

CLAREMORRIS

CUSTOMER SURVEY REPORT

2011

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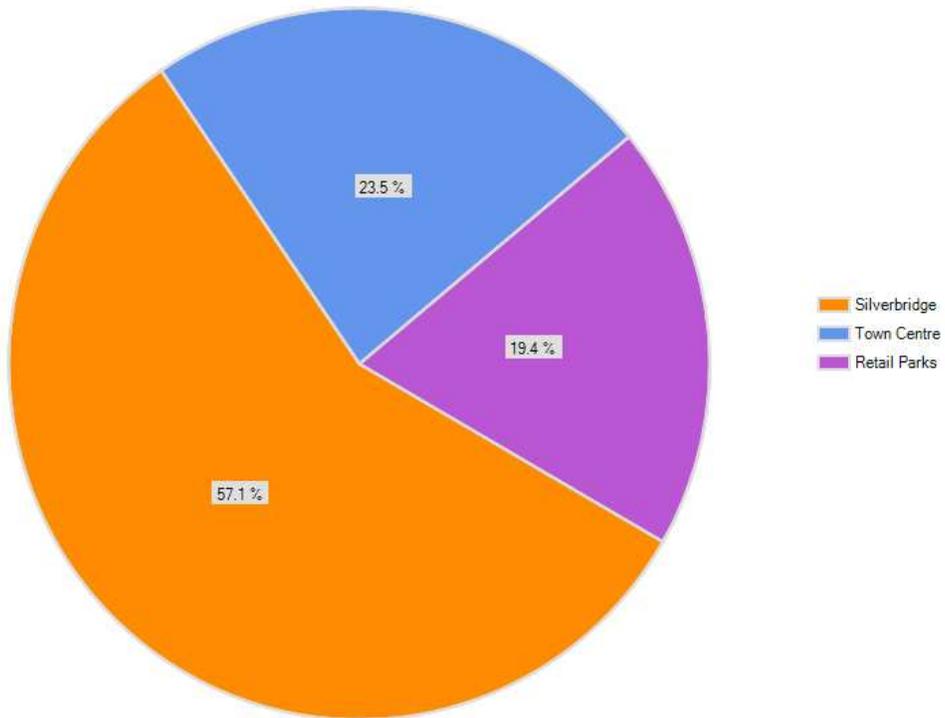
INTRODUCTION AND METHODOLOGY

A survey was undertaken on the behalf of Claremorris Chamber of Commerce to document the views of shoppers in three key locations; *the town centre, Silverbridge* and the *Retail parks*. The principle purpose of the exercise was to gain insight into the spending habits and driving factors of consumers, with particular regard to what influences them to shop in the locations that they choose to shop.

The survey was compiled following on from a series of idea generation sessions held with groups of Claremorris retailers in early January 2011.

The survey was carried out on Friday 18th and Saturday 19th March 2011. It comprised of a mixture of 15 quantitative and qualitative questions and had respondents to totaling 310. Classification data for all the respondents was also recorded to allow for demographic profiling. The distribution of surveys executed in each of the three key locations is as follows:

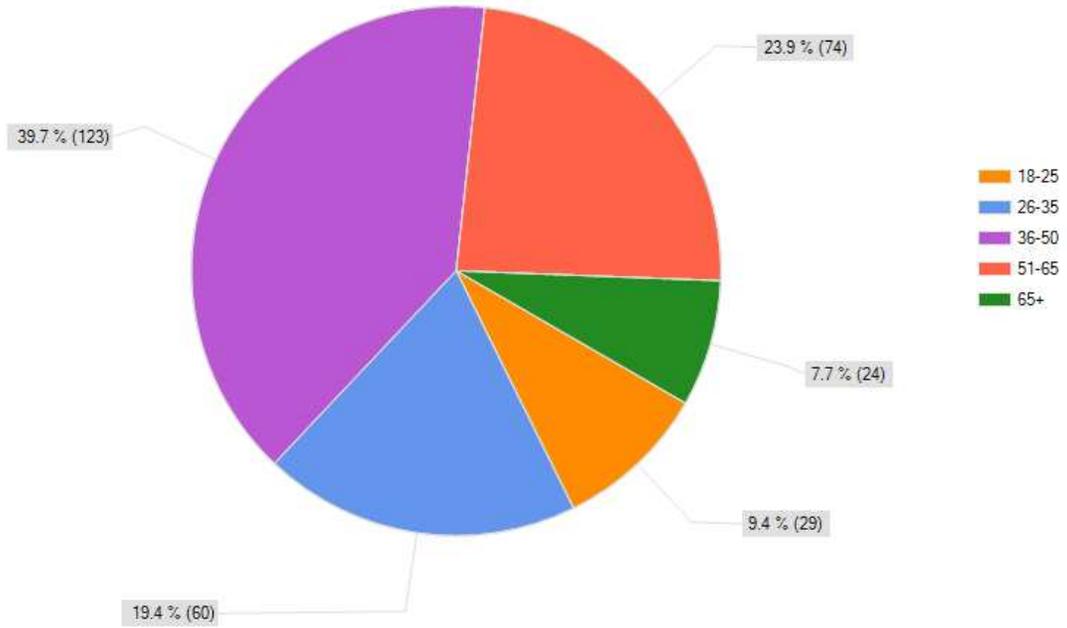
Survey Location



DEMOGRAPHIC PROFILE

The demographic profile of those surveyed, comprised of 62.6% women and 37.4% men. The survey found that shoppers fell predominantly in the 36-50 bracket, followed closely by the 51-65 age range.

