



St George's Market study

Summary report prepared for:
Belfast City Council

2 September 2010



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2 September 2010

Dear Jelena

Please find enclosed the summary report for the study of the Sunday Market at St. George's. If you require any further information please do not hesitate to contact me on 028 90 737090 (maureen.treacy@pimr.co.uk).

Yours sincerely

A handwritten signature in black ink that reads 'Maureen Treacy'.

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1. Methodology

Belfast City Council commissioned Perceptive Insight to conduct a study regarding the Sunday Market at St. George's. The aim of the study was to examine the profile of the city centre and St. George's Market visitors and their awareness of and opinions towards the market.

The study consisted of two surveys of visitors/shoppers, one at St. George's Sunday Market while the other was conducted at various locations in Belfast City Centre such as Belfast City Hall and Donegal Place.

Interviewing was carried out by our team of trained interviewers at the aforementioned locations in Belfast on Sunday 29th August 2010. The questionnaire with city centre visitors took approximately three minutes to administer while the questionnaire with St. George's Market visitors took approximately five minutes to complete.

In total, 106 interviews were achieved with St. George's Market visitors while 105 interviews were achieved with city centre visitors.

A count of the footfall of the market took place on Sunday 22nd August.

2. Visitor Profile

This section explores the demographics of visitors to the city centre and St. George's Market.

St. George's Market survey

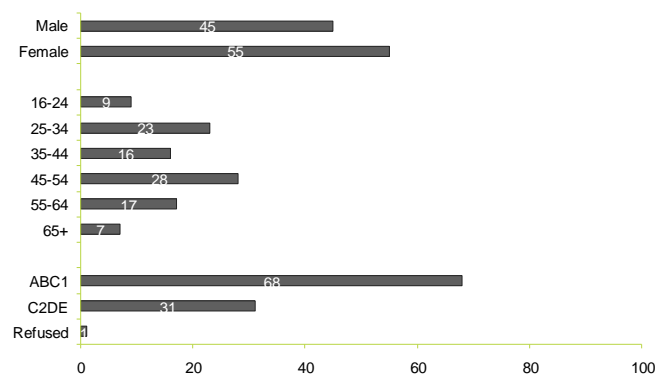
A quota was placed in terms of gender for both surveys to ensure a fairly even spread of males and females.

Regarding age, visitors to the market were most likely to be aged 45 to 54 years old (28%) or 25 to 34 years old (23%). Visitors were less likely to fall into the youngest age bracket of 16 to 24 years old (9%) or the oldest age bracket of 65 years and older (7%).

The majority of those interviewed were ABC1 (68%) with 31% classified as C2DE.

Demographics

Base 106: All respondents



The majority of respondents (83%) were from Northern Ireland. Of these respondents, Belfast (49%), Co. Antrim (excluding Newtownabbey and Castlereagh) (20%) and Co. Down (excluding Holywood) (18%) were the most common locations to travel from.

Seventeen percent came from outside NI. Of these, 12% came from the Republic of Ireland, while 17% were from Northern England and 17% from Southern England. Visitors also came from the East Coast of Scotland (11%), Midlands England (11%), France (6%), Holland (6%), Scandinavia (6%) and New Zealand (6%). There were also 11% from the rest of the world.

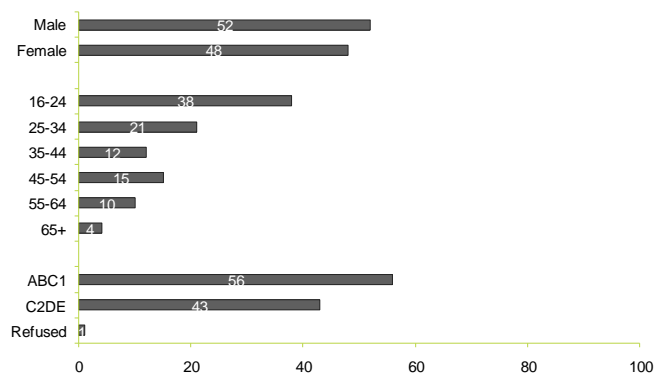
City centre survey

Compared with St. George's Sunday Market visitors, those interviewed in the city centre locations were more likely to have a younger profile with 38% of those interviewed age 16 to 24 years old and 21% aged 25 to 34. Just 10% were aged 55 to 64 and 4% aged 65 and over.

Again, those interviewed were more likely to be classed as ABC1 (56%) with 43% classed as C2DE.

Demographics

Base 105; All respondents



Respondents were most likely to live in Northern Ireland (87%). Again, respondents were most likely to have travelled from Belfast (59%), the rest of Co. Antrim (16%) and the Rest of Co. Down (10%).

Thirteen percent were from outside of Northern Ireland. Of these, 43% were from the Republic of Ireland, 21% from Northern England, 14% from the West Coast of Scotland, 7% from France, 7% from Canada and 7% from the rest of the world.

