



Cabinet

18 NOVEMBER 2015

Subject Heading:

Romford Market Transformation Programme

Cabinet Member:

Cllr Robert Benham Cabinet Member for the Environment

CMT Lead:

Andrew Blake-Herbert
Group Director for Communities & Resources

Report Author and contact details:

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Policy context:

Havering Council Corporate Plan 2015-16: Using our influence to 'Regenerate Romford Market to bring in new traders and attract more shoppers'

Financial summary:

The proposal is to develop a business case to establish whether it is appropriate to invest in Romford Market, with a view to regenerating it.

Is this a Key Decision?

Yes. Expenditure or saving (including anticipated income) of £500,000 or more

When should this matter be reviewed?

November 2018

Reviewing OSC:

Towns and Communities

The subject matter of this report deals with the following Council Objectives

Havering will be clean and its environment will be cared for	[X]
People will be safe, in their homes and in the community	[X]
Residents will be proud to live in Havering	[X]

SUMMARY

This report outlines proposals for the transformation of Romford Market, these fall under four main headings: branding identity and vision; operational management, business development; physical transformation and improved use of space.

Work on the first three is being initiated; the full physical interventions proposed are subject to the successful award of external funding to match Havering Council's proposed investment.

The transformational plan will see a fundamental change in the way Romford Market looks, feels, is managed and operated as well as changes to the Market Place itself and how it is used on both market and non market days.

RECOMMENDATIONS

That Cabinet:

1. **Endorse** the main proposals developed with the assistance of consultants 20:20 Ltd, as identified in section 4 of this report and task officers to progress implementation.
2. **Authorise** that officers engage with traders, retailers and partners in the delivery of the changes described in the report.
3. **Delegate** authority to the Group Director of Communities and Resources in consultation with the Cabinet Member for Environment to finalise the grant application for capital investment in the market to the Mayor of London's London Regeneration fund.
4. **Delegate** authority to the Cabinet Member for Environment and the Group Director of Communities and Resources to submit further funding applications (eg Veolia and HLF) or to other funding sources relating to the Market and Market Place consistent with the programme outlined in this report.
5. **Note** the appointment of architects to cost and develop full proposals for physical development of the Market Place and to **recommend to Council** the allocation of £1m Council Capital funding of the programme subject to securing sufficient match funding from other sources, and subject to a business case being signed off by the Finance Business Partner and Group Director, Communities & Resources, in consultation with the Cabinet Member for Environment.
6. **Utilise** transformational funding to support the market transformation programme as part of the Council's 'invest to save' model and **authorise** the Group Director of Communities and Resources to release funds accordingly, subject to both the Group Director and Finance Business Partner signing off a business case, in consultation with the Cabinet Member for Environment.

REPORT DETAIL

1. Background

- 1.1. The Corporate Plan sets out the Council's new goals Clean | Safe | Proud and the activities that the Council will undertake to 'support our community', 'use our influence and 'lead by example'. To ensure the borough's residents will be proud to live in Havering the Council has committed to 'Energise towns to improve quality of life' and to 'Regenerate Romford Market to bring in new traders and attract more shoppers'.
- 1.2. The Cabinet approved in July 2015 the Romford Development Framework which presented proposals to strengthen the distinct character and fabric of the town-centre bringing new vibrancy and activity to Romford's historic crossroads and market area whilst respecting and capitalising on its heritage
- 1.3. The Market Place is situated in the historic core which incorporates the Conservation Area and the historic cross roads, retains a number of listed and locally listed buildings and the largest public space in the town-centre.
- 1.4. At its peak, the Market had more than 300 regular traders and was the focal point of the town attracting customers from around London and beyond. There are now less than 90 licensed traders, the product offer is not unique or interesting and there is stiff competition from value chain stores surrounding the market. If the decline continues the market may well reach a critical point where we will not be in a position to turn around its fortunes.
- 1.5. Although Romford Town-Centre is the largest shopping centre in the sub region, one of London's ten metropolitan "centres", the lack of a distinct retail offer in Romford provides little to differentiate itself from other centres. There is potential for the Market to enhance the local economy, contribute to building a diverse independent retail offer, create new public space, and attract new food and beverage uses.
- 1.6. Proximity to London makes Romford town-centre a suitable location for commuters, with comparatively more affordable (for London) house prices for first time buyers. Crossrail is likely to reinforce the attraction of residential living in Romford. This will support the town's economic performance which a revitalised market would benefit from.
- 1.7. Other inner and outer London Boroughs are investing heavily into their market propositions such as Kingston, Chrisp Street and Barking, markets. In these

cases this investment is being undertaken in part as a catalyst for re-branding and revitalising of their town-centres.

