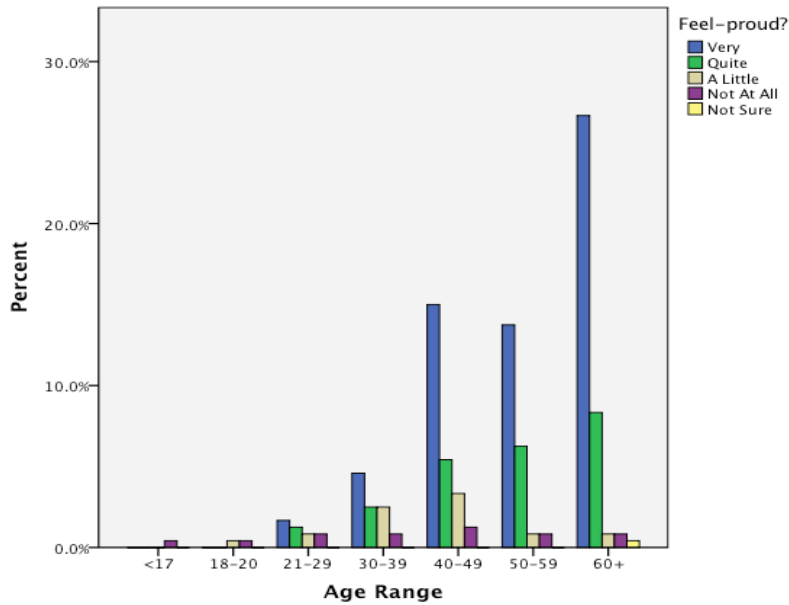
Using the DBIS wording from its 'Five Minute Health Check', the survey asked 'If Ledbury were someone else's High Street, would you want to go back there'. This was thought to be a useful question in asking people to think about the town through the eyes of a visitor, perhaps slightly more objectively, less coloured by the respondents own values and beliefs. The question was framed to elicit an unambiguous response as far as possible.

		Frequency	Percent	Cumulative Percent
Valid	1 Yes	163	67.9	67.9
	2 Perhaps	58	24.2	92.1
	3 No	17	7.1	99.2
	4 Not Sure	2	.8	100.0
Total		240	100.0	

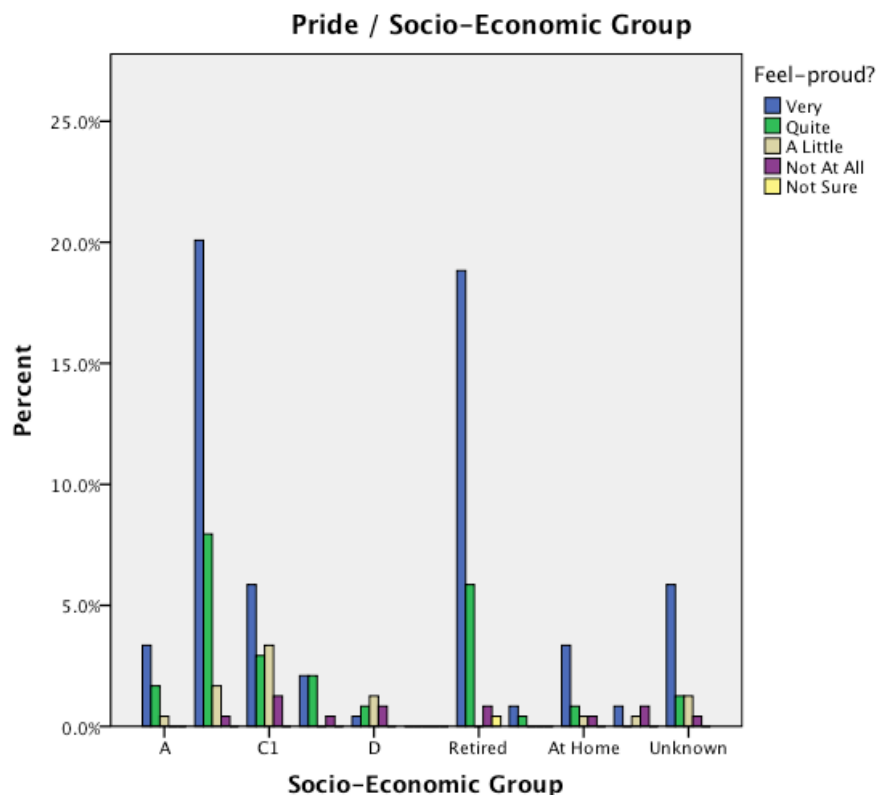
The result showed that 70% of respondents said 'Yes Definitely' that they would want to go back to Ledbury. A further 24% said 'Perhaps' while just 8% of respondents said 'No not at all'.

