CR Cameron Research
Strategic Research & Planning

South Ayrshire Town Centre Assessment

Maybole 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 Maybole 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 48 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 15 responses were received (31% 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 Maybole Business Survey came mainly from the retail and bar / café / restaurant sectors, although other sectors were also represented. They were predominantly independent businesses but with some respondents being part of UK-wide or Scottish / regional chains. They were typically small businesses (93% having fewer than 5 full-time equivalent employees). Businesses had typically been trading within Maybole for a considerable period and drew the great majority of their business (78%) from Maybole and its surrounding villages.

The issues that Maybole business respondents were most likely to raise as positive aspects of Maybole town centre as a business location included the local customer base and community as well as location / convenience / access issues. Issues most likely to be raised as negative aspects of Maybole town centre as a business location were congestion / heavy traffic and negative aspects of the physical and natural environment.

The issues rated positively by a majority of respondents were street cleaning (80%), access by public transport (67%) and a safe/secure environment (53%). Just under half of respondents (47%) considered there to be a positive feel to the place. Ratings are significantly poorer for a number of important issues: only 14% give a positive rating for variety of shops and services, 13% for time restrictions on car parking and 0% for available car parking near shops.

The only category of outlet where respondents felt there were too many of was takeaway food shops (60%). There were no categories of outlet where a majority of respondents considered that there were too few of such outlets in Maybole.

Overall, only 27% of respondents gave a positive view regarding Maybole town centre as a place to do business.

33% of businesses in Maybole town centre indicate that their business performance has declined over the past year, compared to only 27% that consider it to have improved.

Businesses are generally evenly divided between those that own and those that rent their premises. A significant proportion plan to refurbish existing floor space over the next 3 years (47%) whilst 20% envisage the sale of the business as a going concern.

In terms of their marketing approach, businesses were quite likely to use social media (67%), a business website (47%) and the local press (40%) but somewhat less likely to use other communications channels.

Only 27% of Maybole businesses indicate that they are members of any business organisations; 33% indicated that they had accessed business support, advice or training over the past 5 years.

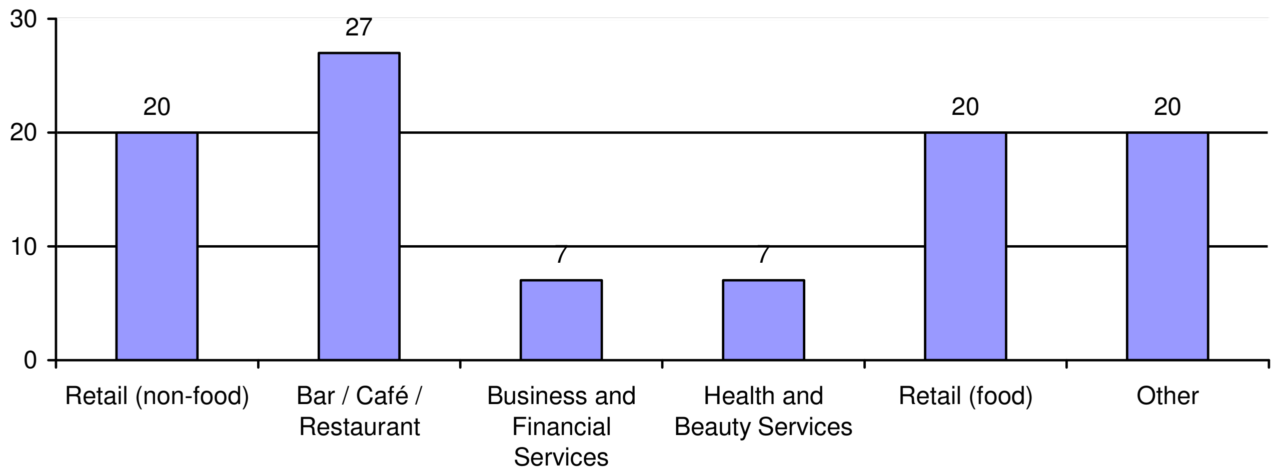
The small number of final comments made by Maybole businesses in response to the survey were most commonly about the need for a plan / vision for the town.