- 1.8. To assist the Council in January 2015 the Council commissioned 20:20 Ltd, retail and branding consultants, to review the potential of Romford Market to attract new traders and shoppers, to be managed more effectively and to become a more vibrant part of Romford's retail offer. Their conclusions and recommendations have now been incorporated into a Business Transformational Programme.
- 1.9. 20:20 carried out a full audit of the market and adjacent retail in the town, and undertook research to understand the growth in markets and best practice in other locations in order to understand the challenges and potential of Romford's market.
- 1.10. To inform this work the Council undertook market research in March 2015 interviewing 690 individuals, a synopsis of this is attached as appendix 1 of this report. 20:20 then carried out a further 35 in depth customer interviews with both users and non-users of the market to understand the aspirations of existing customers and potential customers.
- 1.11. Throughout their work they engaged with traders, other retail stakeholders within the town and the Council, to understand unmet needs and requirements of the market as well as collective ambitions

2. 20:20 Ltd findings

- 2.1 Many of Romford Market's challenges are universal such as the rise in internet shopping and the increase in low cost grocery retailers, pound shops and cheap high street fashion retailers. In addition there has been a change in consumer habits who are increasingly time poor, who save browsing time for value-added experiences. Many challenges are also specific to Romford market itself.
- 2.2 The main findings of 20:20 are outlined below, with most relating to the market and some to Romford as a Town.
 - 2.3.1 Romford Market mainly appeals to low income, ageing demographic with limited disposal income. There is strong potential for the market amongst Experian groups 'settled extended families'; 'Young Families with children' and '65plus with disposable income'.
 - 2.3.2 Across the Town as a whole there is a good mix of retail, leisure caters for the over 50s and under 21s but gaps for other customer groups particularly families, young professionals and affluent 65 plus.
 - 2.5.3 The branding, marketing and events programme for the Market does not encourage these customer groups through interesting events,

variety of product and experience, discounts and elements that build loyalty.

- 2.5.4 There has been a significant loss of trader numbers over the last few years with an average of 136 licensed and casual traders in 2011/12 against a current average of 98. Whilst traders would have usually sold or passed their business onto another family, now it is usual for stalls to be returned to the Council. With the reduction of traders Romford Market has had a reduced revenue income, for the past three years.
- 2.5.5 There is inadequate existing resources with a sole responsibility to source new traders for the market.
- 2.5.6 There is a lack of quality products, a limited diversity of traders providing a limited mix of and poor representation in both key retail drivers such as men's fashion and leisure food and beverage offer.
- 2.5.7 Odd adjacencies and product groupings makes some products less desirable.
- 2.5.8 Despite previous studies in 2012 that showed a very strong demand for a hot food offer within the market, efforts to deliver this have been ineffective and Romford market is woefully under-represented in food.
- 2.5.9 A wider review of retail and commercial offer in Romford concluded (in line with the findings identified in the work to develop the Romford Framework) that there was a lack of quality A3 (restaurants and cafés) and a wider variety of food and beverage provision in Romford. They believed the Market Place could provide such an opportunity.
- 2.5.10 Current stall positions leave gaps, reduce density and bustle, add to the feeling that 'the market is dwindling'. There is a disparity of stall treatments and the lack of standards leaves the market feeling unloved and shabby in parts.
- 2.5.11 Current management resource is not very visible to both traders and customers and there is a need for better control of key operational components such as erecting and breakdown of stalls, pitch locations, flashing and visual merchandising.
- 2.5.12 Romford Market currently lacks any areas for the local community to sit and dwell and it presents very few opportunities for families to relax

The London Retail Street Market Study shows that the number of consumer visits per stall per day for food is 161 and non-food is 38.

Market research undertaken in early 2015 indicates that 76 per cent of respondents visit Romford Market but that 44 per cent of would like to see 'better quality and more variety

and enjoy themselves. Successful town-centres benefit increasingly from dwell space to improve dwell time' (the length of time a customer spends in the town-centre), Experian research and evidence from private car park statistics show dwell time is low, again this is consistent with the findings of the analysis behind the Romford Framework. To increase dwell time the leisure, food and beverage and amenity space requires improvement.