3. Information about the visit

Respondents were also asked a series of questions regarding the visit to Belfast they were undertaking that day and their reasons for doing so.

St. George's Market survey

Reasons for the visit

Visitors to the Sunday St. George's Market were indeed most likely to indicate the main reason for their trip was to visit the market (42%). One fifth (21%) were in Belfast to visit an attraction while 13% were there for shopping. Other reasons were to visit family and friends (8%), for a holiday or weekend break (5%), a day out (3%), for the Botanic event (2%), travel/transport for work (1%) or other (6%).

When probed about their main reason for visiting the actual market, 23% were there to simply browse or look around. Other popular reasons included to buy a snack or get lunch (11%), happened to pass through (6%), that there was nothing else to do (6%) or out of curiosity (6%).

Transport

Private car was the most common form of transport among respondents (67%) while a further 20% chose to walk. Other forms of transport included public bus (5%), train (5%), taxi (1%) or bicycle (1%).

Purchases and time spent at the market

One half of respondents (50%) stated they had spent or intended to spend between one and two hours at the market with a further quarter (27%) indicating they had spent or intended to stay between half an hour and an hour. Just 17% indicated they would spend or had spent more than two hours at the market.

Respondents were also most likely to indicate they had purchased from or intended to purchase from either 1 or 2 stalls (52%) or 3 or 4 stalls (22%).

In terms of spend, respondents stated that they were most likely to spend or had spent between £10 and £49 (76%) with average visitor spend a mean of £19.54.

Respondents were also asked if they will be spending more time in Belfast City Centre after visiting the Sunday Market. Behaviour was almost equally split with (53%) indicating they would be spending more time there with 47% stating they would not.

City centre survey

Reasons for the visit

The majority of visitors were in the City Centre for shopping (61%). Other reasons for visiting included visiting friends and relatives (9%) and to do paid work or on business (6%). Five percent had travelled to the city centre for a show or concert (5%) with a further 5% as part of a holiday or weekend break.

Transport

Again respondents were most likely to indicate they had travelled by private car (38%). However, over one third (34%) had travelled by public bus. One fifth had travelled by foot (20%). Four percent travelled by train, 2% by taxi and 1% by bicycle.

4. Awareness of the Sunday Market

Respondents were asked a series of questions designed to assess their awareness of the Sunday Market at St. George's and how they had first heard about the Sunday Market.

St. George's Market survey

Method of awareness

Word of mouth was the main method by which respondents first heard about the Sunday Market with 38% having been told about it by family and friends. Fifteen percent knew as they had happened to pass by, 13% heard about it through radio advertising while 8% had been to the market before. Other methods included things such as reading about it in a tourist guide (4%) and being told about it by their place of accommodation (3%).

Frequency of visiting

For the majority of respondents (63%), this was their first visit to the St. George's Sunday Market. Almost one quarter (24%) had been two or three times, 9% had been four to six times with 4% indicating they had been seven or more times.

Awareness of shuttle bus service

Three quarters of those interviewed (76%) had not heard of the free St. George's Market shuttle bus service.

City centre survey

Awareness of the Sunday Market at St. George's.

The majority of visitors interviewed in the city centre (68%) had heard of the Sunday Market at St. George's.

Method of awareness

As with those questioned at St. George's Market, respondents were most likely to have first heard about the Sunday Market after being told about it by family or friends (58%). One in ten respondents (10%) had heard about it on television and a further 8% heard about it on the radio.

Frequency of visiting

Just over one fifth (23%) of those questioned had ever visited the Sunday Market at St. George's. Of those who had visited, they were more likely to have visited once only.

Awareness of shuttle bus service

Again, awareness of the shuttle bus service was low with just 17% aware of the service and 83% unaware.

5. Attitudes to & opinions of the Market

Those questioned were also given the opportunity to give their opinions of the Sunday Market and what, if anything, could be done to improve the Sunday Market at St. George's.

St. George's Market survey

St. George's Sunday Market experience

Respondents were most likely to indicate that their visit to the Sunday Market met their expectations (54%). Thirty eight percent meanwhile felt the market exceeded their expectations and 3% felt it fell below their expectations. Three percent were unsure or did not know.

On a scale of 1 to 10, with 1 being extremely poor and 10 being extremely good, respondents were most likely to rate the Sunday Market at St. George's as an 8 (30%). The average score was 8.1. Using the same scale, the average score for the product range at the market was 7.8.

Importance of the Sunday Market at St. George's

Using a scale of 1 to 5 (with 1 being very important and 5 being not at all important), respondents were asked to rate how important the Sunday Market at St. George's is. Responses were positive with 86% of respondents viewing the Sunday Market as very important (rating of 1) and the remaining respondents giving a score of 2 or 3. The average score was 1.1.

Meanwhile, an overwhelming 94% stated that they would come to the Sunday Market should it continue to be held in the future.