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 15

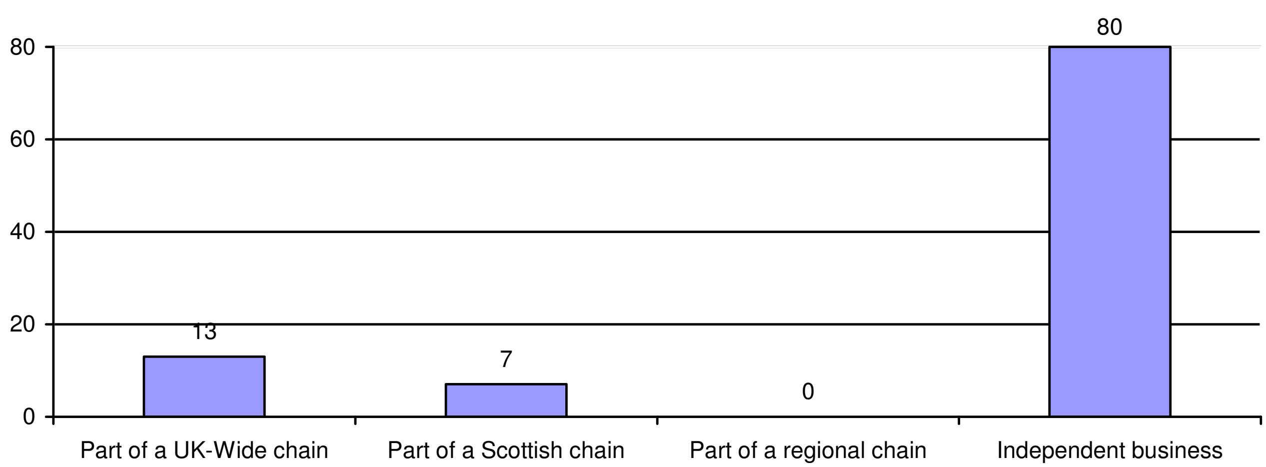


Most commonly, respondents were either in the retail (food and / or non-food) sector or were bars / cafes / restaurants. The "other" responses are listed in full in the appendices.

3.2 As shown in Figure 3.2 below, the great majority of respondent businesses (80%) were independent with the others that provided a response being part of a UK-wide or Scottish chains.

Figure 3.2 Ownership status

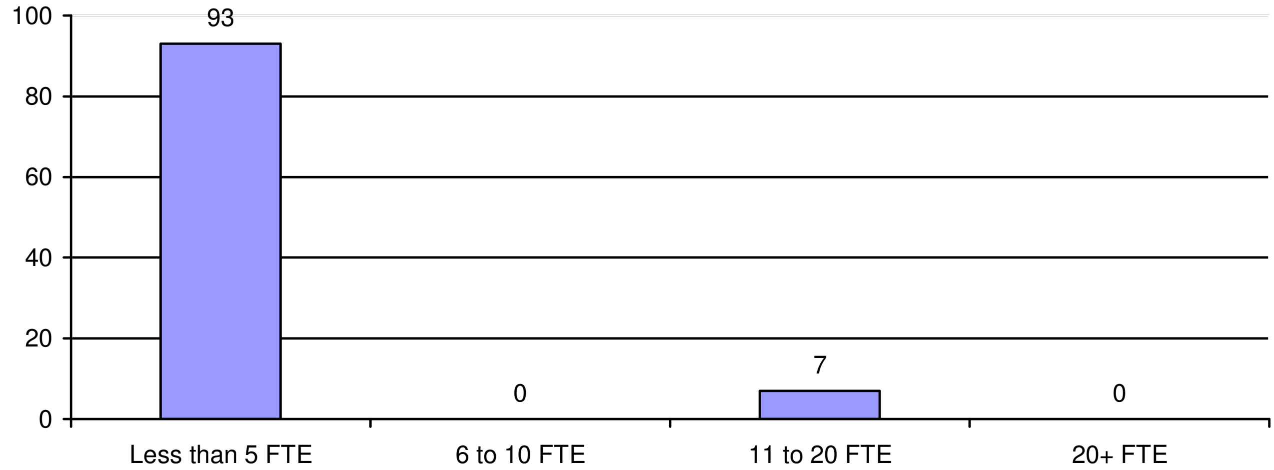
Which of the following best describes the business's ownership status? Base 15