2.5.13 There is a lack of connection to the other retail zones in town including good way-finding. The market appears isolated and the location of stalls into North Street dilutes the core market.

2.5.14 The Market Place itself is a 'huge asset' that the Council controls which isn't performing as well as it could in terms of public amenity, car park, or market and it could generate more income for the council and more importantly add value to the town-centre.

3. Key 20:20 recommendations

- 3.1. Re-establish the importance of the market and Market Place as the core and historic heart of Romford. There is an opportunity to strengthen Romford's identity by providing a civic focal point for leisure and cultural activities. Through investing in play provision, revamped market, creation of dwell space.
- 3.2. The changing demographics of the town with more residential living the market suggest we should aim to target more town-centre dwellers such as young professionals and commuters and weekends and evenings. During the week, target discerning over 65 and younger families whilst seeking to retain its 65 plus loyal customer base
- 3.3. Develop a new brand concept around the theme 'An Everyday Adventure' to appeal to these new target customer groups of young families, affluent 65 plus and young professionals.
- 3.4. Move and improve current stalls e.g. frames and coverings and better visual merchandising and better represent the everyday adventure brand.
- 3.5. Invigorate the secondary events programme with regular visiting markets, seasonal and cultural events.
- 3.6. Improve the visibility of the Market management team to traders and customers.
- 3.7. Establish a Market Pledge which outlines the responsibilities of both the council and the traders – expectations in terms of behaviour, customer services, maintenance, product and visual merchandising standards, within the market, help establish an elected market committee.

- 3.8. Consider timings and trading days in order to attract new target customer's and increase the number of traders.
- 3.9. Balance and further populate the product offering to better reflect the Romford population's shopping patterns and provide a unique product experience.
- 3.10. Increase the proportion of premium products (approximately 10%-25%) especially in food and gifts to lift the overall standard of the market and compliment key offer currently available on the Market which is food and fashion.
- 3.11. Focus product categories to appeal to the key family demographic such as home-ware, family apparel, children's-wear, artisan foods, toys and gifts, woman's accessories and arts and craft.
- 3.12. In line with other markets and the high street more generally, increase cold packaged, fresh and hot food offer 40% of overall market offer.
- 3.13. Zone the market to create a natural 'buzz' and bustle.
- 3.14. Connect Market Place with the rest of Romford with signage, graphics, design and way-finding creating tangible links.
- 3.15. Introduce a public space improve customer satisfaction, increase dwell time and help change perceptions of the market place.
- 3.16. Introduce permanent and semi-permanent food and beverage units to allow the Council to influence and enhance the core leisure town-centre offer.

4. The Transformation Programme

Following 20:20 findings and recommendations, the Council has prepared a transformation programme under the headings below:

- a) Branding, identity and vision
- b) Operational management
- c) Business growth and development of market offer
- d) Physical transformation and improved use of space

4.1. Branding, identity and vision

- 4.1.1. We will implement the 'an everyday adventure concept' celebrating ordinary, sense of discovery, multipurpose, multi-occasion – always worth a visit.
- 4.1.2. We will establish a new mission to deliver a best in class market experience that regenerates Market Place and acts as a catalyst for growth in visitor numbers and retail spend across Romford and a focus on becoming more family friendly and appealing to discerning Shoppers.

4.1.3. The branding will support subsequent changes outlined below to ensure the market is fit for our new target customer market, appealing to a new type of trader and underpins the market's new ethos of an 'everyday adventure'. To achieve this a visual realisation of the 'Everyday Adventure' will be developed with the creation of brand including logo, stall covers, uniforms and signage. An enhanced seasonal events programme and entertainment will be curated together with a refreshed website and use of social media and marketing campaigns.

4.2. Operational management

4.2.1. In order to create a positive environment for trading and improve operational efficiency to reduce costs, generate sales and improve our relationships with our traders we propose to:

4.2.2. Introduce a 'Trader Pledge' and management service level agreement *which will* include: a commitment to trade on all market days; adhere to flash presentation and customer service guidelines; respect all diversity customers and co-workers. It is proposed to introduce a new elected trader organisation to ensure management is visible, available and accessible to customers and traders by installing a market management facility on the Market.

