South Ayrshire Town Centre Assessment

Girvan Town Centre: Business Survey

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APPENDICES (UNDER SEPARATE COVER)

1.0 SURVEY BACKGROUND, OBJECTIVES AND METHODOLOGY

Background

1.1 South Ayrshire Council, along with Project Partners, has been awarded funding from the European Regional Development Fund's INTERREG IVA Programme for delivery of the Business Improvement Districts (BIDS) Project. The Project has been funded through Priority 2, Theme 1: Public Sector Collaboration.

1.2 A Joint Committee of 5 local authorities (Ballymena Borough Council, Coleraine Borough Council, Larne Borough Council, Sligo County Council and South Ayrshire Council) has been established with Ballymena Borough Council acting in role of Lead Partner. A Partnership Agreement has been produced to provide governance guidelines and an operating framework.

1.3 The purpose of the study is to gauge the views and priority issues of customers, businesses and residents of the towns. The town centres to be included are: Ayr, Girvan, Maybole, Prestwick, and Troon. The issues to be investigated include public space and environment, accessibility and events. Cameron Research, in partnership with IBP Strategy and Research, were appointed to conduct a series of surveys to establish the views and priority issues of customers, businesses and residents of the towns and their landward villages.

Objectives

1.4 This analysis will inform the development of town centre plans in South Ayrshire to deliver improvements for businesses, shoppers and residents. Overall, the purpose is to inform the South Ayrshire Strategy Plan to provide consumers with a compelling reason to use the shops and services of each town centre. This work will help to inform the strategy and planning process and provide a baseline against which future initiatives can be measured

1.5 Four distinct surveys were conducted in August 2014:

- shoppers/customers recruited within each of the 5 town centres to collect information on their specific shopping trip/services visit, plus perceptions and attitudes towards the town centre offering
- residents within the settlement boundary of each of the 5 towns and landward villages to expand the information gathered from the town centre surveys
- commercial operators/business: to determine issues and concerns regarding the area, from the business perspective
- representative population survey within South Ayrshire to ask specifically about usage of, and attitudes towards, Ayr town centre.

1.6 For shoppers and residents, questions included demographics, shopping locations, frequency of visits, shopping patterns, perceptions of safety and cleanliness, awareness of offer, spend profile, areas for improvement and alternative shopping locations.

1.7 For businesses, questions included size and type of business, trading operations, perceptions of trading circumstances, assessment of town centre facilities, potential barriers to business and areas for improvement.

1.8 **This document presents the key findings for the Girvan Business Survey. The residents / shoppers surveys and the wider survey and that related specifically to Ayr town centre are detailed in separate reports.**

Methodology

1.9 A database of businesses within the town centre was provided by South Ayrshire Council; this contained 110 businesses. Surveys were hand-delivered to individual businesses and the purpose of the survey explained where possible.

1.10 An initial period was allowed for postal responses and, thereafter, top-up telephone interviewing was undertaken.

1.11 A total of 32 responses were received (29% of the total).

1.12 Detailed appendices are included under separate cover. These include the survey questionnaire (Appendix 1), detailed data tables (Appendix 2) and a full listing of "other" responses and responses to open-ended questions (Appendix 3).

2.0 SUMMARY OF OVERALL CONCLUSIONS

Respondents to the Girvan Business Survey came from a diverse set of business sectors and were predominantly independent businesses but with some respondents being part of UK-wide or Scottish chains. They were generally small (85% having less than 5 full-time equivalent employees). Businesses had typically been trading within Girvan for a considerable period and drew 39% of their business from beyond Girvan and its surrounding villages including 22% from outwith South Ayrshire.

The issues that Girvan business respondents were most likely to raise as positive aspects of Girvan town centre as a business location included location / convenience / access issues as well as elements of the physical and natural environment. Issues most likely to be raised as negative aspects of Girvan town centre as a business location were parking and empty shops.

Businesses give reasonably positive ratings for Girvan in relation to: a safe / secure environment (76% rating this positively); street cleaning (63%) and access by public transport (62%). However, only 37% give a positive rating rating for available car parking near shops, 34% for variety of shops and services, 25% for time restrictions on car parking and 19% for a positive feel to the place.

Existing Girvan businesses were quite likely to consider that there were too many charity shops (72%) but, conversely, they were quite likely to consider that there were too few small / independent shops (50%). The number of discount / pound shops was seen as about right by a majority (75%) as was the number of large / chain stores (66%), non-retail shops such as hairdressers (63%), takeaway food shops (63%), betting shops (63%) and restaurants / cafes (50%).

Overall, only 22% of respondents overall gave a positive view regarding Girvan town centre as a place to do business.

39% of businesses in Girvan town centre indicate that their business performance has declined over the past year, with no respondents at all indicating that it had improved. There are only modest expectations of future improvement.

Businesses are generally evenly divided between those that own and those that rent their premises. A significant minority plan to refurbish existing floor space over the next 3 years (22%) whilst 13% envisage the sale of the business as a going concern.

In terms of their marketing approach, businesses were quite likely to use a business website (50%), to use the local press (38%) and to use social media (31%) but somewhat less likely to use other communications channels.

Only 26% of Girvan businesses indicate that they are members of any business organisations and only 16% indicated that they had accessed business support, advice or training over the past 5 years.