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 14

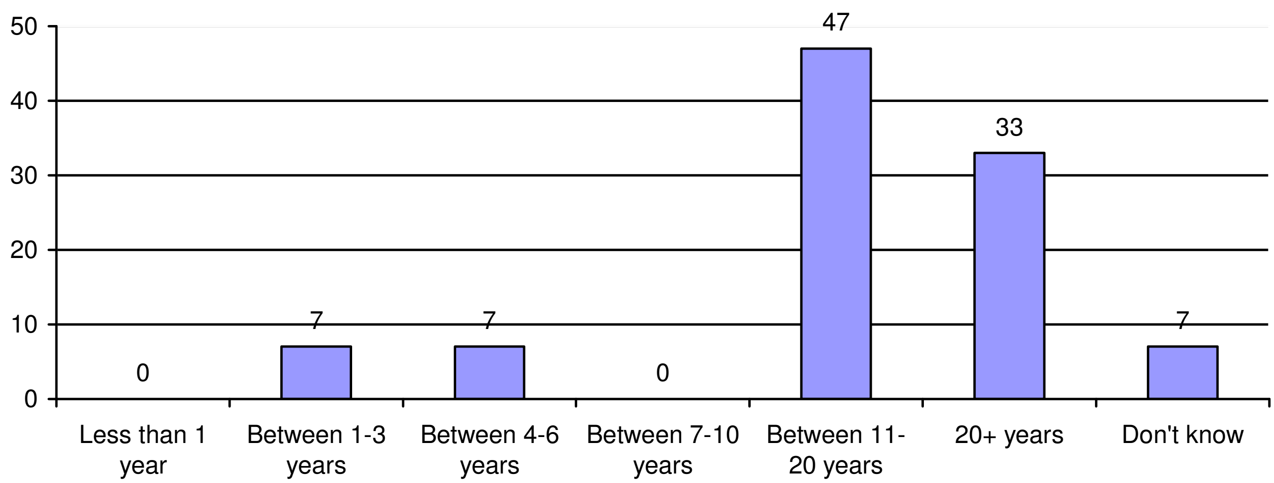


The total number of full-time equivalent employees amongst the 14 businesses that provided this information was 42. The mean number of full-time equivalent employees was 3 and the median number 2 (all numbers have been rounded to the nearest whole number and a part-time job is assumed to be 0.5 times 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, 33% of businesses had been trading for 20+ years and a further 47% for between 11 and 20 years.

Figure 3.4 Length of time trading

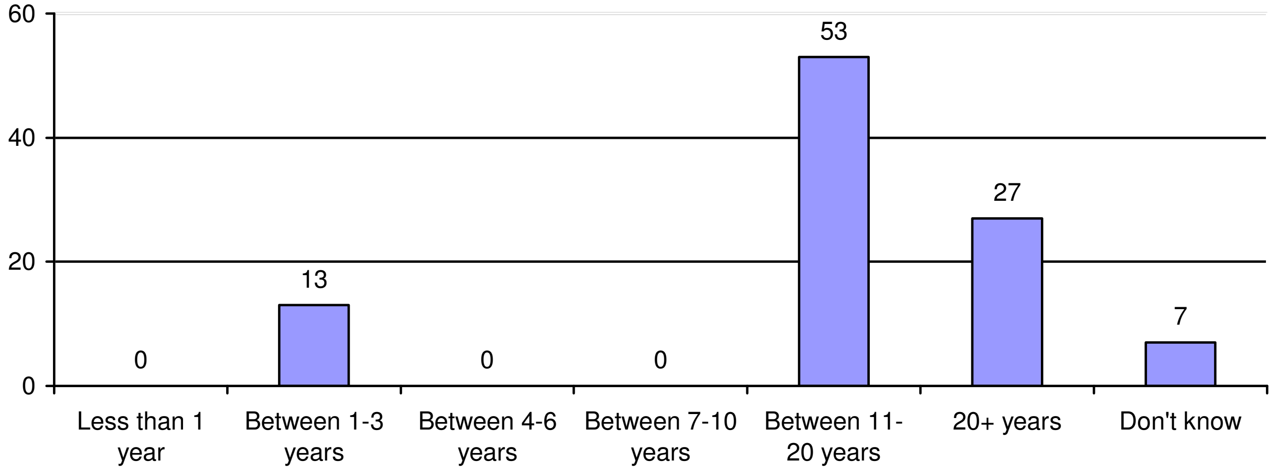
How long has your business been trading for? Base 15



3.5 This pattern is also apparent in terms of the period of time that the businesses have traded in Maybole town centre. As shown in Figure 3.5, 27% of businesses have been trading in the town centre for 20+ years and a further 53% for between 11 and 20 years.