4.2.3. We will consider interventions to better manage and control the shape of the market, improve the efficiency of the erection and dismantling of stalls as well as improve capacity and quality of market maintenance, cleanliness and waste management.

4.2.4. We will significantly improve digital capacity, e-commerce and service delivery by introducing superfast Wi-Fi, contactless/card payments and trader digital marketing. This will be supported through training for managers and traders to ensure delivery and uptake.

4.3. Business growth and development of market offer

4.3.1. Increasing the number of traders on the market is a priority in order to improve the quality and diversity of the offer within existing commodities and introduce new 'interest' categories that appeal to our target customer groups.

4.3.2. A new business development resource will focus on encouraging existing traders to expand and diversify product offer, recruiting and incentivising new experienced traders, and supporting new traders/micro businesses with an incubation strategy.

4.3.3. Plans for the new shape of the market will be developed and designed to ensure it can contract and expand, removing gaps and allowing clustering of complementary traders. If funding permits a new look with high quality, modern fixed stalls will be trialed to radically improve the appearance of the market.

- 4.3.4. It is proposed to consider new market days with a different focus to attract different traders to meet the requirements of the target customer groups, these traders can then be dispersed through traditional market days and the market adapt to current shopping patterns e.g. early evening and Sunday hours.
- 4.3.5. Initially this could include a Thursday market focusing on food and beverage and higher end wares with slightly later trading times to attract young professionals, strengthen late night opening and improve early evening leisure offer. A Sunday market could be a themed vintage and pre-loved (flea market) offer that attracts, boutique casual traders and capitalise on increasing number of shoppers and free parking on a Sunday.

4.4. Physical transformation and improved use of space

- 4.4.1. It is proposed to create a flexible, multifunctional public space with sensitive public art, design, way-finding and lighting linked to the heritage of the market place that enhances the Conservation Area (which is currently on Heritage England's 'At Risk' register.)
- 4.4.2. The key features would include: semi-permanent canopies for year round weather proof activity; Semi-permanent catering installations utilising the public realm for Food and Beverage concessions; Community and dwell space including multi-functional family friendly area incorporating children's play. Car parking would be rationalised as part of the design process and this loss of car parking space would need to be evaluated.
- 4.4.3. The costs of undertaking this work have been scoped and could be above £2m. Through discussions with officers and Cabinet members such investment by the Council on its own it is believed could not be justified. However, if other funding can be secured it is recommended that the Council match that funding.
- 4.4.4. A consultant project team has subsequently been appointed in October to lead on designing Market Place as a multi-function space, with lead consultant DK-CM Architects and specialist team comprising market, food and beverage and quantity surveying expertise. Stakeholders, traders, members and the public will be consulted as the appointed team develop full proposals.

5. Strategic Rationale for the Council's investment

- 5.1. The objectives for this project are to transform Romford Market, create a new heart of the town in the Market Place and act as a catalyst for the town's future growth.
- 5.2. These initiatives fit well with the government's devolution agenda and the ability of the Council to use its influence and funding to support the growth and

retention of businesses in its area and support its business rate income. Romford Town Centre currently accounts for £33 million in business rates this is 40% of the total business rates collected by the borough.

- 5.3. Ensuring Romford remains a viable metropolitan centre will be vital to protecting and retaining the business rate base. Developing and building on the existing retail offer and key assets, such as the market place, will be key to cementing and growing Romford's position as a retail and leisure destination.
- 5.4. The results of the transformational programme will be higher quality and more diverse product offer on the market with an increase number of traders. Our target is an increase of 50 over 4 years and more trading days as described. This could lead to an increase in income.
- 5.5. Capital investment would create a new civic area for the town, with semi-permanent cafe offer. It will be a location for Romford residents and visitors to dwell. Partial covering of the square will improve the trading environment and ensure this space is used throughout the year.
- 5.6. Once external and match funding is secured for a capital investment a full economic impact assessment will be done, however, studies show that for every £1 spend in a market, normally a town benefits from £1.7 additional spend elsewhere. Therefore based on average spend per stall per day 25 new traders could bring in c£1.2 million of additional spend into Romford town-centre.
- 5.7. The investment in the market could be the catalyst for additional investment in the town including the Liberty, who have, for a long time owned the empty premises immediately adjacent to the Market Place at Swan Walk, this could bring in in excess of £500K business rates to the borough.

