Democratic Services Unit
Salisbury District Council
PO Box 2117
Salisbury, Wiltshire SP2 2DF

Officer to contact: Paul Trenell
Direct line: 01722 434250
Email: ptrenell@salisbury.gov.uk
Web: www.salisbury.gov.uk

Report

Report subject : City Centre Management Scrutiny Review

Report to : Planning and Economic Development Overview and Scrutiny Panel

Date : 23rd February 2009

Author : Paul Trenell, Senior Democratic Services Officer

CITY CENTRE MANAGEMENT SCRUTINY REVIEW

1. **Summary:**

This report concludes the Planning and Economic Development Overview and Scrutiny Panel's scrutiny review of City Centre Management and presents the results of the electronic 'Voice & Choice' survey completed as part of the review.

2. **Background:**

2.1. The City Centre Management Scrutiny Review group was commissioned by the council's Planning and Economic Development Overview and Scrutiny Panel. The terms of reference of the review are set out below:

2.1.1. To establish the current remit of the City Centre Management Partnership (CCM) in terms of promoting Salisbury.
2.1.2. To define the most important qualities of Salisbury.
2.1.3. To examine the effectiveness of the City Centre Management Partnership at promoting and preserving Salisbury's distinctive qualities.
2.1.4. To establish a suggested future focus for the City Centre Management Partnership to include the 'Salisbury Vision'.

3. **The City Centre Management Partnership:**

3.1 Salisbury City Centre Management Partnership (hereafter referred to as 'CCM' or 'the partnership') was established in 1998 to bring together the different private and public sector interests in Salisbury. In April 2004 the partnership commenced trading as a Limited Company (this opened the path for CCM to bid for project and event funding).

3.2 The partnership is funded by contributions from its members along with a council revenue grant which id linked to an annually agreed Service Level Agreement. Members include retailers, local media, estate agents, hotels, public houses, the council itself, the Chamber of Commerce, the Federation of Small Businesses and Fisherton Street Trader's Association.

3.3 In addition, the council give CCM a further contribution in return for organising the erection and dismantling of the city's Christmas lights and the switch-on event. This is also linked to an annually agreed Service Level Agreement.

3.4 The central function of CCM is to "enhance the vibrancy and vitality of the city" in order to facilitate economic development in Salisbury. It also strives to ensure that the city remains a safe, clean and beautiful place to live, work, and visit.

3.5 CCM currently works to fulfil this function in a number of ways:

- 3.5.1 A mediation role: by consulting the business community on important issues and liaising with the council to give feedback and influence policy;
- 3.5.2 Providing support and guidance to businesses considering moving to Salisbury in order to attract retailers;
- 3.5.3 Undertaking initiatives such as helping to implement wheel locking trolley systems on Southampton Road to reduce the number of abandoned trolleys, and working with hard to reach groups to integrate them into the city centre and raise road safety awareness;
- 3.5.4 Organising city centre events including the Christmas lights display, the food and drink festival, and St. Georges Day celebrations. The aim of these events is to increase footfall in the city centre and promote a healthy community spirit in Salisbury;
- 3.5.5 Encouraging cooperation between local businesses to improve efficiency;
- 3.5.6 Working in partnership with other local business organisations for the benefit of Salisbury and South Wiltshire. These include the South Wiltshire Economic Partnership, Salisbury Chamber of Commerce and Industry, the Federation of Small Businesses, the Salisbury Tourism Partnership and the Community Safety Partnership.

4. 'Voice and Choice' Survey:

4.1. The Scrutiny Review Group commissioned a Voice and Choice survey to build a picture of people's attitudes towards the city centre and establish a suggested future focus for CCM. A report detailing the survey results is attached at appendix 1.

5. The Business Perspective:

5.1. The Scrutiny Review Group conducted interviews with representatives of the local business community (Ian Hudson - President, Salisbury Chamber of Commerce and Mary Webb - Chairman, Salisbury Federation of Small Businesses) in order to gauge the contribution of CCM to the city's economic vitality and viability. The clear message from these interviews was that CCM is an effective and valued organisation which benefits the city.

5.2. Interviewees highlighted the role that CCM plays in uniting businesses into a business community rather than a disparate group of independent traders. It was felt, however, that CCM could not on occasion lobby as effectively as desired because it is funded in part by the council.

5.3. It was also felt that a lack of resources inhibited CCM's ability to lobby effectively and promote their work among the business community, and thereby increase their membership, their income and their capacity.

6. Conclusions:

6.1. The survey and interviews both suggested that CCM is a valuable organisation which fulfils its remit and should be retained and supported. Perceived problems in the city, such as car parking, traffic access and anti-social behaviour are outside of the partnership's remit.

6.2. The survey revealed a demand for a greater range of shops in the city and this is a key development area. In addition, modern areas of the city were felt to have much room for improvement. Particular focus should go on improving the High Street, Fisherton Street and The Maltings. Other areas of focus are detailed in the attached survey report.

6.3. Given the need to secure funding for the partnership and future initiatives in the city the establishment of a Business Improvement District (BID) as approved by Cabinet at its meeting of 5th November 2008 should be supported.

7. **Options for consideration:**

7.1. The council's options are restricted by the advent of the unitary authority and the transfer of CCM to the City Council. Councillors are therefore invited to make comments which will be passed to CCM and to the forthcoming City Council for consideration.

