

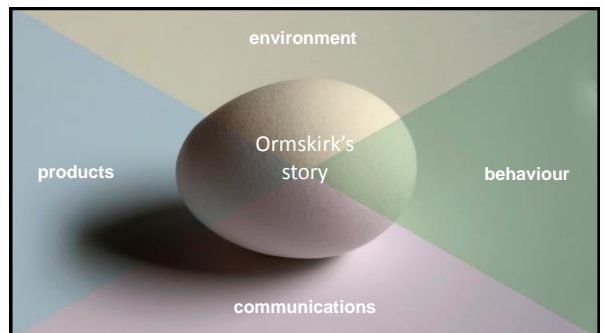
destination and visitor research for Ormskirk Town Centre

agenda

- what's the project for?
- what we did
- what we found
- Ormskirk's 'big idea' and key audiences
- action plan

the questions that matter

- what is Ormskirk for?
- who is Ormskirk for?
- why is Ormskirk special?
- what is Ormskirk's ambition?
- what is Ormskirk's 'story'?



what we did

evidence gathering

- strategy and policy review
- desk research
- 1 day immersion visit
- 9 x business stakeholder interviews
- 3 x focus groups
- on street surveys
- online surveys
- mystery visits

desk research and strategy review

- Market Towns Initiative Survey 2006 Summary
- Market Towns Initiative 'Quality of Life' Survey 2006 Summary
- Market Towns Initiative 'Youth Views' Survey 2006 Summary
- WLBC Business Plan 2011-2015, Annual Report 2014/15
- WLBC Council Plan 2015-2018

- Draft Ormskirk Town Centre Strategy 2015
- OTCS 2015 Questionnaire responses
- Market Town Initiative Executive Summary
- Edge Hill University Strategic Plan 2013 – 2020

immersion

stakeholder interviews

Ormskirk positives

- good place to live
- safe, quiet
- leafy, rural, countryside
- night time economy
- economic benefits of university
- independent

Ormskirk's challenges

fragmented – town vs University
 student accommodation 'swamped' town
 traffic congestion, poor parking
 poor gateways, sign posting
 lack of events
 no one knows what or where it is

is Ormskirk? . . .

	Yes(%)	No(%)	Don't Know (%)
Historic	100	0	0
Modern	0	100	0
Sleepy	78	22	0
Vibrant	11	89	0
Functional	67	33	0
Desirable	22	78	0
Traditional	100	0	0
Contemporary	0	100	0
Generic	44	44	12
Independent	67	33	0

	Yes(%)	No (%)	Don't Know (%)
Busy	33	67	0
Quiet	67	33	0
For locals	89	11	0
For visitors	33	67	0
Optimistic	44	56	0
Pessimistic	33	67	0
Exciting	11	89	0
Boring	67	33	0
Rich	100	0	0
Poor	0	100	0

Ormskirk's markets

- too generic – not audience focussed
- low quality
- aimed at older people – not sustainable
- layout poor for retailers
- needs more colour/vibrancy
- need to add variety of markets

focus groups

business

business - opportunities

- good place to live
- people want place to succeed
- USP – University town
- accessibility
- wider assets – Rufford Hall, Martin Mere
- need a mix of markets 'up its game'
- Liverpool (inc cruise ships)

business - challenges

tensions between University & town
WLBC not leading/engaging business
failing market
poor accommodation offer
offer not joined up

politicians

politicians - opportunities

place of up-market food offer
links to Liverpool & cruise ships
university economy
improve relationship with WLBC & EHU
animation/space/events
assets, church, night time economy

politicians - challenges

historic market town
partial dormitory town
local place for local people
don't brand town as 'university town'

students

students - opportunities

it meets need – not desire
more diverse range of markets (gourmet food,
vintage, jewellery, healthy snacks)
developing links with town (eg events,
Burlesque show)
night time economy
need stronger relationship with business

students - challenges

public transport – limited and traffic
accommodation – limited and expensive in
comparison to other areas in L
nothing to keep us here
town has a negative perception of students
town doesn't provide what they need
market is traditional and not attractive

on street survey

215 responses
>600 refusals (1 in 3)
daytime (weekdays & weekends)

on Street Survey – stats & behaviour

older demographic (61% over 45)
 80% travelled less than 6 miles (car or walk)
 visit weekly or more often
 primary reason is convenience shopping
 also use services, eat out, comparison shop
 stay 1-2 hours (<12% stayed over 4 hrs)
 spend £10 - £20 per person

10th thinkingplace

on Street Survey – perceptions

92% are very likely or better to visit again
 only 44% would recommend Ormskirk
 56% think shopping is "good" or better
 Positives: eating options, services, safety, welcome
 Negatives: shop range, events, facilities & parking
 50% think the market is "good" or better
 Positives: value, range of stalls, service
 Negatives: food options, generic products & parking

10th thinkingplace

on Street Survey – improvements asked for

choice & range of shops
 mix of shops (independents & multiples)
 traffic
 Sunday opening
 speciality markets
 late night opening
 parking cost

10th thinkingplace

online survey

311 responses
 245 residents
 34 businesses / 32 students

10th thinkingplace

online Survey – residents

tally strongly with on-street results
 84% use Ormskirk centre weekly or more
 choose Ormskirk for; convenience shopping,
 services, market, meeting friends, eating out
 prefer to travel for comparison shopping,
 events & leisure
 select by passive means (knowledge, WoM,
 spur of the moment)

