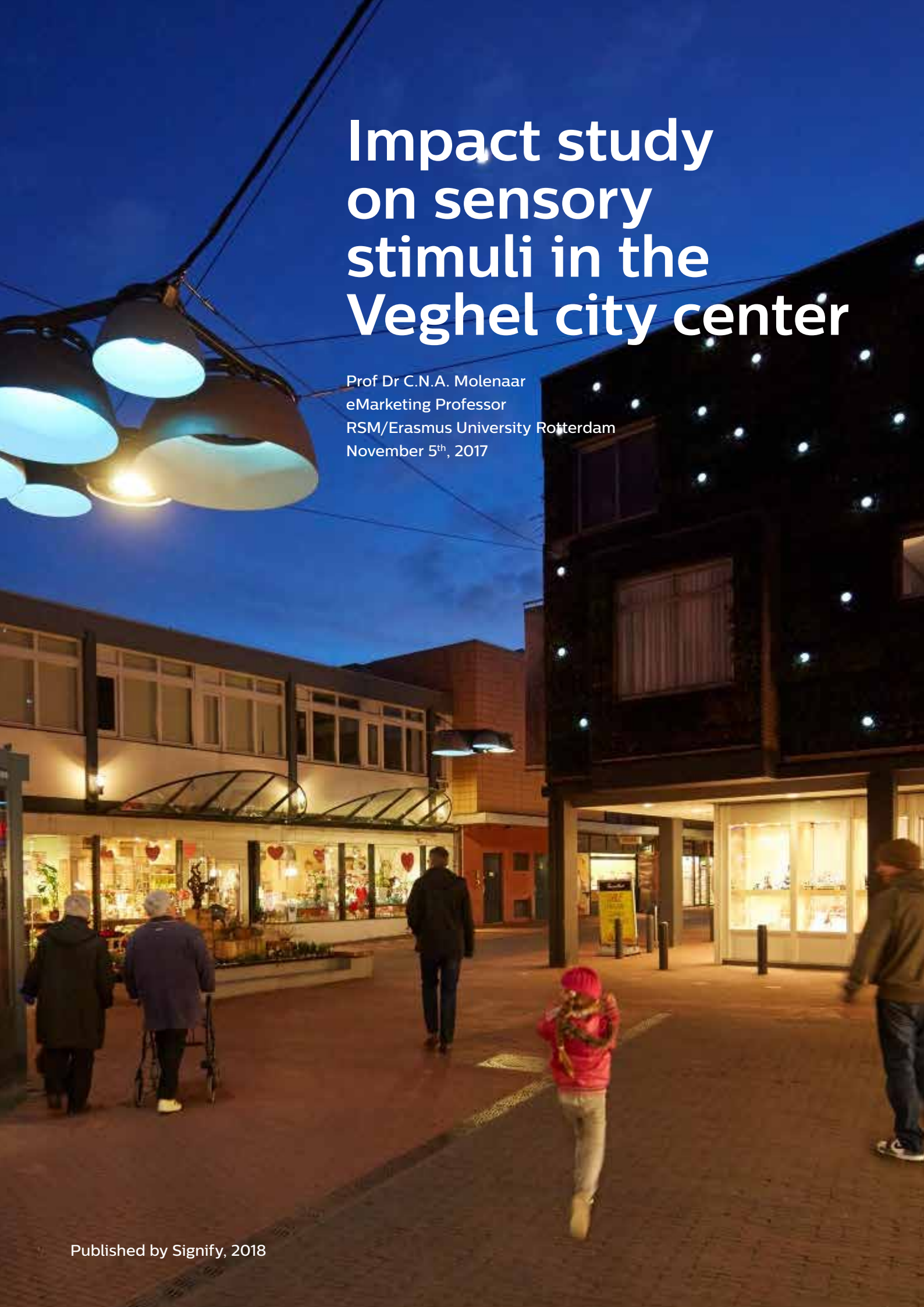

Impact study on sensory stimuli in the Veghel city center

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Contents

Introduction

The impact study was carried out to support implementation of a light and sound plan in the city center of Veghel. The purpose of the plan was to create more ambiance and a better atmosphere in the city center, which would lead to an increase in visitor numbers as well as encourage them to stay longer. The effects should lead to increased purchases in shops and, due to the improved economic foundation, also lead to fewer vacancies in the city center.

Research assignment

The project was commissioned on June 28th, 2015, based on three research questions:

- *Does the installation of visual environment modifications, such as light and sound, improve the attractiveness of the city center?*
- *Are there significant measurable differences in visitor numbers between the baseline measurement and the follow-up measurements?*
- *Do these modifications increase the economic resilience of the city center?*

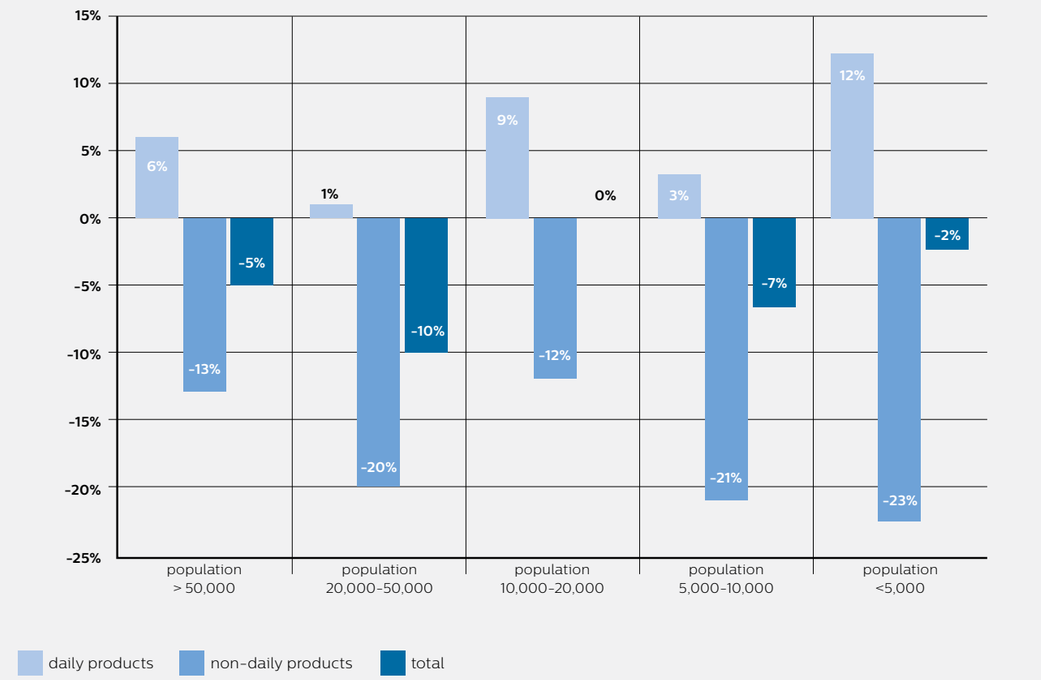
Influence of light and sound on the city center of Veghel

The analysis of the influence of light and sound on the city center of Veghel was based on three dimensions:

- Experiences of residents
- Visitor numbers
- Results from retailers and catering establishments, measured using turnover figures – these were not possible because the figures were not yet available. For these results, an overview was provided of the nationwide trends per sector.