8. **Consultation Undertaken:**

8.1. The attached survey results detail extensive consultation with local residents.

9. **Recommendations:**

1) That the report be noted;
2) That the survey results be forwarded along with councillors' comments to the City Centre Management Partnership and the forthcoming City Council.

10. **Background Papers**:

Salisbury: Home Town or Clone Town? (2004)

Department for Communities and Local Government, 'The Development and Implementation of Business Improvement Districts' (2007)

Salisbury City Centre Management, Business Plan (01 April 2005 to 31 March 2008)

Salisbury City Centre Management, Strategic Development Plan (01 March 2006)

Salisbury City Centre Management, Salisbury Performance Analysis Report (2003-2005)

Reading Chamber of Commerce, Business Improvement Districts (2004)

www.ukbids.org - Website of the national BIDs advisory service

11. **Implications:**

- **Financial:** None
- **Legal:** None
- **Human Rights:** None
- **Personnel:** None
- **Climate Change:** None
- **Council's Core Values**: Promote a thriving local economy; Communicate, especially listening and responding; Meet local needs; Work together.
- **Wards Affected:** All city wards.

Voice & Choice - Survey Results

Salisbury City Centre

Planning and Economic Development Overview and Scrutiny Panel
February 2009

Contents

Summary

Introduction:
The Council's Planning and Economic Development Overview and Scrutiny Panel commissioned an electronic 'Voice and Choice' survey as part of their scrutiny review of the City Centre Management Partnership (CCM) in order to address a term of reference seeking to identify Salisbury's most important qualities.

The survey was e-mailed to residents across the district. Over 1,000 responses were received, making the data a valuable reflection of public perceptions of the City Centre.

Whilst the review lost impetus due to the onset of Local Government Reorganisation and the subsequent transfer of City Centre Management to Salisbury City Council, it is envisaged that the survey results presented below will be a useful resource for City Centre Management and for the forthcoming City Council.

Main Observations:

- → The major problems and concerns identified by respondents lie outside of the remit of City Centre Management.
- → Historic elements were considered to be the most important and valued aspects of the city.
- → Cleanliness is considered to be important by users of the city centre.
- → The Charter Market & Farmer's Market play a critical role in attracting visitors to the city centre.
- → People feel that there is much room for improvement in the city's more modern areas, notably the High Street, Fisherton Street and The Maltings.
- → Whilst people use and value the Market Square levels of satisfaction with the area are low, affirming the need for the redesign project.
- → Cheaper car parking and a better range of shops are identified as the two things that would make people visit the city centre more often.
- → Online shopping is likely to impact on business in the city centre over the coming years, with retailers of books, holidays and electrical goods most affected. A strategy for responding to the growth in internet shopping should be considered.
- → People are discouraged from visiting the city centre at night by what is viewed as antisocial behaviour.
- → Respondents had little appetite for further cafés and restaurants in the city.

Section 1 - Shopping Habits

1.1 Statistics on shopping habits enable us to build up a picture of how people use the city centre, revealing areas of focus for the future development of the city.

1.2 99.4% of respondents to this survey live within 30 miles of Salisbury. Therefore, the results are indicative of the views of local people who use the city regularly rather than tourists or one-off visitors. These views have been built up over a period of time and should accurately reflect the true picture of how Salisbury's regular users view the city than an opinion formed at first glance by visitors.

Q: "What mode of transport do you use most often to get into Salisbury city centre?"

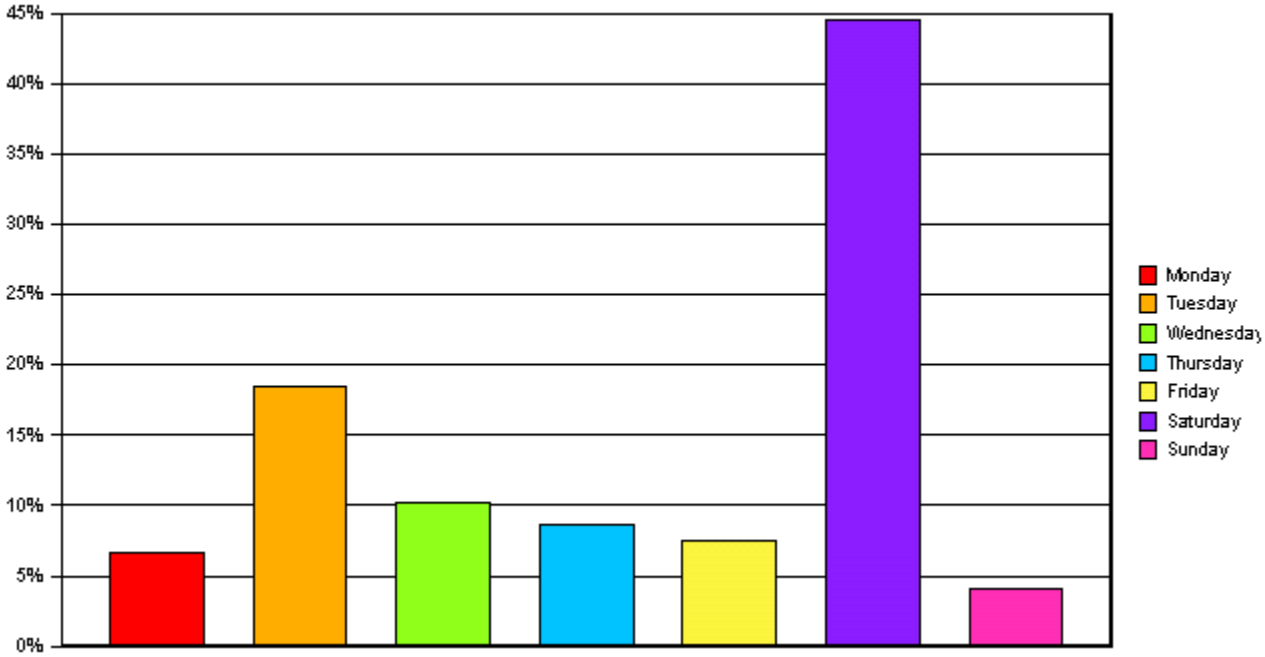
Private Car	Park & Ride	Bus	Walking	Bicycle	Motorbike	Train
84.3%	9.1%	5.0%	0.8%	0.3%	0.3%	0.3%