Improvements to the Sunday Market

Participants were asked to give their views on what improvements could be made to the market. Over one half (56%), felt that nothing could be done to improve their experience. Four in ten respondents (40%) felt there should be more stalls, 22% that there should be more publicity, 18% more car parking and 16% felt there should be more seating in the food area.

City centre survey

St. George's Sunday Market experience

Those questioned in the city centre who had ever visited the Sunday Market (16 respondents) also felt that the market met their expectations (63%). Thirty one percent felt it exceeded their expectations and 6% (one respondent) stated it fell below expectations.

The sixteen respondents were also asked on a scale of 1 to 10, with 1 being extremely poor and 10 being extremely good, to rate the Sunday Market at St. George's. The most common

score was 6 while the average was 8.0. Using the same scale, the average score for the product range at the market was 7.8.

Likelihood of future visits to the Sunday Market

Over three quarters of respondents (78%) indicated they would be quite likely or very likely to visit the St. George's Sunday Market. Sixteen percent indicated they were unlikely to visit with a further 8% neither likely nor unlikely.

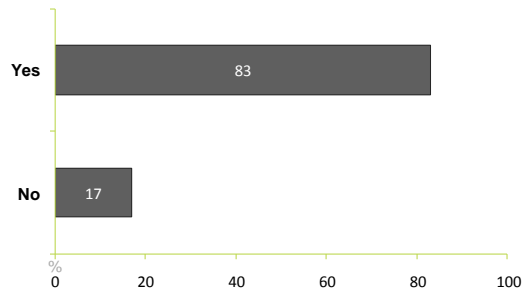
The sixteen respondents who stated they were unlikely to visit in the future were asked why. Eight of these respondents were unlikely to visit as they were not interested with the remaining eight respondents stating reasons such as they work on a Sunday, they do not like shopping or they do not shop on a Sunday.

6. Appendix A - Results graphs

St. George's Market survey

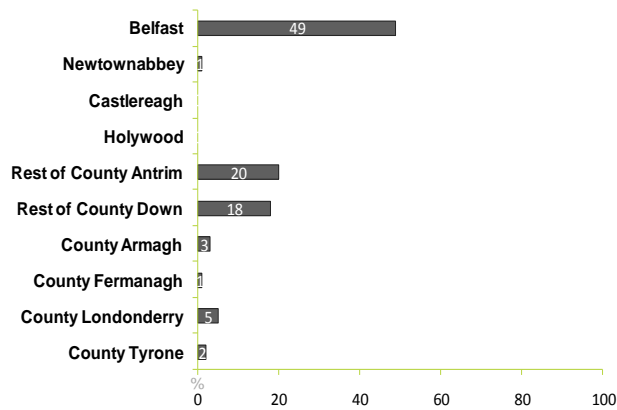
Do you currently live in Northern Ireland?

Base 106: All respondents



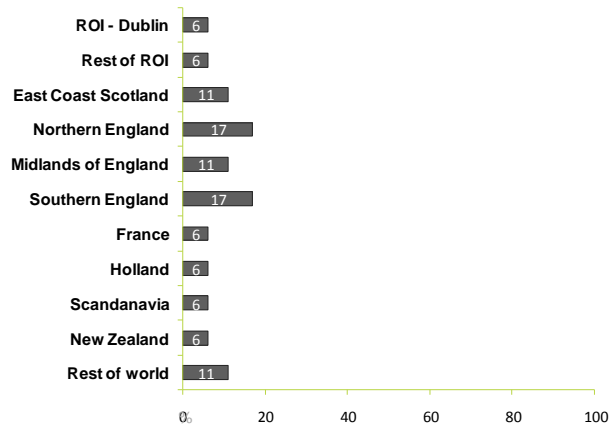
In what part of Northern Ireland do you live?

Base 88: Respondents that live in NI



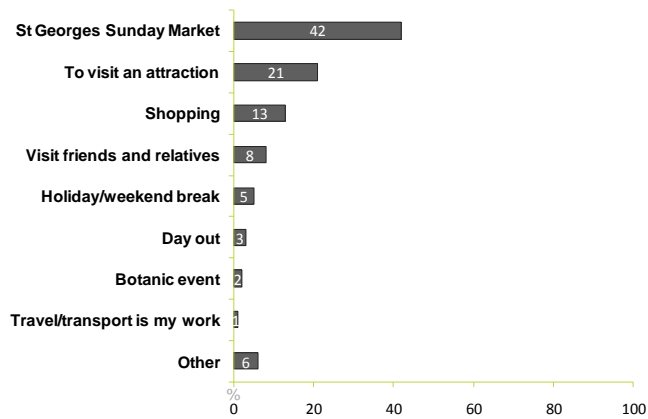
In which country do you live?