Figure 3.5 Length of time trading in Maybole town centre

How long has the business traded in Maybole town centre? Base 15



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. 15 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: 15	
	%
Residents of Maybole and its surrounding villages	78
Residents from elsewhere in the South Ayrshire Council area	9
Visitors from outwith South Ayrshire	13

4.0 VIEWS ON MAYBOLE TOWN CENTRE

4.1 Respondents were asked firstly to rank the things that they liked about Maybole 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 Maybole town centre

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

Issue	1st rank (base: 10 comments)	2nd rank (Base: 7 comments)	3rd rank (6comments)
Customer base / community	40%	29%	33%
Location / convenience / access issues	30%	-	-
Good range and type of shops	-	29%	17%
Compact / easy to get around	-	14%	33%
Parking	-	14%	-
General positive comments	-	14%	-
Other	30%	-	17%

It should be stressed that the figures quoted are the proportion of comments made in each priority rank (1st, 2nd, 3rd). The most common issue like about Girvan is the existing customer base / community followed by location / convenience / access issues and range and type of shops. However, the small base number of responses should be noted here. 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 Maybole 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 Maybole town centre

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

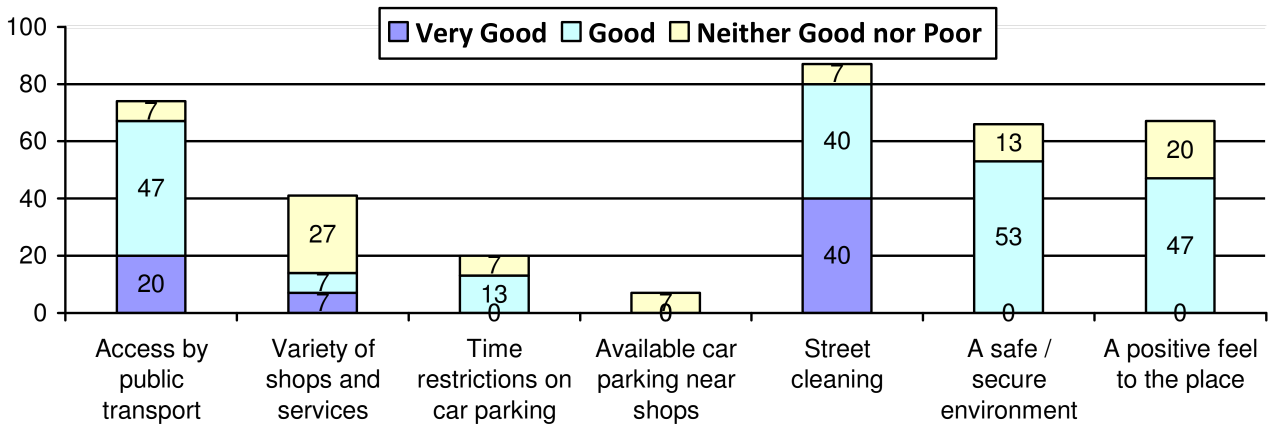
Issue	1st rank (base: 15 comments)	2nd rank (Base: 15 comments)	3rd rank (11 comments)
Congestion / heavy traffic	60%	7%	-
Poor physical and natural environment	20%	7%	36%
Parking	13%	40%	9%
Empty shops	7%	13%	9%
Business rates / lack of investment and support	-	7%	9%
Poor range and type of shops / services	-	7%	18%
Undesirable people	-	7%	18%
Less convenient to access than other locations	-	7%	-
Poor footfall / area not busy	-	-	-
General negative comments	-	-	-
Other	-	7%	-

The most common issues that are mentioned as being least liked about Maybole town centre as a business location include congestion and heavy traffic as well as aspects of the physical and natural environment; a number of negative comments were also made about parking. 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 Maybole town centre with regard to each of the following? Base 15



