

Ross Chamber of Commerce Survey of Retail Goods Sales - Analysis of Returns June 2008

Overall Response	2006	2007	2008
Number Distributed	89	79	88
Number Returned	61	58	52
Percentage Response	69%	73%	59%

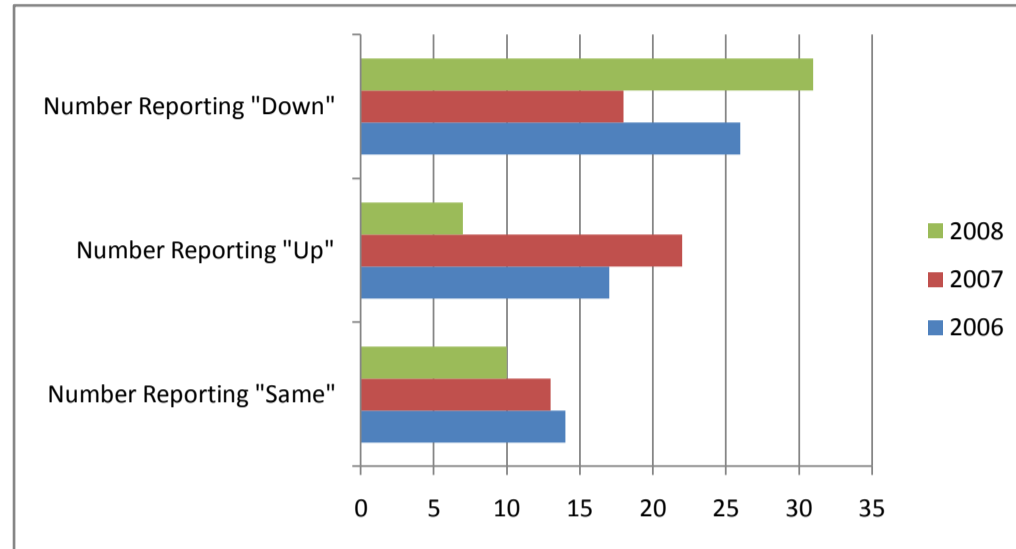
The questionnaire was given only to shop retail outlets selling goods, not services



Question:

Sales Now Compared to 12 Months Ago?

	2006	2007	2008
Number Distributed	89	79	88
Number Responded to this Q	58	56	48
Percentage Response	65%	71%	55%
Number Reporting "Same"	14	13	10
Number Reporting "Up"	17	22	7
Number Reporting "Down"	26	18	31
New Businesses This Year	1	3	4
Ups and Sames Less Downs	5	17	-14



In 2006 just over 50% of returns reported same or better sales. In 2007 that figure had risen to 66%. In 2008 it has dropped to 35%.

Question:

Balance of Sales Compared to 12 Months Ago?

	2006	2007	2008
Number Distributed	89	79	88
Number Responded	56	52	37
Percentage Response	63%	66%	42%
Same	14	13	10
10-20%	-3	+9	-20
20-50%	-6	-4	-6
50-100%	-1	-1	-2