6. Financial investment

- 6.1. Achievement of these outcomes is dependent on investment from the Council and other sources. These are outlined in broad terms below.
- 6.2. Creating a brand with new covers/website/branded uniforms/marketing campaign will require one off investment and continued funding to maintain marketing campaigns and events programmes out of existing budgets.
- 6.3. Increasing the range and number of traders will require investment in business development resource and a business support package. This may be self-funding within two years.
- 6.4. Funding would be required to deliver wifi in the town together with a digital training and support package for traders. There may be commercial revenue opportunities from this which we are exploring.

- 6.5. We will need new stalls; this may in part be delivered through monies secured through the LEP New Homes Bonus fund.
- 6.6. The significant reshaping of the Market Place to deliver covered areas, catering units and children's/family friendly area would cost upwards of £2m which would only take place if we secured match funding (see section 7 below).
- 6.7. It is proposed that consideration be given for an experienced transformation manager, who could assist the Council in the delivery of this programme of change. This post would need to be funded.
- 6.8. A detailed business case is under preparation. Recommendations 5 and 6 are dependent on a business case being signed off by the Finance Business Partner and the Group Director of Communities and Resources, in conjunction with the Cabinet Member for Environment.

7. External funding sources

Mayor's London Regeneration Fund

- 7.1. The London Regeneration Fund has been established by the London Enterprise Panel (LEP), using funding secured as part of its 'Growth Deal'. There is £20m capital funding available, between April 2016 and April 2018, to specifically help London's high streets and places of work by supporting innovative and place-based projects throughout the city (across 32 London Boroughs).
- 7.2. An outline application has been submitted to the Mayor's regeneration fund to attract and establish new retail and catering businesses, create a covered section of the Market, install new stalls, catering facilities, and a feature play space. Proposals submitted are being assessed and successful ones finalised in December 2015.
- 7.3. It is proposed in recommendation 3 of this Cabinet report to give delegated authority to the Group Director of Communities and Resources in consultation with the Lead Member for Environment to finalise the grant application for capital investment in the market to the Mayor's London Regeneration fund

Other funding sources

- 7.4. Heritage England have indicated that they would support the council in an application to the Heritage Lottery Fund Townscape Heritage programme which helps communities regenerate deprived towns and cities across the UK by improving their built historic environment. Grants range from £100,000 to £2million.

- 7.5. We have begun discussions with Veolia North Thames Trust about the exciting plans to transform the Market Place for public dwell and play space and whether this would meet Entrust criteria around the provision, maintenance or improvement of a public park or public amenity.
- 7.6. Other funding sources to invest in the public realm include Transport for London.
- 7.7. Recommendation 4 proposes to delegate the authority to Lead Member for Environment and the Group Director of Communities and Resources to submit further funding applications (eg Veolia and HLF), or to other funding sources relating to the Market and Market Place and consistent with the programme outlined in this report.

8. Governance

- 8.1. A Project Board will be established to oversee this programme of change, this will include the Group Director of Communities and resources in conjunction with the Cabinet Member for Environment.
- 8.2. A transformation manager will be employed to oversee the programme reporting to the Head of Property Services to oversee the transformational programme and ensure all relevant internal and external stakeholders are engaged.
- 8.3. The Service Heads of Economic Development and Streetcare will form part of the delivery group to support the proposed changes and ensure the market both fits in and is supported by the other investments in the town.

9 Next Steps

Engage with traders and other stakeholders over proposals	Nov/Dec 2015
Develop full business case and transformation programme	Nov/Dec 2015
Recruit new staff:	
e.g. Transformation and Business Development Manager	Nov/Dec 2015
Development of brand concept	Nov 2015
Public/trader/stakeholder consultation on Physical design	Nov 2015
Christmas Village	Dec 2015
Introduce market pledge and trader organisation	Jan 2016
New covers, and generators (to move stalls)	March 2016
Launch of new brand and layout	March 2016

REASONS AND OPTIONS

Reasons for the decision:

A revamped market will bring income to the council and will spur economic activities elsewhere in the town. The Romford Development Framework indicates Romford is poised for significant future growth with the potential of 3,400 homes, and 23,000 m² of office and retail space leading to 480 new jobs over the next 10 years. The RDF and findings of the 20:20 study show that to reach this potential, Romford needs to improve, and this Market Transformation Programme is fundamental to cementing and growing Romford's position as a retail and leisure destination.