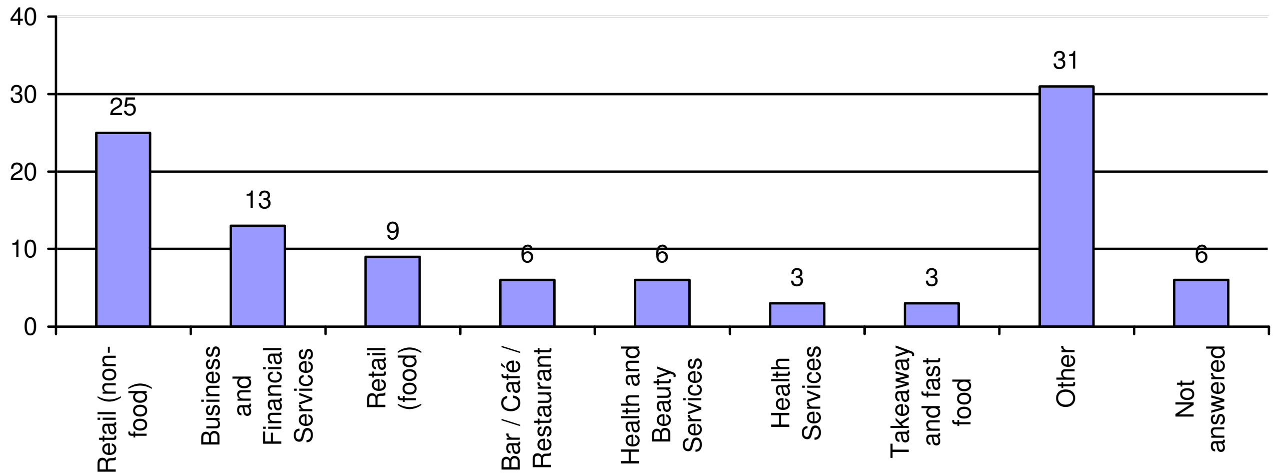
The final comments made by Girvan businesses in response to the survey reinforce the above themes with these comments most commonly being about the perceived need for a vision / plan for the town.

3.0 BUSINESS RESPONDENT PROFILE

3.1 The profile of respondent businesses by business sector is set out in Figure 3.1 below. It should be noted that, throughout the report, sums may not add to 100% due to rounding.

Figure 3.1 Business sector

Which of the following best describes your business sector? Base 32

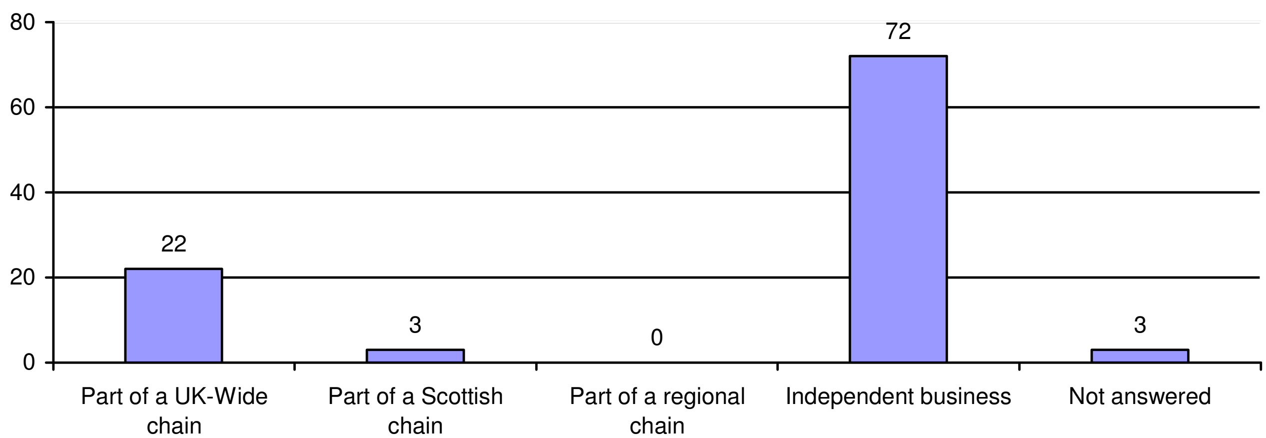


Most commonly, respondents were either in the retail (non-food) sector or the business and financial services sector, although there was broad representation across a range of sectors. A significant number of businesses placed themselves in the "other" category. These are listed in full in the appendices.

3.2 As shown in Figure 3.2 below, the great majority of respondent businesses (74%) were independent with the others that provided a response being part of a UK-wide chain.

Figure 3.2 Ownership status

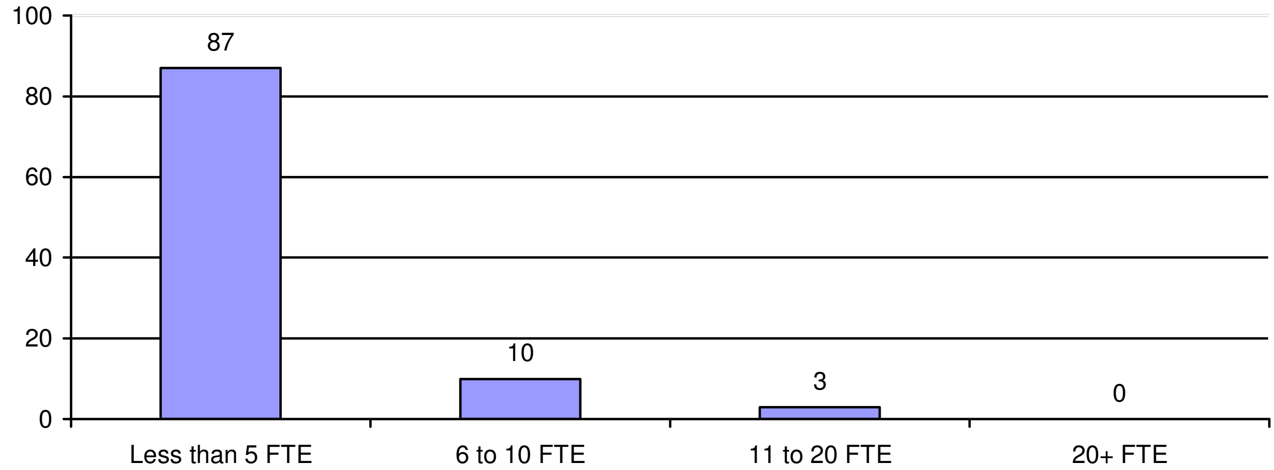
Which of the following best describes the business's ownership status? Base 32