Based on these studies, the individual values could be established, after which the mutual effects were determined. Despite frequently repeated requests, we did not receive any turnover figures, not even in any indicative form. This made it impossible to take the results and conclusions of the other studies and convert them into tangible turnover trends. We were therefore also unable to include the turnover trends at a sector level (nationwide) as comparison indicators. However, a large-scale study by I&O Research in east Netherlands could be used as a basis. It clearly reflects a decrease in non-daily purchases (non-food) for smaller municipalities (up to 50,000 residents).

Percentage-based trend in average retail turnover in citi centers based on size category for daily and non-daily sector (2010-2015)



Overview of online market and trends, 2016-2017

Based on the analysis by GFK, the conclusion can be drawn that online purchases are still increasing significantly. The sectors responsible for the biggest growth are Fashion, Toys, Home & Garden, and Health & Beauty. This increase directly influences turnover for stores in those sectors. The market shares of these sectors (in particular toys at 46%) are clear indicators of changing purchasing behavior. The following figures are based on the first half-year of 2017 and are related to the same period in 2016.

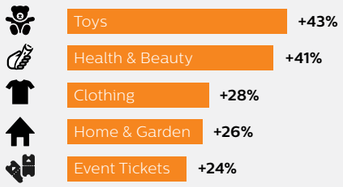
Online consumer spending grew by 13% in HY1 2017

Online consumer spending: € 10.66 billion
- Products: € 5.89 billion
- Services: € 4.77 billion

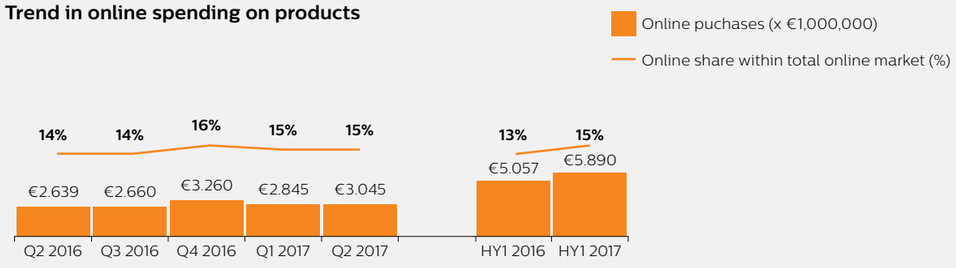
Growth in online spending compared to HY1 2016: +13%
- Products: + 16%
- Services: + 9%

Online share of total purchases: 23%

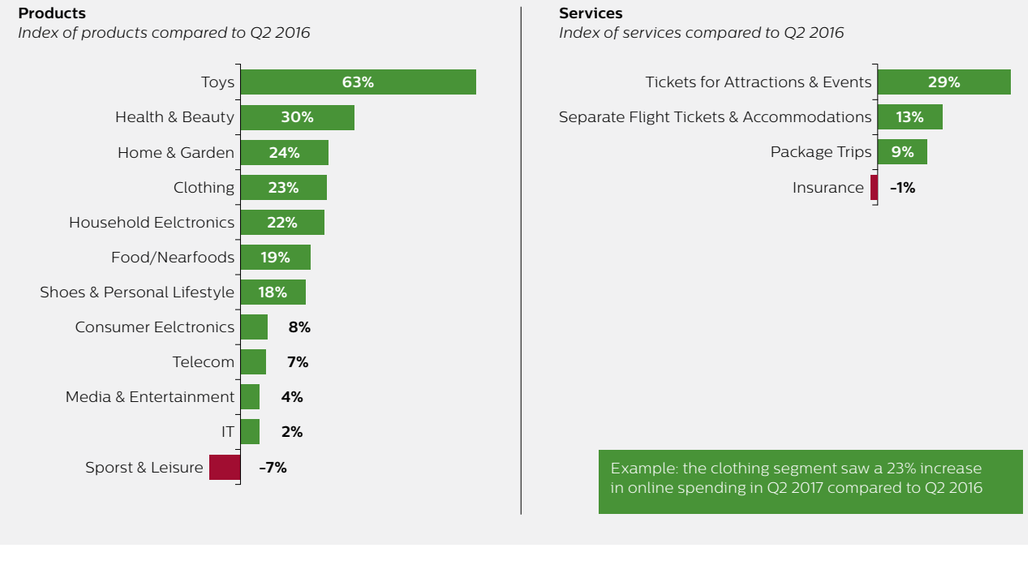
Toys and Health & Beauty show biggest growth in online spending for HY1



Trend in online spending on products

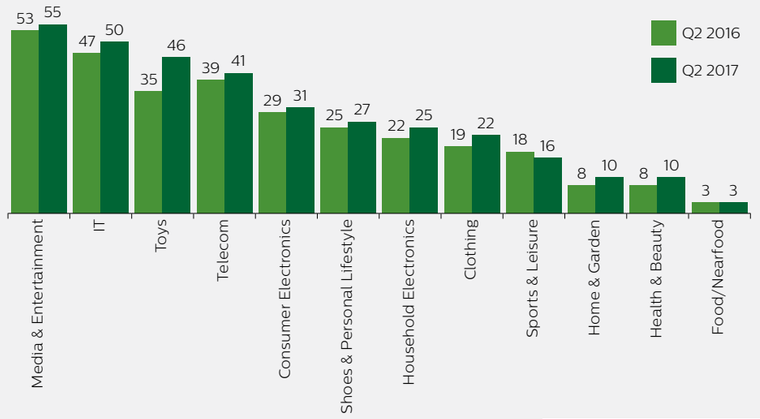


Growth percentage in online spending per market segment



Example: the clothing segment saw a 23% increase in online spending in Q2 2017 compared to Q2 2016

Online in share % in each market segment based on purchased (products)

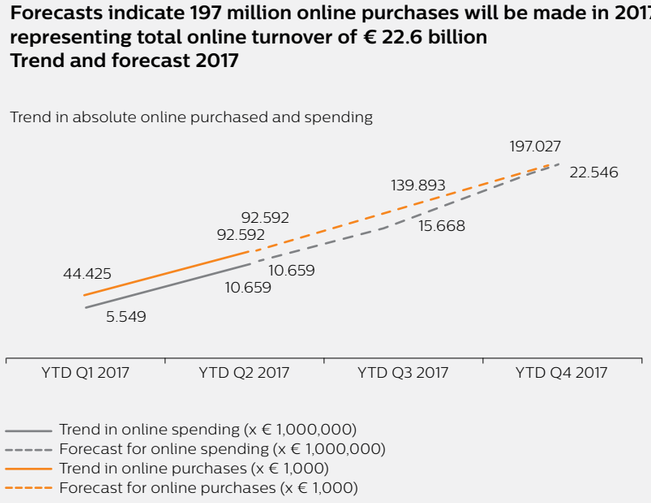


Example: 22% of all purchaes in Q2 2017 in the clothing segment came from online spending

The impact of online purchases on the respective stores in shopping streets is clear. In principle, this has the same effect on visitor numbers, even though this cannot be established unequivocally. The visits could also be aimed at other activities, catering establishments or window shopping. It is clear, though, that decreased purchases also lead to less frequent visits to shopping streets. Estimations between 10% and 25% are used for shopping areas outside the big cities. City size and store selection are highly relevant factors for this. An average decrease between 10% and 25% also applies to Veghel if there is no change in policy (compared to 2015).