Base 18: Respondents that do not live in NI



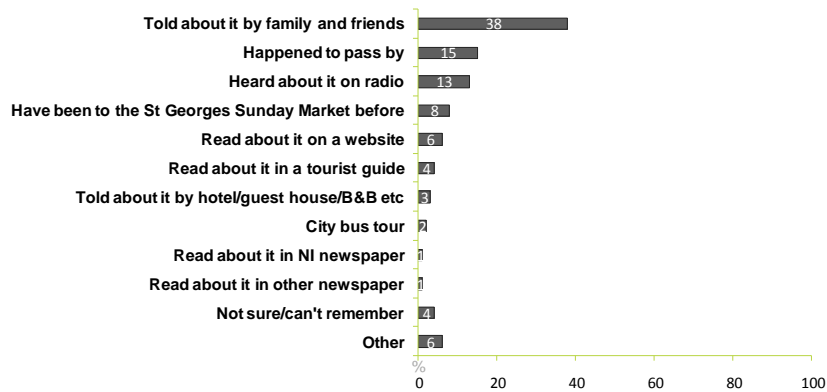
Which one of these was the main reason for your trip to Belfast city centre today?

Base 106: All respondents



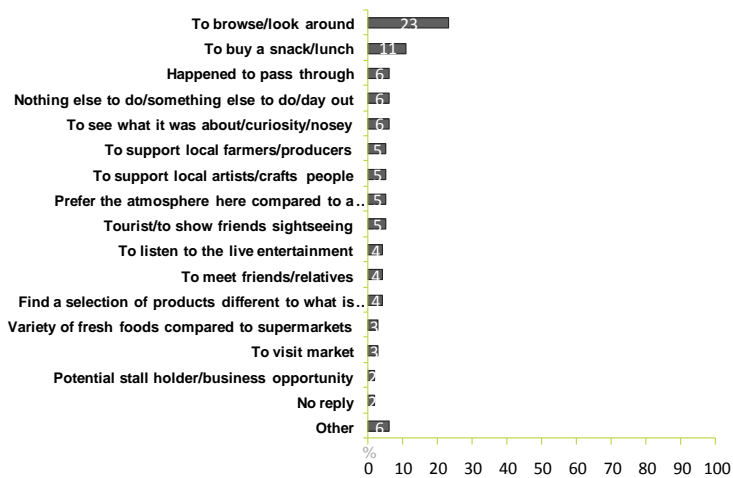
How did you first hear about the St Georges Sunday Market?

Base 106: All respondents



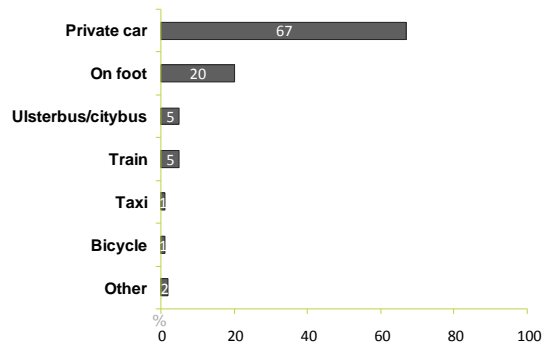
What was the main reason for visiting the St Georges Sunday market today?

Base 106: All respondents



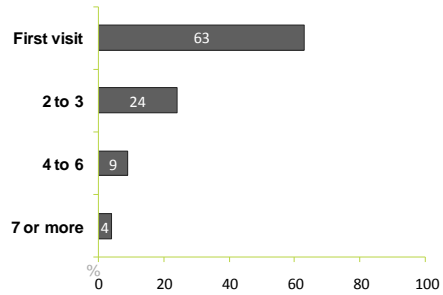
What was the main form of transport you used to get to St Georges Market today?

Base 106: All respondents



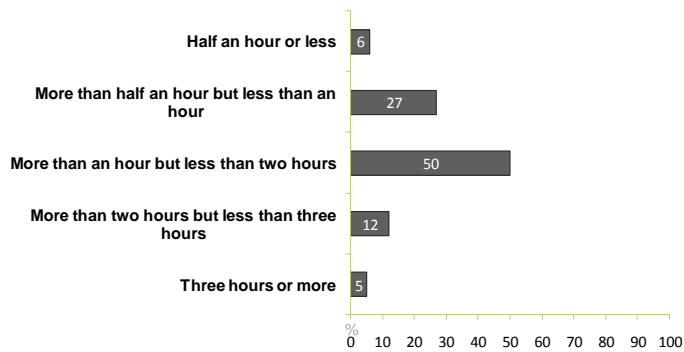
How many times have you been to the St Georges Sunday Market?

Base 106: All respondents



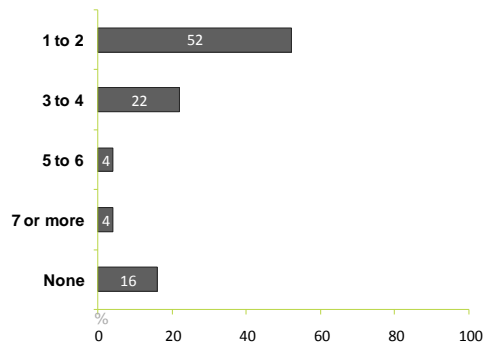
How long have you spent/intend to spend at the St Georges Sunday Market today?

