Newhan Markets Strategy & Policy Review

Summary of Research Findings

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Introduction to project work

In the course of completing the study The Retail Group has completed an extensive programme of engagement, along with a variety of bespoke research workstreams including both primary and secondary research, engagement with traders, local businesses, market management team, community groups, council officers and wider local stakeholders. We have also completed an extensive review of existing data, policies and reports.

This is a summary of the various research / engagement areas and a selection of the key findings from each.

Consumer Research

A new and focused survey of 425 consumers was commissioned using Fieldworks Assistance, an independent and MRS accredited market research agency to complete the field interviews.

Half of the interview sample was completed at Queen's Market / Green Street and half at Stratford Indoor / Outdoor markets. Furthermore, the sample included circa 75% of respondents at each location were regular shoppers / users of the markets and 25% were irregular / nonusers.

The survey probed reason for visiting, frequency of visit, mode of travel, likes about the markets, improvements wanted to experience as well as products sold.

Both markets have diverse and multi-ethnic customer base with Queen's Market having more Asian consumers, and Stratford more ‘White British’ / Irish, whilst both markets also attract significant minorities of Black Caribbean & African shoppers.

Most consumers travel by foot or bus and are visiting mainly to shop. This presents a big opportunity to build destination / anchor appeal through adding additional reasons to visit.

Consumer Survey

Sample Profile

In total, 427 consumers were actually stopped and their responses included in the survey.

Of these, 63% were female and 37% male.

73% classed themselves as 'regular visitors' and 27% as 'irregular / non users'.

The age split was 18-25 (12%), 26-44 (37%), 45-64 (32%) and 65+ (19%).

72% were surveyed on weekdays, and 28% on weekends.

219 were surveyed at Queens Market and / or Green Street. 138 at Stratford Indoor and 70 at Stratford Outdoor Market.

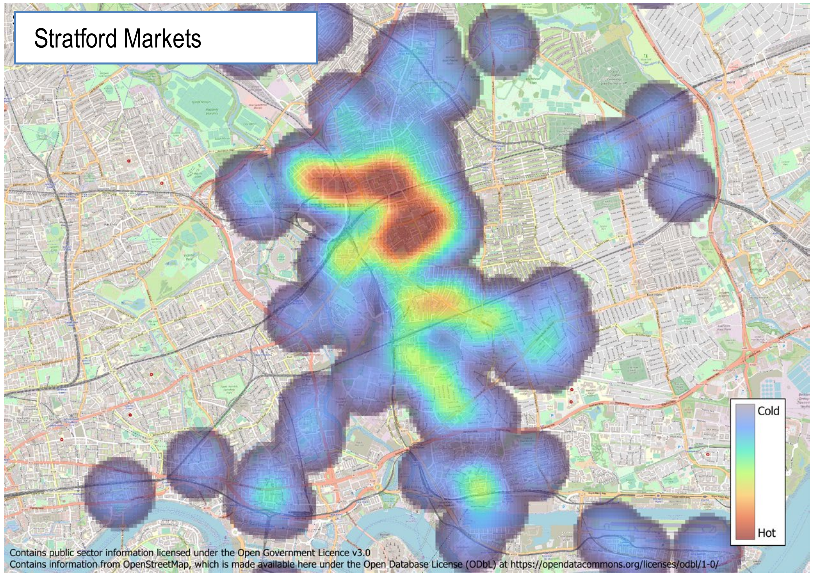
In terms of ethnic mix, the table below summarises the mix of respondents for the three markets.

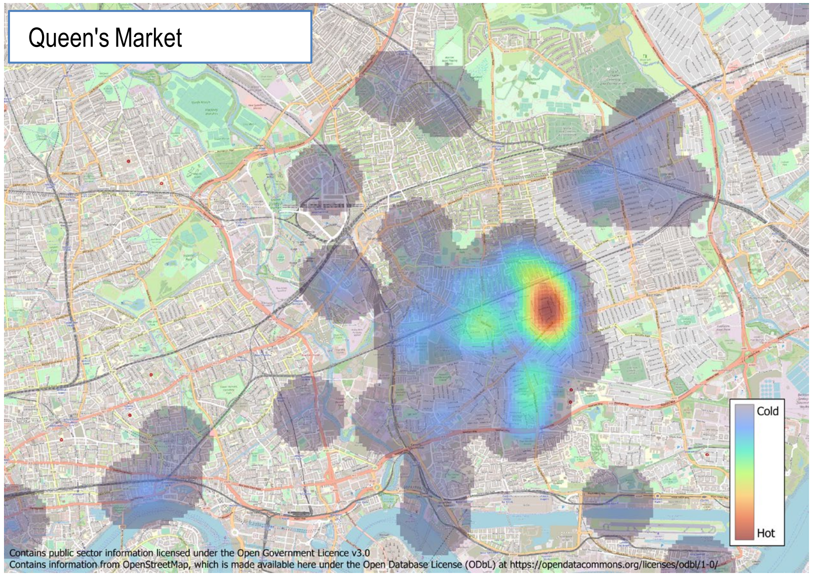
	Queens Market / Green Street	Stratford Indoor	Stratford Outdoor
White British / Irish	19%	46%	40%
White European / South American	20%	6%	14%
Black Caribbean	10%	8%	12%
Black African	15%	13%	14%
Asian	31%	15%	14%
Mixed / Other	4%	12%	4%

Consumer Research Key Findings cont'd.