## Age and Socio Economic Factors

It is striking that there appears to be a strong sense of Pride in Ledbury across age ranges, although a higher proportion of over 60s are proud than in the 21-29 age range. Unfortunately sample sizes are too small in the under 20 years group to draw any conclusions.



In terms of socio-economic group it appears that there is a positive correlation between high socio-economic group and sense of local pride in that high S/E groups display higher pride than lower S/E groups.



### Perceptions of Choice and Range in Shops and Facilities

Respondents were asked whether Ledbury offers a 'wide range of shops and facilities' choosing between 'yes very wide', 'quite wide', 'no not wide' and 'don't know'. They were further asked optionally to say in their own words what it 'lacks'. Responses from this open-ended question were wide ranging so for analysis purposes, they were grouped into a manageable range of broadly related categories.

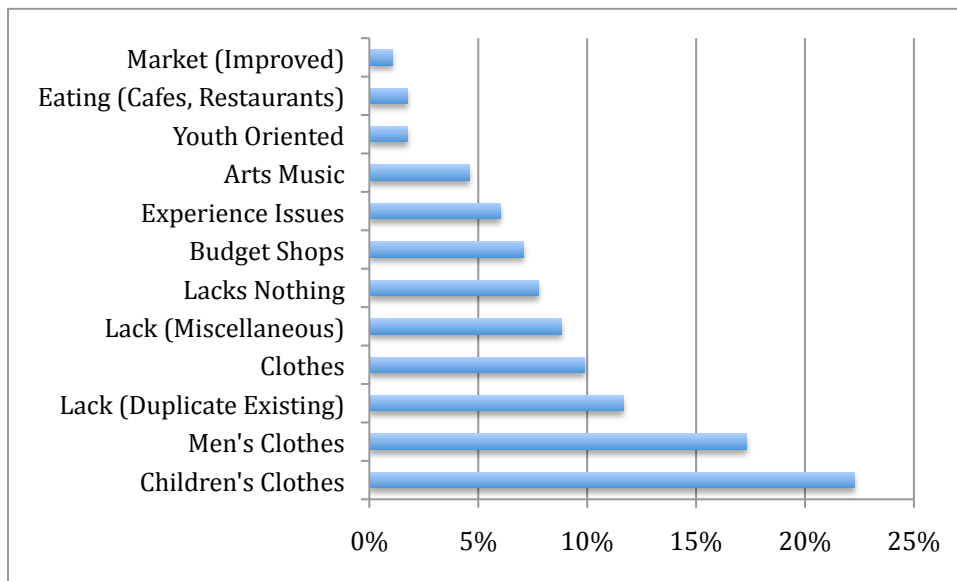
		Frequency	Percent	Cumulative Percent
Valid	1 Very Wide	78	32.5	32.5
	2 Quite Wide	108	45.0	77.5
	3 Not Wide	53	22.1	99.6
	4 Don't Know	1	.4	100.0
Total		240	100.0	

The responses show that 30% feel range is Wide, 45% Quite Wide, and 22% Not Wide. Some people commented on the fact that Ledbury has too many of the same sort of shops, (e.g. gift shops, tourism-oriented shops) and would benefit from a wider range of budget-priced options. A typical comment was: '[We need] shops for everyone, people with families and younger people, not just for older people.'