Forecasts indicate 197 million online purchases will be made in 2017 as a whole, representing total online turnover of € 22.6 billion
Trend and forecast 2017

Trend in absolute online purchased and spending



Forecast for online purchases 2017
197 million online purchases are expected to made over 2017 as a whole. This implies an expected growth in online sales of 13% compared to last year.

Forecast for online spending 2017
Online spending in 2017 is expected te reach € 22,55 billion, which implies a growth forecast of 12%.

Conclusion

The increase in online purchases is still continuing at a steady pace. Especially stores in shopping streets are increasingly losing turnover to online vendors. In addition, this also leads to margins coming under pressure as consumers have more choice as well as transparency in selection and prices. That overview does show that the increase differs per sector. However, if this results in a decrease in the selection of nice stores, it will also lead to a decrease in the appeal of a city center. The study by I&O Research for municipalities under 50,000 residents confirms this.

Experience Monitor: Results and experiences

Introduction

Experiences of residents

The experiences of residents were studied using an Experience Monitor. A survey was posted online/on Facebook. In addition, these experiences were verified on location by means of a physical check. This questionnaire received a lot of publicity and Veghel residents were encouraged to take the survey. This resulted in a high number of visitors to the survey page, as well as a high number of completed answers. The reliability score is therefore **over 95%**, which is high for these types of studies.

The Experience Monitor was implemented as a (baseline) -0- measurement and a -1- measurement. The aim was to measure the experiences of the residents at two different times in order to relate the differences to the measurements taken in terms of light and sound (sensory stimuli). The studies were conducted at the same time of year (September/October 2015 and September/October 2016) with the same endeavors and the same questionnaire. This made an objective comparison possible. Any differences in weather did not influence the responses. Other disruptive influences on this comparison have not been identified.

Questionnaire 09/2015 – 10/2015

1306	702	398	203	53,8%
Total visits	Completed answers	Incomplete answers	Only display	Total succes percentage

Questionnaire 10/2016 – 11/2016

1537	690	389	468	44,9%
Total visits	Completed answers	Incomplete answers	Only display	Total succes percentage

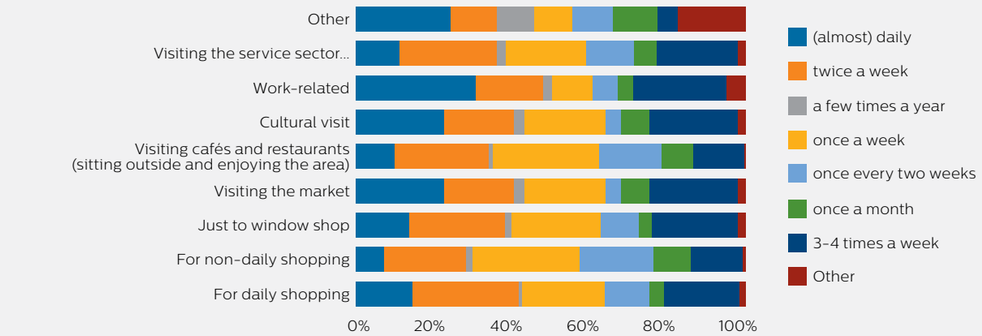
The success rate of both studies is very high, which led to a reliability of over 95% regarding the results. Both studies included many opinion-based questions, which provided clear views of the experiences (closed questions). These closed questions are the basis of the comparison between the two measurements. In addition, the studies contained open questions, or allowed for an explanation of the answers of the closed questions. There were also questions based on the Likert scale (five-point scale) for continued testing and objective comparison. This made a more specific grading possible, as well as adding nuance to the answers. The open questions were not compared and were only used to derive a more detailed explanation regarding the observed differences. An objective comparison with open questions is difficult to establish statistically. As a whole, both measurements are highly reliable and very good for comparison due to the number of respondents.

Results of the Experience Monitor

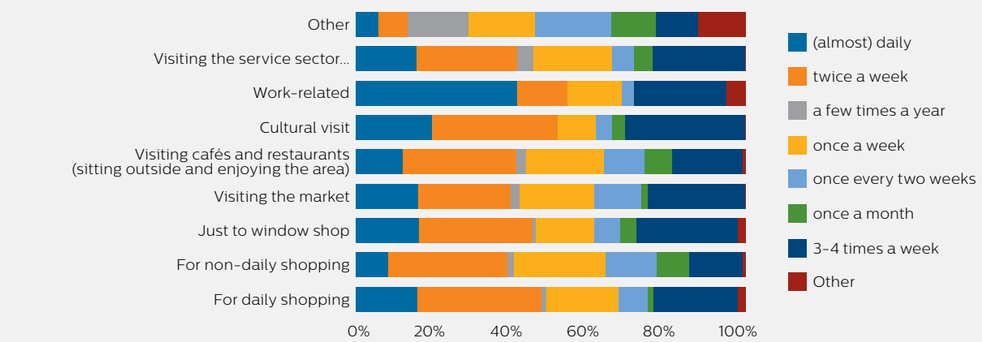
The most relevant questions were analyzed in greater detail based on the results of the modifications. To that end, a selection was made from the complete questionnaire. The questions were also correlated for the purpose of consistency in responses. This proved to be the case.

Why do people go to Veghel city center and what is the frequency of their visits?