1.3 Private car is still by far the most used means of accessing the city. It is therefore important that sufficient parking is provided if people are to continue to visit Salisbury.

1.4 Given that over 85% percent of respondents live over 5 miles from Salisbury it is not surprising that walking and cycling are rarely used means of accessing the city. However, it is surprising that just 0.3 % use the train. Encouraging access by train represents a potential development area and another means of keeping cars out of the city. More users accessing the city by train would also provide an opportunity for increased footfall for retailers on Fisherton Street.

1.5 It is encouraging that the park and ride now carries 9.1% of regular users into the city, as this will be reflected in a reduction in car traffic. As demonstrated on page 11, the amount of traffic represents big concern for users of the city centre.

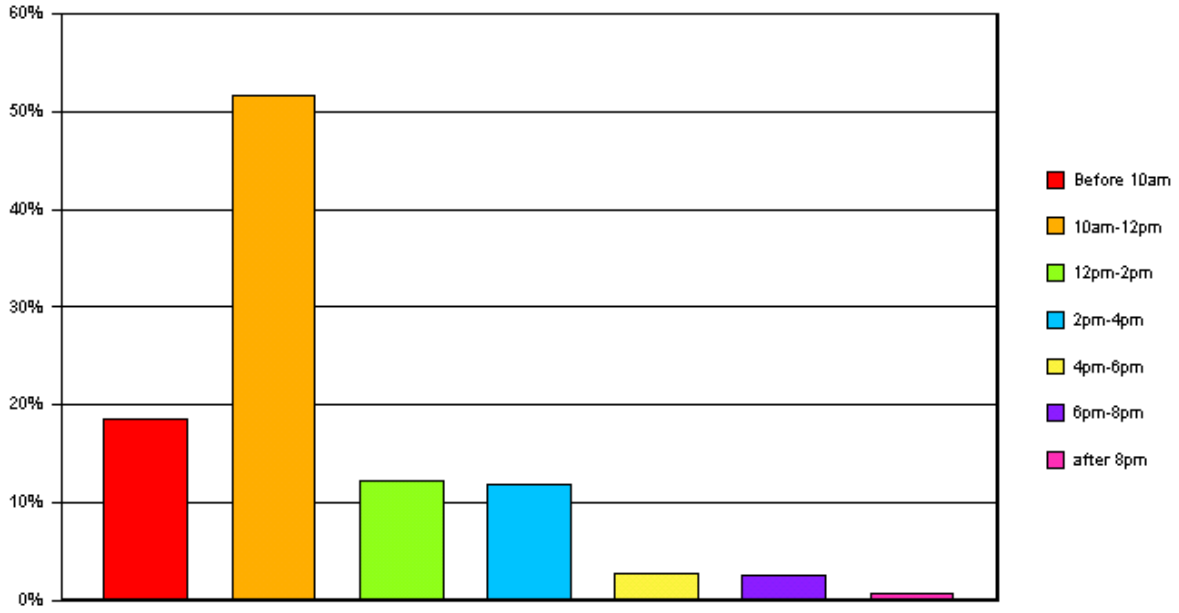
Q: "On which day do you visit the city most often?"



1.6 The vast majority of respondents visited Salisbury on a Saturday, closely followed by a Tuesday. This highlights the importance of the Charter Market in attracting shoppers to

Salisbury. The fact that Wednesday is a more popular shopping day than Monday, Thursday and Friday also suggests that the fortnightly Farmer's Market plays a role in attracting visitors to the city. This highlights the importance of the Market Square in Salisbury's wider economy and the need to ensure that it is fit to host regular markets.

Q: "At what time of day do you visit the city most often?"



1.7 Mid-morning is the most popular time for visitors and the time that shops should expect the greatest amount of custom. This data also highlights the opportunity for the city's restaurants and cafés to cater to the lunchtime market when there is a captive customer market already in the city.

1.8 The figures for visiting the city in the evening are extremely low. Three explanations for this should be considered:

- The age profile of respondents (74% of respondents were aged over 45 whilst only 1% of respondents were age 18-24);
- People's attitudes to the city centre at night (see page 14);
- The absence of late night shopping in the city.

Section 2: Perceptions of the City Centre

2.1 Participants were asked for their views on the city centre. It is hoped this data can be used to inform the city's development.

Q: "How important do you think the following issues are to the vitality of the city centre?"