Many people conversely felt that Ledbury lacks for very little, and in relation to the town's size is extremely well served. This feeling was summed by a respondent who said: "I think it has something of everything, not always a huge range, but you can pretty much buy anything in Ledbury."

The broad conclusion from this question is that a majority of people feel that choice and range of goods offered by the town centre is good for a town of its size and location.

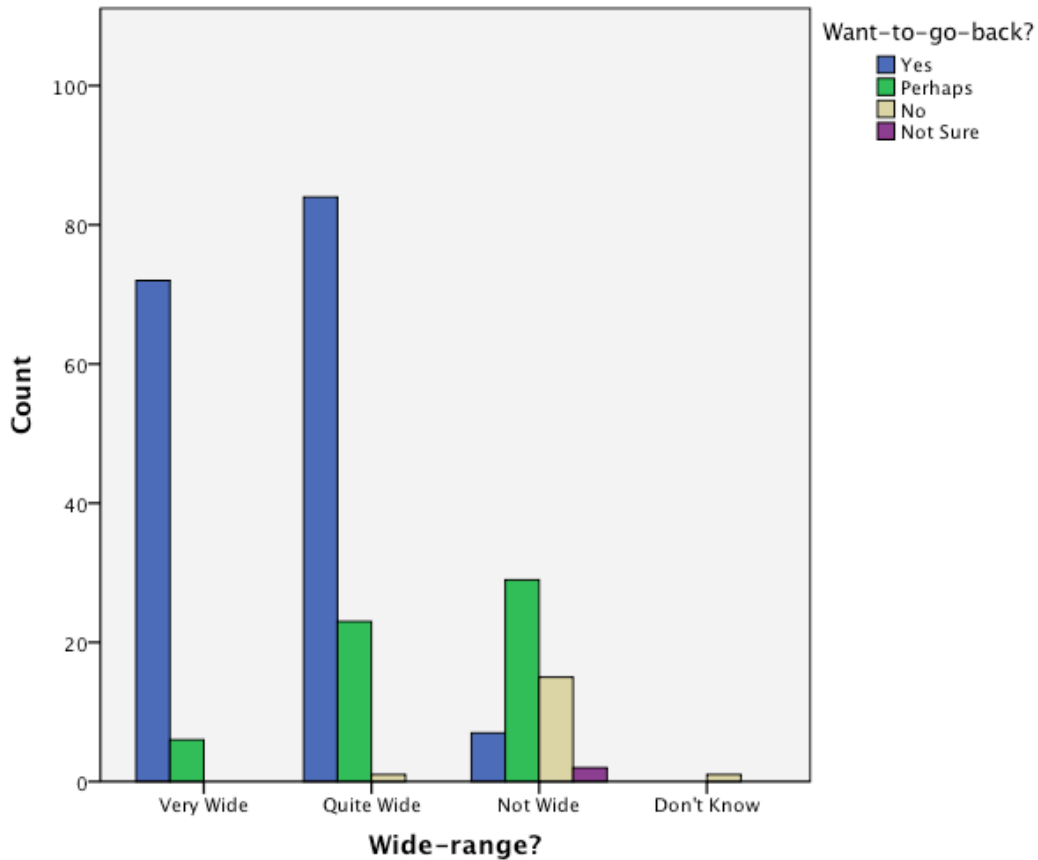
Nevertheless, in terms of gaps and lacks in shopping provision, the online survey pointed to a range shopping items which Ledbury does not provide including including: Children's clothing (budget), Men's clothing, Budget Shops for 'Everyday Items'.



**Note:**

1. Lack (Duplicate Existing) refers to responses where Ledbury currently does offer this service e.g. fishmonger, greengrocer, delicatessen, bakery etc and may indicate dissatisfaction in the current provision or lack of awareness;
2. Lack (Miscellaneous) refers to shops which Ledbury does not have including computer supplies, car parts, pet shop, haberdashery;
3. Experience Issues refers general aspects of the Ledbury 'experience' including parking, police presence, toilets, later shopping hours and the presence of big name multiples in the High St.

