MEDWAY HIGH STREET
SHOPPERS SURVEY
RESULTS

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Executive Summary

In the current retail climate where out of town shopping centres and on-line retail have modernised the way we shop there is a continued interest and concern for the future of our High
Streets. Kent Business School has been conducting research into this area and approached Medway Council to work together to improve the shopping experience in the Medway Towns.

The objective of the research was to evaluate the shopping habits and perceptions of the local residents in Medway in order to identify what changes need to be made to improve the shopping environment and their shopping experience and thus encourage them to shop more locally, more often. This report contains the summary of the results from the Medway Shopper Survey and individual reports were also prepared by Masters Students at KBS focusing on each of the Town centres: Chatham, Rochester, Gillingham, Strood and Rainham. Recommendations have been made for the stakeholders to consider.

The shopper’s survey was completed by 778 residents across the 5 Towns. The sample of respondents was a good representation of the residents in Medway in terms of gender, age, employment however a low number of disabled residents responded which needs to be taken into account.

The Medway towns are within only 6 miles of each other and therefore there is a competitive nature to the Town Centres and how they co-exist. However there continues to be some distinct features in each of the town centres in terms of the shopping offer and the shopping environment. The most visited town for shopping in Medway was Chatham with Hempstead Valley offering the highest competition amongst the large shopping centres (ahead of Bluewater). The residents agreed across the towns that the most important features that determine where they are to shop are: customer service, wide range of shops, no fear of crime, general appearance and accessibility to the town centre. However when asked to ‘rate’ their towns from awful to excellent the average consensus was 2 out of 4 overall which was ‘quite good’ but 2.4 out of 4 for the most important features which was ‘good’.

Not surprisingly, the major improvement that 46% of Medway residents suggested would encourage them to shop more locally more often was a wider range of shops followed by 14%
who wanted to see an improvement in appearance/cleanliness, 8% free parking and 5% a safer environment.

**Background Information**

The shopper’s survey was launched in the local newspaper, Kent Messenger, on 28th February and residents in Medway were encouraged to complete the survey on-line via a link to the internet. KBS Masters students visited and surveyed shoppers in the 5 locations and a local Marketing company was also hired over the Easter holidays to survey residents in the high streets and other town centre locations i.e. Railway Station, Library and Contact points. Many local retailers also supported the collection of data by handing out surveys in their shops. The survey closed on Tuesday 2nd April with 778 respondents of which 228 were online surveys. As an incentive, there was a prize draw of £100 offered by KBS.

**Sample Composition of Residents**

The highest numbers of the respondents lived in Chatham 23%, 19% in Gillingham, 14% in Rochester, 12% in Strood and 11% in Rainham. However 21% of respondents failed to declare which was their local town centre.
The sample of respondents was made of both male (34%) and female (66%). Although not representative of the population this difference in male/female respondents is quite normal for this type of survey. There was a fair representation of age groups (see appendix 1). Disabled respondents were 6.4% of the sample; which is not representative of the population where 9% are registered disabled.

The majority of the respondents were in employment, Full-time 40% and Part-time 21%, whereas unemployed were 7% and 18% of the sample were retired. Another diversely active part of the Medway population are students who represent 7% of respondents, stay-at-home parents 6% and carers 1%.
Research Findings and Analysis

Shopping Frequencies

Chatham was the most popular shopping destination with 84% of respondents shopping there at least once a month, followed by Hempstead Valley with 60% and Rochester with 59%. Rainham was the least popular destination with 42% of respondents shopping there each month and the majority of these were Rainham residents.

35% of respondents visited their local town over 10 times a month and also visited Chatham and one or more of the shopping centres 1 or 2 times a month. These higher frequency shoppers were mainly retired, full time carers or unemployed as you would expect due to less time pressures from work commitments.

Number of respondents who had not visited the Town/Centre in the last month

Over half of the 778 respondents had not visited Rainham and Strood in previous month and it was surprising to see that so many residents also avoided Maidstone and Bluewater.
Hempstead Valley was described as being the most popular shopping centre due to the ease of access, free parking and choice of food and clothing shops. This graph shows the potential to encourage Medway shoppers to shop in local towns more frequently but they will only do this if they have a compelling reason to do so such as a special event, more frequent markets or enhanced choice of shops/restaurants.