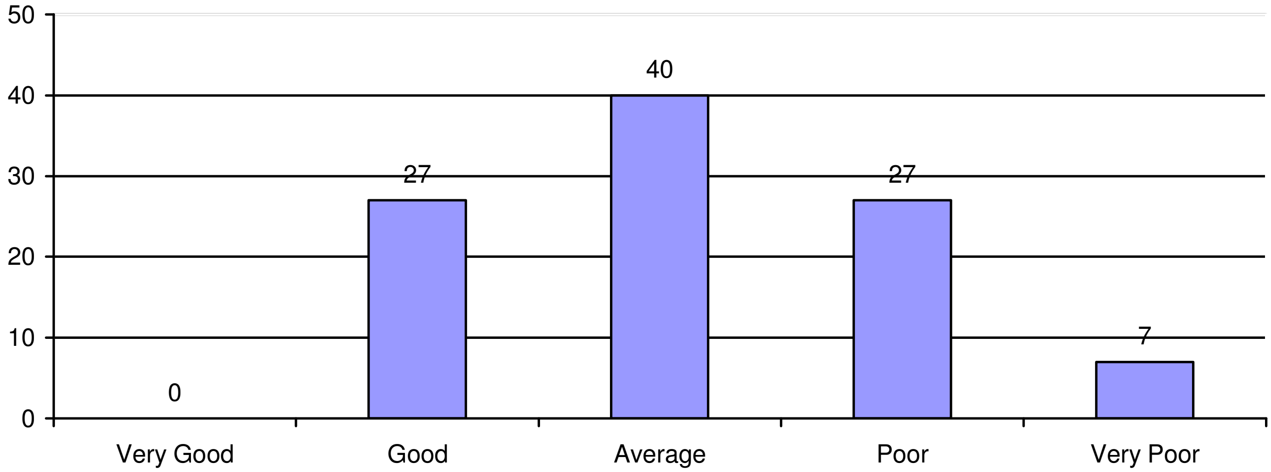
The issues rated positively by a majority of respondents were street cleaning (80%), access by public transport (67%) and a safe/secure environment (53%). Just under half of respondents (47%) considered there to be a positive feel to the place.

Ratings are significantly poorer for a number of important issues: only 14% give a positive rating for variety of shops and services, 13% for time restrictions on car parking and 0% for available car parking near shops.

4.4 When taken as a whole, 27% of business respondents gave a positive view overall about Maybole town centre as a place to do business, compared to 34% 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 Maybole town centre

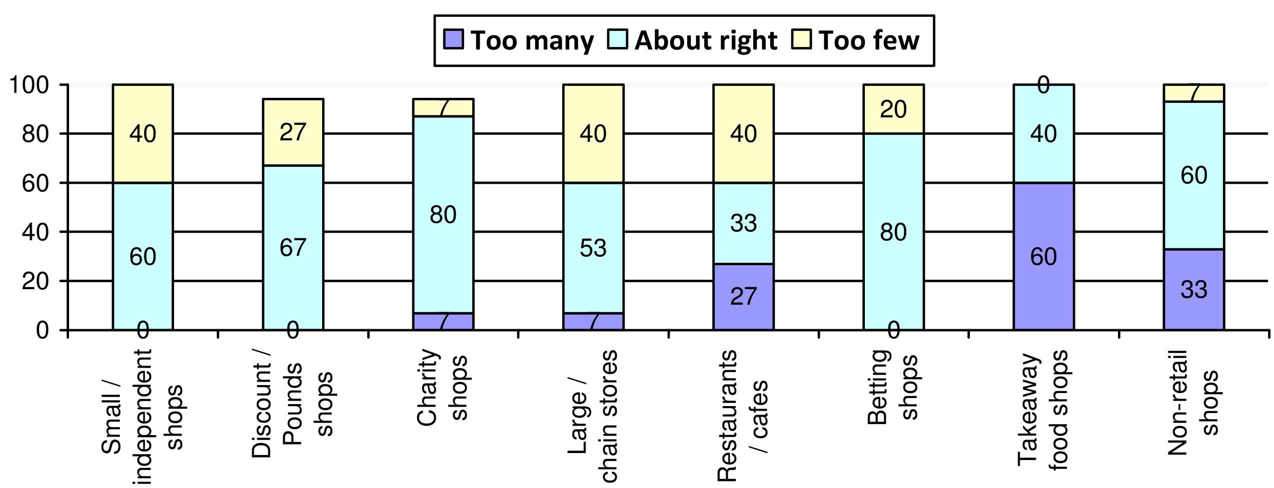
What is your overall view of Maybole town centre as a place to do business? Base 15



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 Maybole town centre? Base 15



The only category of outlet where respondents felt there were too many of was takeaway food shops (60% considered this to be the case). There were no categories of outlet where a majority of respondents considered that there were too few of such outlets in Maybole.

In most cases, the number of outlets of a given type was considered to be about right. This was the case in relation to: charity shops (80%), betting shops (80%), discount / pound shops (67%), small / independent shops (60%), non-retail shops such as hairdressers (60%) and large / chain stores (53%).