Analysis of people's perceptions of range correlated to whether they would want to go back, shows a broadly positive picture. Even among people who feel that Rebury's range is not wide, a large proportion would 'perhaps' want to return here, twice as many as those who definitely not want to.

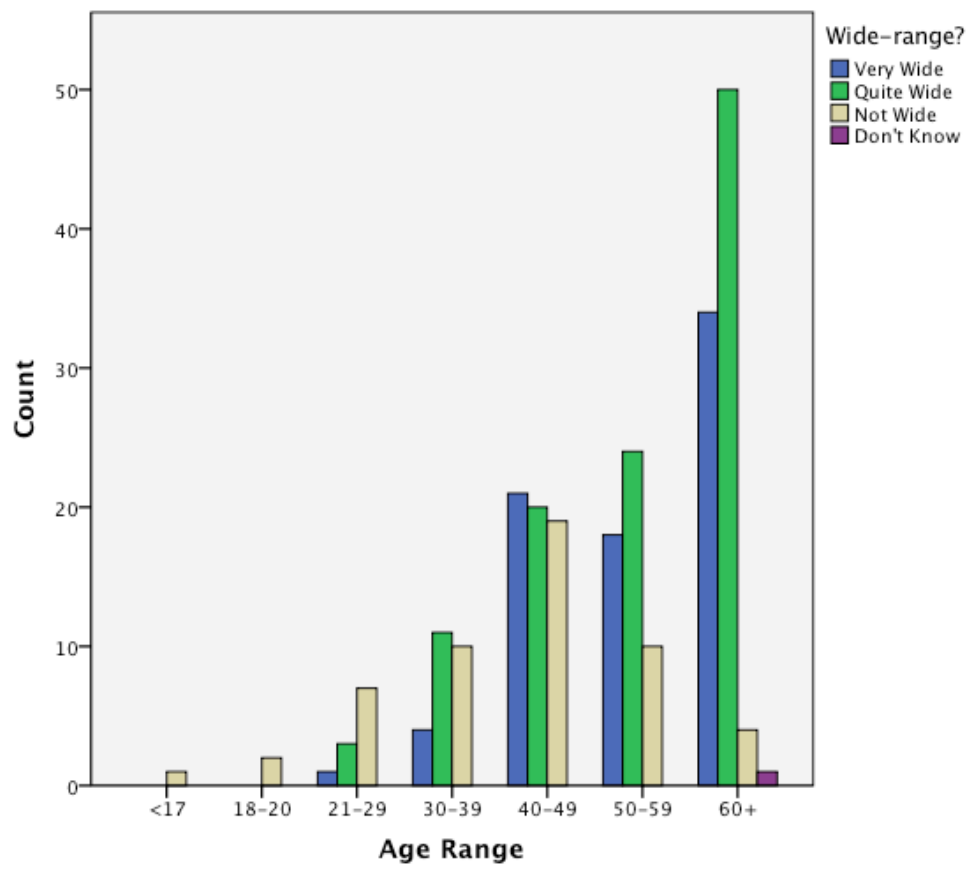


### Age - Wide Range

Interesting variations exist between age groups and their perceptions of how wide is Ledbury's shopping offer. Younger age groups see Ledbury as more limited than older age groups. Within the 40-49 and 50-59 age groups, relatively more people see Ledbury's offer as 'very wide'. A higher proportion of over-60s see Ledbury's offer as 'quite wide'.