Baseline measurement



Follow-up measurement



Top 3 – Baseline measurement
1. Visiting cafés and restaurants (N= 352)
2. For non-daily shopping (N= 345)
3. For daily shopping (N= 319)

Top 3 – Follow-up measurement
1. For non-daily shopping (N= 381)
2. Visiting cafés and restaurants (N= 371)
3. For daily shopping (N= 346)

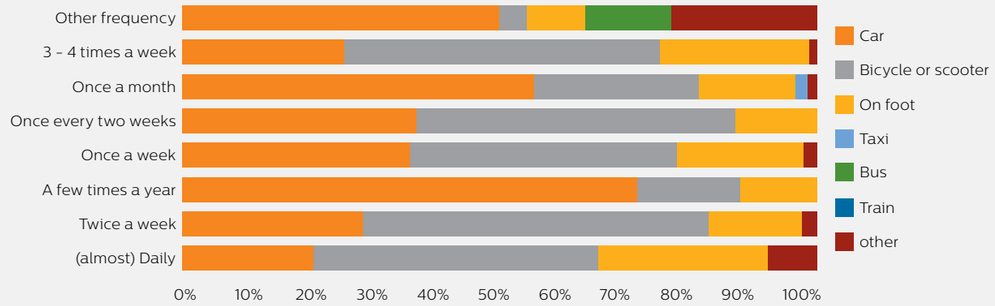
Both studies show that people visit Veghel city center specifically for its catering establishments, for non-daily shopping and for daily shopping. The most common frequencies are the same for both studies: twice per week, 3-4 times per week and once per week. Veghel city center is characterized as a city center that is suitable for frequent visits, considering the facilities present there. A difference between the two studies can be seen in the catering sector, which obviously benefits from the changes. The -1- measurement also shows that visits to the city center have increased, also regarding non-daily shopping. The increase can only be caused by the measures taken. Nationwide, the “footfall” has decreased. It is also notable that people visit the city center more often; in particular, the increase from once per week to twice per week is remarkable.

How often do you visit Veghel city center?	For daily shopping	For non-daily shopping	Just to window shop	Visiting the market	Visiting cafés and restaurants (sitting outside and enjoying the area)	Cultural visit	Work-related	Visiting the services sector (bank, realtor, etc.)	Other
(almost) Daily	48	26	14	19	37	10	18	15	18
Twice a week	85	71	24	30	84	8	10	32	9
A few times a year	2	8	2	1	4	1	2	3	7
Once a week	69	93	22	26	95	9	5	26	7
Once every two weeks	36	65	10	15	56	2	4	16	8
Once a month	12	31	3	5	27	3	2	7	8
3 - 4 times a week	61	47	21	25	47	10	14	27	4
Other	6	4	3	3	2	1	3	3	639

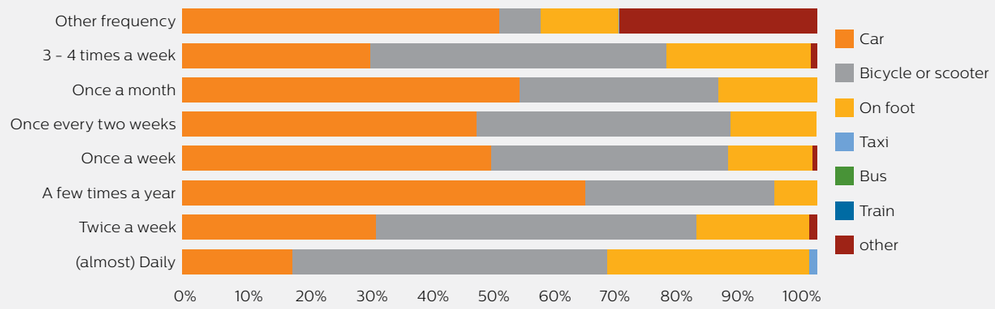
How often do you visit Veghel city center?	For daily shopping	For non-daily shopping	Just to window shop	Visiting the market	Visiting cafés and restaurants (sitting outside and enjoying the area)	Cultural visit	Work-related	Visiting the services sector (bank, realtor, etc.)
(almost) Daily	55	33	22	21	45	13	22	20
Twice a week	111	115	38	32	109	21	7	31
A few times a year	4	8	1	3	10	0	0	6
Once a week	63	87	20	26	72	6	7	24
Once every two weeks	27	52	9	15	40	3	2	8
Once a month	4	30	5	3	24	2	0	5
3 - 4 times a week	75	55	34	33	67	20	15	30
Other	7	1	3	0	4	0	0	0

Which form of transport do you primarily use?

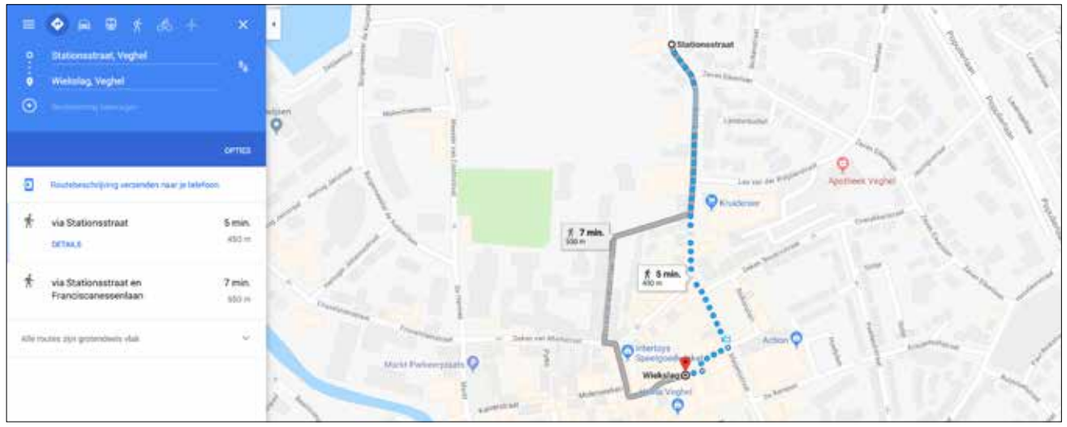
Baseline measurement



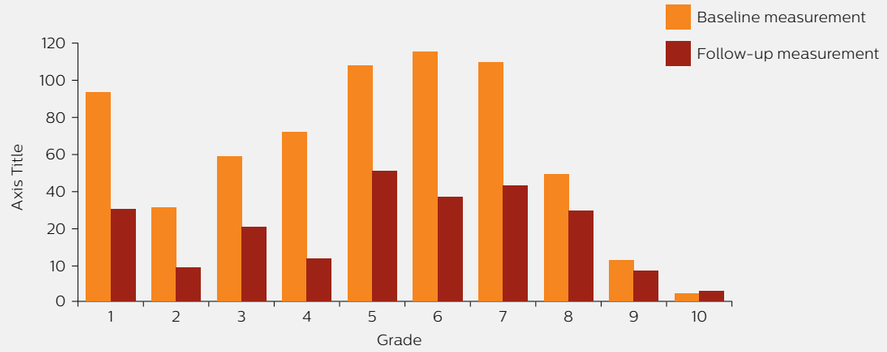
Follow up measurement



The car is most often used to visit Veghel city center. Surprisingly, public transport is hardly ever used, or at least is not indicated by the visitors. Nevertheless, the city center is very accessible by public transport.