3.3 Figure 3.3 profiles the breakdown of employee numbers amongst this group of business respondents:

Figure 3.3 Employee numbers

How many staff does the business employ at this location? Base 31

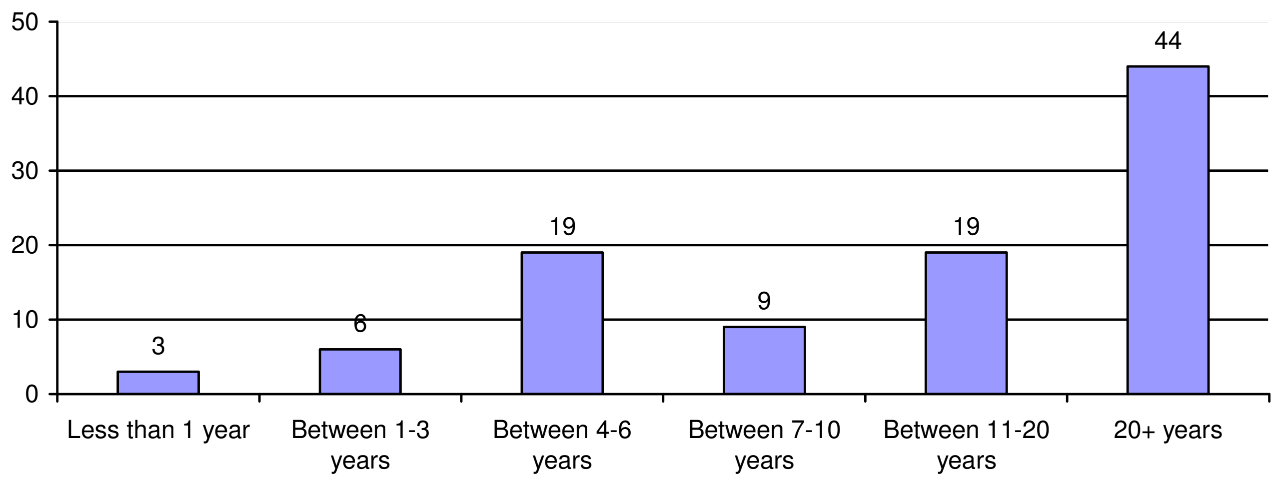


The total number of full-time equivalent employees amongst the 31 businesses that provided this information was 88. The mean number of full-time equivalent employees was 3 and the median number 2 (all numbers have been rounded to the nearest whole number and a part-time job is assumed to be 0.5 times a full-time job).

3.4 A very significant proportion of those businesses that responded to the survey have been trading for some time. As shown in Figure 3.4 below, 42% of businesses had been trading for 20+ years and a further 19% for between 11 and 20 years.

Figure 3.4 Length of time trading

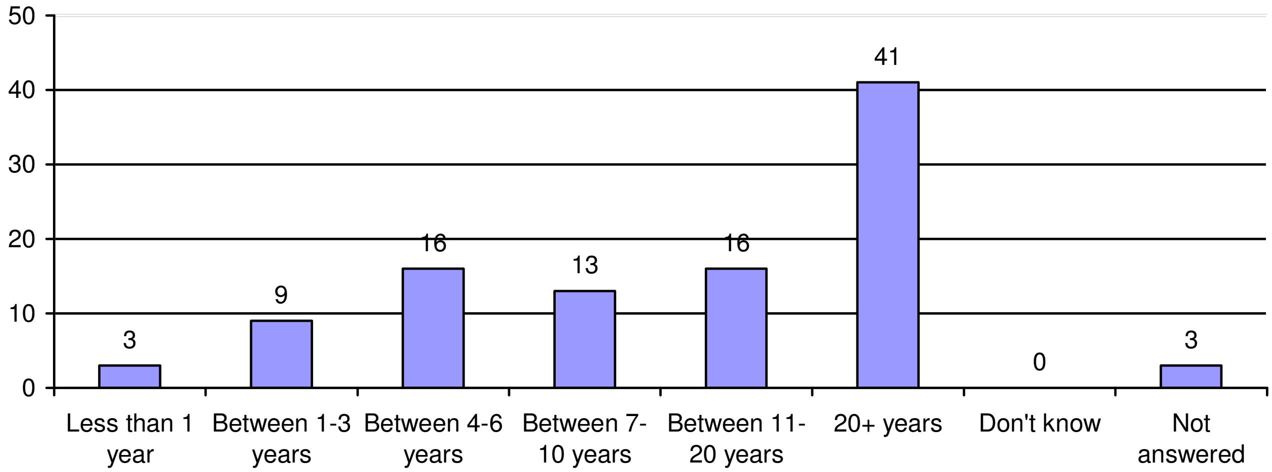
How long has your business been trading for? Base 32



3.5 This pattern is also apparent in terms of the period of time that the businesses have traded in Girvan town centre. As shown in Figure 3.5, 42% of businesses have been trading in the town centre for 20+ years and a further 13% for between 11 and 20 years.