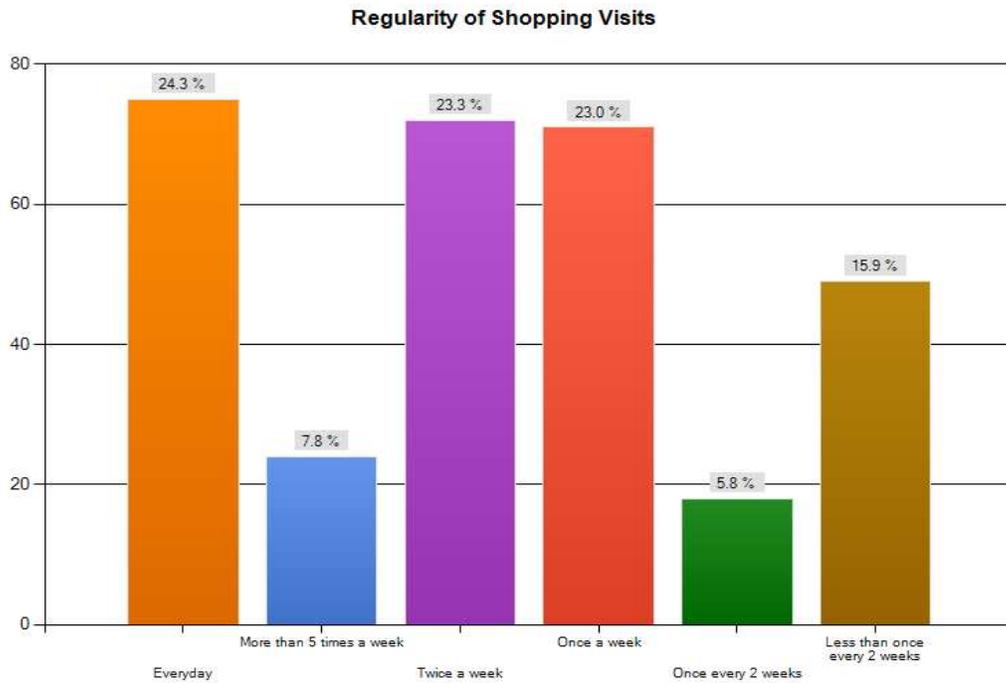
Age



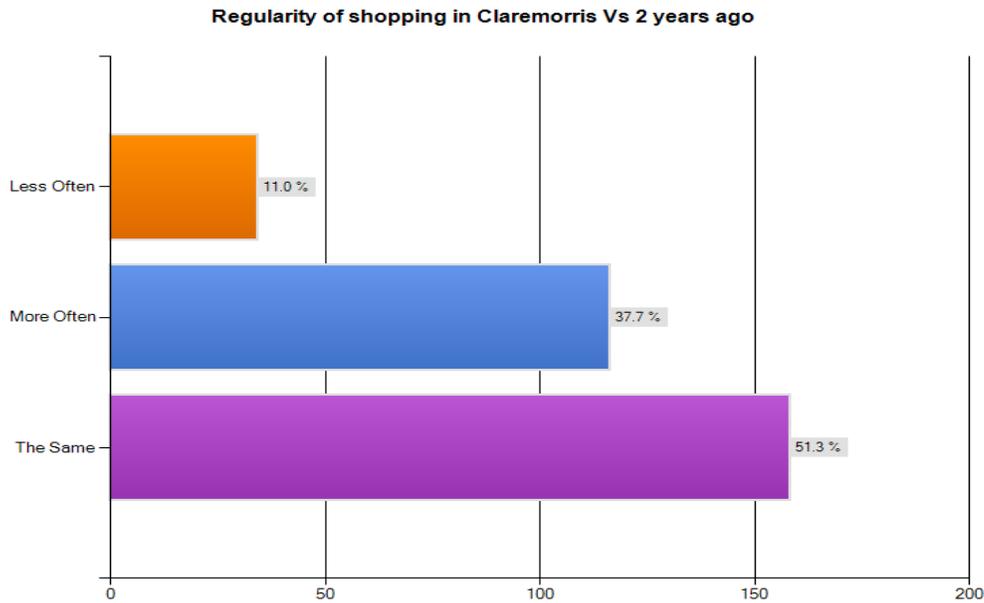
SURVEY RESULTS AND ANALYSIS

Regularity of visits

In order to gain an insight into the shopping patterns of the survey respondents, they were asked how frequently they tended to shop in the area. The three most recurrent responses were 'everyday', 'twice a week' and 'once a week'



When asked to stipulate whether participants felt that they shopped in Claremorris more or less often than they did two years ago, a marginal majority (51.3%) claimed that they shopped in Claremorris the same amount as compared with two years previously, whilst 37.7% opted for 'more often' and the remaining 11% claimed that they were shopping 'less often'.

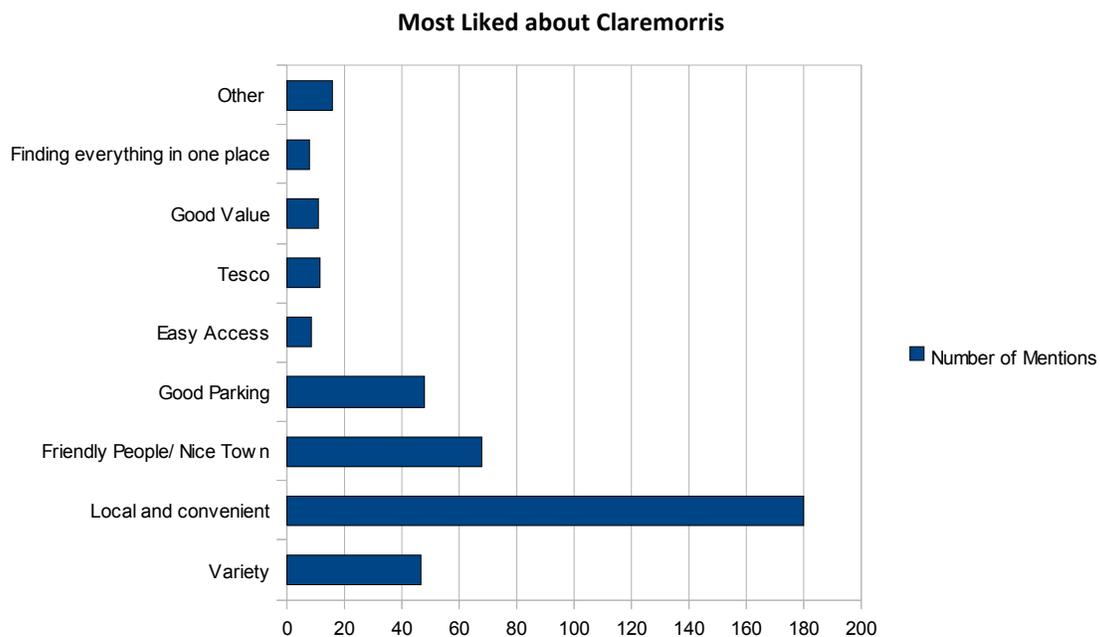


Of those who stated that they shopped less often, the reason given was primarily circumstantial. The three most common reasons being: financial restrictions due to recession, having a smaller family to provide for, and traveling else where for work. Other comments included having more time and being better organised. 74.3% of the reasons given for shopping less often can not be attributed to the town, its businesses or infrastructure but the remaining 25.7% consciously chose to shop in Claremorris less for the following reasons: lack of variety, perceiving it to be 'too expensive' and unsatisfactory parking and congestion.

Of those who purported to shop in Claremorris more regularly than they did two years ago only 34.7% of the reasons given were circumstantial, with the most common causes being 'living or working closer to town' and 'having a bigger family to provide for'. 65.3% of people claimed to be shopping more regularly due to changes in the town. Over 87% of the non-circumstantial responses said that they shopped more because they believed there to be a greater variety of shops on offer, in fact 50% of those who stated 'more shops' as a factor in their increased activity, cited Tesco specifically.

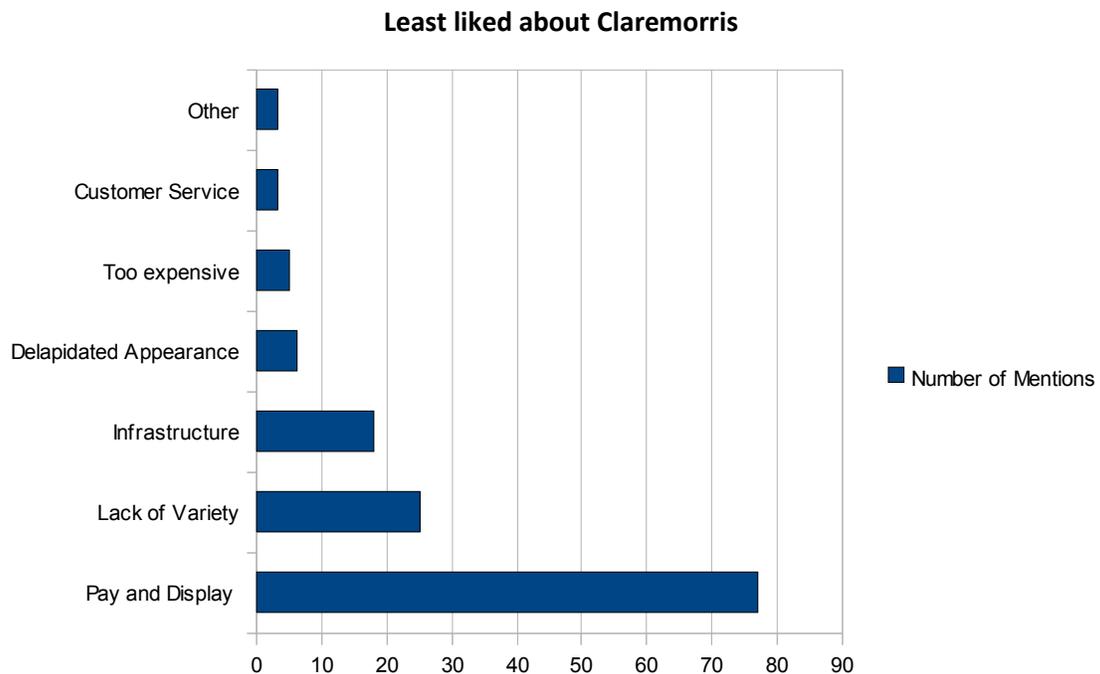
Perceptions of Claremorris

Upon being asked what they liked most about shopping in Claremorris the most forthcoming answer was that it was local and therefore convenient to the respondent, 45% people cited this as the most attractive thing about shopping in Claremorris. A further 17% appreciated it as having a friendly atmosphere and being a nice town. 12% stated that good parking was what they liked best, however an overwhelming 44/48 of the positive comments made in relation to parking were made in by customers shopping in Silverbridge or the retail parks. Similarly any mentions of 'easy access' entirely excluded participants surveyed in the town centre. Finally 'good variety' was claimed to be the biggest draw for 11.8% of consumers – however it must once again be taken into account that 74.5% of those who praised Claremorris for its variety were people surveyed in either Silverbridge or the retail parks.