Parking rates in Veghel city center



The parking rates are sufficient overall, but it is striking to note that parking rates received much lower scores in the second study. This is probably the result of the implementation of the ‘blue zone’, where visitors can park for free for one hour, which gives the area that does require paid parking extra attention, leading to a negative rating.

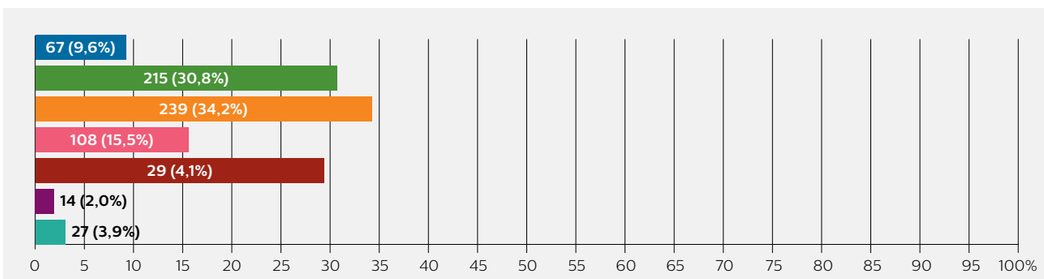
The time spent in the city center is an indication of having fun. The more fun a city center is perceived to be, the more time is spent there. There is also a positive correlation between the time spent there and the spending pattern. This applies to both (daytime) catering establishments and the stores for non-daily purchases. There is also a relation between both sectors, because the fun factor is high in both cases (the happiness feeling).

How much time do people spend in Veghel city center?

Baseline measurement

How much time do you generally spend in the city center area (on average)?
Single choice, Answered **699x**, unanswered **3x**

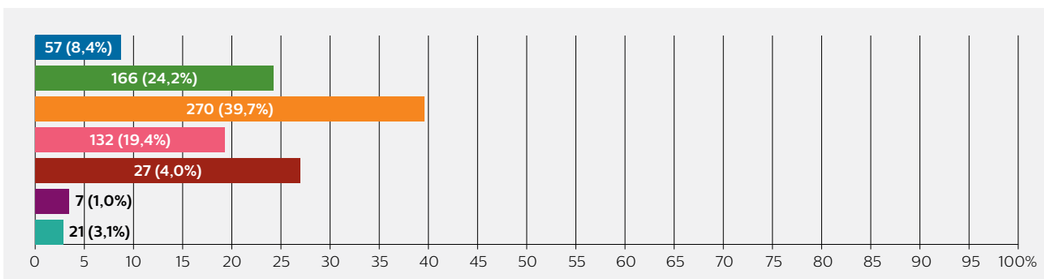
Answer	Anwers	Ratio
Less than 15 minutes	67	9,6%
15 to 30 minutes	215	30,8%
30 minutes to 1 hour	239	34,2%
1 to 2 hours	108	15,5%
2 to 3 hours	29	4,1%
3 to 4 hours	14	2,0%
4 hours or longer	27	3,9%



Follow-up measurement

How much time do you spend in the city center area (on average)?
Single choice, Answered **680x**, unanswered **10x**

Answer	Anwers	Ratio
Less than 15 minutes	57	8,4%
15 to 30 minutes	166	24,4%
30 minutes to 1 hour	270	39,7%
1 to 2 hours	132	19,4%
2 to 3 hours	27	4,0%
3 to 4 hours	7	1,0%
4 hours or longer	21	3,1%



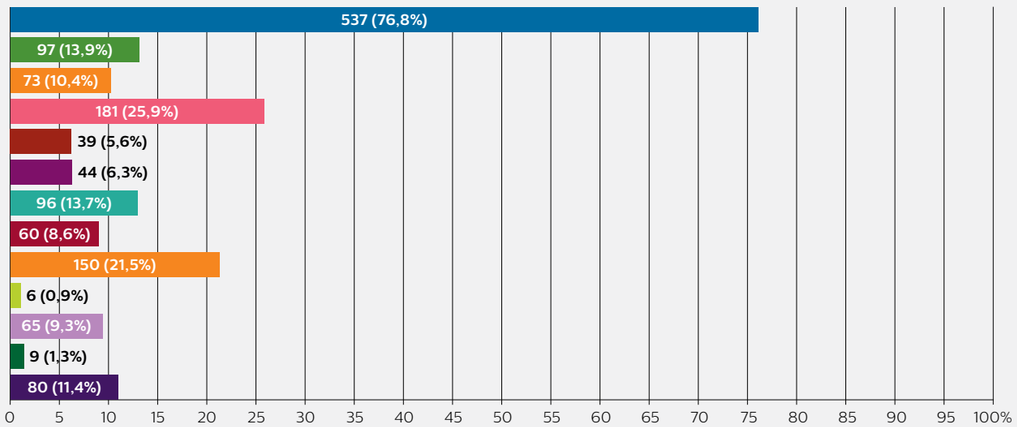
When both analyses are compared, it is clear that the time spent increases in the section from 30 minutes to 1 hour (34.2% versus 39.7%) and between 1 and 2 hours (15.5% versus 19.4%). This increase was at the expense of a short stay (9.6% versus 8.4%). This supports the previous conclusions regarding the frequency of visits (often twice instead of once) and the reason for the visit (more because of the catering sector and non-daily purchases).

Why was Veghel chosen instead of another shopping area?

Baseline measurement

Why did you visit this city center area instead of another shopping area? (multiple answers possible)
Mulitple choice, Answerd **699x,** unanswered **3x**

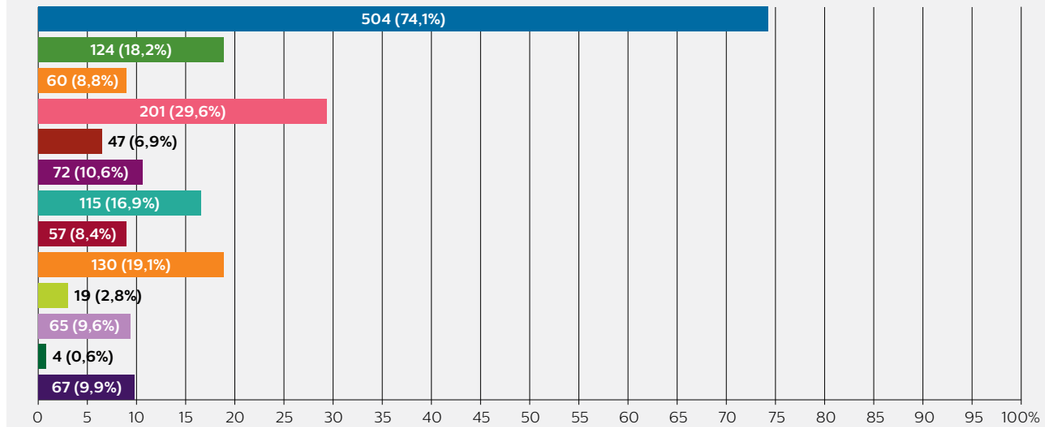
Answer	Anwers	Ratio
Close by	537	76,8%
Easily accessible	97	13,9%
Specific products	73	10,4%
Specific stores	181	25,9%
Good parking facilities	39	5,6%
Free/cheap parking	44	6,3%
Stores I like to visit	96	13,7%
I work in this city (or city center area)	60	8,6%
Selection of cafés and restaurants	150	21,5%
Friendly, charming city center	6	0,9%
Advertising/promotions	65	9,3%
Wifi access (possibly free)	9	1,3%
Other	80	11,4%