Analysis % Responses	Total Responses	Very important	Important	Fairly important	Not very important	Not at all important
Total Responses	**11011**	**43%**	**38%**	**15%**	**4%**	**1%**
Transport Access	**1001**	69%	23%	7%	1%	1%
Historic attractions	**1001**	51%	35%	11%	2%	0%
Range of shops	**1001**	44%	45%	9%	2%	-
Cafe culture	**1001**	11%	32%	35%	19%	3%
The Market	**1001**	43%	38%	15%	3%	1%
General atmosphere	**1001**	51%	40%	8%	0%	0%
Green and open space	**1001**	37%	39%	17%	6%	0%
Range of places to eat	**1001**	21%	48%	25%	5%	1%
Scenery	**1001**	32%	45%	17%	5%	1%
Easy to get around	**1001**	41%	45%	11%	2%	0%
Cleanliness	**1001**	69%	27%	4%	0%	-

2.2 The two most important issues in terms of the vitality of the city centre were felt to be cleanliness and transport access. Transport access is outside the remit of City Centre Management. With regard to cleanliness it is noteworthy that CCM employed a City Centre Ranger for a brief period with a remit of improving the cleanliness of the city, but had to discontinue the post due to a lack of funding. With 100% of respondents classifying cleanliness as "important", this should be treated as a priority if Salisbury is to retain and increase trade. The re-employment of a City Centre Ranger could be made a priority for the city centre if the proposed Business Improvement District (BID)[1] is established.

2.3 99% of respondents identified the general atmosphere in the city as "important" or "very important". Whilst this is an ethereal notion, it can be considered to include cleanliness, street decorations, flower displays and the welcome received by people using the city centre. Again these types of initiatives are often funded through BIDs.

2.4 Historic attractions were considered to be "very important" by an overwhelming majority of respondents. By their nature these cannot be improved upon or added to, but can be protected and emphasised. Salisbury is blessed in this area, with a heritage that singles out the city and cannot be replicated elsewhere. Salisbury should emphasise its history and heritage when targeting visitors and traders, marketing itself as a city which offers something different than the average town.

2.5 The range of shops was considered to be "important" or "very important" by 99% of respondents. Salisbury has a wide range of independent shops which distinguish the city and independent traders should continue to be encouraged. However, Salisbury does lack a number of large national retailers. This gap is a factor in displacing trade to competitor locations (see page 11). Attracting a wide range of shops is the main development area identified by this survey that falls squarely within the remit of CCM.

[1] A report on the establishment of a BID in Salisbury went to Cabinet on 5th November 2008. Cabinet supported the idea and approved funding for a feasibility study to be undertaken. For further details please refer to the report which can be accessed at: http://documents.salisbury.gov.uk/council/committees/Cabinet/2008-11-05/R08-2008-11-05.pdf

2.6 A noteworthy response is that just 11% of people considered the city's café culture to be "very important". 19% considered it to be "not very important", a much higher percentage than any other issue. Whilst the introduction of a café culture is generally considered to have been successful, this result suggests that any move to expand this under the redesign of the market place and the Vision should be carefully considered.

Q: "Is there something that you feel makes Salisbury really special?"

2.7 We asked people for their thoughts on what makes Salisbury special. A wide range of answers were received. Frequencies revealing which aspects were mentioned most often along with a small sample of the comments received are below. A full list of respondents' comments is available on request.

Rank	Special aspect of Salisbury	Percentage
1	Historic elements	51%
2	Character/ambience	11%
3	No/negative response	9%
4	Size/compact layout	8%
5	Architecture	7%
6	Natural elements and open spaces	6%
7	Range of independent shops	3%
8	Accessibility	2%
9	Culture	2%
10	Safety	1%

2.8 Below is a sample of responses which gives a flavour of attitudes to the city centre:

Historic Elements:

- "Has managed to keep its historic feel and not catered to the skyscraper, modern tower block culture."
- "The cathedral and historical houses…these are reasons why people visit Salisbury"

Character

- "Village atmosphere in a city"
- "The old world charm"

Negative responses:

- "It used to be variety of shops but these seem to close and chains are taking over"
- "No, it's simply my nearest medium-sized city"

Size/Compact Layout:

One word repeatedly cited as a positive for city-users was the compact nature of the city and the fact that all areas of the city can be easily accessed on foot. For example:

- "It is a very compact city, so good for pedestrian activity"
- "Compact city centre with its mixture of history/culture and modern life"
- "Compact, historic, easy to get around"

Architecture

- "The old buildings and narrow streets which make the city look quaint and give character and an identity unlike modern built cities**"**
- "The skyline of the city is the most iconic part of Salisbury. Few cities have such low rise development with a majestic cathedral as a focal point wherever you are."

Q: "How highly do you value the following areas?"