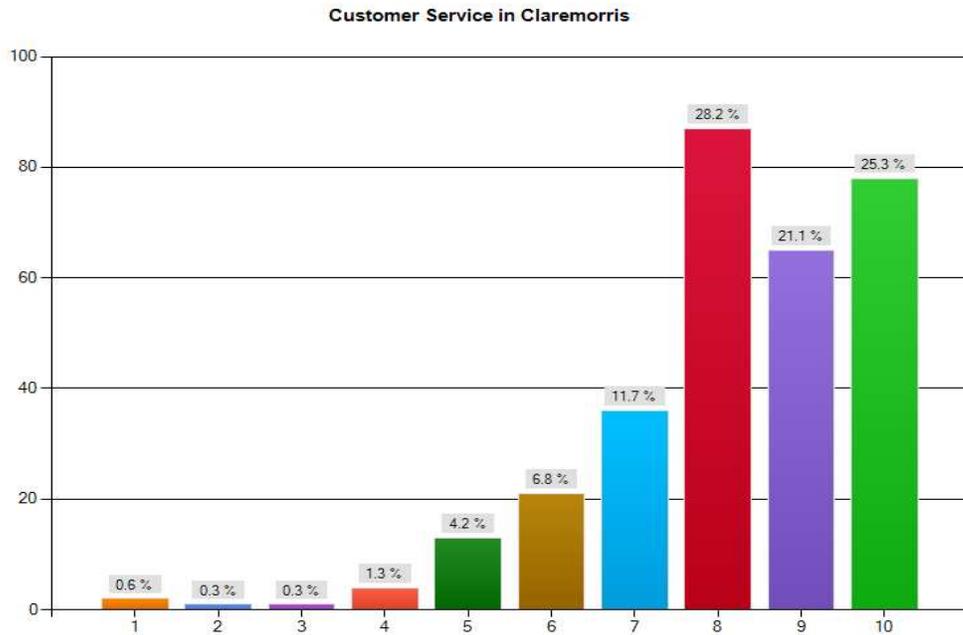


In addition survey participants were asked to indicate what they liked least about Claremorris, the most recurrent reply was dissatisfaction with the pay and display parking system, with a 56.3% share of all the comments. In second position was a

perceived lack of variety by 18.2% of shoppers, followed by 13.1% who were disappointed by the infrastructure of the town (i.e. problems with congestion, the fragmented nature of the shops' layout, the lack of pedestrian crossing and inadequate disabled access). Aside from the three main gripes, other factors that people 'liked least' were; the dilapidated appearance of the town centre, prices that were perceived to be too high and poor levels of customer service. Negative comments relating to customer service, referred to Tesco for the most part.

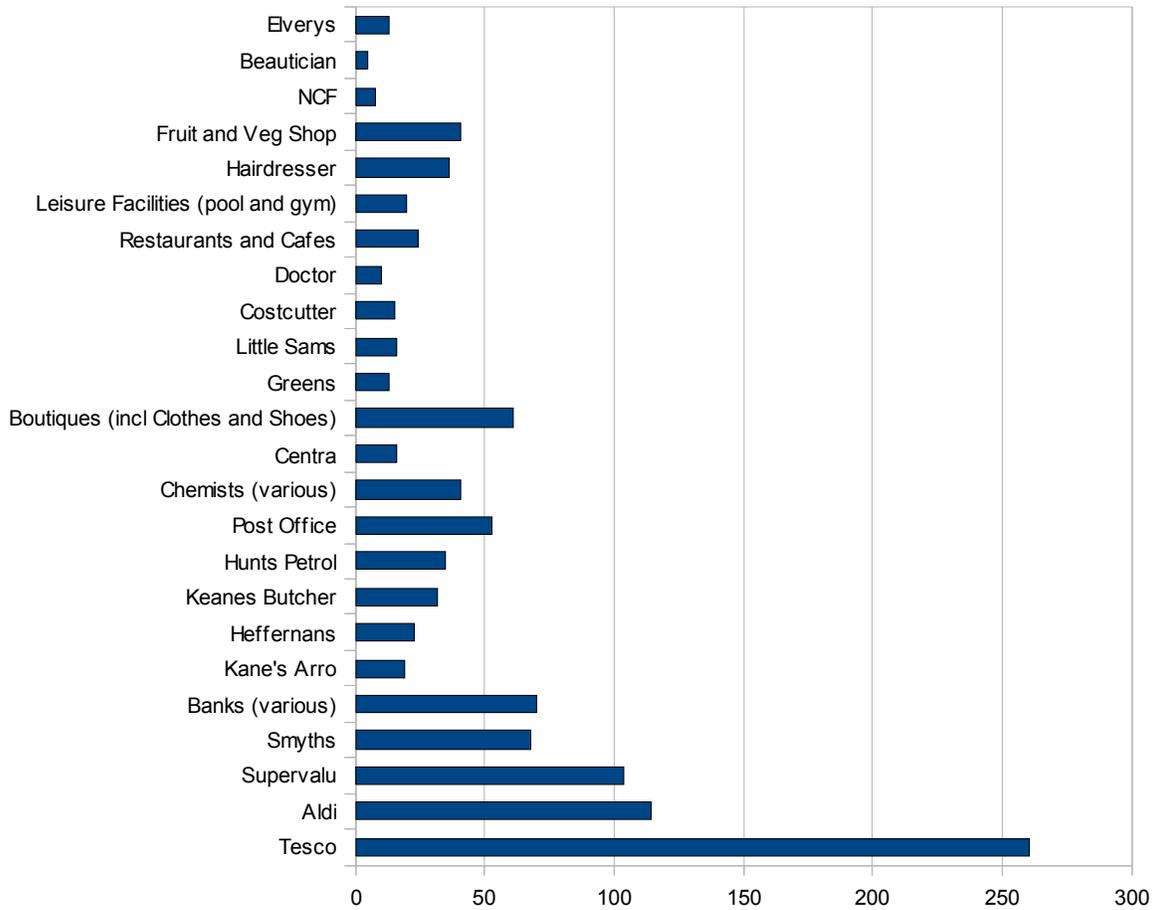


On the whole people were very pleased with the level of customer service that they received with just under 75 % scoring it between 8 and 10 out of 10.