Figure 3.5 Length of time trading in Girvan town centre

How long has the business traded in Girvan town centre? Base 32



3.6 Respondents were also asked to provide details as to the dates and times at which their business was usually open. This information will be provided to the Council in spreadsheet form for subsequent analysis.

3.7 Finally, in terms of the profile of responses, respondents were asked to estimate the proportion of their business that came from three categories of customer, broken down geographically. 30 respondents provided this information. Figure 3.6 shows the average proportion of business that comes from each of these areas amongst these respondents. It should be noted, however, that this figure does not take account of the different overall sizes of certain businesses (i.e. it is a raw average figure with the figures for each business being given equal weight, irrespective of business size).

Figure 3.6 Business breakdown

Approximately what proportion of your business would you say comes from the following categories of customer?

Base: 30	
	%
Residents of Girvan and its surrounding villages	61
Residents from elsewhere in the South Ayrshire Council area	17
Visitors from outwith South Ayrshire	22

4.0 VIEWS ON GIRVAN TOWN CENTRE

4.1 Respondents were asked firstly to rank the things that they liked about Girvan town centre as a business location. This was an open-ended question and the responses have been coded into a set of common categories as set out in Figure 4.1.

Figure 4.1 Things liked most about Girvan town centre

In broad order of importance, please list up to three things that you like about Girvan town centre as a business location?

Issue	1st rank (base: 26 comments)	2nd rank (Base: 18 comments)	3rd rank (11 comments)
Location / convenience / access issues	35%	11%	27%
Good physical and natural environment	27%	17%	9%
Compact / easy to get around	19%	11%	0%
Good range and type of shops	12%	6%	18%
Customer base / community	12%	22%	0%
Good footfall / busy area	4%	6%	27%
Parking	4%	22%	9%
General positive comments	0%	6%	0%
Other	0%	0%	9%

It should be stressed that the figures quoted are the proportion of comments made in each priority rank (1st, 2nd, 3rd). It is certainly clear from these figures that the things that businesses most like about Girvan town centre relate firstly to location / convenience / access issues. However, other important issues are the physical and natural environment of the area and it being compact / easy to get around. A full listing of these comments is contained in the appendices.

4.2 Conversely, respondents were also asked to rank the things that they liked least about Girvan town centre as a business location. Again, this was an open-ended question and the responses have been coded into a set of common categories as set out in Figure 4.2.

Figure 4.2 Things liked least about Girvan town centre

In broad order of importance, please list up to three things that you like least about Girvan town centre as a business location?

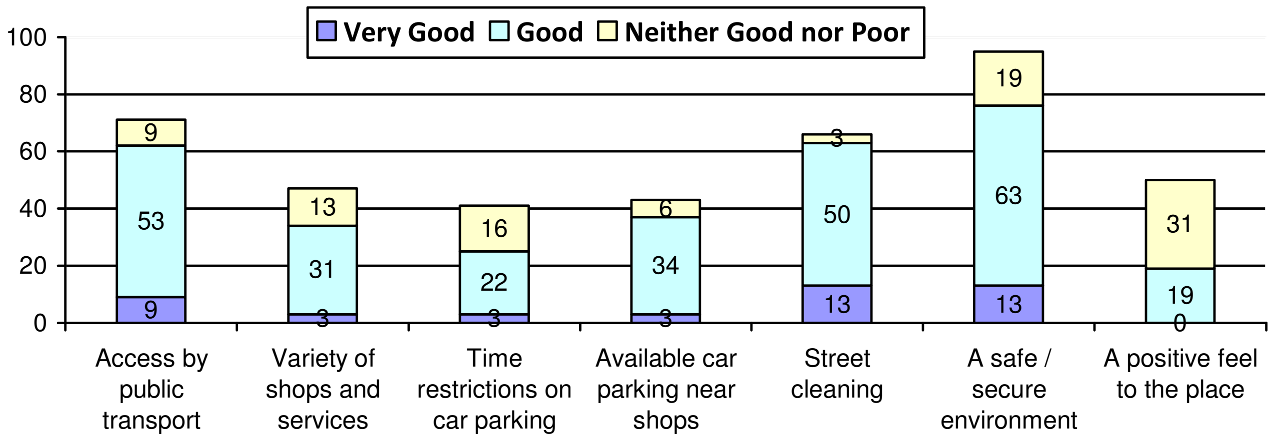
Issue	**1st rank (base: 29 comments)**	**2nd rank (Base: 26 comments)**	**3rd rank (21 comments)**
Parking	21%	12%	10%
Empty shops	21%	8%	14%
Poor footfall / area not busy	17%	12%	10%
Congestion / heavy traffic	14%	12%	19%
Poor physical and natural environment	10%	42%	14%
Poor range and type of shops / services	10%	8%	24%
Business rates / lack of investment and support	3%	4%	0%
General negative comments	3%	0%	0%
Undesirable people	0%	0%	0%
Less convenient to access than other locations	0%	0%	0%
Other	0%	8%	10%

The most common issues that are mentioned as being least liked about Girvan town centre as a business location include parking and empty shops. A number of comments are also made with respect to poor footfall. Congestion and heavy traffic in the area is also a concern for some as are elements of the physical and natural environment. Again, a full listing of these comments is contained in the appendices.