Analysis % Responses	All Responses	Very Highly	Highly	Not very highly	Not at all	Don't know the area
All Responses	**12012**	**18.7%**	**37.6%**	**29.0%**	**8.4%**	**6.2%**
Cathedral Close	1001	68.5%	25.3%	4.6%	1.2%	0.4%
High Street	1001	15.3%	53.9%	29.6%	0.9%	0.3%
Market Square	1001	40.9%	47.5%	11.1%	0.6%	-
Old George Mall	1001	7.0%	37.9%	45.1%	9.8%	0.3%
Fisherton Street	1001	8.1%	36.7%	44.9%	9.7%	0.7%
Butcher Row	1001	18.0%	55.8%	20.7%	1.6%	3.9%
The Maltings	1001	5.4%	30.9%	49.1%	12.4%	2.3%
Queen Elizabeth Gardens	1001	25.5%	48.4%	15.5%	2.6%	8.1%
Wyndham Park (Council House Grounds)	1001	9.9%	27.0%	30.9%	14.0%	18.3%
The Greencroft	1001	7.1%	24.8%	32.6%	8.2%	27.4%
The Arts Centre & surrounding grounds	1001	14.0%	43.2%	25.7%	6.8%	10.4%
Churchfields Industrial Estate	1001	5.3%	20.5%	38.7%	33.1%	2.5%

2.9 The Cathedral Close is the most highly valued area of the city, closely followed by the Market Square. In general, historical areas of the city were highly prized by respondents with 73% of people valuing Butcher Row "highly" or "very highly". This demonstrates the importance of history in attracting people to the city and should reinforce the need to retain the city's character and heritage rather than moving towards a modern city centre that is indistinguishable from many others. By retaining and emphasising the city's heritage Salisbury can offer visitors an experience that many local rivals cannot.

2.10 The modern areas of the city were not as highly prized. Only 15% of people valued the High Street "very highly". This number should be increased given that it is one of the principal shopping streets and the main route between the cathedral and the city centre. Only 5% of people valued the maltings highly. Given the potential offered by the setting of the maltings this figure reflects badly on the shops in that area and should be improved.

2.11 There is also room for improvement in Fisherton Street, where more respondents did not value the street at all than valued it highly. This is the street that offers train visitors their first glimpse of the city, and at in its present form it does not create a good first impression. This should be an area of focus for CCM.

2.12 Green spaces in the city were relatively highly valued, and it is noteworthy that the Arts Centre grounds and Queen Elizabeth Gardens were more popular than the Greencroft and Wyndham Park. The development of the Council House grounds into a valued public open space following the redevelopment of Bourne Hill is an ambition that should be pursued.

Q: "How satisfied are you with the following areas?"

Analysis % Responses	All Responses	Very satisfied	Satisfied	Neither	Dissatisfied	Very dissatisfied	Don't know the area
All Responses	**12000**	**10.6%**	**37.3%**	**29.4%**	**11.5%**	**4.2%**	**7.0%**
Cathedral Close	**1000**	58.4%	34.9%	5.5%	0.5%	-	0.7%
High Street	**1000**	11.3%	52.7%	27.1%	8.3%	0.4%	0.2%
Market Square	**1000**	10.8%	52.9%	18.6%	15.1%	2.6%	-
Old George Mall	**1000**	4.3%	38.4%	36.2%	17.0%	3.3%	0.8%
Fisherton Street	**1000**	2.4%	32.2%	37.0%	23.8%	3.9%	0.7%
Butcher Row	**1000**	8.2%	56.2%	27.3%	3.6%	0.5%	4.2%
The Maltings	**1000**	2.5%	32.8%	38.5%	17.9%	5.5%	2.8%
Queen Elizabeth Gardens	**1000**	17.3%	47.7%	21.7%	3.2%	0.3%	9.8%
Wyndham Park (Council House Grounds)	**1000**	2.7%	20.8%	40.6%	9.2%	4.2%	22.5%
The Greencroft	**1000**	2.3%	22.6%	38.3%	6.2%	1.4%	29.2%
The Arts Centre and surrounding grounds	**1000**	5.3%	41.5%	33.6%	7.9%	0.6%	11.1%
Churchfields Industrial Estate	**1000**	1.2%	15.1%	28.4%	25.7%	27.1%	2.5%

2.13 Perhaps the most striking result here is the Market Square. Whilst 40% of people valued the Market Square highly, only 11% of people were satisfied with the area. This suggests that significant improvements to the Market Square could be made and validates the current redesign project.

2.14 Only 1% of respondents were satisfied with Churchfields, whilst 53% were dissatisfied. This further highlights the need for the movement of the site to be achieved through the Salisbury Vision.

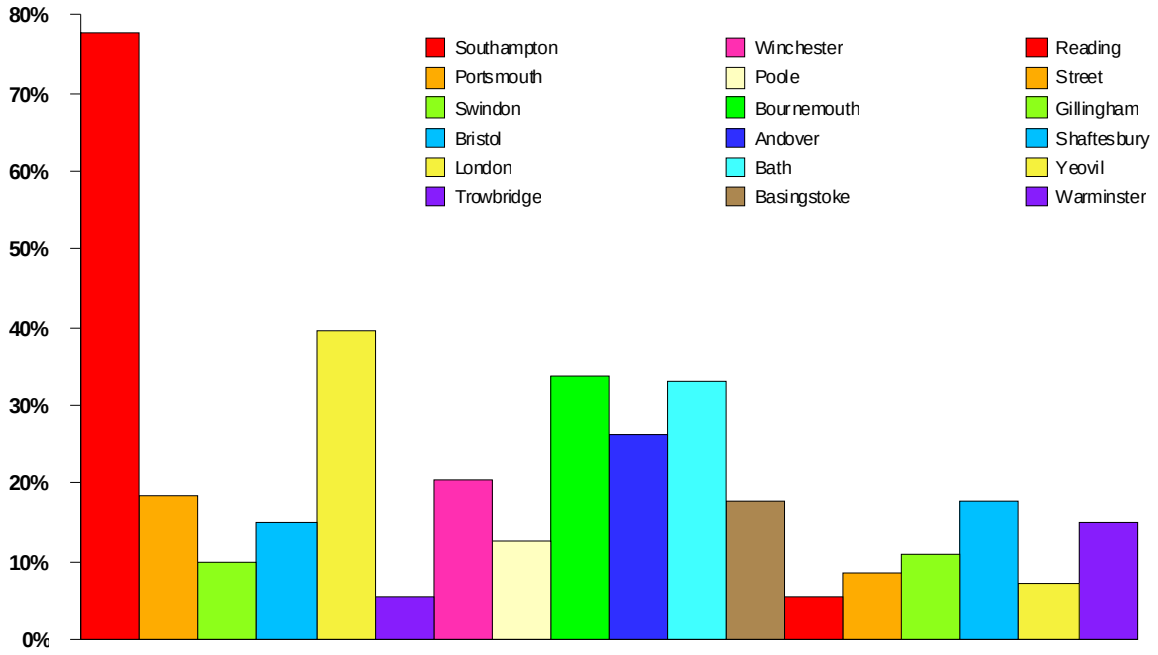
2.15 Besides Churchfields the areas that most respondents were dissatisfied with are ranked below. These represent potential development areas for the city:

- Fisherton Street: 27.7%
- The Maltings: 23.4%
- Old George Mall: 20.3%
- Market Square: 17.7%
- Wyndham Park 13.4%

Q: "Is Salisbury your primary destination for non-food shopping?"

2.16 The survey shows that Salisbury is the primary destination for non-food shopping for 70% of people living within a 30 mile radius. Whilst this is a clear majority it still means that 30% of people choose to go somewhere instead of Salisbury.

Q: Which, if any, of the following locations have you visited for shopping purposes during the past 6 months?

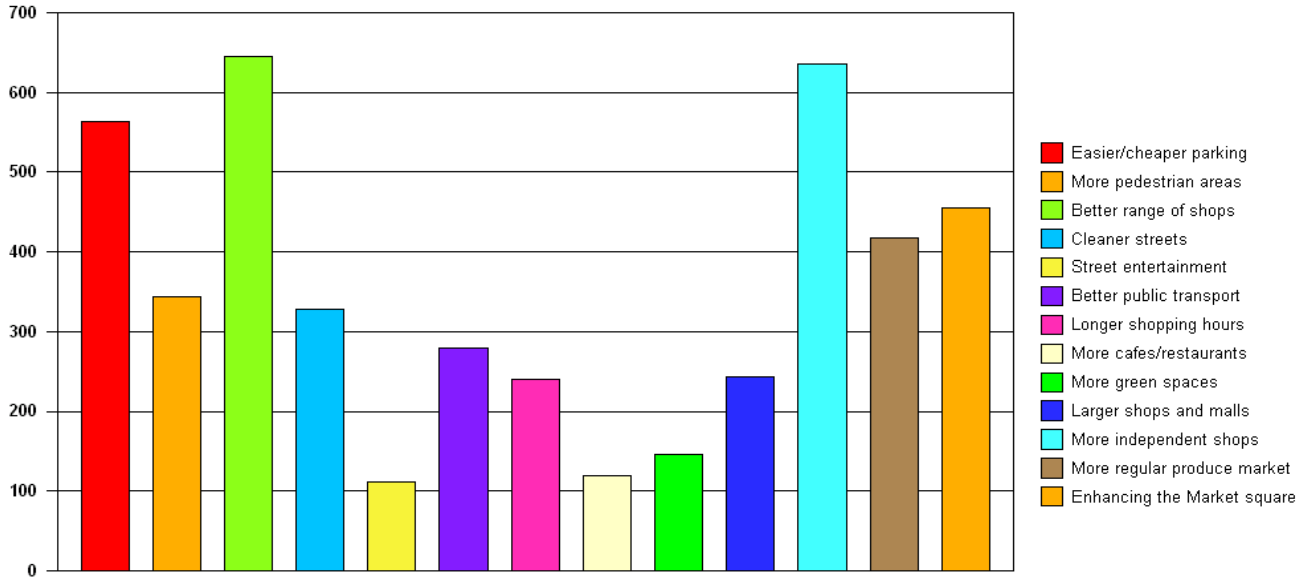


2.17 The results above identify the other towns and cities that people living in and around Salisbury have visited for shopping trips. The most popular alternative destinations are ranked below:

- Southampton
- London
- Bournemouth
- Bath
- Andover
- Winchester

2.18 London offers a unique experience as the nation's capital city, and should not be seen as a direct competitor to Salisbury. However, Southampton, Bath, Bournemouth, Andover and Winchester are places with which Salisbury can compete for trade.

Q "What would encourage you to do more shopping in Salisbury?"



2.19 Cheaper parking, a better range of shops and more independent shops were the three main factors that would encourage people to shop more in Salisbury. Whilst parking revenue will be an important source of funding for both Wiltshire Council and the new City Council it will be necessary to balance the need for revenue generation with the need to attract shoppers to the city in order to stimulate the economy. This will be especially important during the recession and in light of the greater availability of online shopping opportunities (see section 3).

2.20 The high scores for 'better range of shops' and 'more independent shops' reveal a tension in the development and character of the city, the desire for a better range of shops could stem from the lack of a selection of national retailers in Salisbury (i.e. H&M, Primark or another department store). However, were these retailers to be attracted to the city it would be likely to impact detrimentally on the independent retailers that many respondents value. Nevertheless, drawing trade into Salisbury from areas like Southampton appears dependent on offering the consumer greater choice.