Base 106: All respondents



How many stalls have you already purchased from or intend to purchase from at the St Georges Sunday Market?

Base 106: All respondents



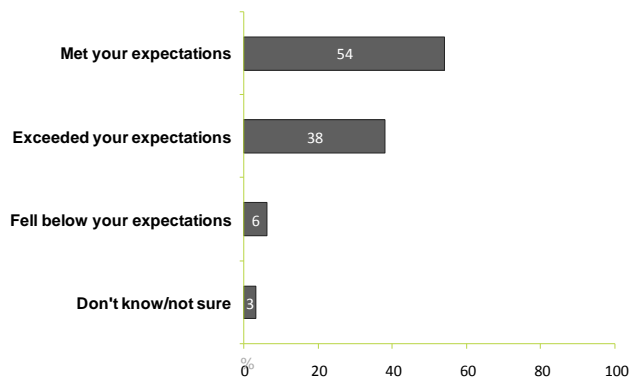
How much have you spent/do you intend to spend on goods/products at St Georges Sunday Market?

Base 106: All respondents



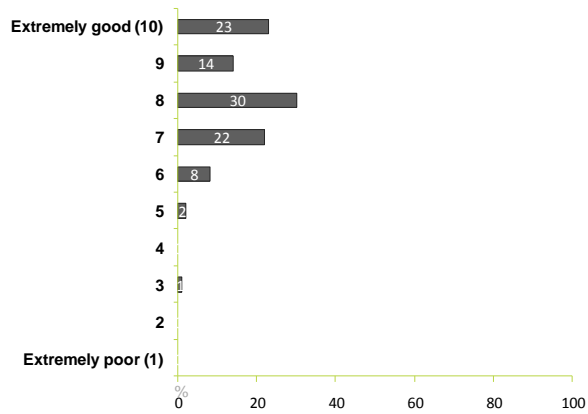
Would you say that your visit to the St Georges Sunday Market has....?

Base 106: All respondents



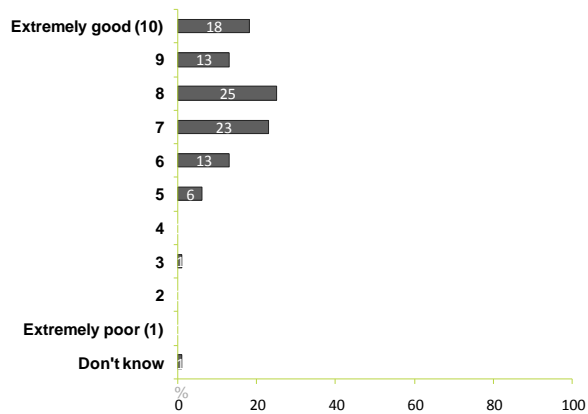
How would you rate St Georges Sunday Market as a whole?

Base 106: All respondents



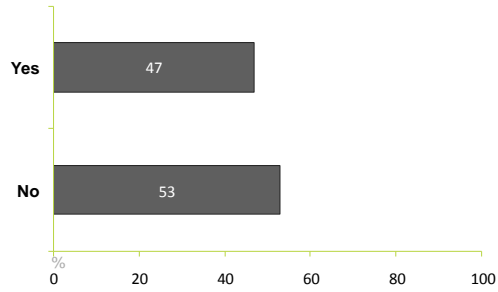
How would you rate the product range at St Georges Sunday Market?

Base 106: All respondents



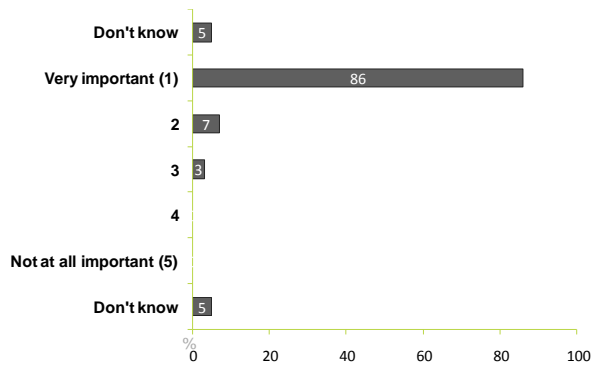
After visiting the Sunday Market today, will you be spending more time in Belfast City Centre?