4.3 Following on from this open-ended question, a list of specific town centre features was shown to respondents and they were asked to rate each of these. The results are summarised in Figure 4.3 below:

Figure 4.3 Attitudes towards town centre

How do you rate Girvan town centre with regard to each of the following? Base 32



Ratings are reasonably positive with regard to three of these issues: a safe / secure environment (76% rating this as either very good or good); street cleaning (63%) and access by public transport (62%).

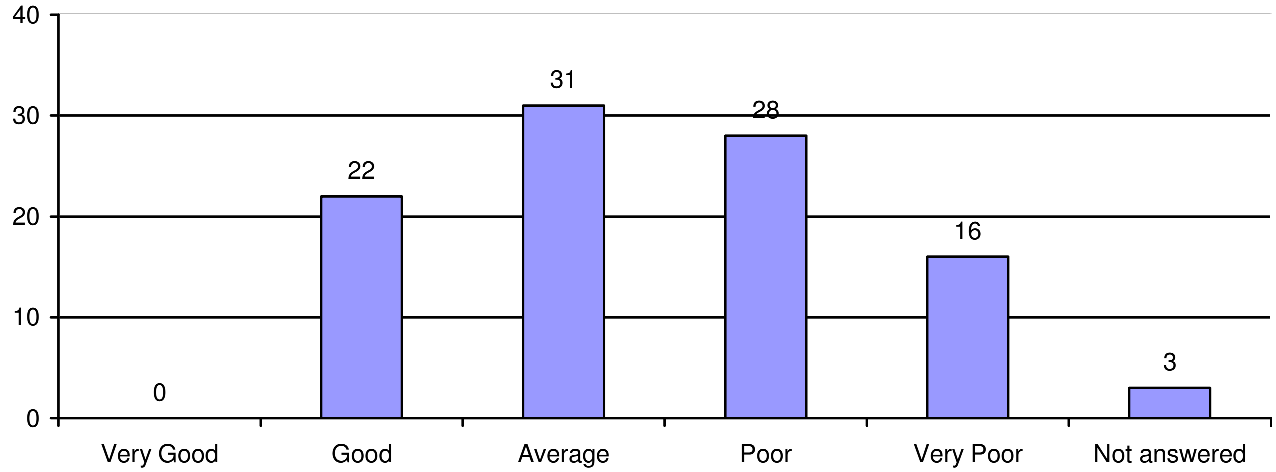
However, ratings are significantly poorer for a number of important issues: only 37% accord a very good or good rating for available car parking near shops, 34% for variety of shops and services, 25% for time restrictions on car parking and 19% for a positive feel to the place.

4.4 When taken as a whole, only 22% of business respondents gave a positive view overall regarding Girvan town centre as a place to do business, compared to 44% that gave an expressly negative rating (the balance being neutral respondents or respondents that did not express an opinion). These results are shown in figure 4.4 below.

Figure 4.4 Overall rating of Girvan town centre

What is your overall view of Girvan town centre as a place to do business?

Base 32

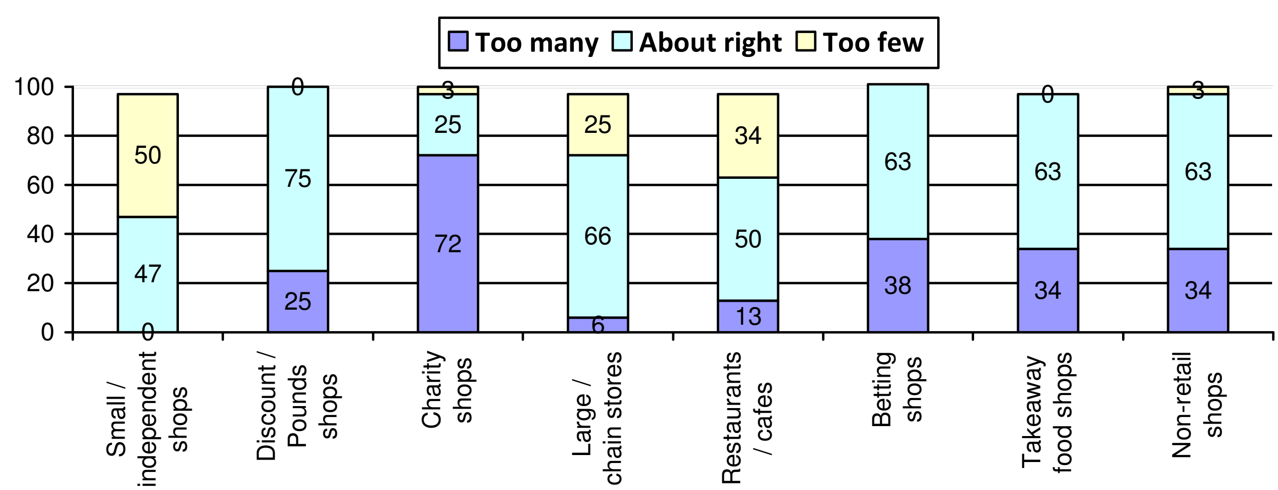


4.5 A further question relating to attitudes to the town centre concerned views on the types of outlet in the town centre and whether this number was too many, about right or too few. The results are illustrated in Figure 4.5 below:

Figure 4.5 Types of outlet

What do you think about the number of these types of outlet in Girvan town centre?

Base 32



Respondents were quite likely to consider that there were too many charity shops (72% felt this to be the case) but, conversely, they were quite likely to consider that there were too few small / independent shops (50% felt so).