Shopper Origin

The maps below show the home origin of shoppers to both Stratford Markets and Queen's Market.



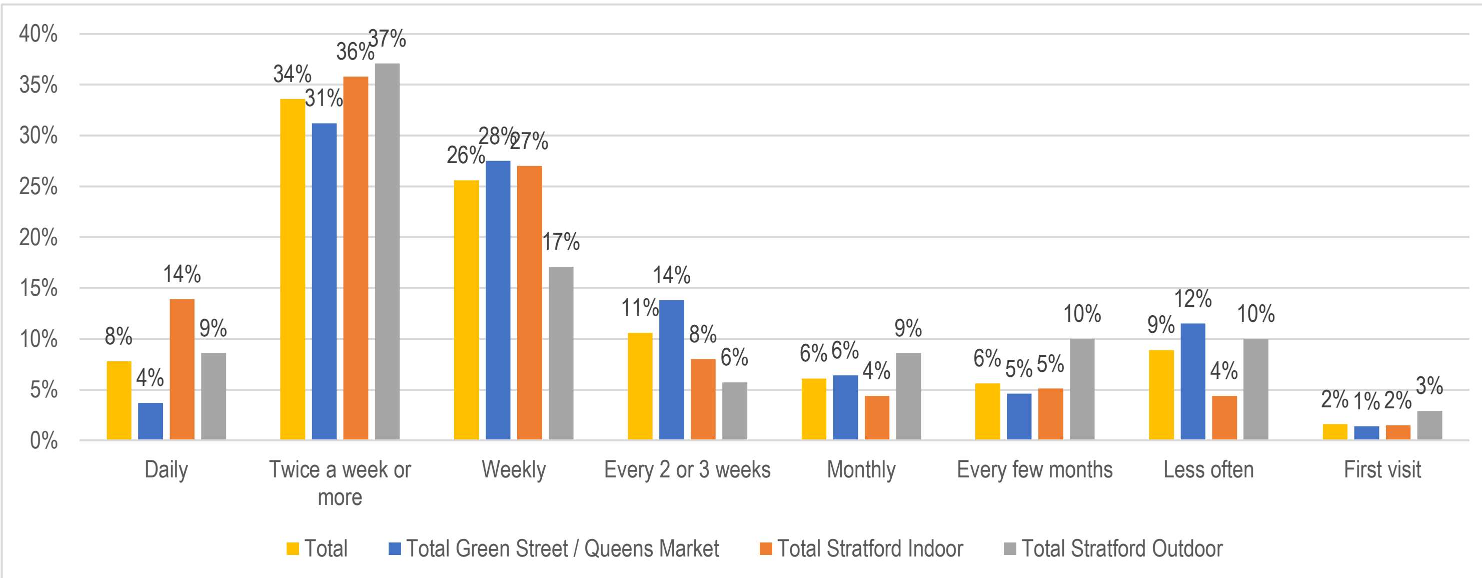


As is clear, Stratford has the bigger / wider catchment draw area, due to both Stratford Shopping Centre offer, as well as Westfield, as well as the extensive transport facilities. Indeed, Stratford Markets catchment extends to and includes Upton Park (home of Queen's Market) albeit with a low response level.

Queen's Market is drawing most of its customers from a smallish area, with additional inflow. Neither markets draw extensively from East Ham, the location of Pilgrims Way market. There are other parts of the borough that provide low levels of customer to the two main markets. This indicates opportunities for more localised markets and for the main markets to attract more residents.

Consumer Survey

typical visit the Market



Just over a third of customers visit the markets twice a week or more often. Over a quarter of customers visit weekly. Nearly 70% of customers visit at least once a week.