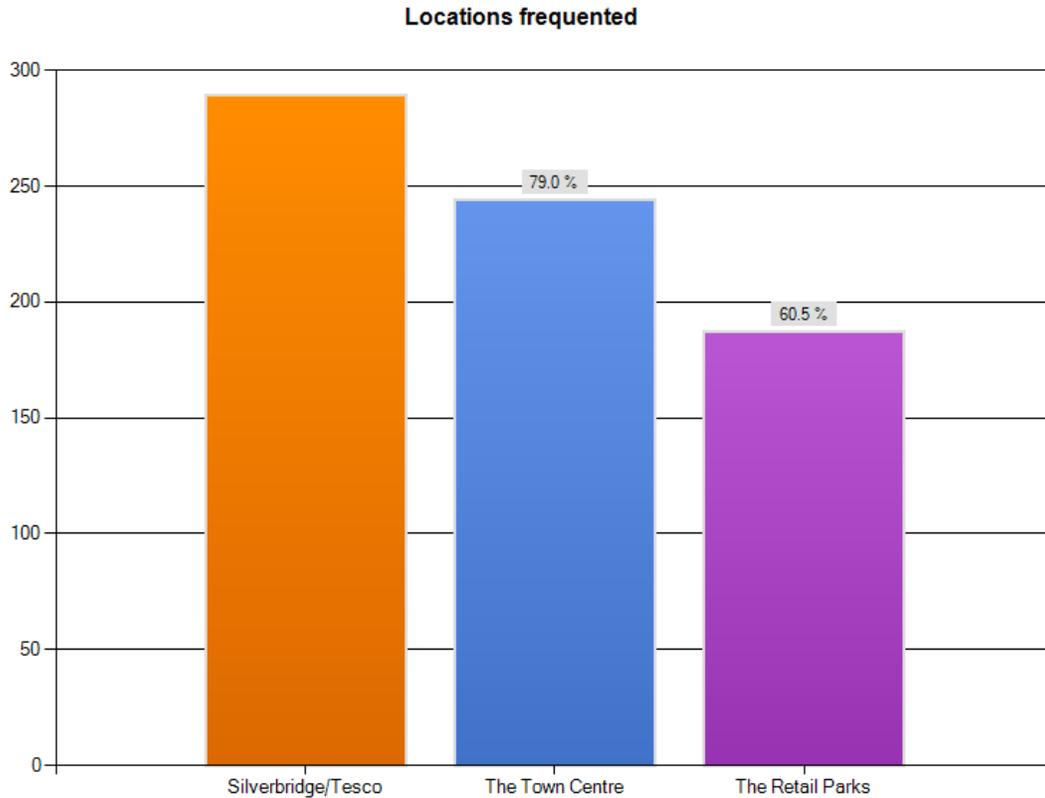
Most Used Shops and Services

Participants were asked to indicate which shops and services they used most when shopping in Claremorris. Tesco was the clear forerunner – with 24% of all the mentions, followed at a distance by other supermarket chains like Aldi and Supervalu – which were mentioned 114 and 104 times respectively. The relative positions of various shops or services according to the number of mentions they received are represented below.



* The proportional representation of 'Smyths' may be inaccurate as no distinction was made between Smyths Newsagents and Smyths Toys.

Locations frequented



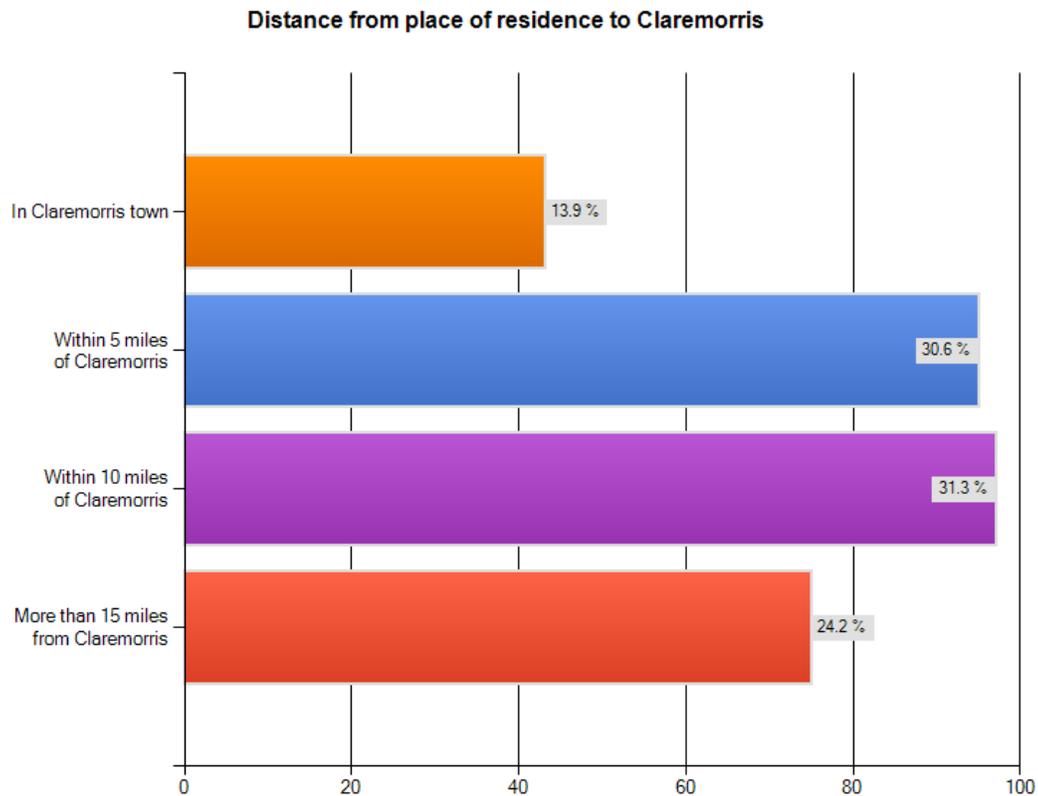
The graph above represents the locations frequented by those who were surveyed, it shows that 93.5% of all the people who were approached regularly shopped in Silverbridge, 79% shopped in the town centre and 60.5% visited the retail parks.

However when the findings are processed by location we can see that:

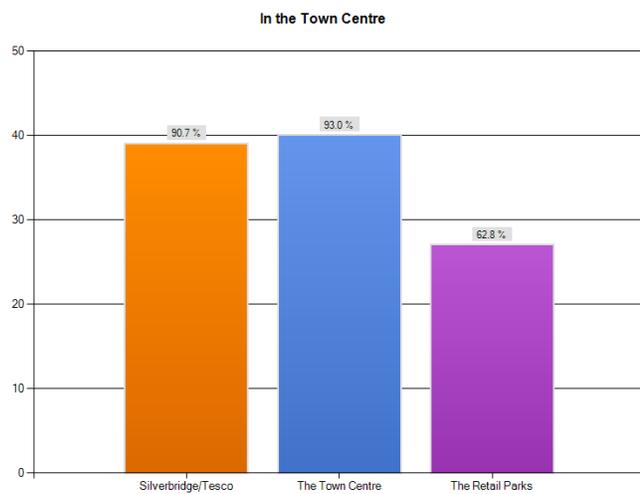
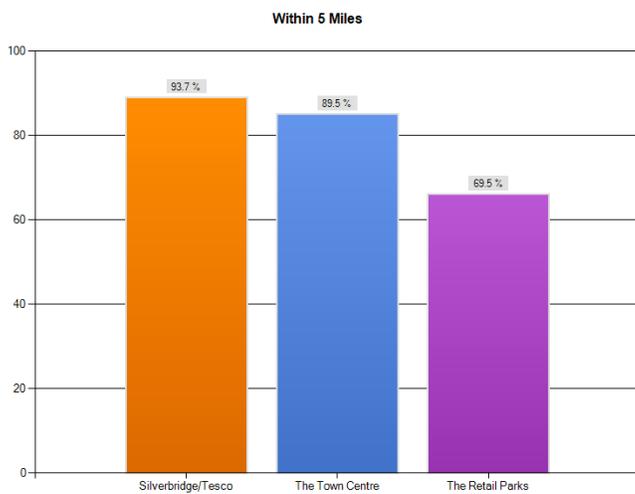
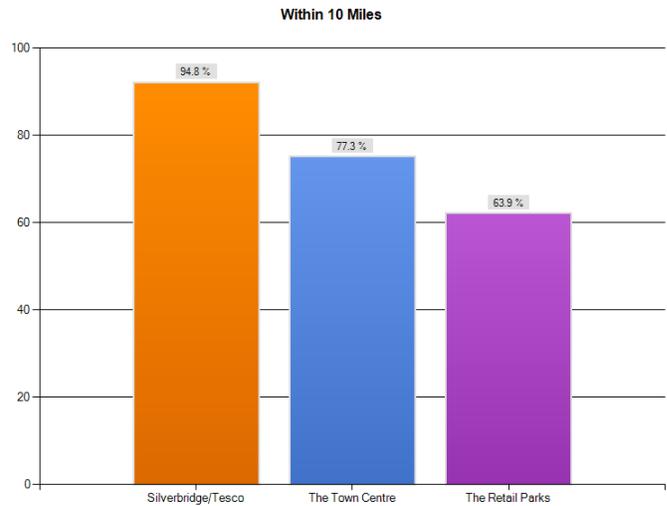
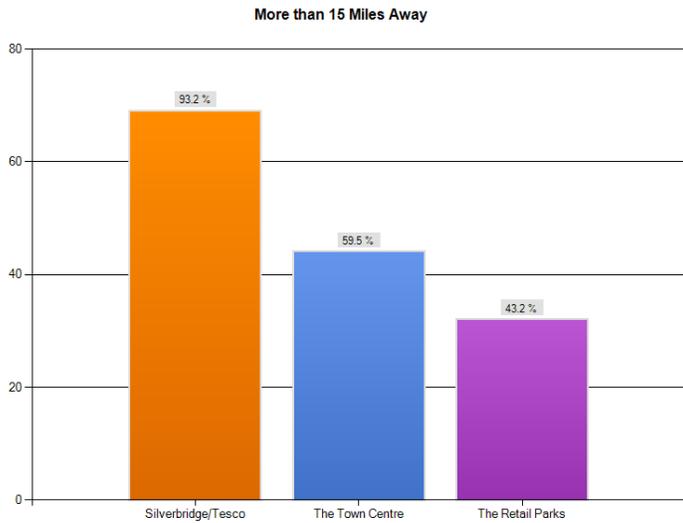
- Of those surveyed in the town centre, 75.3% also visited Silverbridge and 58.9% also shopped in the Retail Parks.
- Of those surveyed in the Retail Parks, 98.3% also shopped in Silverbridge and 70% also visited the town centre.
- Of those surveyed in Silverbridge, 73.9% also shopped in the town centre and 50.6% also shopped in the Retail Parks.