Base 106: All respondents



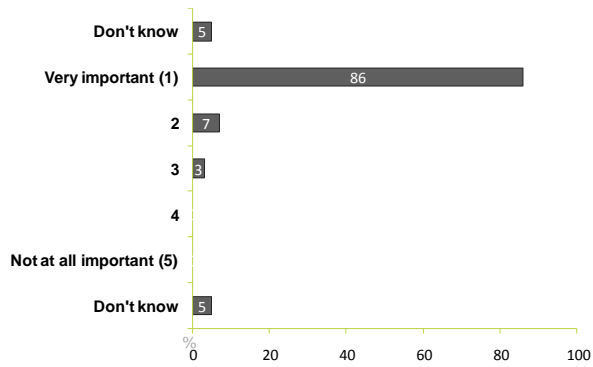
How important do you think it is for the St Georges Sunday Market to continue on in the future?

Base 106: All respondents



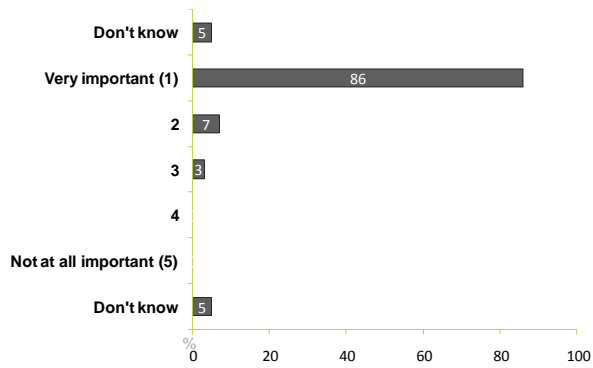
How important do you think it is for the St Georges Sunday Market to continue on in the future?

Base 106: All respondents



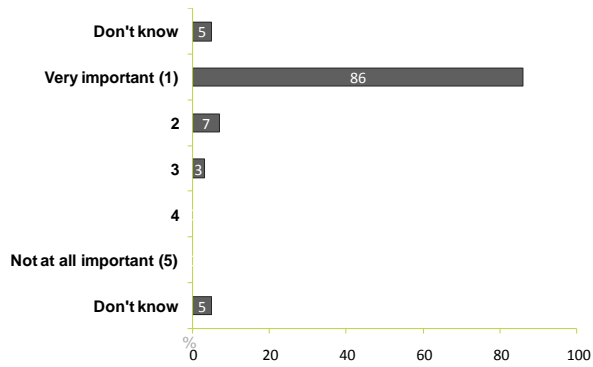
How important do you think it is for the St Georges Sunday Market to continue on in the future?

Base 106: All respondents



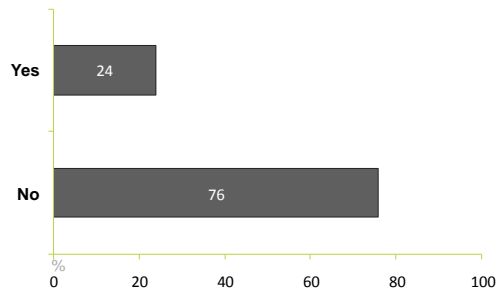
How important do you think it is for the St Georges Sunday Market to continue on in the future?

Base 106: All respondents



There is a free St Georges Market shuttle bus which runs every 20 mins. Had you been aware of this service before today?

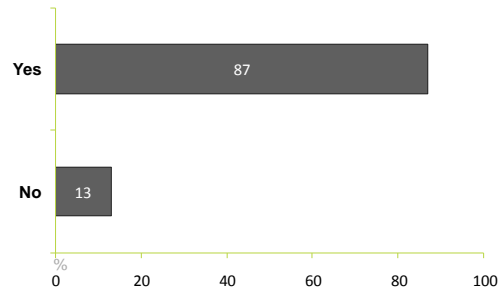
Base 106: All respondents



City centre survey

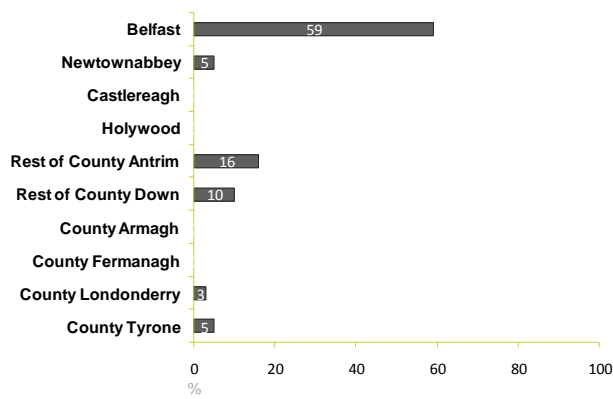
Do you currently live in Northern Ireland?

Base 105: All respondents



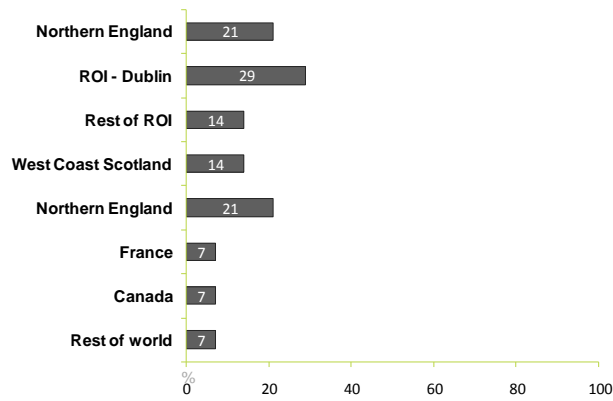
In what part of Northern Ireland do you live?