10^{thinkingplace}

online Survey – residents shopping preferences

town Centre and Out of town superstores top
 venues for convenience shopping
 City Centres, Retail Parks & online top for
 comparison shopping
 town centre and markets seen as functional
 for essentials, not for browsing
 retail choice, mix, parking availability & cost,
 and choice of eating top influencing factors

10^{thinkingplace}

online Survey – businesses sales profile

¾ of all sales occur at premises in Ormskirk
 residents most important customer group by
 far (students seen as least)
 Thu/Fri/Sat key trading days
 passive marketing key (repeat, WoM, passing)
 70% saw dip/flat spend and turnover in 2015
 56% optimistic about 2016

10^{thinkingplace}

online Survey – students

81% visit Ormskirk weekly (only 6% visit daily)
 weekdays vastly more than weekends
 convenience shopping, access services, eating
 & drinking out (evenings)
 do not consider for comparison shopping
 more likely to choose elsewhere if possible

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perceptions

10 thinkingplace

A	%A	%B	B
Historic	95	5	Modern
Sleepy	81	19	Vibrant
Functional	83	17	Desirable
Traditional	95	5	Contemporary
Generic	53	47	Independent
Busy	32	68	Quiet
For Locals	81	19	For Visitors
Optimistic	34	66	Pessimistic
Exciting	18	82	Boring
Rich	49	51	Poor

10 thinkingplace

perceptions – describing Ormskirk

>50% negative

key moans: shopping quality, traffic, cleanliness

feeling that Ormskirk is dull, dated & unloved

visible divide between residents & students

BUT a number of champions

home, convenient, friendly, safe & potential pride visible (if deflated)

10 thinkingplace

perceptions – positive vs. negative features

Positive	Negative
Location	Retail Offer
Surrounding Environment	Leisure offer
Access to services	Prosperity
Safety	Sense of community
History	Market
Eating Out	Parking prices
Educational Offer	Traffic

10 thinkingplace

perceptions – positive messages

"Nice little town, nice places to eat, reasonably handy for food shopping and basic services."

"Quiet friendly town apart from the traffic congestion"

"Visit the whole of Ormskirk. Shops are open 6 days a week not just on market days."

"Ok for bits and bobs like the bank but that's all I'm afraid"

perceptions – negative messages

"Plenty of pound shops. There's a market on a Thursday."

"You would only need half an hour"

"Stay away on Market Day it is rubbish"

"I'd lie!"

"The Uni is bounding ahead while the town is lagging ten years behind..."

"Don't! Just go Liverpool"

perceptions – visualising Ormskirk



Strong agreement across all groups
 Low scores; litter, independent shop & eating out
 Empty shop, charity collectors & Edgehill middling

perceptions – things to improve...

Residents	Businesses	Students
Retail Offer	The Market	Retail offer
Traffic/congestion	Retail Offer	The Market
HMOs	Parking prices	Venues for social interaction
Quality of the Market	Better marketing	Events
Physical appearance	Town centre facilities	Leisure offer
Leisure offer	Transport links	
Anti-social behaviour		

external perceptions

mystery visits
80 on-street interviews
Liverpool / Southport / Wigan / Chorley

Southport

Southport – mystery visit



far more to offer for a little more effort
more expensive but efficient parking
consistent and effective wayfinding system
City-centre retail mix with independent presence
bright & colourful indoor market
generally consistent branding & identity
terrible public toilets

Wigan

Wigan – mystery visit



- much more to offer but rough round the edges
- expensive parking
- wayfinding patchy & limited at access points
- City centre retail offer (less independents)
- indoor market excellent
- noticeable number of vacant units
- limited visitor information

Chorley

Chorley – mystery visit



- nicer day out than Ormskirk but little to linger for.
- good signage at access points
- very clean & tidy (best public toilets ever!)
- similar retail mix to Ormskirk but less catering
- limited visitor information & interpretation
- market, vibrant, attractive and diverse
- consistent town branding & style

external perceptions of Ormskirk

external perceptions of Ormskirk

68% have heard of Ormskirk
only 36% have actually visited
no reason to go / never considered it
those that have, like: location, market, eating
think its: clean, safe, lifeless place with a market
want: less traffic, better shops, more events
needs something to make it stand out

**potential audience propositions
for Ormskirk**

key audience groups

visitors
students
residents

visitors

what's important

wider, joined up offer i.e. Farmer Ted,
Martin Mere, Rufford Hall
more for families
specialist markets & events
night time economy
signage, maps, app

students

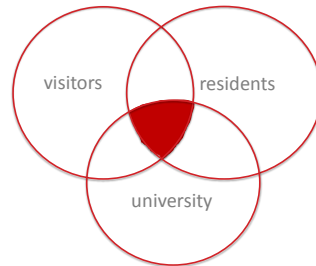
what's important

connect to town
daytime offer
night time economy
monthly market
parents/family
open event facilities, communicate benefits

residents

what's important

- University facilities, centre of assets
- appeal to 'affluents'
- night time economy
- more reasons to go – events
- traffic
- meet local needs
- family friendly



Ormskirk

- 'hub'
- events – use space
- media
- better market – layout, 2 different per month
- family friendly
- food and drink
- functional AND desire
- students, visitors, residents

big idea

- what you are about
- what you stand for
- what you believe in

clarity, consistency, self-awareness

an emotive, 'strategic signature' and statement of intent

big idea

Ormskirk: the university market town

action plan: 10 key points

1. place brand
2. place website
3. relationship with University – offer, events

4. think of wider offer using assets

5. create a map of the wider place

6. signage

7. two special markets per month i.e. farmers, students, higher end, fashion

8. change layout of market

9. events – new events, maximize existing

10. history – do it or leave it