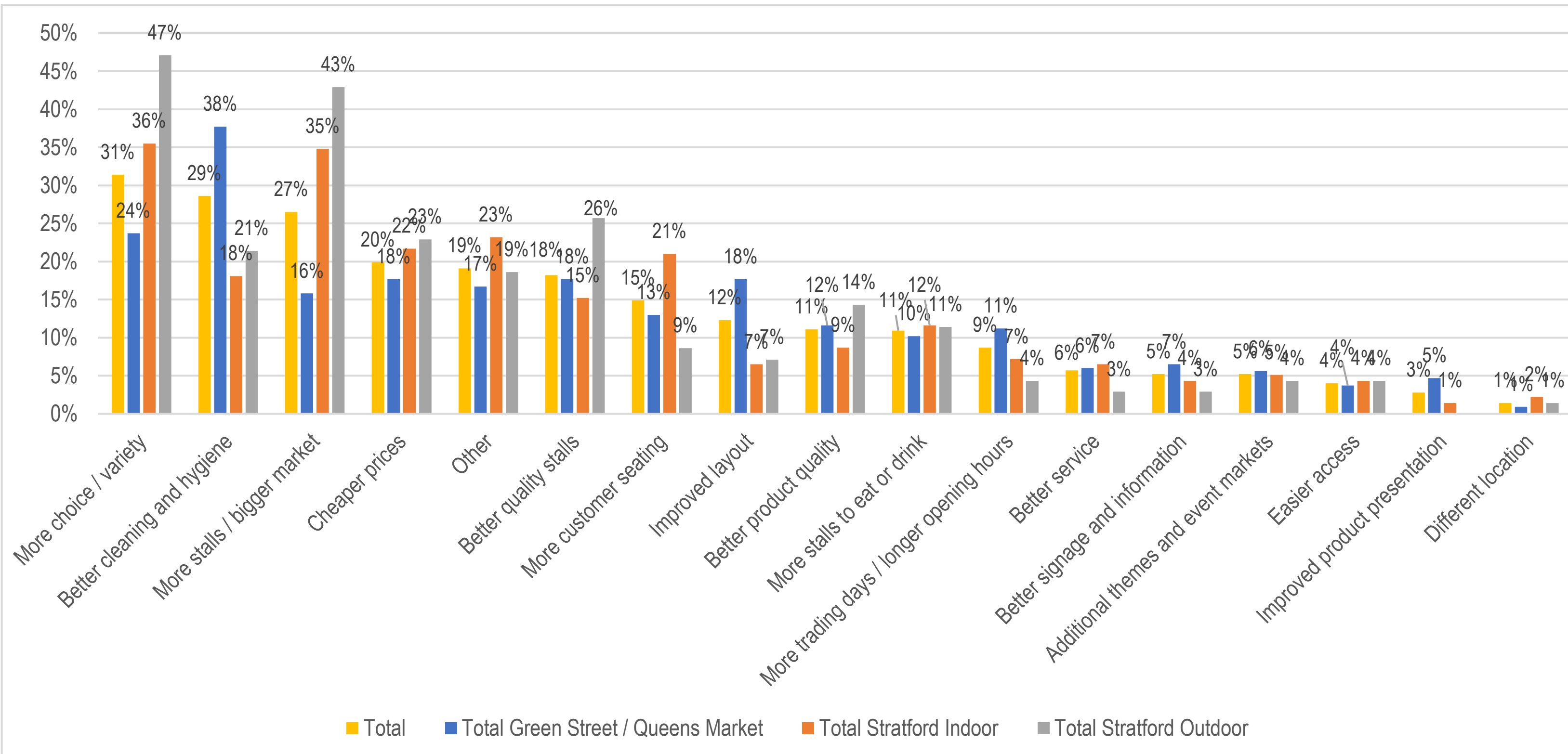
For regular users this figure jumps to 85% visiting at least once a week.

There is little change or difference when looking at visit frequency by market location. The overall pattern is clear. The markets have a high repeat visit. The number of new visitors is low.

This would imply a strong local and loyal customer base with lots of visits from the same customers. The markets also need to attract new customers and expand the customer base.

Consumer Survey

What would encourage you to visit / use the market more? Record up to 3 responses



Commentary for this graph and responses is shown overleaf.

Newham London

THE RETAIL GROUP

Consumer Survey

What would encourage you to visit / use the market more? Record up to 3 responses

Customers have identified a variety of opportunities to improve the experience of using Newham's Markets.

There are different priorities for each market.

The dominant three aspects (for all markets) are more choice / variety, better cleaning and hygiene, and more stalls / bigger market.

Cheaper prices, and better quality stalls, along with ‘other’ make up a second group of priority improvement areas. We have summarised the ‘other’ responses below.

Remaining improvements include more seating, improved layout, more catering, expanded trading and improved service.

Regular and irregular customers are broadly in agreement with the ‘total response findings.

On a location basis:

- At Queens Market, improved cleaning and more choice, variety and stalls, lead the responses. There is a diverse group of secondary priorities which includes better quality stalls, more stalls, choice, cheaper prices and improved layout. There are also many other aspects to improve.
- At Stratford, both for the indoor and outdoor the priorities are more choice, variety / size of market, quality of stalls, particularly on outdoor. More seating at the indoor market.

Other: 31 (8%) ‘fine as it is’, 11 (2%) toilets; 7 Parking, 7 Security, 5 variety choice, 5 café / catering, 4 service.

The consumers have identified lots of opportunities to improve the offer.