Base 91: Respondents that live in NI



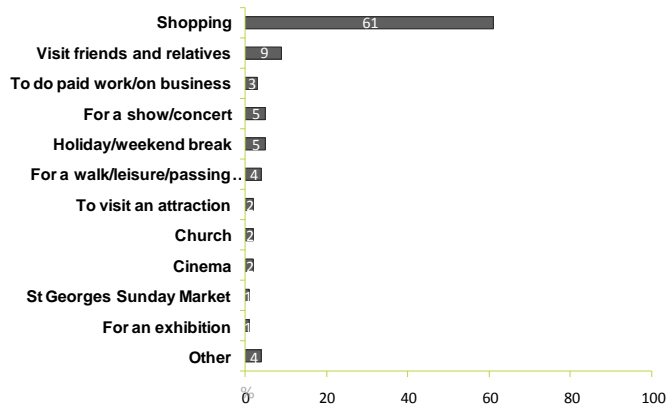
In which country do you live?

Base 14: Respondents that do not live in NI



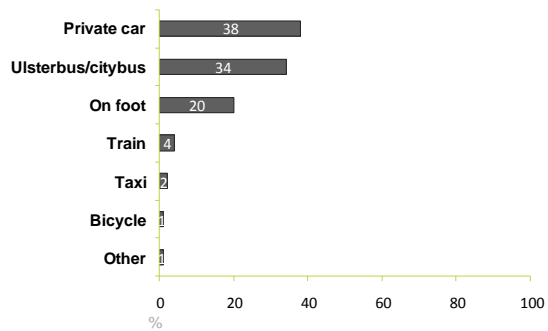
Which one of these was the main reason for your trip to Belfast city centre today?

Base 105: All respondents



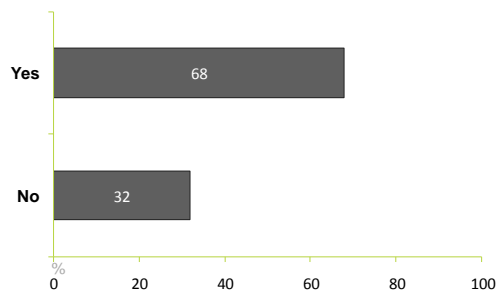
What was the main form of transport you used to travel into Belfast today?

Base 105: All respondents



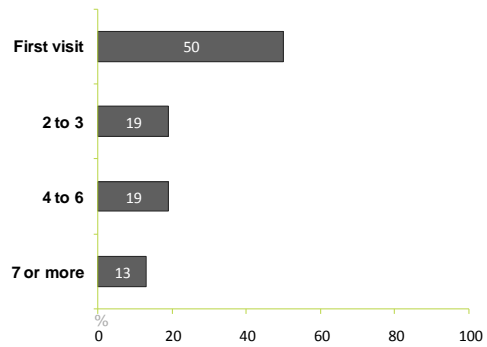
Have you heard of the Sunday Market at St Georges?

Base 105: All respondents



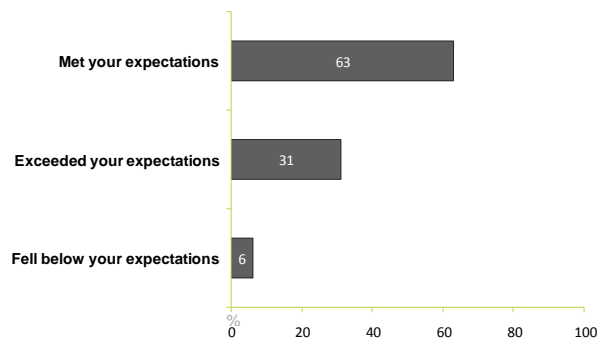
How many times have you been to the St Georges Sunday Market?

Base 16: Respondents that have been to the market



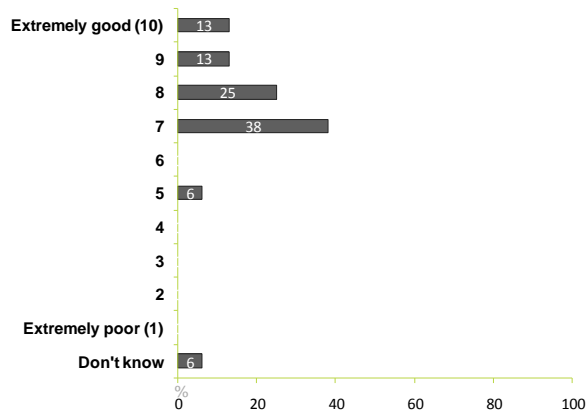
Would you say that your visit to the St Georges Sunday Market has....?