Other options considered:

Do nothing. Without intervention the market will continue to decline and underperform as a commercial proposition but also as an asset for the Town.

IMPLICATIONS AND RISKS

Financial implications and risks:

The market generates in excess of £500K gross income for the council per annum, and the fortunes of the market can be changed. The projected increase in net profit from the transformational programme is in the order of £130,000 on an annual basis.

To achieve this improvement transformational funding 'invest to save' monies will be needed. These will be released as per the recommendations in the report.

Capital investment as described in the report can be factored into the Council's future programme and will need to be approved by full Council. Release of capital funds is dependent on receiving match funding from external sources.

There would be a loss of car park income depending on the physical interventions and expanding the number of market days.

Legal implications and risks:

The London Borough of Havering owns the market rights to operate a market, and to licence any other markets within a 6 and 2/3 mile radius of Romford Market. These market rights were granted by the Crown in 1247. Under the Royal Charter of the Liberty of Havering, granted by King Henry III no other market is permitted to set up within a 6 and 2/3 miles radius of the Romford market. Any market within this radius shall be deemed to be a Rival Market. . The effect of this is that the council as owner of a franchise is able to grant or refuse permission for rival markets. Under the charter, a Wednesday market is operated.

A Friday and Saturday market on the same site is held under powers conferred by the Food Act 1984. The same Licensing Rights referred to above apply to the Friday and Saturday market other than in respect of a directly operated local authority

market. Any additional market trading days (Thursday and or Sunday) may be established under S.50 of the Food Act, or optionally operated under the London Local Authorities act 1990.

S.50 of the Food Act provides local authorities with the power to establish markets within their area, subject to the proviso that a market may not be established so as to interfere with any rights, powers or privileges enjoyed in respect of a market within the area without the consent of the person with the benefit of such rights. Should there be any market operators falling within this group, the council will require their consent. S.52 of the Act provides that a market authority may appoint days on which, and hours during which, market days are to be held. S.53 allows charges to be demanded in respect of the market and S.60 allows byelaws to be made, dealing with matters including, the regulation of the Market Place and prevention of nuisances or obstructions in the market place.

Trading at the Romford market does not constitute 'street trading' for the purposes of the London Local Authorities Act 1990 (the Act) S.41 of the Act provides an exemption for "anything done in a market or fair the right to hold which was acquired by virtue of a grant (including a presumed grant) or acquired or established by virtue of an enactment or order. Markets established by Charter or statute are therefore exempt from the street trading regime under the Act. This means that a street trading licence is not required under the Act.

Development within Romford market or a variation to trading days may require the grant of planning permission before being implemented.

The proposals are likely to impact on car parking arrangements in the market. Any proposals to change an existing Traffic Management Order would require advertisement and consultation before a decision can be taken on their implementation.

The council should also conduct an Equalities Impact assessment on the proposals to improve the market offer and environment.

The proposed delegations are ones which can be made by Cabinet.

Further legal issues may arise as the proposals are developed.

Human Resources implications and risks:

There will be a requirement to recruit new resources to oversee the Market transformation project, undertake the business development aspects of delivery and deliver a programme of activities to ensure Romford market becomes an experience and destination. As market operational issues are developed and changes there may be further human resource implications.

Equalities implications and risks:

A strategic Equalities Impact Assessment covering all of the work streams comprising the market transformation programme will need to be undertaken. Completing this analysis will assist the organisation to identify practical steps to address any negative effects and to highlight positive interventions. It will ensure we have record of our

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decision making processes and activities we have completed to ensure that no groups are adversely affected by the implementation of this project. The EIA will be updated regularly and a full and final EIA will be published upon completion of the project.