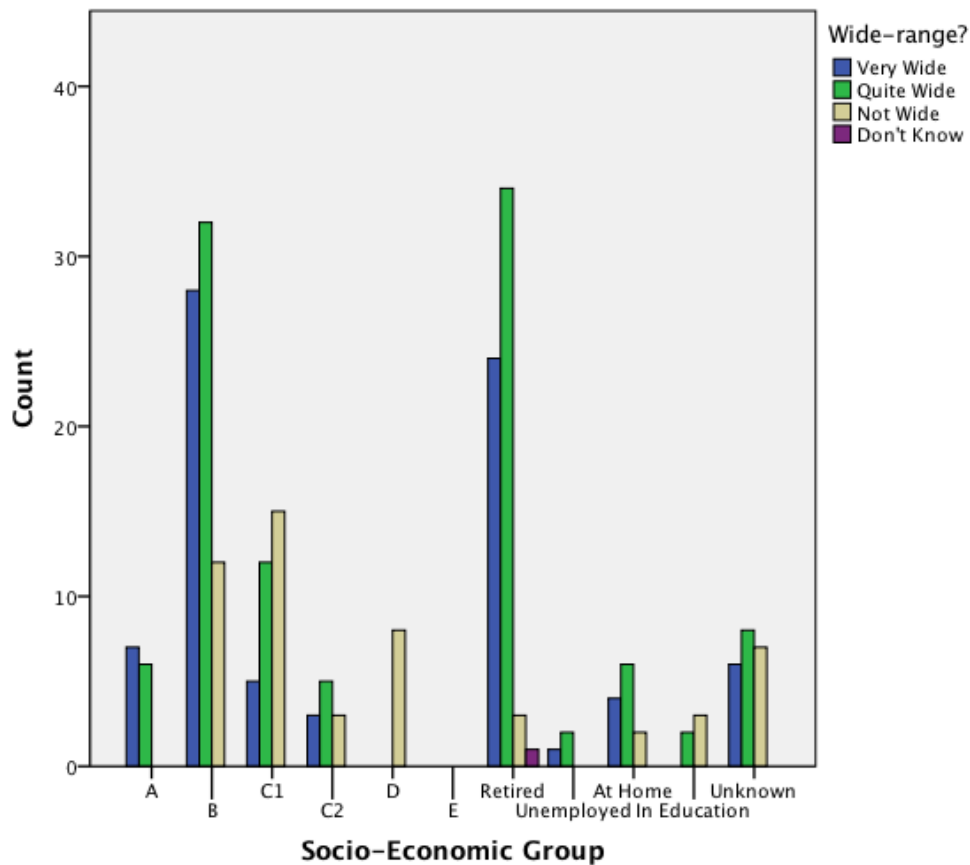
This finding suggests that Ledbury appeals more strongly to people in the over 40, pre-retirement bracket. We hypothesise that this is correlated to higher disposable incomes within 'empty-nester' families who are at their career peak/ maximum earning potential.





### Socio-Economic Group – Wide Range

Among S/E groups A and B (Managerial and Professional), Ledbury High Street is perceived to offer a wider range than among C1, C2 and D (Administrative and Manual).



### Conclusions

Ledbury appeals most strongly to older age ranges, particularly those within the over 40 age group and affluent professionals and managers.

People from lower S/E categories are more dissatisfied with Ledbury's offer and this is reflected in the qualitative answers outlined in what the town lacks ie Budget Shops, Children's Clothes and Everyday Items.