Base 16: Respondents that have been to the market



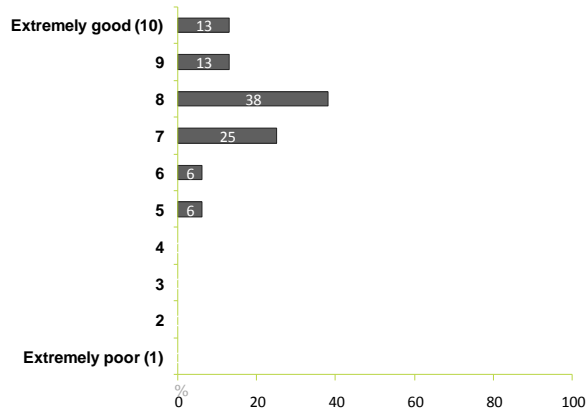
How would you rate St Georges Sunday Market as a whole?

Base 16: Respondents that have been to the market



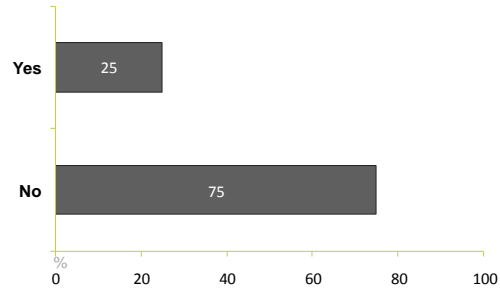
How would you rate the product range at St Georges Sunday Market?

Base 16: Respondents that have been to the market



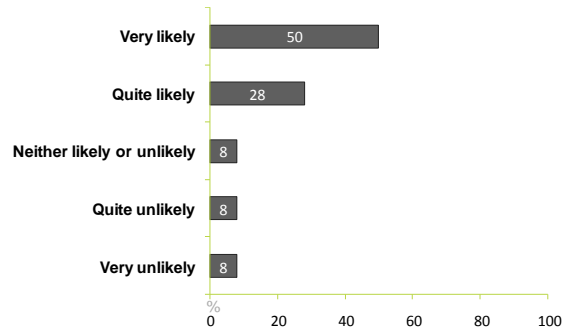
Did you visit the St Georges Sunday Market today?

Base 16: Respondents that have been to the market



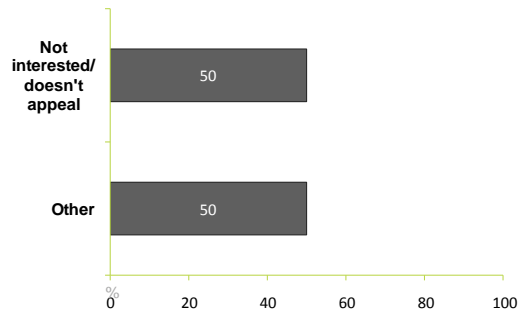
How likely are you to visit the St Georges Sunday Market in the future?

Base 105: All respondents



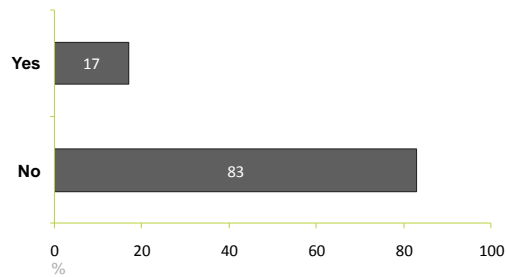
Why would you be very/quite unlikely to visit the St Georges Sunday Market in the future?

Base 16: Respondents that are unlikely to visit the market in the future



There is a free St Georges Market shuttle bus which runs every 20 mins. Had you been aware of this service before today?

Base 105: All respondents



7. Appendix B - Footfall results

Table 7.1: St. George's Sunday Market footfall by time and entrance gate

	E1	E2	E3	E4	E5	Total
10:00 – 10:15	8	3	22	19	1	53
10:16 – 10:30	11	13	34	10	11	79
10:31 – 10:45	1	8	24	32	4	69
10:46 – 11:00	0	4	37	24	8	73
11:01 – 11:15	6	3	49	24	11	93
11:16 – 11:30	10	15	33	32	6	96
11:31 – 11:45	19	24	81	54	16	194
11:46 – 12:00	15	15	69	37	24	160
12:01 – 12:15	5	24	87	39	9	164
12:16 – 12:30	9	39	52	67	21	188
12:31 – 12:45	36	12	59	28	27	162
12:46 – 13:00	19	31	77	29	19	175
13:01 – 13:15	12	32	60	42	26	172
13:16 – 13:30	8	16	65	43	16	148
13:31 – 13:45	13	9	61	51	21	155
13:46 – 14:00	17	24	81	30	6	158
Total	189	272	891	561	226	2139