Follow-up measurement

Why did you visit this city center area instead of another shopping area? (multiple answers possible)
Mulitple choice, Answerd **680x,** unanswered **10x**

Answer	Anwers	Ratio
Close by	504	74,1%
Easily accessible	124	18,2%
Specific products	60	8,8%
Specific stores	201	29,6%
Good parking facilities	47	6,9%
Free/cheap parking	72	10,6%
Stores I like to visit	115	16,9%
I work in this city (or city center area)	57	8,4%
Selection of cafés and restaurants	130	19,1%
Friendly, charming city center	19	2,8%
Advertising/promotions	65	9,6%
Wifi access (possibly free)	4	0,6%
Other	67	9,9%



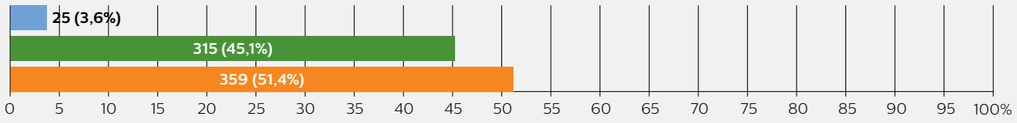
Veghel city center is close by for visitors and easily accessible. It is interesting to note that Veghel city center is visited due to the presence of certain stores and the selection of catering establishments. These are good indicators of the city center's appeal. This is also reflected in the assessment regarding the friendly, welcoming city center. An increase from 0.9% to 2.8% is significant.

Atmosphere and friendly charm

Baseline measurement

What do you think of the atmosphere and friendly charm in the city center?
Single choice, Answered **699x**, unanswered **3x**

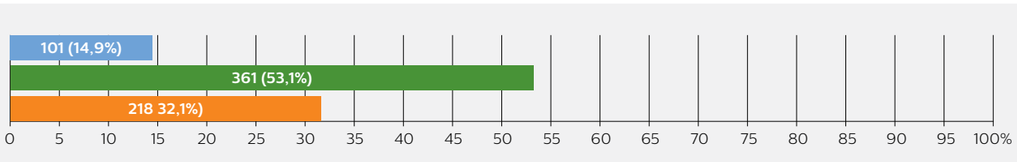
Answer	Anwers	Ratio
Good	25	3,6%
Moderate	315	45,1%
Poor	359	51,4%



Follow-up measurement

What do you think of the atmosphere and friendly charm in the city center?
Single choice, Answered **680x**, unanswered **10x**

Answer	Anwers	Ratio
Good	101	14,9%
Moderate	361	53,1%
Poor	218	32,1%



One very remarkable finding and a clear positive difference between the two studies is related to the atmosphere and friendly charm of the city center, which has increased significantly. You can clearly see the effect of the implemented changes here. The percentage of “poor” has decreased from 51.4% to 32.1%.

Conclusion of the Experience Monitor

Based on the results of the Experience Monitor, the conclusion can be reached that Veghel city center has increased its attractiveness. This is reflected for example in the frequency of visits, the time spent and the specific appreciation for the city center. This is an important factor, because it results in a positive consideration regarding shopping locations (e.g. compared to Uden) and shopping options (internet). The combination of (daytime) catering establishments and stores is important, as well as the stimulation of senses which are based on light, sound and color.

The study indicates what the respondents of the city center thought about it. This group is comprised primarily of Veghel residents. The connection with Veghel has increased. It should be noted that the concentration of supermarkets outside the immediate city center is a positive thing. This provides options for a combined visit, and there is also sufficient parking capacity close to the city center. The access to the city center by way of Het Steegje makes sense in this respect.

The results of the Experience Monitor come from answering questions regarding Veghel city center, and personal appreciation. The counters (beacons) were used to determine if that also leads to different visitor behavior (walking patterns and quantities). The visitor numbers are measured for this purpose. The number of visitors to shopping centers is decreasing nationwide, there is fierce competition from Uden, and the increasing number of online purchases creates a negative image for shopping centers. The study aims to assess whether the perception and experience of Veghel city center are positively influenced by ambiance lighting, sounds and color. Based on the study (Experience Monitor), the answer is yes. The second part of the study focuses on the walking patterns and a study on transients (people passing by) to determine whether there is a change in transient numbers and behavior.

Conclusion of the Experience Monitor

- Veghel city center is visited more often
- The time spent in the city center increased
- The friendly charm factor increased from 2015 to 2016
- Overall appreciation was more positive

Results of Transit Counts (beacon registration)

Influence of light and sound on the city center of Veghel

The analysis of the influence of lights and sounds on Veghel city center was based on the qualitative study among residents, the Experience Monitor, and a transit count at four locations. The flow of people moving in and out of the shopping area was measured continuously.

Beacons were purchased and installed to objectively measure visitor numbers 24/7. Weekly totals were used for the analysis. Processing took place in Excel at a weekly level per measurement location. That is the quantitative data, linked to the attractiveness values using the Experience Monitor. The attractiveness values, such as opinions about the city center and the amount of time spent there, are leading when it comes to comparison and interpretation of the visitor numbers. Both give indications of the effect of the sensorial infrastructure (light, sounds and modification in the city center).

These measurements were taken continuously over a period of two years to determine the points in time worthy of detailed analysis as well as to determine a sequence during these two years. This could be relevant for the flow of transients and to establish the complementarity of stores and catering establishments.

General findings

There is an overlap in numbers when, for example, people leave the shopping area for the market square and vice versa. That is why the measurements for entering and leaving were made separately, which meant that walking patterns (entering and leaving) could be documented. In total, this will be equal; however, these figures could be different per measured location. Visitors could enter Veghel from a different point than where they exit it. Also, the passage from the market to the shopping area and vice versa can be determined this way (by way of Kalverstraat). Based on the total number of counts, a negative trend in the number of visitors can be observed. This is not strange, as the decreasing "footfall" in smaller municipalities (under 50,000 residents) is a general trend. Percentages between 10% and 25% are normal, and may rise even higher in case of a change in the array of stores. In Veghel, the total decrease in visitors is approximately 7%. **This is significantly below the national trend**. The following graph shows the decrease. It is worth noting that the temporary dip has recovered.