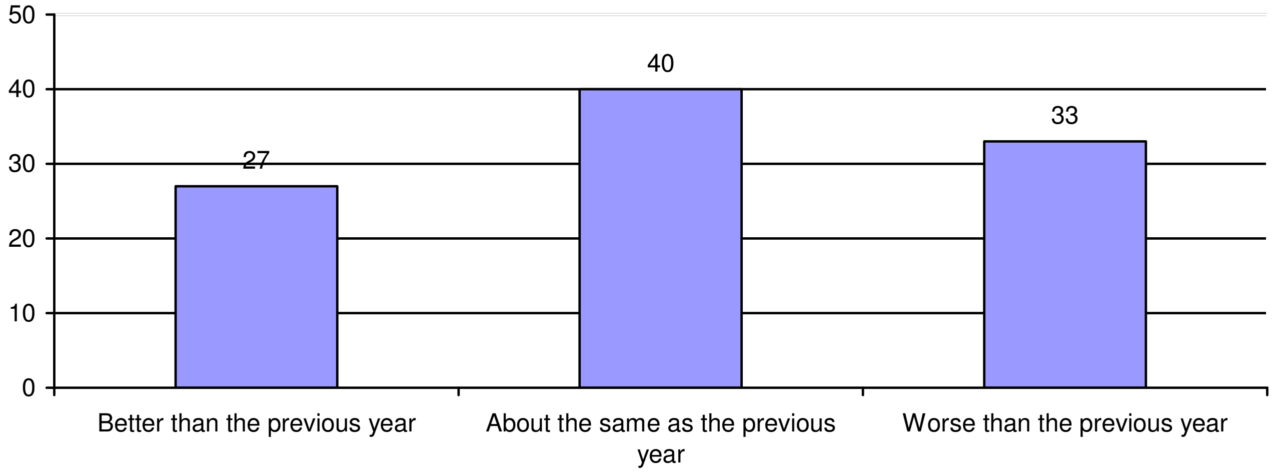
Opinions were divided as to restaurants / cafes, with 27% of respondents considering there to be too many of these, 33% considering the amount to be about right and 40% considering there to be too few.

5.0 BUSINESS PERFORMANCE AND EXPECTATONS

5.1 As part of the section on attitudes to Maybole 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 15



It is notable that 33% of businesses in Maybole town centre indicate that their business performance has declined over the past year, compared to 27% that consider it to have 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 5

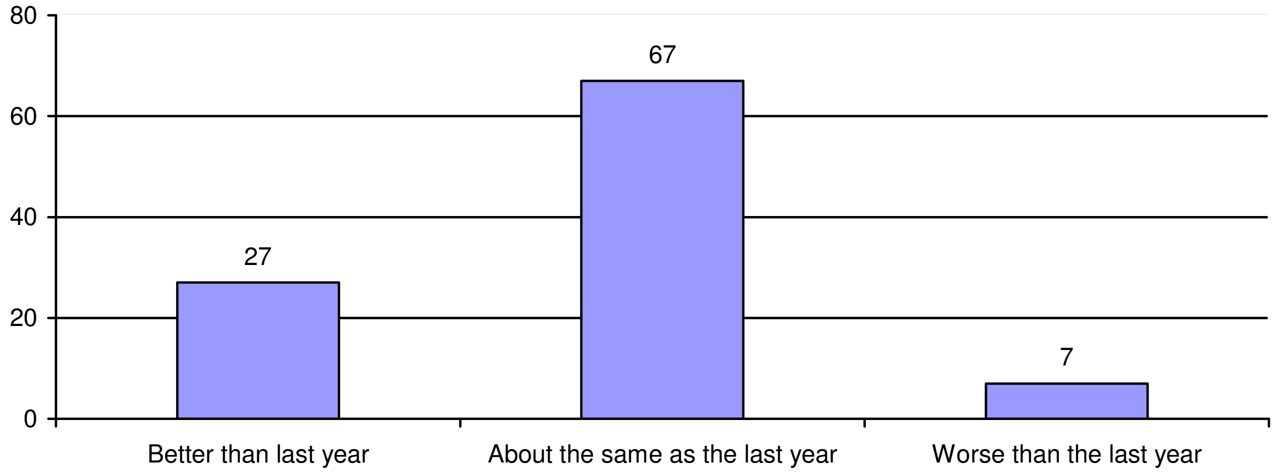
Reason	% of comments
Competition from other areas	80%
Economic downturn / less money	40%
Footfall / customer base	20%
Other	20%

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 15



These figures are slightly more positive in that more anticipate an improvement (27%) than a worsening (7%), though some element of optimism bias may be apparent here and, in any case, most (67%) do not anticipate any changes.