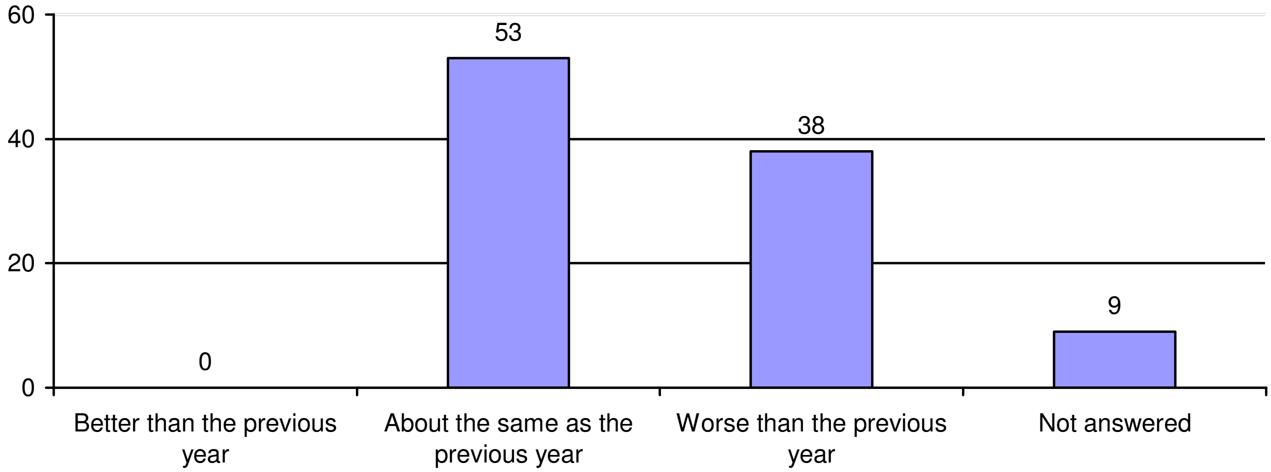
The number of discount / pound shops was seen as about right by a majority (75%) as was the number of large / chain stores (66%), non-retail shops such as hairdressers (63%), takeaway food shops (63%), betting shops (63%) and restaurants / cafes (50%).

5.0 BUSINESS PERFORMANCE AND EXPECTATONS

5.1 As part of the section on attitudes to Girvan town centre, businesses were asked to comment on their own recent business performance and future expectations and these results are summarised in this section. Figure 5.1 summarises how businesses indicated that they had performed over the past year:

Figure 5.1 Business performance

How would you say that the business has performed over the past year? Base 32



It is notable that 38% of businesses in Girvan town centre indicate that their business performance has declined over the past year, with no respondents at all indicating that it had improved.

5.2 Those respondents that indicated that their business had performed worse in the past year were asked to comment on the reasons for this through an open-ended question. These responses have been coded by IBP into common categories and are set out in Figure 5 .2.

Figure 5.2 Reasons for business performing worse

If your business has performed worse than in the previous year, what would you say were the reasons for this? Base 11

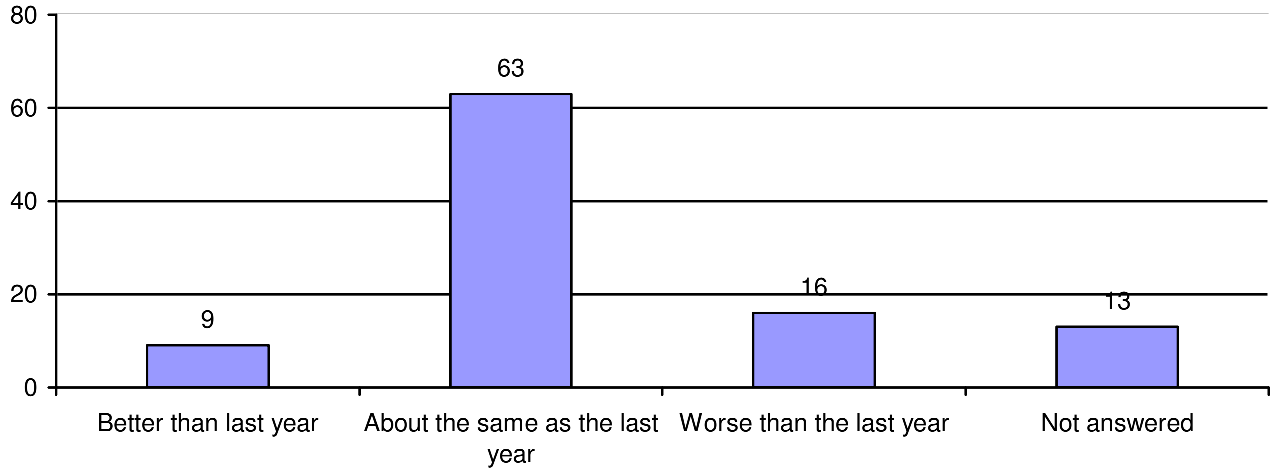
Reason	% of comments
Footfall / customer base	45
Economic downturn / less money	27
Competition from other areas	18
Specific circumstances of particular business	18

Again, a full listing of these comments is contained in the appendices.

5.3 Businesses were then asked how they expected their business to perform over the next year. The results are summarised in Figure 5.3 below:

Figure 5.3 Expected business performance

How would you expect the business to perform over the next year? Base 32



These figures are slightly more positive although it is still the case that only 9% of respondents expected an improvement in business performance (and this itself could reflect a degree of optimism bias)

5.4 Respondents were asked as to their reasons for these future expectations and these are detailed in full in the appendices. Illustrative comments are shown below to highlight the key themes.