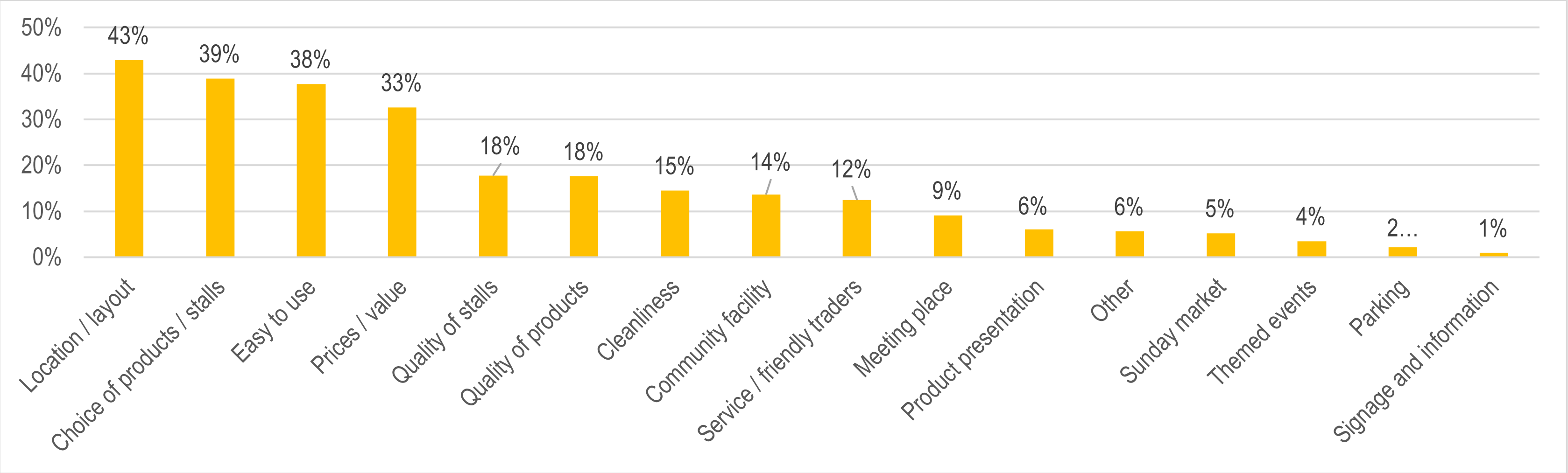
Many of the identified improvement areas might be viewed as basic aspects to improve and get right.

Consumer Research Key Findings cont'd.

Shopper Visit Patterns

Visit frequency is high, with 70% visiting at least once per week (Stratford Indoor is highest). There are significant numbers of irregular / occasional users in each location. Visitors to Green Street tend to use Queen's Market at least most of the time, which indicates a loyal customer base. Most people stay for an hour or less, and this presents a definite opportunity to increase the duration in the market. Most consumers are satisfied with market opening hours.

Main likes about the markets: (all market responses combined, for individual market responses see findings report)



As can be seen shoppers like the location and layout of the markets, the choice and ease of use. Prices are also liked, particularly at Queen's Market.

An alternative way to look at the responses is to look at the aspects not 'liked' by many respondents. There are a lot of aspects only liked by less than 20% of respondents, quality of stalls, product, cleanliness, community space, meeting places all the way to events and parking. This does start to identify areas for improvement

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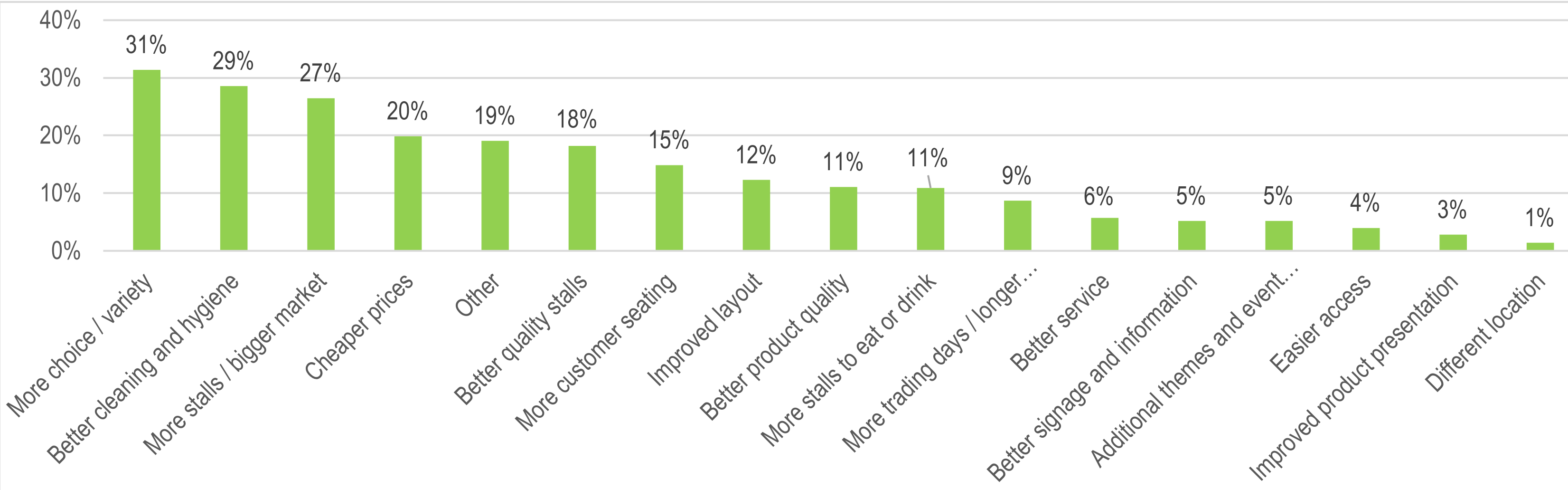
Consumer Research Key Findings cont'd.

What would encourage more visits / higher frequency (all market responses combined, for individual market responses see findings report)



As can be seen there are many aspects identified as areas to improve, in order to attract more visits.

At Stratford the need is far greater for more choice, variety, bigger market / more stalls. In Queen's Market shoppers want better cleaning / hygiene and improved layout.