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?

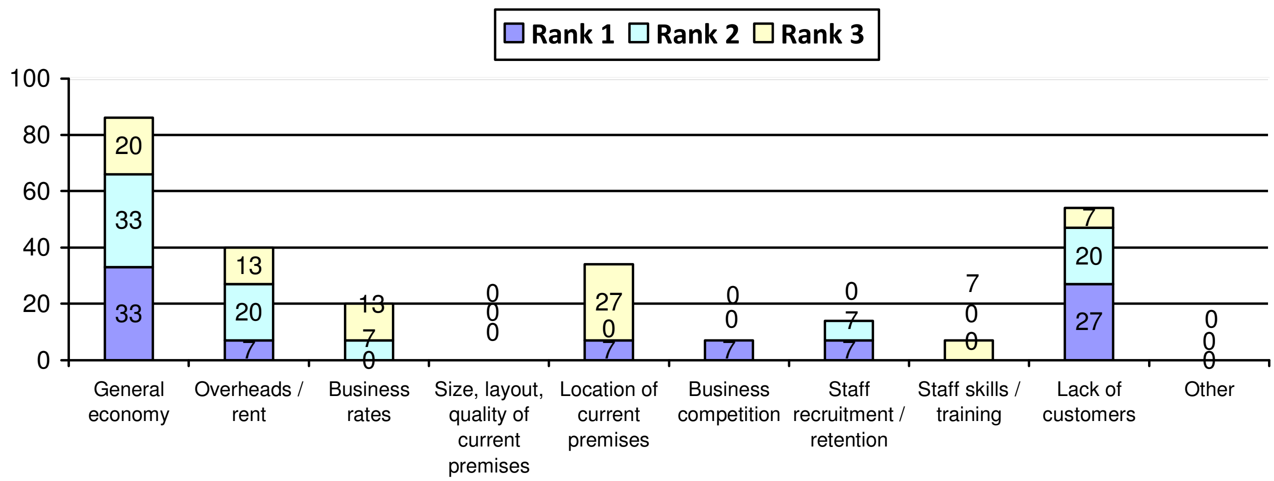
Business performance expected to be better than last year
"We have seen steady growth." *"Feel that people are more optimistic about the future."*
Business performance expected to be about the same as last year
"Confidence not yet returned to economy." *"Because most of our clients are local; we don't get many strangers."*
Business performance expected to be worse than last year
"Less people going out; more drinking at home."

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 15



Whilst a broad set of such challenges are important it is clear that the general economy (ranked as top priority by 33% of respondents and in the top 3 priorities by 86%) and lack of customers (top priority for 27% and in the top 3 for 54% of respondents) are key issues.

5.6 For those respondents that indicated business competition as one of their challenges, a subsequent question asked where such competition came from. This applied to only 1 respondent from Maybole, who indicated that such competition came from each of the town centre itself, nearby town centres and the internet.

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 47% of respondents indicated that their premises were owned and 53% rented.

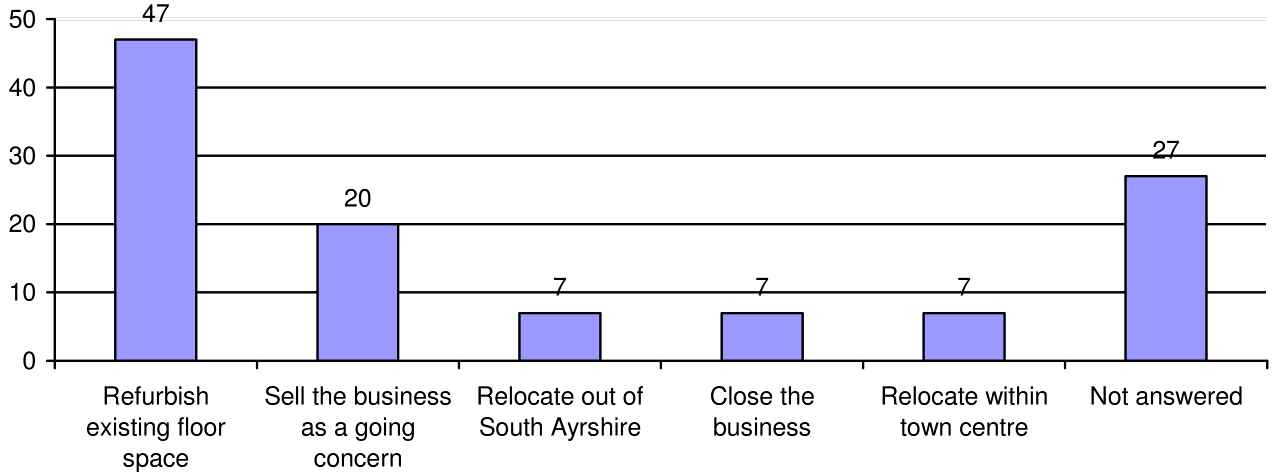
6.3 The floor space occupied by respondent businesses ranged from 200 square feet to 3,000 square feet. The average figure amongst the 6 respondents that answered this question was 1,002 square feet.