Figure 5.4 Reasons for future business expectations

Please five brief reasons for your answer (to the question about expected business performance) in the space below?

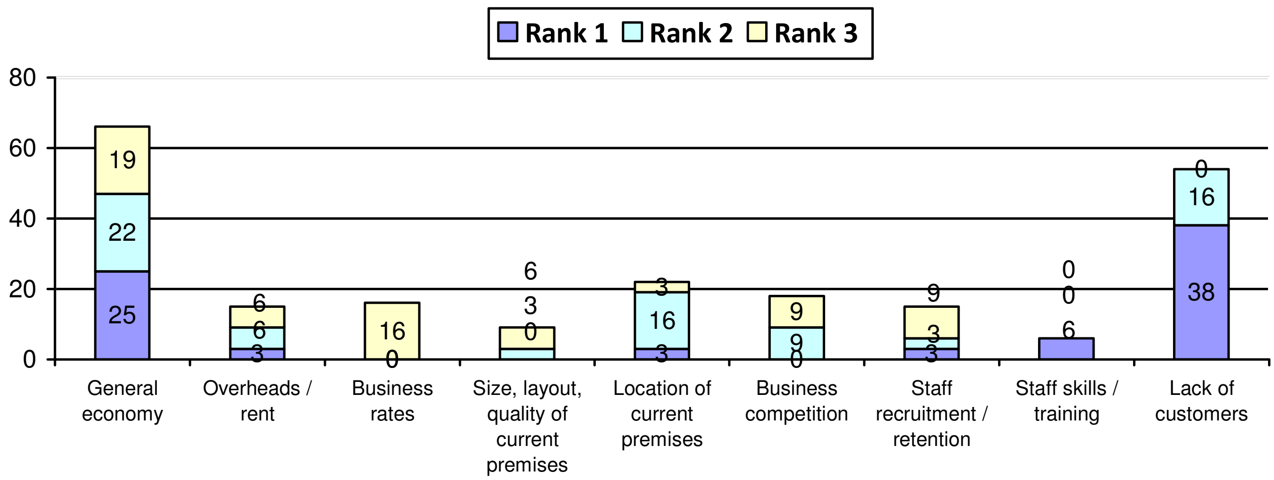
Business performance expected to be better than last year
"More people becoming health conscious." *"Have to look to increase business so have started to sell online."*
Business performance expected to be about the same as last year
"Still think we are in recession." *"Due to the general economy it is difficult to justify the increases to clients."*
Business performance expected to be worse than last year
"Lack of visitors." *"Asda taking business away."*

5.5 More generally, business respondents were asked to rank the top 3 challenges facing their business, from a prompted list. The results are illustrated in Figure 5.5 below:

Figure 5.5 Business challenges

From this list, please rank the top 3 business challenges facing your business, in order of importance, where 1 is most important and 3 is 3rd most important?

Base 32



Whilst a broad set of such challenges are important it is clear that the general economy (ranked as top priority by 25% of respondents and in the top 3 priorities by 66%) and lack of customers (top priority for 38% and in the top 3 for 54% of respondents).

5.6 For those respondents that indicated business competition as one of their challenges, a subsequent question asked where such competition came from. Only six respondents gave an answer to this question, with 4 indicating that such competition came from within the town centre, 2 from the internet, 1 from out-of-town shopping centres and 1 other response (multiple responses were allowed).

6.0 BUSINESS PREMISES

6.1 A series of questions were asked within the business survey as to respondents' business premises. We understand that this information may be used on a case-by case basis by the Council and appropriate information will be provided in Excel format to facilitate this. In this section, however, we summarise the key points arising from these questions.

6.2 44% of respondents indicated that their premises were owned and 47% rented. 3% (1 respondent) gave an "other" response, which was that premises were leased. The remaining 6% (2 respondents) did not answer this question.

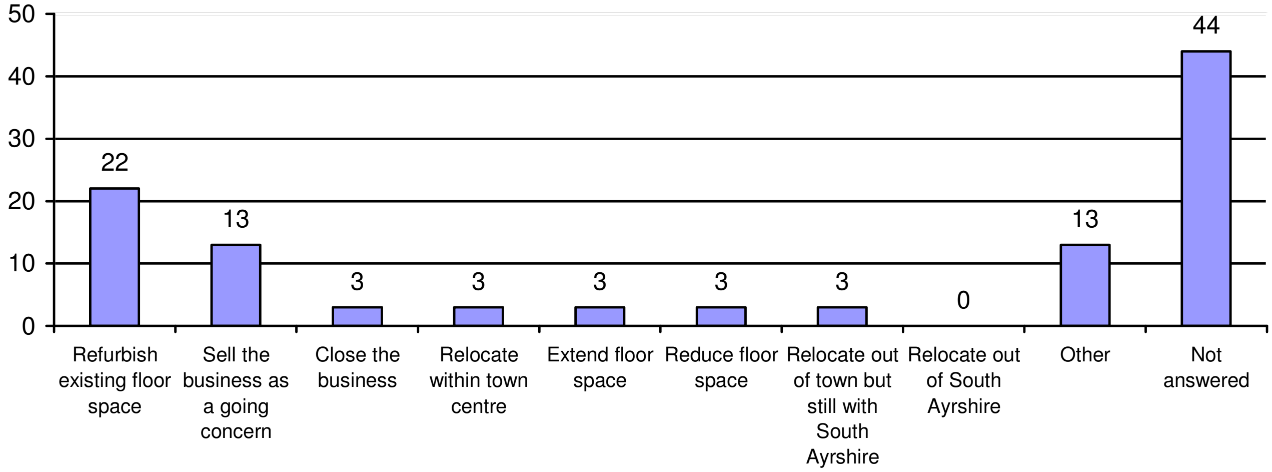
6.3 The floor space occupied by respondent businesses ranged from 18 square feet to 6,458 square feet. The average figure amongst the 13 respondents that answered this question was 1,927 square feet.