Proximity of Residence

The participants were asked to state how far their primary residence was from Claremorris. Overall the results were as follows:

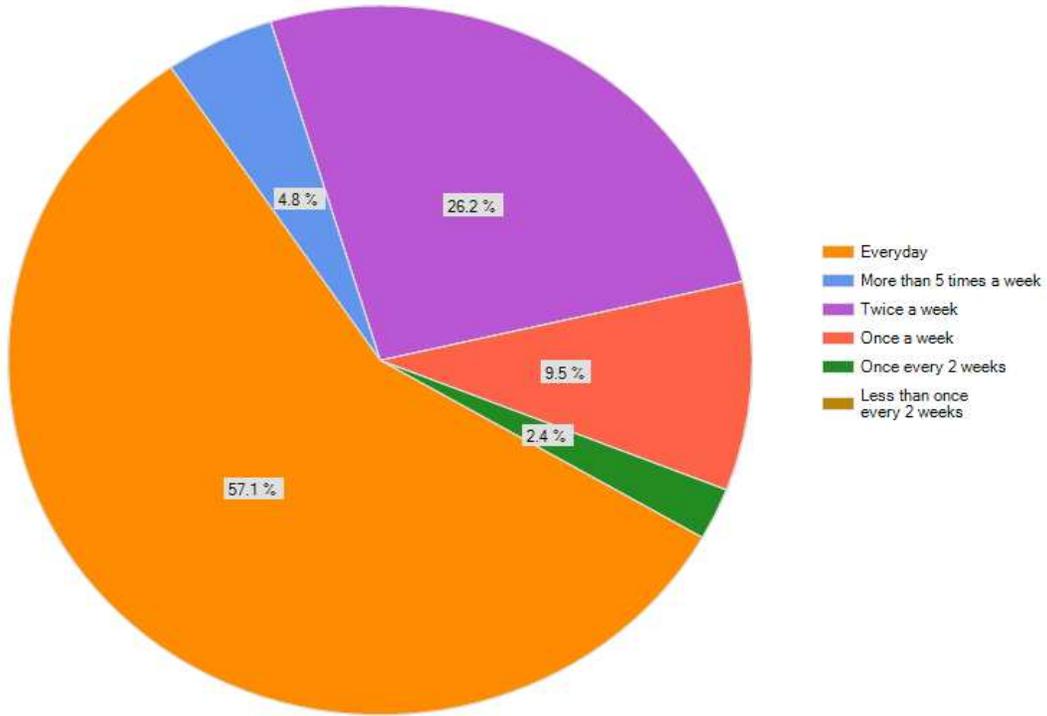


When these results were cross tabulated with the statistics on the locations that people frequented, we can see that 'how far they lived from the town' did have a bearing on where they chose to shop, as demonstrated by the four charts overleaf.

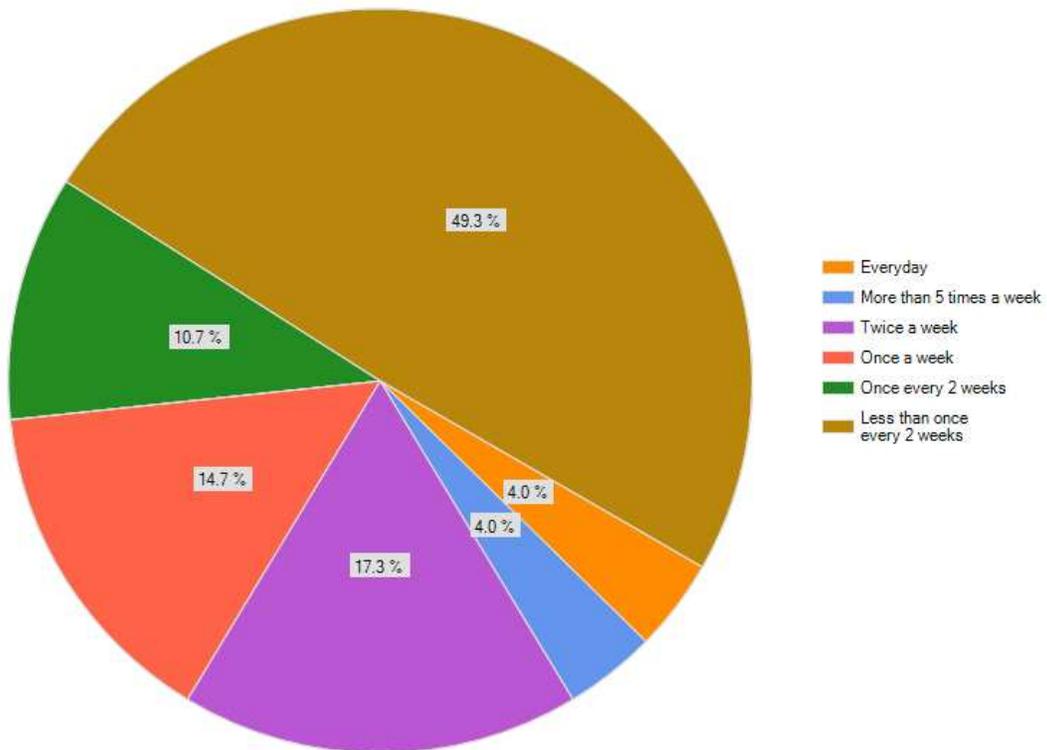


Similarly it is apparent that ‘how far respondents lived from Claremorris’ had a sizable impact on how often they came to shop. The 2 charts below demonstrate that of those who lived in town, over 57% shopped there daily. Conversely, those who had to travel 15 miles or over, only 4% said that they visited daily. In broad terms, there is a trend indicating that those living further away tend to shop less often and are more likely to frequent Silverbridge when they do so. Whereas those who were living closer displayed patterns of much more frequent shopping trips and were just as likely to shop in the town centre, as well as Silverbridge.