6.4 47% of businesses indicated that they occupied a single floor in the building they occupied whilst 20% had more than one floor in the building, but with all floors occupied by their business. In 27% of cases, the premises had multiple floors, some of which were occupied by other businesses. A further 7% of respondents did not answer this question.

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 15



A significant proportion of businesses indicated an intention to refurbish existing floor space (47%) but 20% also indicated an intention to sell their business as a going concern. For the single respondent that indicated a desire to relocate, this was due to 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; of these, 1 indicated that the building was A listed and 2 that it was B listed.

7.0 BUSINESS SUPPORT

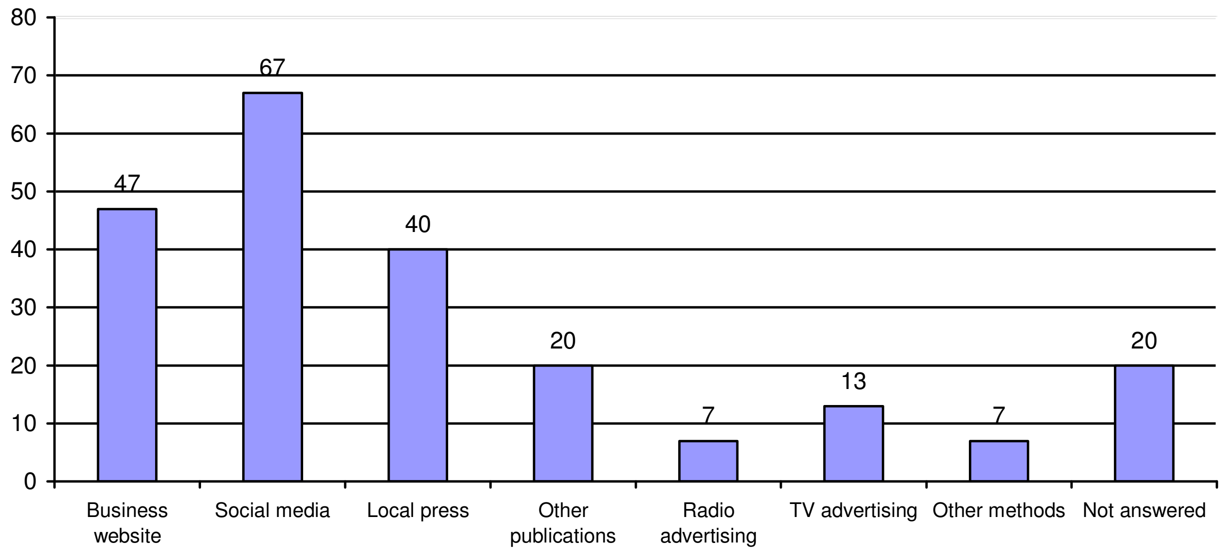
7.1 27% of respondents (4 businesses) indicated that they were members of business organisations. The details of these organisations are listed in full in the appendices. 3 businesses mentioned the Federation of Small Businesses with other individual trade bodies also being mentioned.

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 15



Businesses were quite likely to use social media (67%), a business website (47%) and the local press (40%) but somewhat less likely to use other communications channels.

7.3 33% 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 generally referred to specific examples of training support.

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 amongst the very small number of responses to this question the main theme was a perceived lack of need.

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 4 comments (some comments are attributed to more than one heading)

Issue	% of comments made
Need for a plan / vision for the town	75%
Other	25%

There were very few additional comments made but most of these related to the perceived need for a plan / vision for the town. A full listing of these comments is contained in the appendices.