**Online shopping Trends**

From the survey, 38% of respondents never shopped on-line and only 8% did all of their shopping online. 40% of shoppers said they bought more than half of their purchase of entertainment products online. Other popular on line purchases were gifts where 18% of shoppers spent more money online but only 13% spent more on clothing and 10% on food shopping online. Therefore there is some competition from online retailing but this is not a major threat particularly to food and clothing shops. Entertainment (books and music) continues to be a category where independent shops struggle to compete against the dominance of Amazon and i-tunes.
Shopping Attitudes & Perceptions

The residents were asked to rate how important 17 shopping criteria were, to determine where they shop. They rated these from very important (4) to not important (1). They were then asked to rate their local town centre on the same criteria from: excellent (4), very good (3), good (2) or awful (1). The idea was to determine what the ‘gap’ was comparing the two and taking action to ensure the most important criteria to the customers meets or exceeds their expectations.

They agreed across the towns that the most important features that determine where they are to shop are: customer service, wide range of shops, no fear of crime, general appearance and accessibility to the town centre. When asked to ‘rate’ their towns from awful to excellent the average consensus was 2 out of 4 which was ‘quite good’ but 2.4 out of 4 for the most important features which was ‘good’. Customer Service, easy access and ample car parking were considered ‘good’ which is often an issue for larger town centres or cities and therefore a key selling point for Medway.
Overall, the respondents were less influenced by good bus service, leisure activities and outdoor markets and the towns meet the expectations. However the results of the analysis of this data for each town did highlight different attitudes from the residents. These can be viewed in the individual town reports in appendix 2-6.

*Improvements to encourage the residents to shop more locally more often*

The most important question in the shopper survey was to ask the respondents to determine one change that would make them shop more frequently in their local town centre. Across the five towns the top five responses were 46% wanted a wider range of shops, 14% an improvement to the general appearance (specifically cleanliness), 8% free parking and 5% wanted to feel more safe when shopping in their high street (there were lots of comments about unsociable behaviour).
Across each of the towns these results did vary and the top 5 challenges for each of the towns are discussed in the individual reports in appendix 2-6. Recommendations are also suggested to encourage more residents to shop more locally more often.

In summary the top improvement across all of the high streets was a **wider range of shops**. Following that the areas for change were as follows in order of response rate:

**Chatham**: The general appearance particularly cleanliness and the fear of crime and unsociable behaviour had the next highest response.

**Rochester**: A provision for food shopping (an M&S or Waitrose in particular!), more markets, free/cheaper parking and pedestrianisation were on the list. However 12% of respondents also felt that no changes were needed – this was the only town centre were this response was given.

**Gillingham**: General appearance, fewer betting and charity shops and more markets were suggested.

**Rainham**: Free parking and the general appearance were suggested.

**Strood**: Better toilets, free/cheaper parking and general appearance were again suggested.
In summary

Although vying for attention in a 6 mile stretch of Medway the five town centres have unique dynamic and differing challenges. They also have loyal local residents who shop at least once a week and often many more times. Inevitably these customers also shop online and in the larger local shopping centres particularly Chatham and Hempstead Valley where more choice of products are on offer. This is encouraging for Chatham retailers and a further opportunity for them make improvements to the ambience of the high street to encourage more shoppers to stay longer and therefore spend more money.

Rochester is unique due to its tourist appeal and high proportion of independent retailers. Many residents appreciate the charm this affords the high street and would change nothing. Other residents would like to shop in Rochester for their food shopping and wanted to see a small M&S or Waitrose in the town centre.

With the smaller towns of Gillingham, Strood and Rainham were it is unrealistic that larger chain stores will invest the issue of a better choice of shops is more challenging. As seen in Rochester this can be resolved by encouraging more independent retailers or market stalls to meet these needs. The general appearance also needs attention to perhaps move from a functional environment to a more sociable environment where the town centres are not purely dependent on retailing to increase footfall and the desire to participate in the community. This could be local events, markets or community activities to revert back to the idea of a meeting place which was the spirit of these towns originally.

Engaging with the local retailers and particularly the independent retailers is a critical part of encouraging and sustaining the local economy on the High street. The next stage of this project is to offer Retail ‘Workshops’ to this community. This seeks to share knowledge and to encourage more growth and prosperity by listening and exceeding the needs of the local residents as determined by this study.
Appendix 1:

**DEMOGRAPHICS**

**COMMENTS:**

Nearly twice as many females responded to the survey, compared with males. This is typical of this type of survey on shopping habits.

75% of our respondents were 35 years old or over.
Chatham
One change that you would like to see as a %

Rochester
One change that you would like to see as a %
Gillingham
One change that you would like to see as a %

Rainham
One change that you would like to see as a %
Strood
One change that you would like to see as a %

For more information about our work with Town Centre teams and Independent Retailers, please contact:

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