6.4 69% of businesses indicated that they occupied a single floor in the building they occupied whilst 6% (2 businesses) had more than one floor in the building, but with all floors occupied by their business. In 25% of cases, the premises had multiple floors, some of which were occupied by other businesses.

6.5 In relation to premises, businesses were asked as to whether they had any plans in terms of space / relocation over the next 3 years. The results of this are set out in Figure 6.1 below:

Figure 6.1 Future plans in relation to premises

Do you plan to alter the business in any of the following ways in the next 3 years? Base 32



A significant minority of businesses indicated an intention to refurbish existing floor space (22%) and a reasonable proportion (13%, 4 respondents) indicated that they would wish to sell their business as a going concern. Two businesses indicated a plan to relocate (one within the town centre, one to elsewhere in South Ayrshire). In both cases, the reason given for this was reduced footfall in the town centre. It should be noted that multiple responses were allowed to this question. The "other" responses are listed in full in the appendices but typically included responses such as "no plans".

6.6 3 respondents indicated that they were housed within a Listed Building; in each case the building was B listed.

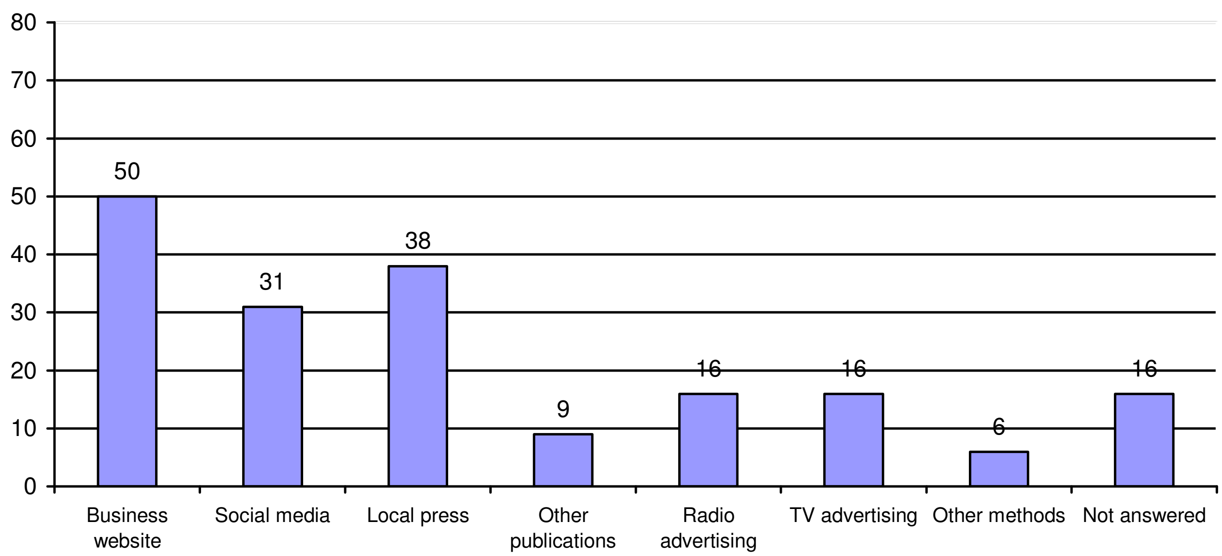
7.0 BUSINESS SUPPORT

7.1 26% of respondents (8 businesses) indicated that they were members of business organisations. The details of these organisations are listed in full in the appendices. Only 5 respondents cited specific examples; 2 mentioned the Federation of Small Businesses and the others individual trade bodies.

7.2 The marketing/ advertising methods that businesses indicated they used are set out in Figure 7.1 below.

Figure 7.1 Use of marketing / advertising methods

Which of the following marketing / advertising methods do you use for your business?
Base 32



Businesses were quite likely to use a business website (50%), to use the local press (38%) and to use social media (31%) but somewhat less likely to use other communications channels.

7.3 Only 16% of respondents (5 businesses) indicated that they had accessed business support, advice or training over the past five years. Examples of this support are detailed in full in the appendices but included a range of individual elements of support, with respondents not always able to recall the precise details.

7.4 Businesses that had not accessed any such advice were asked as to the reasons for this. Again, comments are listed in full in the appendices but typically related to a perception that such support, advice or training was not required.

8.0 ADDITIONAL COMMENTS

8.1 Respondents were given the opportunity to make any further comments that they wished in the form of a final, open-ended question. These comments have been coded and the results are summarised in Figure 8.1 below:

Figure 8.1 Further comments

Please use the space below to make any further comments that you would like about the issues raised in this questionnaire? Base 10 comments (some comments are attributed to more than one heading)

Issue	% of comments made
Need for a plan / vision for the town	70%
Need to market the town	10%
General negative comments	10%
Other	10%

Within this small number of additional comments, the perceived need for a plan / vision for the town was very prevalent. A full listing of these comments is contained in the appendices.