## Investigating what 'changes would most improve Ledbury town centre'

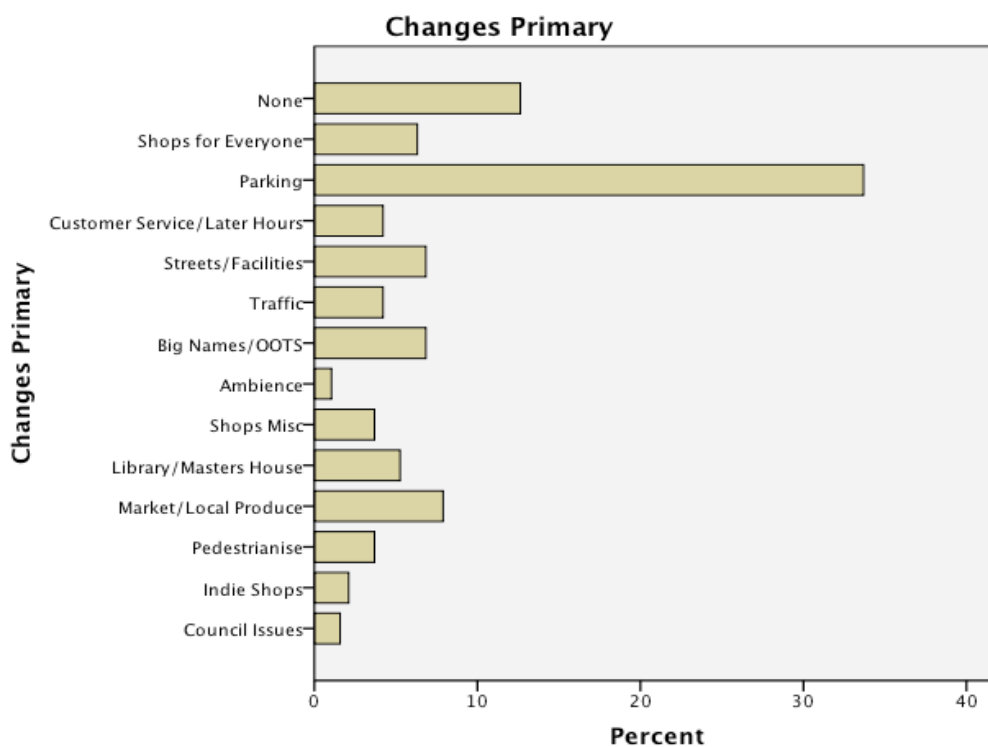
The most frequently state 'Change that would improve Ledbury' was improvements in parking provision.

These ranged from more free parking, a free initial hours parking, more car-park provision.

15% of people felt that no changes were needed: they like Ledbury as it is.

Other frequently (10-15%) stated changes included:

- More 'shops for everyone' (ie less tourist/high-end provision)
- Improved street scene and facilities
- An improved market specializing in local produce
- More Big Name multiples on the High St coupled with an Out of Town Superstore (these were often mentioned together).
- A rapid completion of the Masters House and improved library



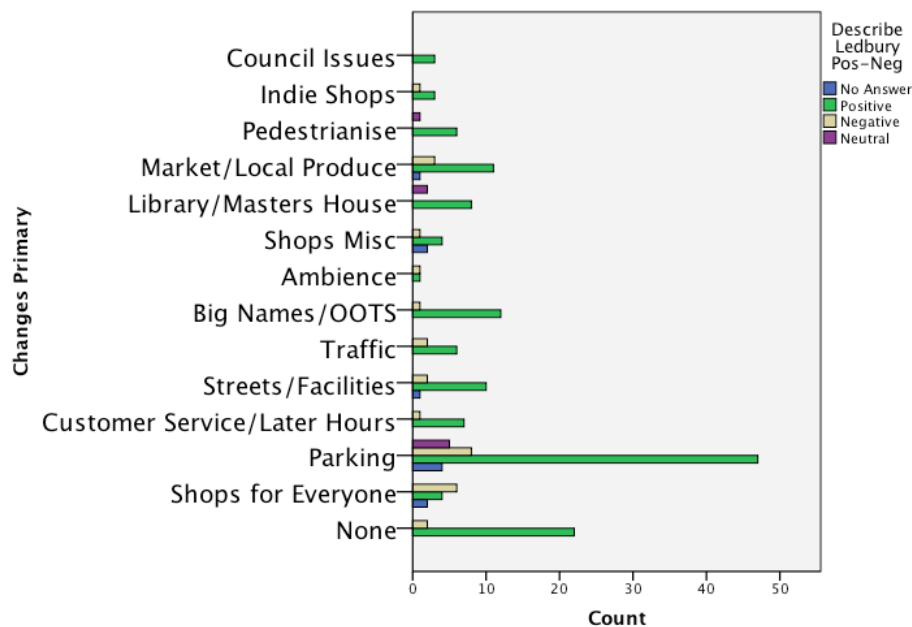
Cross analyzing Changes with people's positive attitudes to Ledbury it is evident that people who want more Shops For Everyone have a more negative view of Ledbury.

More people who mention parking as a Change issue are neutral in the way that they describe Ledbury.

People who see no need for change are relatively more positive.

Unexpectedly, people who favour more Big Name multiples are largely positive about Ledbury.