The markets have individual areas to improve, as well as common and collective aspects to improve.

Consumer Survey

Summary of Consumer Survey

Newham Market Shoppers have provided clear insight and information to influence the future direction.

- Access / method of transport is typically by public transport (mainly buses) or on foot. At Queens Market / Green Street only 18% arrive by car.
- Shopping is the dominant reason for using the centres, even more so at Queens Market / Green Street (68%).
- Other reasons to visit are typically low single digit percentages.
- The markets benefit from frequent multiple times per week / weekly visits.
- Low ‘new / first time’ visitors.
- When customers are in the area, they tend to use the markets every time.
- Typical visit durations are up to an hour.
- The majority feel that trading hours are about right, where not (13%) they would like more trading days.
- Customers like the location, layout, choice, ease of use and prices / value.
- Customers have identified many opportunities to improve the appeal and experience. Choice, variety and cleaning are lead aspects to improve. This is followed by choice, variety and prices.
- A clear, loyal and regular customer base. Need to attract more new customers and broaden the base.
- There are several basic aspects to improve.
- Markets could do more to be multi-purpose destinations, currently reliant on shopping.

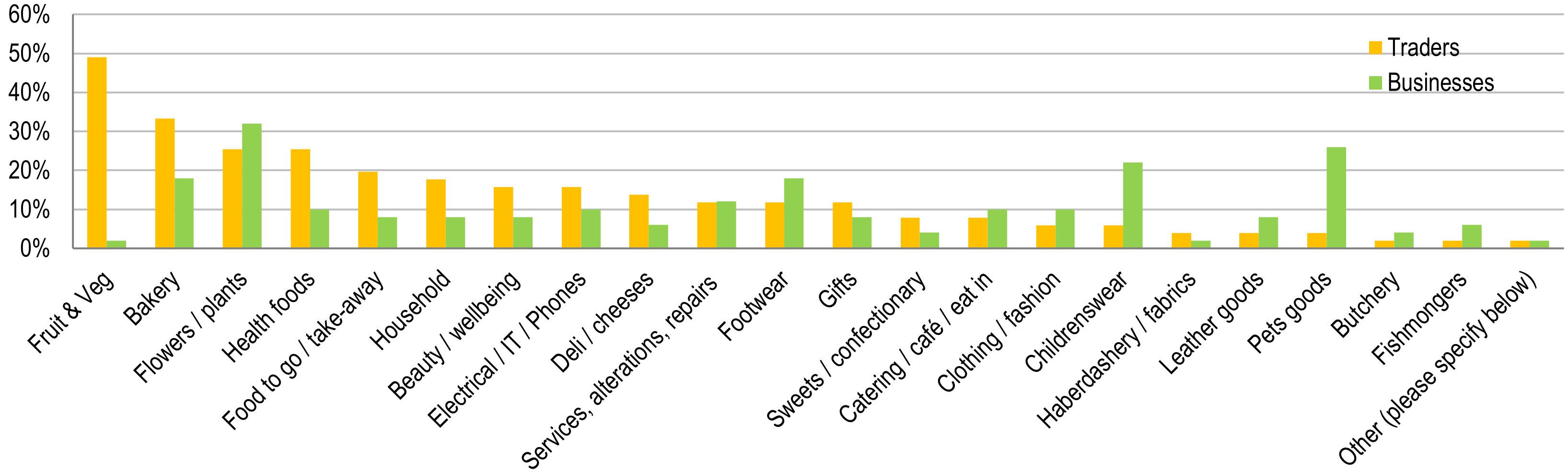
Trader and Business Engagement Survey

Methodology

A further tailored and original engagement survey was developed for the project, with aim of successfully engaging market traders and businesses. All traders in all markets were individually handed surveys and encouraged to take part, as were a selection of adjoining retail businesses. Completed surveys were picked up same / next day. A few traders handed their surveys into the market management. Over 200 responses received across the markets, including 100 from Queen's Market alone. This represents one of the most successful trader / business engagement initiatives completed by the Council.

Queen's Market /Green Street Findings

Shopping is major reason for visit – mostly locals visiting frequently, especially on Saturdays. According to respondents, footfall and sales have been steadily declining over several years. In regards additional choice needed traders / businesses identified the following:

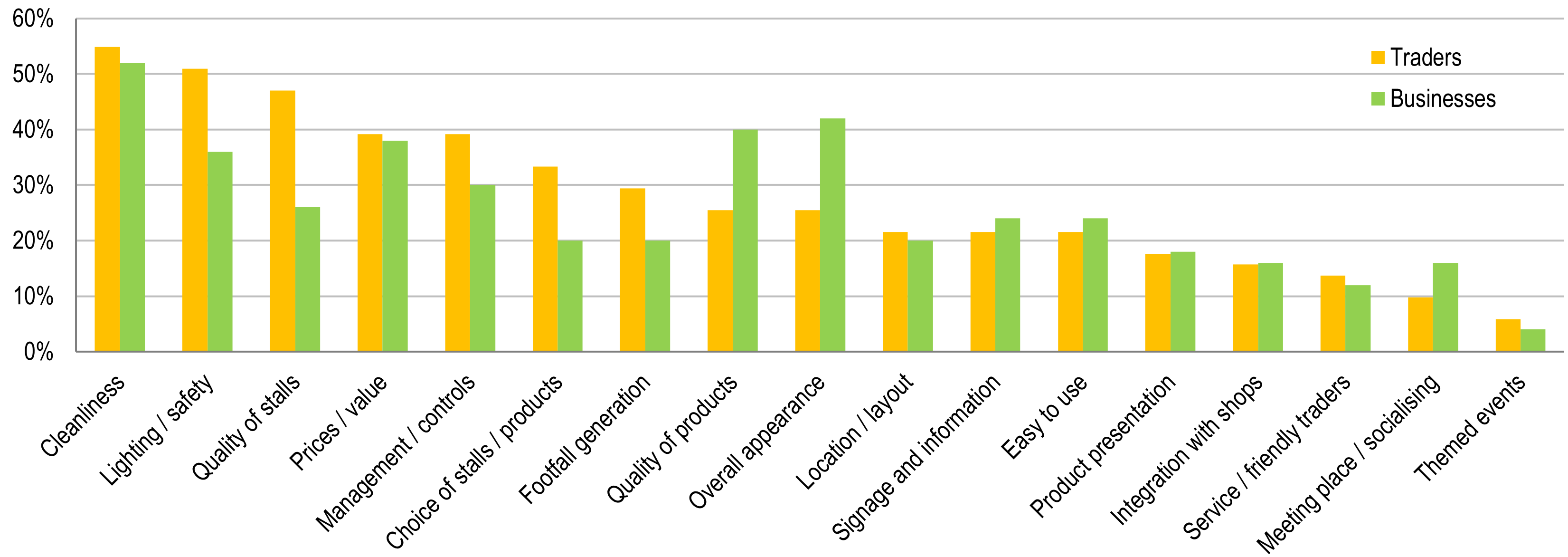


More choice is especially wanted in fruit & veg, bakery, flowers / plants, health foods, food to go / take-away, but also household, electrical, deli and services. Trading hours are viewed as broadly appropriate, and traders are broadly happy with the performance of their business and the centre.

Trader and Business Survey cont'd.

Further Queen's Market Findings

In regards improvements wanted:



The number one improvement wanted is much better cleanliness. Other improvements wanted include lighting, stall quality, better visibility, management / control, choice, more footfall, more customer seating, more trading days / long hours, layout, better facilities, signage, ease of use, integration with shops and customer service. Traders / businesses identify lots of opportunities to improve the appeal and experience for customers.

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Trader and Business Survey cont'd.

Stratford Indoor & Outdoor Market Findings

51 completed surveys. Shopping is the biggest trigger, for different customer groups and types. High frequency of visit, with Fridays and Saturdays the peak days. Performance is seen as ok, with footfall declining. Outlook is positive. In regards missing categories:

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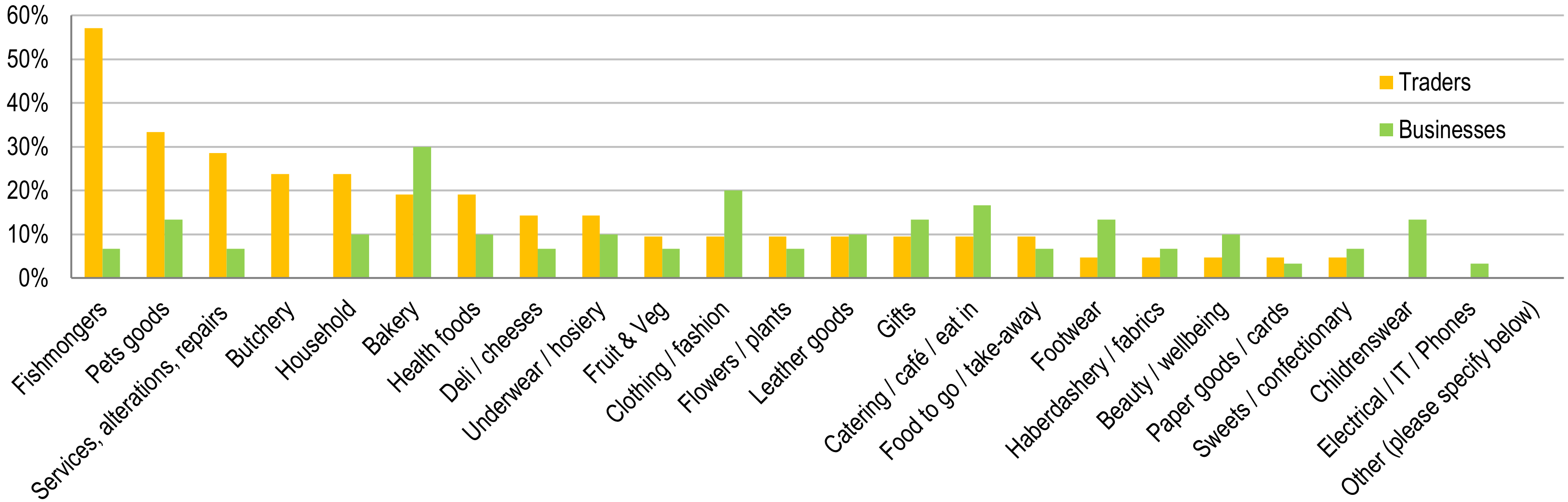

This question achieved quite differing views on missing categories, traders identify fishmongers, pet goods, services, butchers, household and bakery. Businesses agree on a bakery, overall have typically lower response rates, want more clothing / fashion / catering.