2.21 The desire for more independent shops belies the fact that Salisbury already hosts a large number of independent retailers, and offers more than local competitor destinations in this area. However, it also provides a clear signal that independent shops are valued by city centre users and should form a key part of the city's development in an era when many of Britain's towns look all too similar.

2.22 There appears to be little appetite for further cafés and restaurants, indicating that the city may have reached the optimum level of development as far as this area is concerned.

2.23 It is noteworthy that the fourth most popular response was the enhancement of the Market Square. Despite media coverage questioning the need for the project, this suggests that it could produce a clear economic benefit through attracting more visitors to the city centre.

Q: "Is there anything that would encourage you to visit Salisbury more often?"

2.24 We asked people what would make them use Salisbury city centre more frequently. This differs from the question above in that people were not restricted to a number of choices, but given the opportunity to make any comments they wished. This yielded slightly different results, though the main themes were the same. Frequencies and some examples of the comments received are below. A full list of people's comments is available on request.

Rank	Reason to visit more regularly	Percentage Of Respondents
1	Better/easier/cheaper car parking	34%
2	Easier access to the city/less congestion	16%
3	Better range of shops	12%
4	Better public transport (bus, trains and Park & Ride)	6%
5	More independent shops	5%
6	Pedestrianisation of the city centre	4%
7	Introduction of a covered mall or shopping area	4%
8	More cafés & food shops	2%
9	More events in the Market Square	2%
10	Others	15%

2.25 Below is a sample of responses which gives a flavour of people's attitudes.

Better/easier/cheaper car parking:

Better, cheaper or easier car parking was by far the most frequently stated response.

- "Cheaper parking, Andover is now my preferred shopping area as Salisbury is too expensive."
- "Short term free on street parking for the quick but necessary visit to a bank, shop or chemist"
- "Cheaper parking. Somerset parking is 2 hours for £1 so I shop in Yeovil more."

Easier access to the city/less congestion:

Many respondents said that difficulties in getting into the city centre quickly put them off visiting Salisbury. A frequently raised point was the need for a bypass to divert traffic away from the city centre.

- "The traffic is always busy, whatever time of the day."
- "More parking and traffic free centre. A bypass road would also help as at least 50% of traffic going into Salisbury does not want to stop there but has to go through to get to their destination."

Better range of shops:

Many respondents called for a better range of shops in Salisbury, and in particular people wished to see another department store to provide competition and consumer choice.

- "Better young ladies clothes shops so I didn't have to go to Southampton or Bath all the time."
- "Better choice of shops. There are far too many opticians, mobile phone shops and not enough good quality stores - therefore I have to go to Southampton if I want quality shopping."
- "At least one more quality department store"

Better public transport (bus, trains and Park & Ride):

Given concerns about accessing the city by car and car parking, a number of respondents said they would use the city more if better public transport was provided. Evening bus services to the outlying village were identified as a potential draw for evening visitors to the city:

- "More frequent train services to/from the area west of Salisbury (Tisbury/Gillingham)."
- "More frequent and later running bus service"
- "Evening bus service from Alderbury and returning after evening performances"

More independent shops:

Salisbury is well served by a good range of small independent shops; however a number of respondents felt they would like to see more. This supports the idea that Salisbury should develop its own identity, distinct from competitor towns and cities, in order to attract custom.

- "More independent/small (non-chain) shops"
- "More varied independent shops"

Section 3: The Impact of Online Shopping

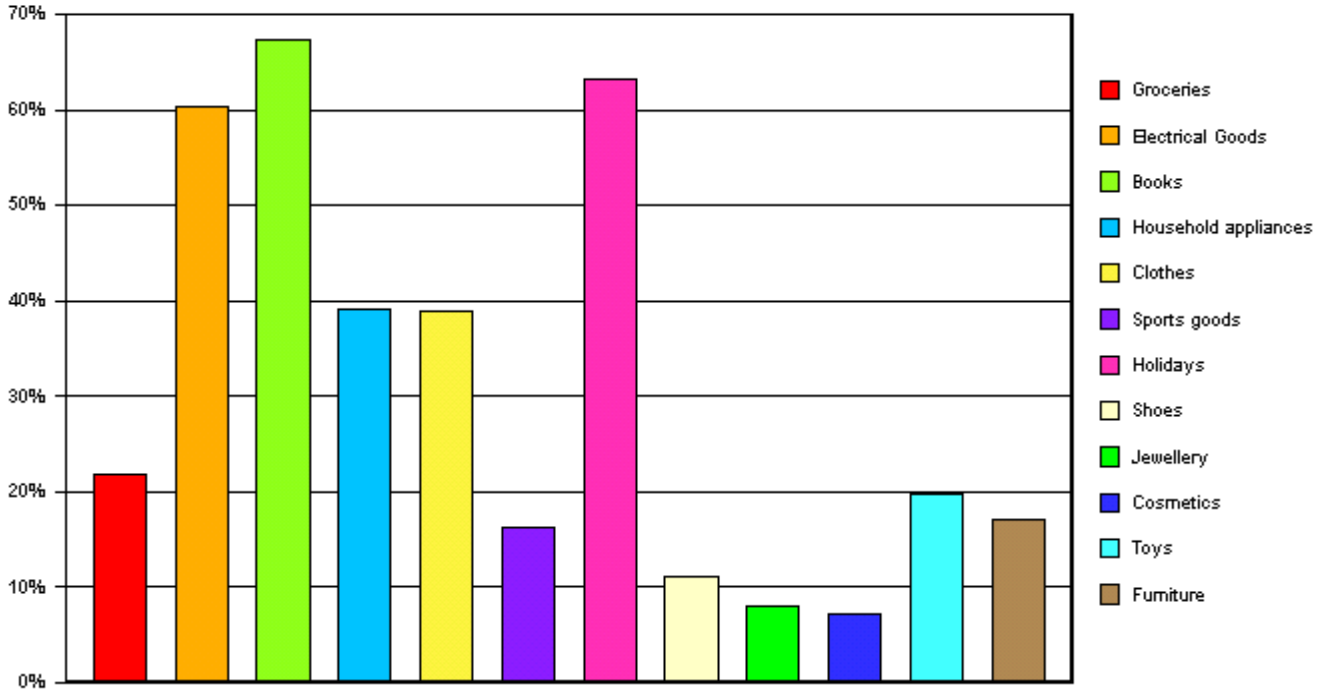
3.1 Online shopping could have major impact on the make up of town and city centres in the coming years, so we asked for a little more information about people's electronic shopping habits.