BACKGROUND PAPERS

There are none

Appendix 1

Romford Market Research

Assosia
Quality Assured

Methodology

- Assosia were commissioned to conduct face to face research/questionnaires with members of the public about Romford Town Centre. Surveys were conducted in 6 separate locations within Romford as follows:
 - ☐ Liberty Shopping Centre
 - ☐ Mercury Shopping Centre
 - ☐ Market Place – Near Debenhams
 - ☐ South Street/ Market Place Cross Roads
 - ☐ Visitor centre on South Street
 - ☐ Arcade Place – Near Brewery
- The research was conducted on the following dates:
 - ☐ Saturday 21st March (Market Day)
 - ☐ Tuesday 24th March (Non-Market Day)
 - ☐ Wednesday 25th March (Market Day)
 - ☐ Thursday 26th March (Non-Market Day)
- This Appendix shows the information gathered that relates to Romford Market

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Demographics

Assosia
Quality Assured

- A total of 690 surveys were completed in Romford Town Centre across all days, with the following percentage split by Gender and Age:

Sex	Age	Percentage
Female	18-24	4.64%
	25-34	10.72%
	35-44	7.68%
	45-54	9.28%
	55-64	9.13%
Male	65-80	17.39%
	80+	3.40%
	18-24	3.33%
	25-34	6.23%
	35-44	3.40%
Total	45-54	5.22%
	55-64	5.30%
	65-80	10.29%
	80+	3.77%

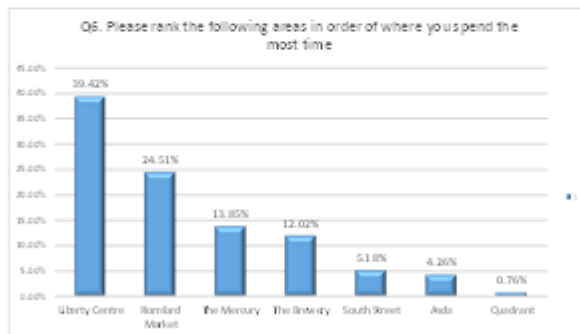
- The feedback captured was fairly evenly split between male and female respondents (38% vs 62%).
- The highest responses from both Genders being aged 65-80years (28% total).

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In which area of Romford do you spend the most time?



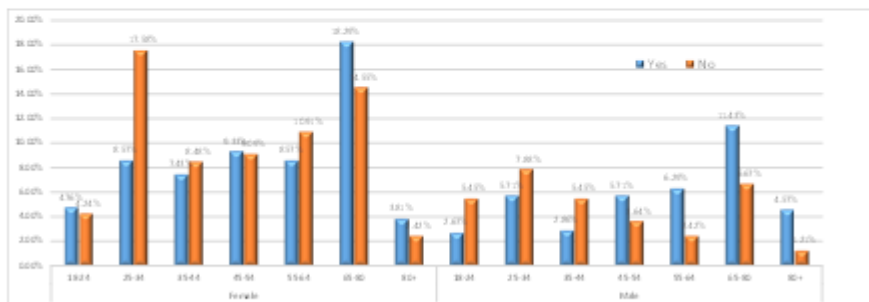
- Respondents were asked to rank 7 areas of Romford Town Centre in order of where they spend the most time – 39% of respondents (259) stated that 'The Liberty' was where they spent the most time, followed by 'Romford Market' with 25% (161) and 'The Mercury' at 14% (91).
- 'The Quadrant' was where shoppers spent the least time with only 1% selecting this area. During the face to face surveys, many shoppers were unaware of this area at all.



Do you ever visit Romford Market?



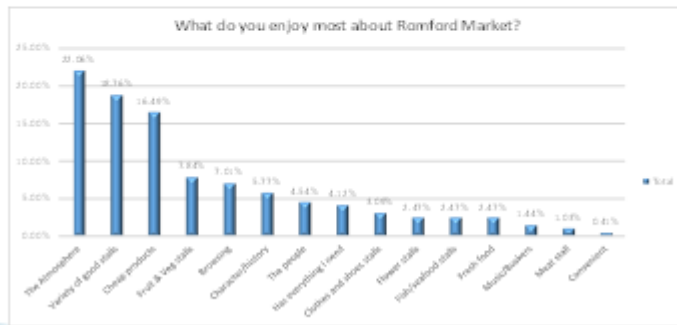
- Overall, 76% of respondents confirmed that they did visit Romford Market.
- Of those that confirmed they did visit Romford Market, there was a 60/40% split between Female and Male respondents. The highest percentage by age across both genders was those aged 65–80 years.
- Of those that did not visit Romford Market, the highest percentage was those aged 25–34 years.



If you do visit Romford Market: What do you enjoy the most?