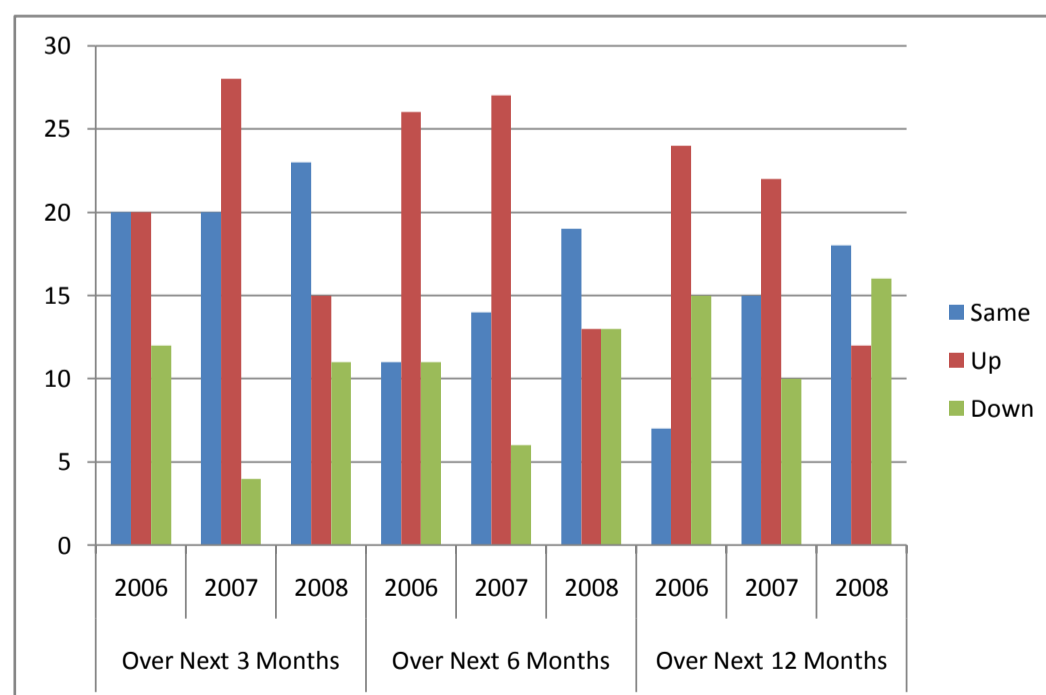


In 2006 overall sales well down on 2005, in 2007 little different from 2006 but again, in 2008, well down.

Question:

Predicted Sales Over the Next 12 Months?

	2006	2007	2008
Number Distributed	89	79	88
Number Responded	52	47	49
Percentage Response	58%	59%	56%
	Same	Up	Down
Over Next 3 Months	2006: 20	2007: 20	2008: 12
	2006: 20	2007: 28	2008: 4
	2006: 23	2007: 15	2008: 11
Over Next 6 Months	2006: 11	2007: 26	2008: 11
	2006: 14	2007: 27	2008: 6
	2006: 19	2007: 13	2008: 13
Over Next 12 Months	2006: 7	2007: 24	2008: 15
	2006: 15	2007: 22	2008: 10
	2006: 18	2007: 12	2008: 16



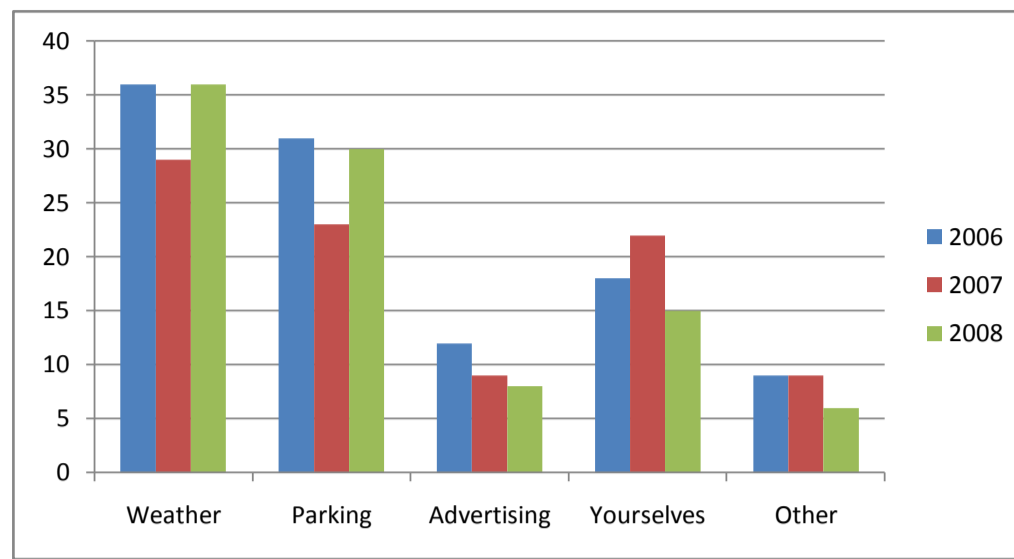
Unlike previous years, in the medium term, people are less optimistic.

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Question:

**Principal Effect On Sales Achieved?**

	2006	2007	2008
Number Distributed	89	79	88
Number Responded	61	57	49
Percentage Response	69%	72%	56%
Weather	36	29	36
Parking	31	23	30
Advertising	12	9	8
Yourselves	18	22	15
Other	9	9	6



Once again, the weather and parking are the favourite scapegoats but see the Chamber comment below.

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**COMMENT**

There is a clear and sharp downturn in sales and, for the first time, confidence is also well down.

Most respondents still blame the weather and parking but the figures tell a different story.

There is a strong correlation between those who rate "advertising" and "themselves" highly and improving sales.

The Chamber discounts parking because two years ago we demonstrated that Ross is better placed than adjacent Market Towns.

Last year we appealed to shopkeepers to provide evidence to the opposite. There has been a nil response.

Nobody can influence the weather but how about a campaign of reduced prices during inclement weather?

**In the Chamber's Opinion, the following has to be faced up to:**

- 1 Lifestyles are changing and shopkeepers have little influence over that.
- 2 For both jobs and leisure people travel more and they shop where that takes them.
- 3 There is a steady and rapid rise in on-line shopping.