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Trader and Business Survey cont'd.

Further Stratford Indoor & Outdoor Market Findings

In regards improvements wanted:

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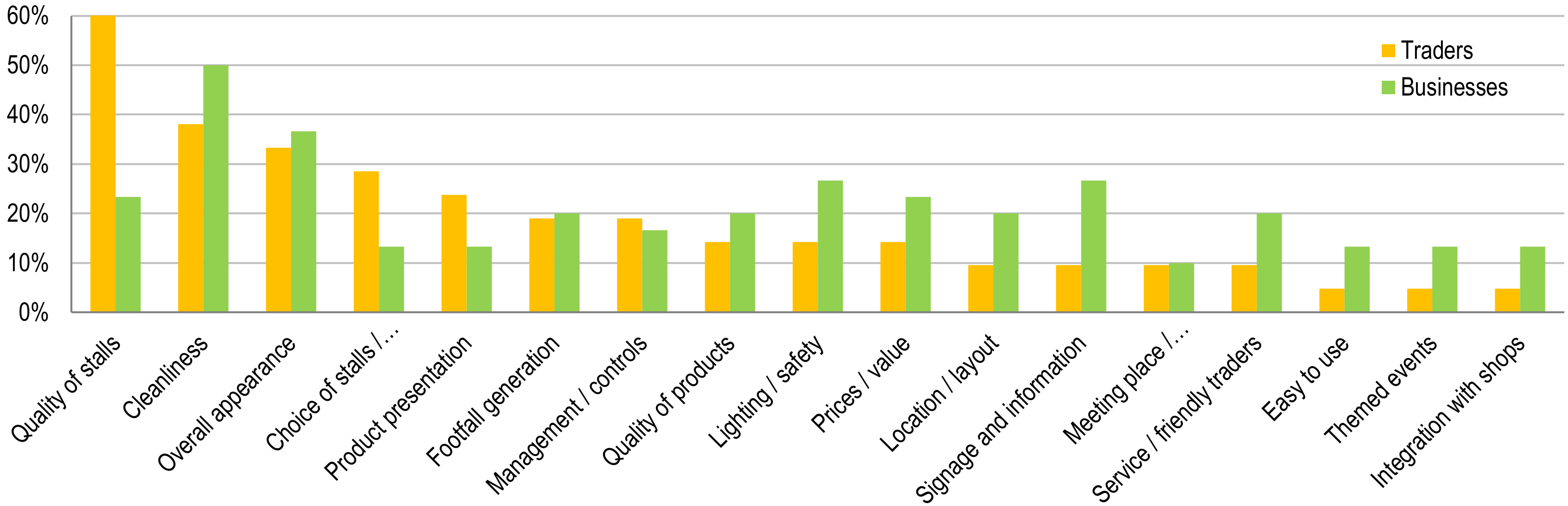

Improvement areas at Stratford Indoor & Outdoor Markets focus on stall quality, cleaning, overall appearance, choice and product presentation, more seating, more stalls and improved visibility. Businesses, focus on cleaning, overall appearance, lighting / safety, signage and information and prices / value.
Lots of areas to improve the delivery of the markets and the customer experience.

Trader and Business Survey cont'd.

Pilgrim's Way (East Ham High Street) & Woodgrange Market (Forest Gate)

Both surveys achieved a strong response, given the markets offer in each centre.

For Pilgrim's Way the centre has high visit frequency, local shoppers and shopping is the key driver.

At Woodgrange Market the customer is local and loyal, with high visit frequency. Fridays and Saturdays are peak days.

In regards to a future market offer, at Pilgrim's Way the desire is for a stronger offer, more choice, improved cleaning, equipment and facilities. The offer needs to complement the existing offer and appeal to local residents / shoppers. The market is viewed as a potential footfall driver (Pilgrim's Way Market is targeted for growth by the markets management team).

At Woodgrange Market, businesses want a bigger market, with more choice and impact, improved signage, facilities and cleaning is essential. Businesses do not think it needs to trade on more days (market is operated under licence on a Saturday).

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Stakeholder Engagement

Methodology

We identified 3 groups of stakeholders, wider local stakeholders (35 contacted – 11 responses from local interest groups, from market operators, landlords, charities, arts / culture providers, businesses, community groups, and place managers), internal LBH officers (from teams connected to markets - Economic & Regeneration, Licensing and Regulation, Traffic and Parking, Cleansing, Highways, Property Services, Food Strategy in Public Health), existing markets management team. The stakeholder engagement has been extensive and very successful. We have met, spoken to, had specific input from over 50 different stakeholders. Fantastic insight and collective views, not all in agreement or alignment, but all clearly supporting an improved markets offer.