Regularity of visits from those living in the Town Centre

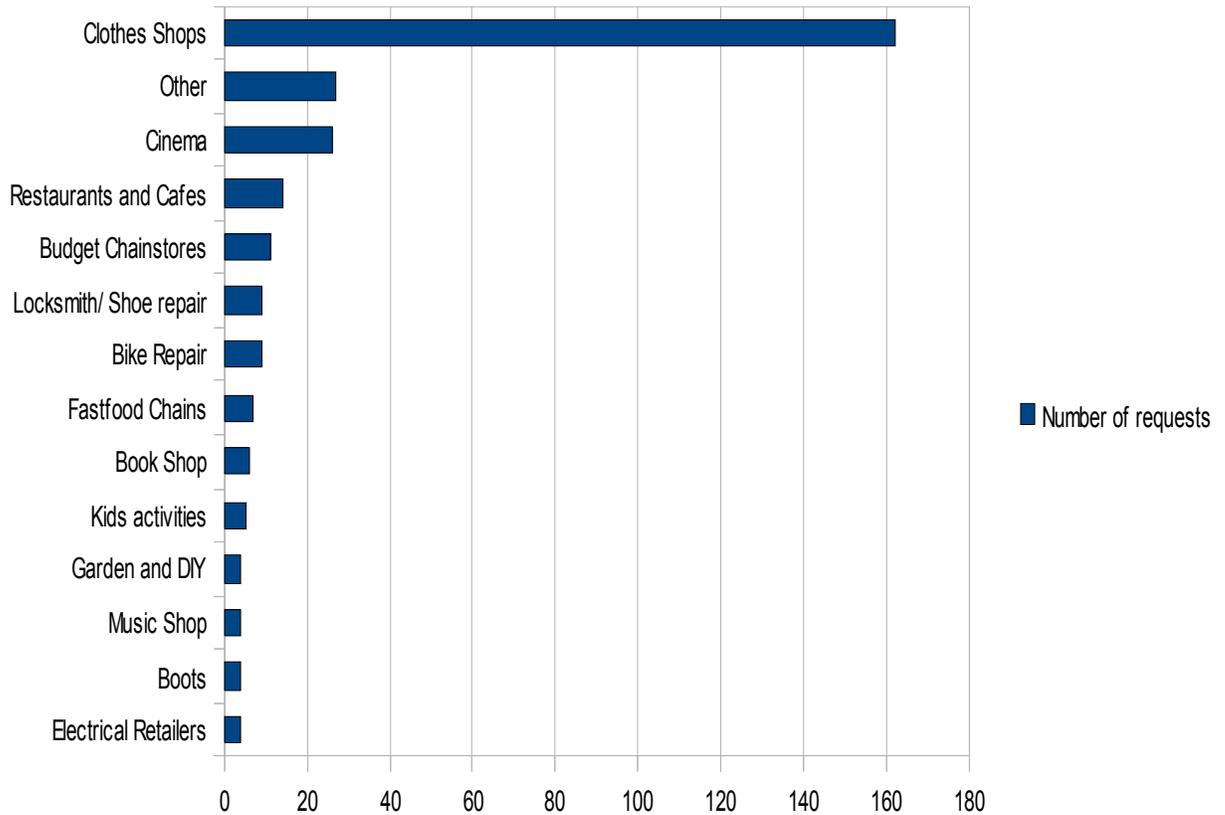


Regularity of visits from those living more than 15 miles away



Additional Services

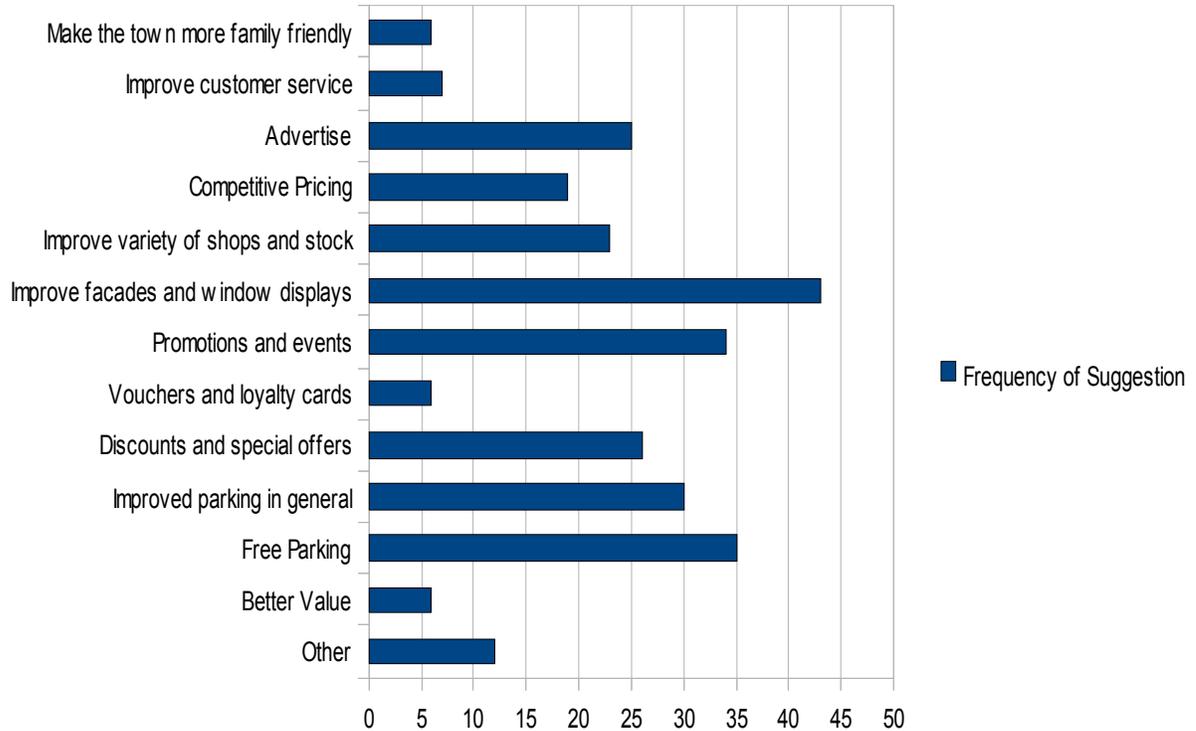
People surveyed were asked to indicate if they felt there were any other shops or services, not already available, which would be good for the town. A staggering majority opted for a variety of clothes shops (particularly mid-priced, national chains)



Notably requested were Dunnes and Penneys, which accounted for 56 % of the total request for clothes shops.

Advice to Traders

Shoppers were asked what advice they would offer to traders to encourage more business in the town centre:

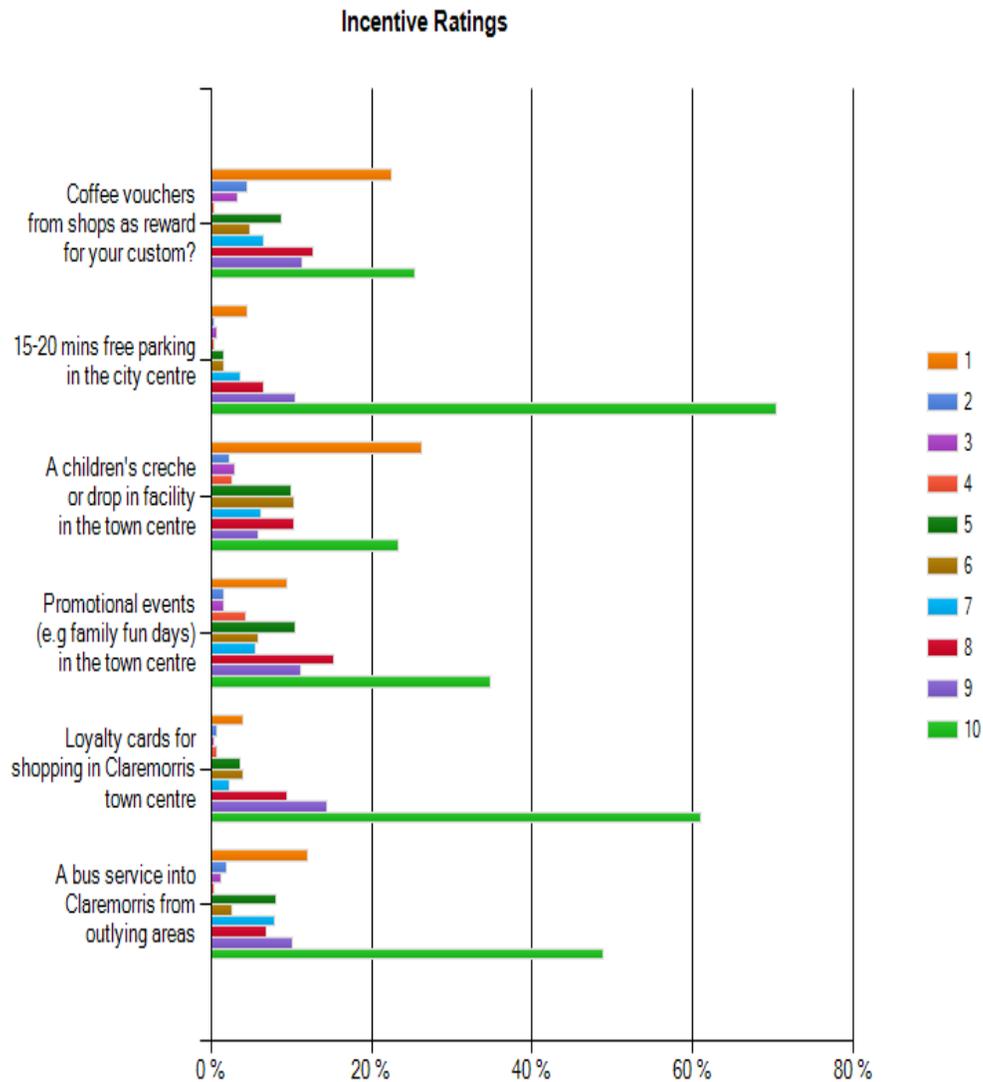


The two most visible trends concerned parking and the up-keep in the town centre. 24% of those surveyed felt that parking should be improved, with over 50% of them indicating that it should be free. Town up-keep and appearance was the second most frequent piece of advice, as people felt that the town looked dilapidated in appearance and that litter was a problem. 16% of all suggestions concerned painting shop facades, improving window displays and re-vamping empty retail units.

Incentives

Respondents were asked to rate on a scale of 1-10 whether or not various incentives would encourage them to shop in Claremorris, the incentives tested, were a result of ideas generated by Claremorris traders themselves. For the most part all suggestions were well received. Unsurprisingly the most popular suggestion was 15-20 mins of free

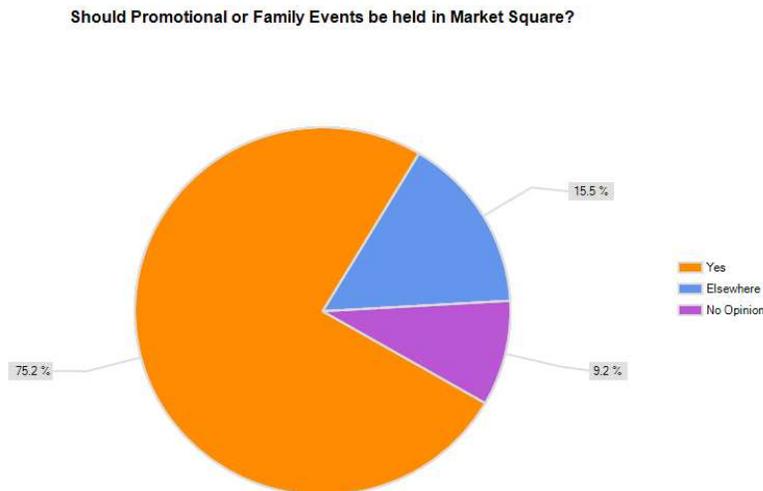
parking, with over 70% of people rating the idea with a 10/10. A proposed loyalty card scheme was also favoured, with just over 60% giving it the highest rating. The reception to all incentives are charted below.



It is also worth taking into account that some suggestions where the lowest rating was given relatively frequently reflects the participants circumstances rather than the validity of the incentive, i.e. A low rating for the creche by those who do not have children or little enthusiasm for a bus service from those that already live in the town centre.

The Use of Market Square

Participants were asked for their opinion as to the possible uses of Market square. Upon being asked if they felt that potential family or promotional events should be held there, they answered as follows:

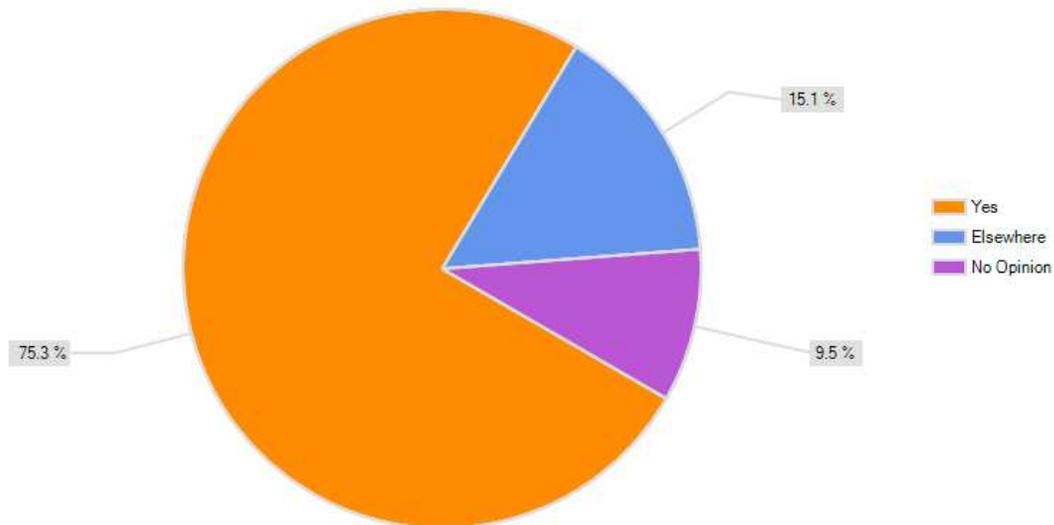


Of the 15.5% who felt that such events should take place elsewhere, suggestions for alternative locations included;

Suggested Locations	Number of Requests
Outskirts (incl, Silverbridge and Retail Parks)	19
Sports Ground	7
Park	7
'Anywhere else' to avoid parking and litter	9
Throughout town	4
Racecourse	3
Chapel Lane	2

The same question was proposed in relation to the location of the Farmers' Market:

Should the Farmer's Market be held in Market Square?

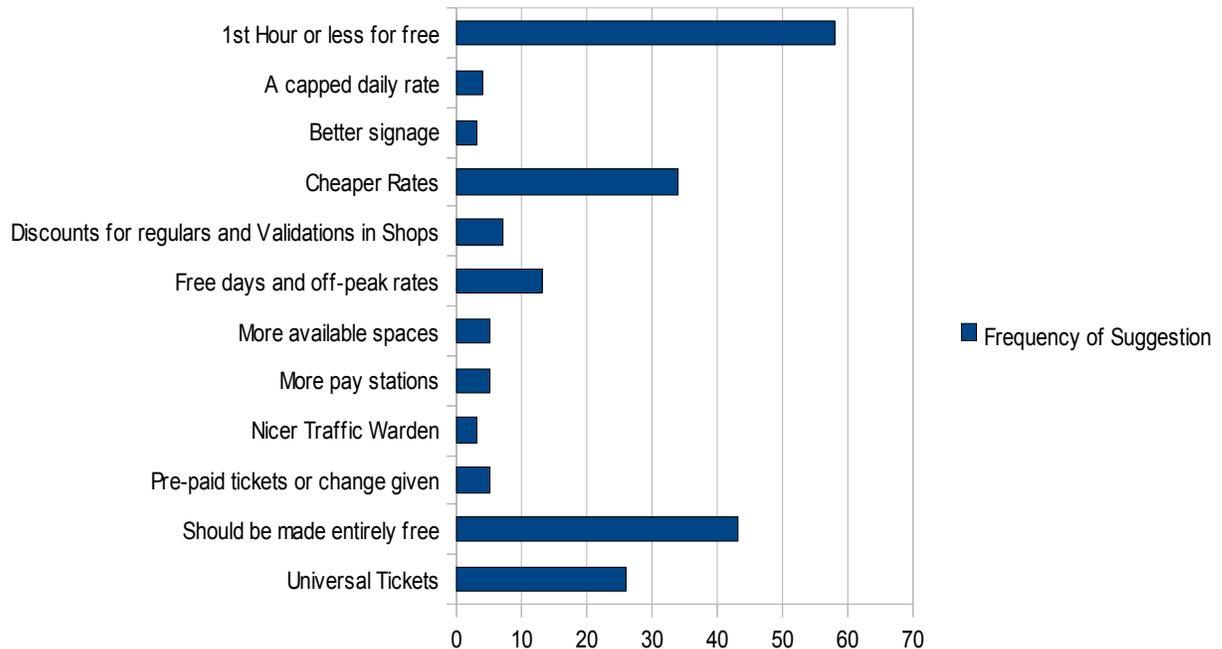


Once again a relatively small number thought that it should be held elsewhere to avoid traffic congestion and parking issues. Suggestions for alternative locations included the following:

Suggested Location	Number of Requests
Outskirts (incl. Silverbridge and Retail Parks)	15
Townhall	13
'Anywhere' to avoid parking and litter issues	11
'Other' (Park, Station, Sports Ground, Racecourse, indoors)	11

Ways to Improve Pay and Display

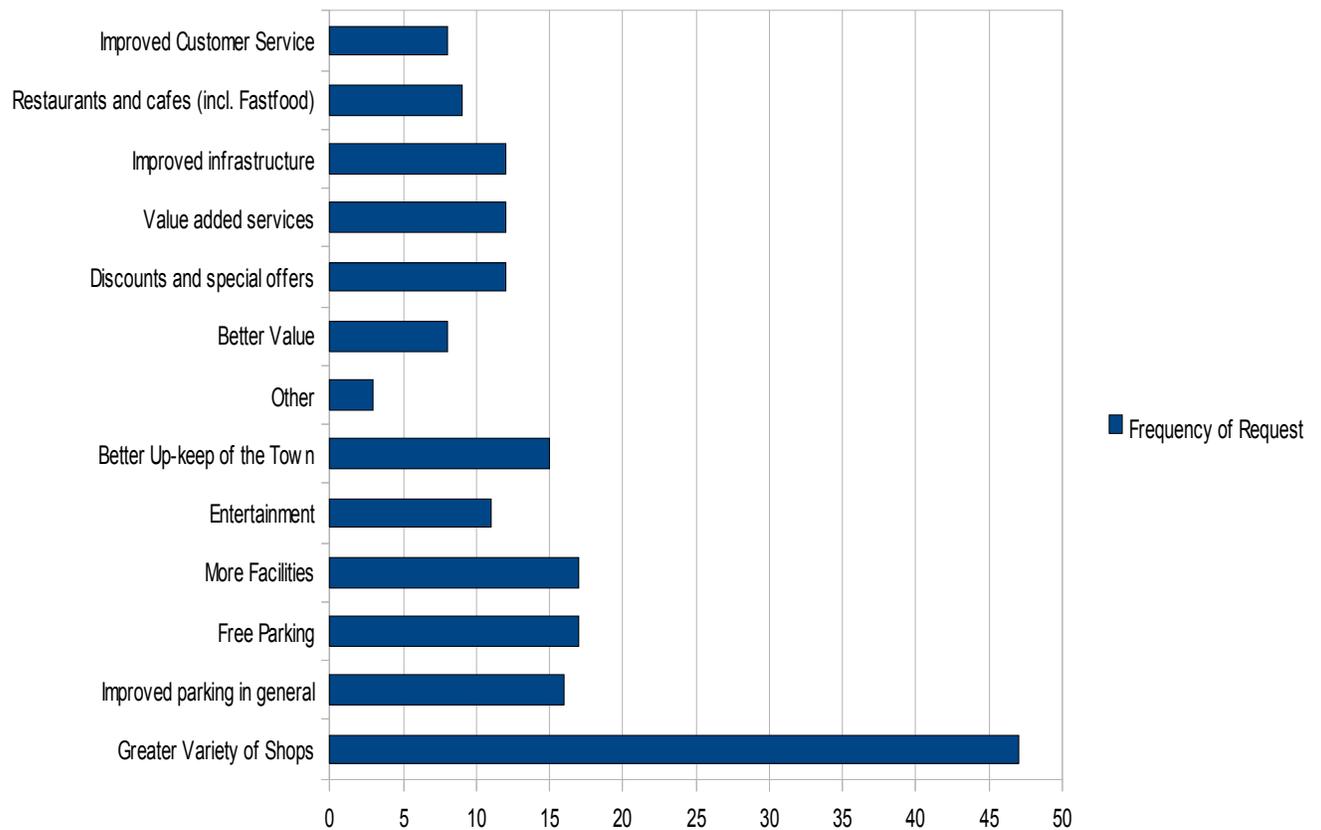
The people approached were asked how they felt the current Pay & Display system could be improved upon. It should be noted that despite the restrictive nature of the question ('If Pay and Display **has to continue...**') a significant number of people did not accept the premise and insisted that it should be made free entirely.



Of those who did accept the question's premise, the most popular answer with a 35.6% frequency rate, was that anything up to the first hour should be free (There was variation in the amount of free time stipulated but for the most part people tended to consider 30mins as satisfactory.) Other significant trends included the request for cheaper rates and 'universal tickets' that cover the entire town. It should also be noted that the issue of paid parking in Claremorris town centre was viewed by participants with extreme dissatisfaction. This was reflected in the language used throughout the survey answers that repeatedly referred to the parking as 'atrocious', 'dreadful' 'a nightmare' etc. Some even went so far as to say that they actively avoided visiting the town because of it.

Suggestions for an improved shopping experience

Shoppers were asked to cite one thing that they felt would improve their overall shopping experience in Claremorris. The results essentially reflect an amalgamation of the advice given to traders and the additional shops and services that people feel are necessary. They are as follows:



Once again the request for a great variety of shops, consisted in the main, as a request for clothing chains. As before the other major concern was the issue of parking. The suggestion of improving the town's facilities referred to things like covered seating areas, bus shelters, public toilets and more ATMs. A number of value-added services were suggested, like delivery services, bag packing and pre-ordering online.

RECOMMENDATIONS

The following are our recommendations which the traders of Claremorris could consider implementing, or which may help in generating additional ideas to develop and revitalize the town.

Management

- Set up a separate traders committee.
- Set up a traders development fund, payable by direct debit - of €5 per week.
- Use this “traders fund” to implement a selection of agreed recommendations.
- Work as a group to negotiate on: rates parking, congestion issues, signage, level crossings, disability access etc.

Signage

- Position signage listing retailers and services on all key entry points to Claremorris.
- Use the hoarding at Silverbridge for graphic displays and promotion of the town.
- Erect signs and town maps around Claremorris listing all services/retailers in the town.

Upkeep

- Clean up the town.
- Create a natural access/linkage from Silverbridge to the town centre.
- Decorate vacant shop windows.

Parking

- Negotiate changes in current parking system.
- If this is not possible communicate to shoppers that parking is only 30c per hour, and tickets are valid ALL around the town.
- Communicate clearly about parking on signage around the town and via a local PR campaigns (photos and media releases).

Implement Meaningful Promotions

- Consider generic loyalty card which give **genuine** discounts. Vouchers or coupons which give a small discount subject to a range of conditions annoy customers and create bad will.
- Consider – Zappa tag, 10% off days, freebie days.
- Continue with special events e.g. St Patrick's Day, Paint Claremorris Pink

Communicate about your Plans

- Public Relations.
 - Issue regular media and photo releases to local media. (Remember when choosing how and where to communicate the survey showed that 50% of shoppers live over 5 miles from Claremorris)
- Encourage all retailers to use Face book / Twitter / Text where appropriate to communicate to potential customers.

CONCLUSION

The survey results show that there are many things which Claremorris traders are implementing which lead to a positive shopping experience for shoppers. Equally there are areas in which shoppers feel the town could improve on. The results also reveal that shopper perceptions are not always the reality. If the Claremorris traders wish to revitalise and develop their town there is much that can be done to change those perceptions and create an even better shopping experience.



ARMS