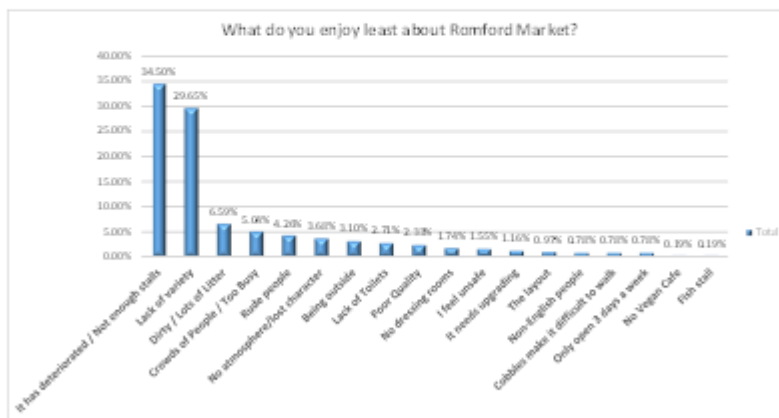
- > 22% of respondents confirmed that the thing they liked most about Romford Market was 'The Atmosphere', this was followed by 19% that liked 'The Variety of Stalls' and 16% that liked 'The Cheap Products'.
- > Other enjoyable factors accounting for less than 1% of the overall feedback (not displayed in the below graph) were;
 - The Layout, Christmas Time, Convenience, Sweet Stalls, Indoor Market, Speciality Shops & Pubs & Bars.



If you do visit Romford Market: What do you enjoy the least?



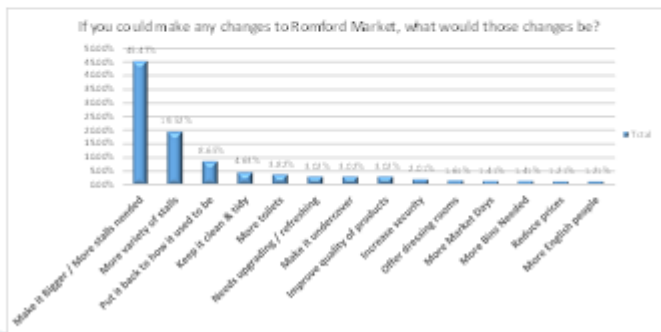
- > 35% of respondents (178) confirmed that the thing that they liked least about Romford Market was that 'It has deteriorated & there are not enough stalls', thereafter 30% (153) confirmed that the Market 'Lacked Variety'.



If you could make any changes to Romford Market, what would those changes be?



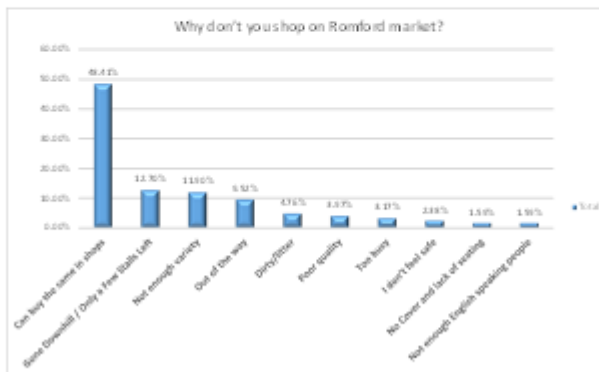
- > Almost half of all respondents asked (45%) confirmed that 'Increasing the Number of Stalls' would be the main change they would like to see. This was followed by 20% of respondents that would like to see 'More Variety of Stalls'
- > Other suggested changes accounting for less than 1% of the overall feedback (not displayed in the below graph) were;
 - A Better Atmosphere, More Food Stalls (including Vegan options), Lower Parking Fees, More Seating Areas, More Family Entertainment, More Book Stalls & More Fabric Stalls.



If you do not visit Romford Market: Why do you not?



- > Excluding 24% that had 'No interest in Markets', almost half of respondents (48%) confirmed that they do not shop on Romford Market because they 'Can buy the same items in the shops'.
- > 13% do not shop on Romford Market because 'It has gone downhill and there are only very few stalls left'.



If you do not visit Romford Market: What would have to change to get you to visit?



- Excluding those again that had 'No interest in Markets', 45% claimed that there would need to be 'More Stalls and More Variety' to get them to visit.
- Thereafter 21% of respondents would want 'Better quality stalls' and 11% would want 'Lower Prices'.
- Other requests included; 'A Revamp / Layout Change', 'A Cash Machine' & 'More Seating'.