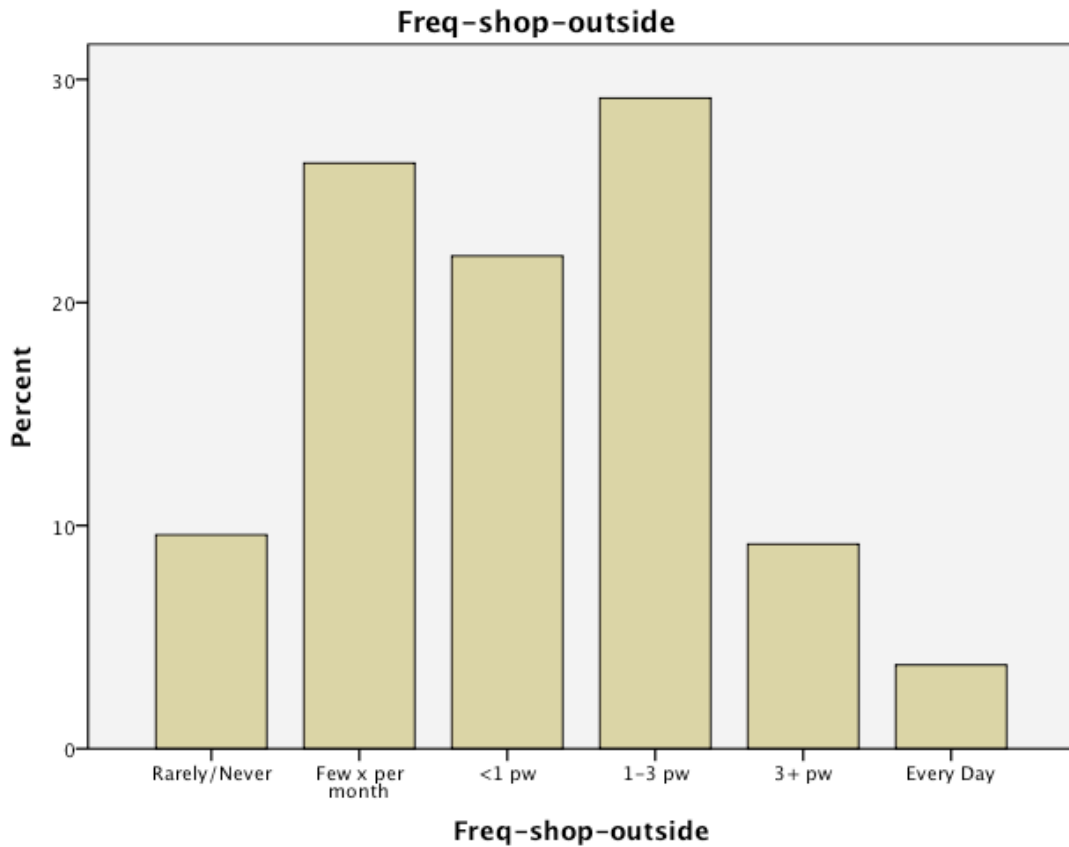
It is concluded that the issue of Changes and Improvements largely cuts across social and economic groups. There is common agreement that Parking issues should be tackled as a priority.