The latest observations since June 2017 showed a clear increase and are nearing the visitor numbers of 2015 again. Initially, the economic revival could have played a role, but this will have a negative influence due to the impact of online purchases. In this situation, the combination of daytime catering establishments and non-daily shopping encouraged by the attractiveness aspects is also a positive combination.

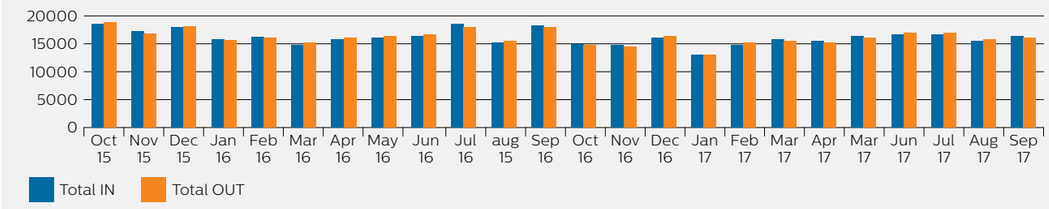
The variation for "in" is between 82% and 91.8%.
The variation for "out" is between 78% and 94.7%.

The analysis per measuring point shows a mixed picture. In the follow-up of the analysis, every location will be discussed separately.

	Steegje IN	Steegje OUT	Molenwieken IN	Molenwieken OUT	Wiekslag IN	Wiekslag OUT	Kalverstraat IN	Kalverstraat OUT
Oct-15	33266	35138	32716	32571	42084	48568	77196	71487
Nov-15	39302	39734	28398	26440	34763	36860	68931	65385
Dec-16	43669	44796	31249	29131	40859	48896	63060	58997
Jan-16	40028	38866	28093	24779	34493	43296	55874	51140
Feb-16	42910	41206	33241	30814	31517	39143	54549	50645
Mar-16	43372	40040	29998	26421	33348	49091	41459	37282
Apr-16	46356	42829	32449	29845	32880	45464	46286	41420
May-16	46608	43969	32523	29598	34364	47670	46972	41964
Jun-16	49187	45826	33249	31018	32069	42007	49680	45437
Jul-16	54335	51931	40283	36601	38388	43458	53688	48202
Aug-16	46910	44384	31255	27716	31695	42447	45405	41321
Sep-16	57167	53515	40459	35028	34041	45733	53763	48884
Oct-16	48270	44820	32112	28883	31028	39223	38853	34123
Difference								
Oct-15	33266	35138	32716	32571	42084	48568	77196	71487
Oct-16	48270	44820	32112	28883	31028	39223	38853	34123

	Total IN	Total OUT
Oct-15	185262	187764
Nov-15	171394	168419
Dec-15	178837	181820
Jan-16	158488	158081
Feb-16	162217	161808
Mar-16	148177	152834
Apr-16	157971	159558
May-16	160467	163201
Jun-16	164185	164288
Jul-16	186694	180192
Aug-16	155265	155868
Sep-16	185430	183160

	Total IN	Total OUT
Oct-16	150263	147049
Nov-16	149019	146325
Dec-16	162191	163740
Jan-17	130377	129834
Feb-17	148801	153300
Mar-17	159390	156083
Apr-17	155620	153403
May-17	162433	160878
Jun-17	166871	168798
Jul-17	166824	168041
Aug-17	155463	156442
Sep-17	163392	162311



Het Steegje and other observation points
Incoming and outgoing visitors were tracked at Het Steegje. This is a good indication, as you can both enter the shopping area by way of Het Steegje, and also exit through that route to the supermarket and car park.

Het Steegje

The following graph displays the observations of the first year (October 2015-September 2016) and of the second year (October 2016-September 2017), compared side by side. It provides a generally positive picture with some monthly variations. The blue column is the first observation, while the red column is the second observation.

The conclusion that can be drawn from this is positive. The modifications have had a positive effect on access to the shopping area.

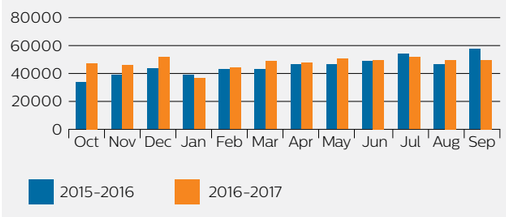
Het Steegje is also quite popular with transients exiting the area, with September 2017 as a particularly significant month.

Based on this analysis, the conclusion can be drawn that Het Steegje has become popular due to the measures taken and shows an increase in transients. The outgoing flow is a little less though, a sign that people are taking another exit from the city center. There are also fluctuations in this, probably caused by the weather.

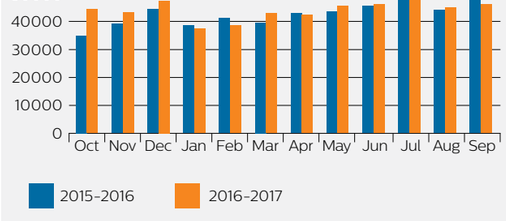
Steegje IN	2015-2016	2016-2017
October	33266	48270
November	39302	46392
December	43669	51531
January	40028	36625
February	42910	44093
March	43372	48947
April	46356	47618
May	46608	50871
June	49187	50026
July	54335	52264
August	46910	49362
September	57167	50072

Steegje OUT	2015-2016	2016-2017
October	35138	44820
November	39734	43450
December	44796	48087
January	38866	37441
February	41206	38619
March	40040	43295
April	42829	42190
May	43969	45974
June	45826	46348
July	51931	48711
August	44384	45401
September	53515	46458

Steegje IN



Steegje OUT



Molenwieken

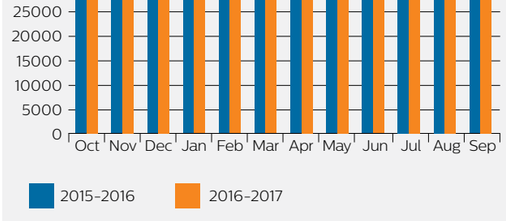
De Molenwieken shows a positive picture. Some fluctuations in July and September are also noticeable in the other measurements. External influences may play a role in this. However, in total we can see a positive influence on a monthly basis. When we isolate the months July and September due to incidental deviations, **the increase is more than 3%.**

The same picture can be seen in outgoing transients. An increase of over 3% can also be seen when isolating the incidental months of July and September.