Results

Responses and findings are varied and quite diverse, some degree of misunderstanding of roles and aims. All three groups have identified multiple opportunities to improve the markets offer. The internal LBN officers along with the markets management have clear desire to improve the markets for the benefit of Newham residents. Between these groups, they provided over 50 different suggested improvement opportunities, including:

- Develop the Newham Markets Standards charter, includes participation in training and development, improve trader standards (not trading standards)
- Use parking facilities as an anchor for markets, footfall driver
- Develop more smaller markets around the borough, pop up and permanent visiting markets, take Queen's Market to the borough, target food deserts
- Improve cleaning and overall customer experience, increase customer base
- Improve the offer, expand the choice, adaptability, build on existing strengths
- Improve access for all customer groups and for new traders, pro-active development of new traders, start ups, skills development
- Improve promotion and awareness, improve perception, branding
- Improve many of the ‘basics’, LBN to lead by example, facilities, services
- Improve community connection, events, social, hub, fulcrum

Objective Market Reviews

Queen's Market

One of biggest markets in East London plus is anchor for Upton Park. The market is evidently very popular with diverse range of shoppers. There is a very good fruit & veg offer, along with women's clothing / accessories, haberdashery & jewellery. The external appeal, impact and visibility of offer is very poor. Internal environment and lighting is also poor. Whilst many stalls are acceptable, many look dated, with poor quality stalls and basic retail standards. Catering / food & beverage offer is almost non-existent. We highlight that the strengths are visually dominated by the weaknesses.

Stratford Indoor & Outdoor

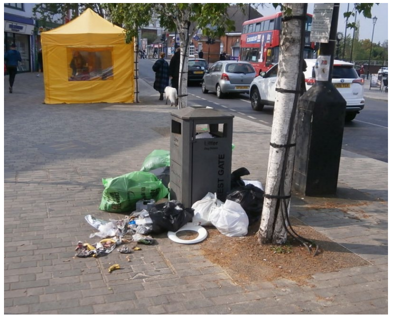
The two Stratford Markets feel disparate and unconnected. The indoor market benefits from exceptional footfall levels. The shopping centre is clearly evolving and changing, the market is not keeping up. It could, and should be much stronger, more visually appealing and trading even better. The outdoor market is well positioned to benefit from major change. Issues include ASB, environment and visual impact. Improvements include better trading equipment and facilities, improved and expanded offer, much more catering, communal seating, stronger place, signage and branding. In short there is much to do, but worth the effort and input.

Market Reviews cont'd.

Woodgrange Market

This market is friendly, welcoming and in tune with its customer base. The market would benefit from more stalls, choices, impact, clearer signage and promotional messaging. A stronger and more regular line up of traders would be a benefit to the market. The market could do more to provide a community meeting space, seating, catering facilities etc

There is an urgent need for the council to address the waste issue.



Pilgrim's Way Market

Pilgrim's Way Market is almost a blank canvas of opportunity.

The two existing traders will benefit from being part of a 'proper' market offer, one that is in line with East Ham residents.

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Market & Consumer Trends.

Other leading benchmark markets and market teams are:

- Improving the environment, experience, identity, visibility and promotion of their market offers.
- Adding more food & beverage, leisure, services and seating.
- Working with traders to help them improve their stalls and display standards.
- Curating events and promoting their markets.
- Actively curating and growing market offers / use of market space.
- Making it easier for new entrepreneurs to begin trading.
- Encouraging more community and event markets

Review of Dalston Market, from Roaming Rebecca vlog

Resident Profile Overview

Newham has a very large borough population; current estimate is circa 364,000 people. This means it is one of the largest borough populations in London (for context this would equate to a top 15 UK city).

The borough is ethnically diverse, with substantial Bangladeshi, African and middle / eastern European communities, that have established social patterns and form strong communities.

There are recognised issues of deprivation, however the borough also benefits from good employment rates, with incomes above UK averages, but below wider London averages.

The State of the Borough report describes of Newham's residents as follows:
'**Newham has a young, diverse and rapidly rising population. It is fast changing and has high levels of population churn'**

The future market activity needs to ensure that it is appealing to an established and diverse mix of communities, and a constantly changing element of residents. Importantly a young population with its changing needs and lifestyles.

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Wider Policy and Strategy Aims

The following Borough wide Policy and Strategies have been reviewed:

Towards a better Newham
'An economy that works for our residents and delivers a place where communities share the benefits, no matter their background'.
All 8 pillars can be supported by the markets, their offer, delivery and interaction with borough residents.

Community Wealth Building
'An approach to economic regeneration, which focuses on enabling measures that support communities to create wealth and retain more of the benefits of economic growth emerging locally'.
At least 7 policy / outcomes are able to be supported / delivered / implemented by markets and the offer, operations and community connection

Well Newham 50 Steps to a Healthier Borough Health and Wellbeing Strategy 2020-2023
'Improving the health of every individual within the Newham community is more important than it ever has been'.
At least 3 policy / outcomes are fully supported by markets.

Newham's markets have an essential role to play in delivering the wider aspirations and achieving the Council's vision for local communities, community wealth building, improving the health and wellbeing of residents and providing lifelong opportunities for existing and future residents of the Borough.

Indeed, this principle is a central building block for the future Markets Vision and Strategy that follows.