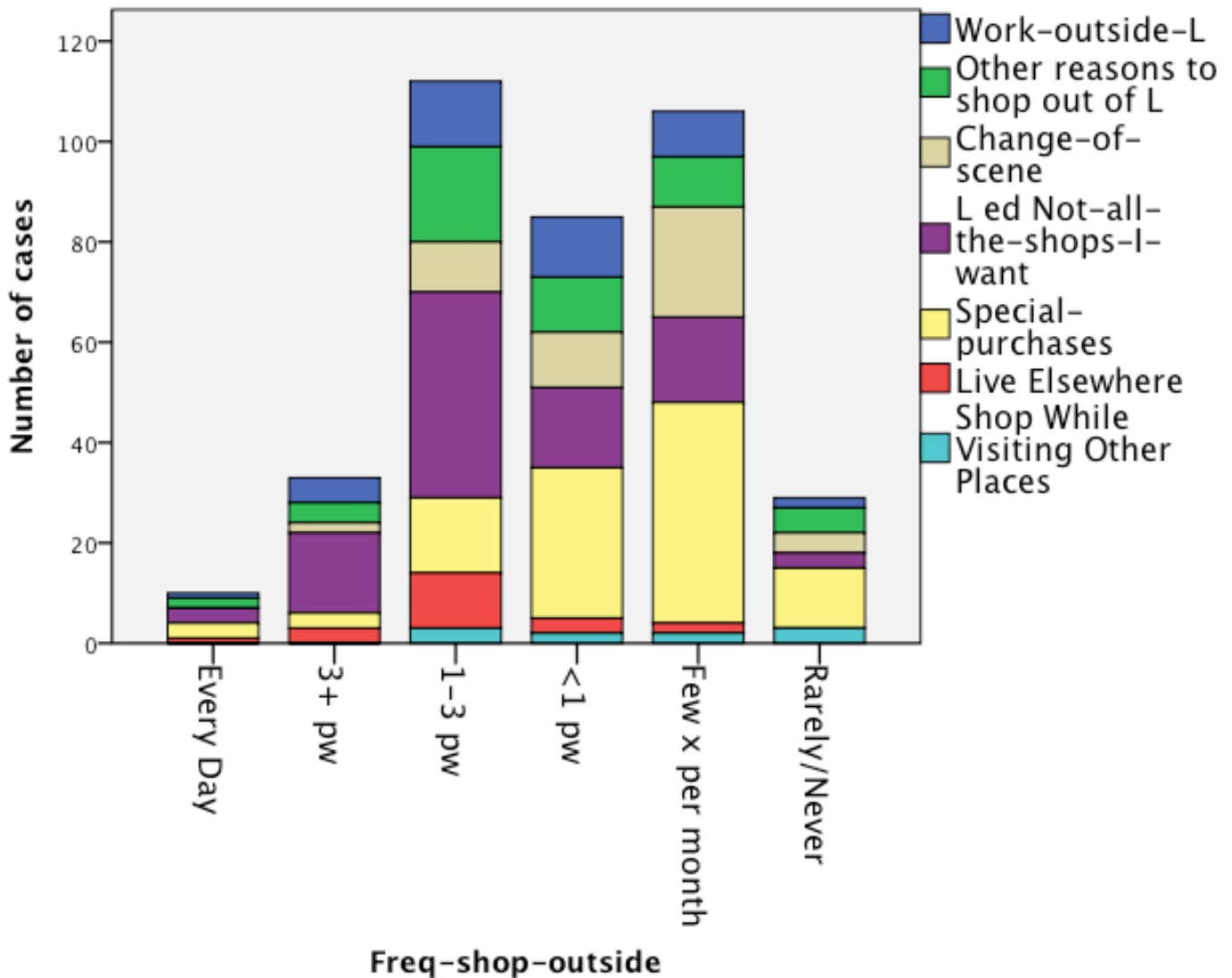
## Shopping Patterns

Respondents were asked to say how many times they shop outside of Ledbury.

This showed that the largest single category consisted of people who shop outside of Ledbury 1-3 times per week. Large numbers of the sample shop outside less than once per week, a few times per month, rarely or never. Less than 15% shop outside more than three times per week.



Respondents were then asked to choose from a multiple response list of reasons why they shop outside of Ledbury. Cross-analysing these responses, interesting patterns emerge.



The chart reveals several factors that lead people to shop outside of Ledbury:

- Among people who shop more than once per week out of Ledbury, a higher proportion of them are dissatisfied with local shops.
- However, in all categories, other reasons for shopping out are mentioned more frequently including significantly 'shopping for special purchases', valuing a change of scene, working outside Ledbury, or a range of other diverse reasons.
- It is concluded that while some 'trade diversion' does occur out of Ledbury due to dissatisfaction with the local retail offer, this should be put in a wider perspective of people who shop out of the town because they naturally enjoy variety, don't expect to get everything that need in Ledbury, and shop while travelling or working out of the town.