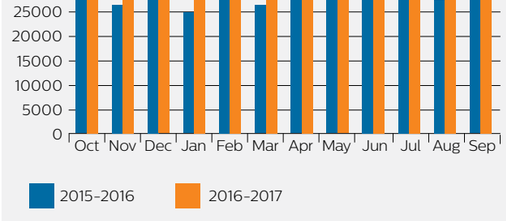
Molenwieken IN	2015-2016	2016-2017
October	32716	32112
November	28398	31114
December	31249	31887
January	28093	30279
February	33241	33391
March	29998	32158
April	32449	31019
May	32523	33827
June	33249	34606
July	40283	34164
August	31255	31745
September	40459	34324

Molenwieken OUT	2015-2016	2016-2017
October	32571	28883
November	26440	28696
December	29131	29825
January	24779	27764
February	30814	36360
March	26421	28450
April	29845	28021
May	29598	29793
June	31018	30429
July	36601	30990
August	27716	28584
September	35028	30306

Molenwieken IN



Molenwieken OUT



Wiekslag

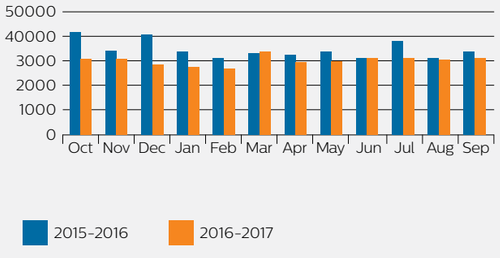
The number of transients through Wiekslag decreased for incoming as well as outgoing. The differences per month are significant, however, and we have been unable to identify the cause. Since March, we have observed a more stable situation. In total, the **decrease in incoming is 13%, while the number of outgoing transients has decreased by 11%.**

Wiekslag shows a decreasing number of transients compared to 2016, being 11%; the outflux has decreased. This means that visitors choose another exit than the measuring point.

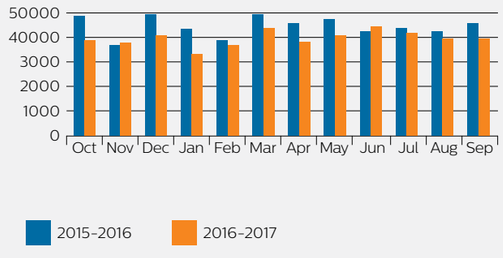
Wiekslag IN	2015-2016	2016-2017
October	42084	31028
November	34763	31339
December	40859	29192
January	34493	28099
February	31517	27580
March	33348	33473
April	32880	29452
May	34364	30157
June	32069	31828
July	38388	31434
August	31695	30791
September	34041	30588

Wiekslag OUT	2015-2016	2016-2017
October	48568	39223
November	36860	37932
December	48896	40516
January	43296	32934
February	39143	36961
March	49091	44077
April	45464	38062
May	47670	40026
June	42007	44542
July	43458	41593
August	42447	39761
September	45733	38891

Wiekslag IN



Wiekslag OUT



Kalverstraat

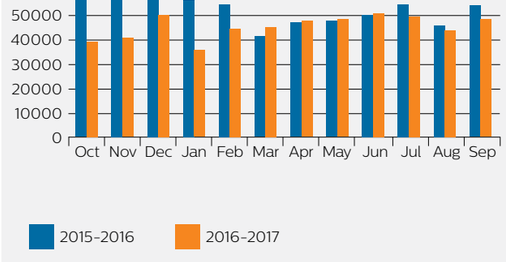
Kalverstraat* as entry point shows a decreasing number of transients. Starting in March 2016, that picture has changed. A decrease of 1.7% can be seen in spite of the negative picture of September, otherwise the number of measured transients would have remained the same.

What is remarkable, though, is the big difference between October and February. These are the holiday months. Probably due to weather or mission-based shopping, Kalverstraat is not a good option for access to the city center.

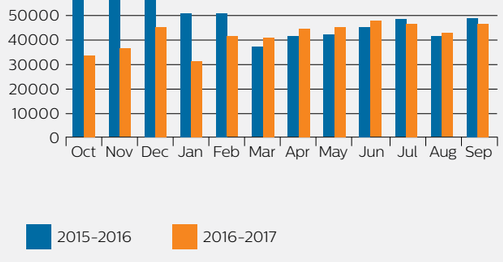
Kalverstraat IN	2015-2016	2016-2017
October	77196	38853
November	68931	40174
December	63060	49581
January	55874	35374
February	54549	43737
March	41459	44812
April	46286	47531
May	46972	47578
June	49680	50411
July	53688	48962
August	45405	43565
September	53763	48408

Kalverstraat OUT	2015-2016	2016-2017
October	71487	34123
November	65385	36247
December	58997	45312
January	51140	31695
February	50645	41360
March	37282	40261
April	41420	45130
May	41964	45085
June	45437	47479
July	48202	46747
August	41321	42696
September	48884	46656

Kalverstraat IN



Kalverstraat OUT



***A systematic error has been identified in Kalverstraat that occurred during the first measurement. It has been isolated in the analysis.**

Kalverstraat OUT shows the same picture as IN. It also shows that major difference from October to February. Based on the transient registration from March 2016, **the increase is over 3%.**

What is remarkable is the decrease in the number of transients during the popular shopping period from October to February. During this period, the Kalverstraat is used less often as an access street to the city center. In fact, it creates a division between the shopping center and the catering square (bi-polarity). It is evident from the Experience Monitor that the catering sector is becoming more important, but it attracts target visitors who park nearby. It is possibly again due to the fact that there is no passageway to and from the city center in October-February. During this period, the combination of stores and a visit to the catering square, or vice versa, becomes less popular. People would rather visit the secondary catering establishments in the city center.

A twin-track strategy could be drawn up for this. Make the stores and shopping even more appealing, based on the walking patterns to and from Het Steegje. For cafés and restaurants, facilities must be provided close to the catering square.

Conclusion of Transit Counts

- The modifications to the city center have a positive effect on the appreciation of the city center as a catering and shopping area.
- A bipolarity can be observed: catering and stores. Traffic back and forth between these two areas is very limited during the traditional shopping period in October-February.
- Visitors park close to their target location, stores or catering establishments.
- The appreciation for the city center has grown significantly.
- In spite of the unavailability of indicative turnover figures, the conclusion can be drawn from the observations that the modifications have had a positive effect on sales in stores, cafés and restaurants. This is based on the passage of transients in comparison to the national trend and based on the assessment of the city center as a place to spend time.

Overall conclusion

The increase in online purchases is still continuing at a steady pace. Especially stores in shopping streets are increasingly losing turnover to online vendors. In addition, this also leads to margins coming under pressure as consumers have more choice as well as transparency in selection and prices. That overview does show that the increase differs per sector. However, if this results in a decrease in the selection of nice stores, it will also lead to a decrease in the appeal of a city center. The study by I&O Research for municipalities under 50,000 residents confirms this.

Final conclusion
Based on the Experience Monitor and Transit Counts, the conclusion can be drawn that the modification of the city center of Veghel has had a positive effect on the time spent by visitors and its appeal. The Transit Count study shows that a slight increase can be observed in spite of the negative trend in the Netherlands for municipalities of the same size.

Traffic back and forth to the catering area is limited. The conclusion can be drawn from this that we are mostly dealing with targeted visits: either stores, or cafés and restaurants. This mainly concerns the catering establishments on the market.