Q: "Roughly what percentage of your non-food shopping do you do on the internet?"

	None	A little (less than 20%)	Some (20 – 40%)	A fair amount (40- 60%)	A lot (60 – 80%)	Nearly all (over 80%)
Percentage	14%	45%	23%	13%	4%	1%
Actual respondents	140	453	231	128	39	10

3.2 At present only 18% of respondents claimed to do over 40% of their shopping over the internet. However this proportion is likely grow as younger and more internet-savvy generations grow into tomorrow's consumers and retailers expand their internet operations to make online purchasing easier and more attractive.

Q: "Internet shopping is likely to have an impact on the vitality of the city centre, what items do you buy online?"



3.3 The retailers most likely to be affected are sellers of books, holidays and electrical goods. Notably, Waterstone's has already reduced its operations in the city to a single store. It can be anticipated that travel agents and electrical goods retailers may also close. Contingencies and alternatives should be considered.

3.4 At present 39% of respondents claim to do clothes shopping online. Whilst this number could also grow, there are advantages to clothes shopping in store – being able to see, feel & try garments – that are less applicable in the book, electrical goods and wholesale sectors.

3.5 Thought should be given to the impact of online clothes shopping in Salisbury. An obvious conclusion is that more people shopping online will reduce footfall in the city. However, a principal reason that trade is displaced from Salisbury is that it does not offer some of the major clothes retailers, and people travel elsewhere to use these stores (principally,

Southampton). If people can access the products of major clothes retailers online, it might reduce the incentive for them to travel to outlets in other towns and cities, leaving them to do the remainder of their shopping in the city. This is an area that could be further investigated to inform a strategy for the city in response to the rise of online shopping.

Section 4: The Night-Time Economy

4.1 In order to build a wider picture of use of the city in the evenings we asked about people's evening and night time activities. 70% of respondents visit Salisbury at night time.

Q: How often do your visits to the city centre at night include the following?

Analysis % Respondents	Total respondents	Daily	Weekly	Monthly	A few times each year	Never
Total respondents	**4260**	**0.6%**	**5.1%**	**16.0%**	**48.7%**	**29.6%**
Pubs & clubs	**710**	0.4%	12.5%	15.2%	40.6%	31.3%
Cinema	**710**	-	0.8%	17.9%	65.6%	15.6%
Dining out	**710**	-	6.1%	33.7%	55.5%	4.8%
Gym/Health club	**710**	3.1%	8.5%	1.5%	3.8%	83.1%
Arts/theatre	**710**	0.3%	2.1%	18.9%	63.4%	15.4%
Concerts	**710**	-	0.7%	8.9%	63.1%	27.3%

4.2 Pubs and clubs and gym/health clubs are the night time activities that attract people to visit the city centre on a regular basis. These activities are repeated frequently, and therefore keep people returning to the city regularly.

4.3 Cinema and theatre goers were more likely to visit the city in the evening on a monthly or less regular basis, motivated by a particular film or show which appeals to them. This suggests that a cinema showing a wider range of films would attract more people to the city centre at night on a more regular basis.

4.4 When people were asked **"Is there anything that attracts you to visit the city centre at night?"** many people used the opportunity to express what deters them from using the city at night. Whereas opinions on the city in the day time are mainly positive, with people proud to live in and use the city, opinions on the city at night are markedly different:

- "I find going into Salisbury at night a frightening experience - totally unpleasant due to yobs."
- "Antisocial behaviour discourages me."
- "Can be pretty grotty."
- "I am worried by the increase in loutish behaviour, which may eventually put me off."
- "I would never take children into town on a Friday or Saturday night."
- "I do not feel comfortable walking in the city at night."
- "The city centre varies from lively to dangerous at night."

4.5 Whilst anti-social behaviour is a national problem these comments reveal a deep strength of feeling that merits attention. However, the age profile of respondents must again be borne in mind (74% of respondents were aged over 45 whilst only 1% of respondents were aged 18-24). The city does not cater to a single demographic, and it could be argued that having distinct day time and night time economies, one based on retail and one based on entertainment and socialising, is an appropriate way of catering to all tastes and maintaining the city's vitality & viability.