CR Cameron Research
Strategic Research & Planning

ibp Strategy & Research

South Ayrshire Town Centre Assessment

Prestwick Town Centre: Business Survey

November 2014

Cameron Research
67 St Ninians Road
Prestwick KA9 1SL
Tel: 01292 678373

European Union
European Regional Development Fund
Investing in your future

A project supported by the European Union's INTERREG IVA Programme managed by the EU Programmes Body

south AYRSHIRE COUNCIL

CONTENTS

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 Prestwick 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 148 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 40 responses were received (27% 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 Prestwick Business Survey included strong representation 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 (82% having fewer than 5 full-time equivalent employees). Businesses had typically been trading for a considerable period with a number having moved to Prestwick some time ago but after they were established. These businesses draw 35% of their business from beyond Prestwick and its surrounding villages including 16% of their business from outwith South Ayrshire.

The issues that Prestwick business respondents were most likely to raise as positive aspects of Prestwick town centre as a business location included the good range and type of shops as well as location / convenience / access issues. The most common issues that was mentioned as being least liked about Prestwick town centre as a business location was, by some distance, parking. Congestion / heavy traffic and negative aspects of the physical natural environment were also noted by some.

The issues rated positively by a majority of respondents included: access by public transport (100% give a positive rating), a positive feel to the place (95%), variety of shops and services (85%), street cleaning (85%) and a safe / secure environment (83%). Ratings are significantly poorer in relation to parking issues: available car parking near shops (26% give a positive rating), time restrictions on car parking (10%).

In all cases, the number of outlets of a given type was considered to be about right. This was the case in relation to: betting shops (80%), charity shops (80%), discount / pound shops (75%), restaurants / cafes (70%), large / chain stores (65%), small / independent shops (63%) and takeaway food shops (60%).

Overall, 76% of respondents gave a positive view regarding Prestwick as a place to do business.

30% of businesses in Prestwick town centre indicate that their business performance has performed better over the past year compared to only 3% that consider their performance to have worsened over this time.

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 (33%).

In terms of their marketing approach, businesses were quite likely to use social media (58%), a business website (55%) and the local press (38%) but somewhat less likely to use other communications channels.

38% of Prestwick businesses indicate that they are members of business organisations; however, only 5% indicated that they had accessed business support, advice or training over the past 5 years.

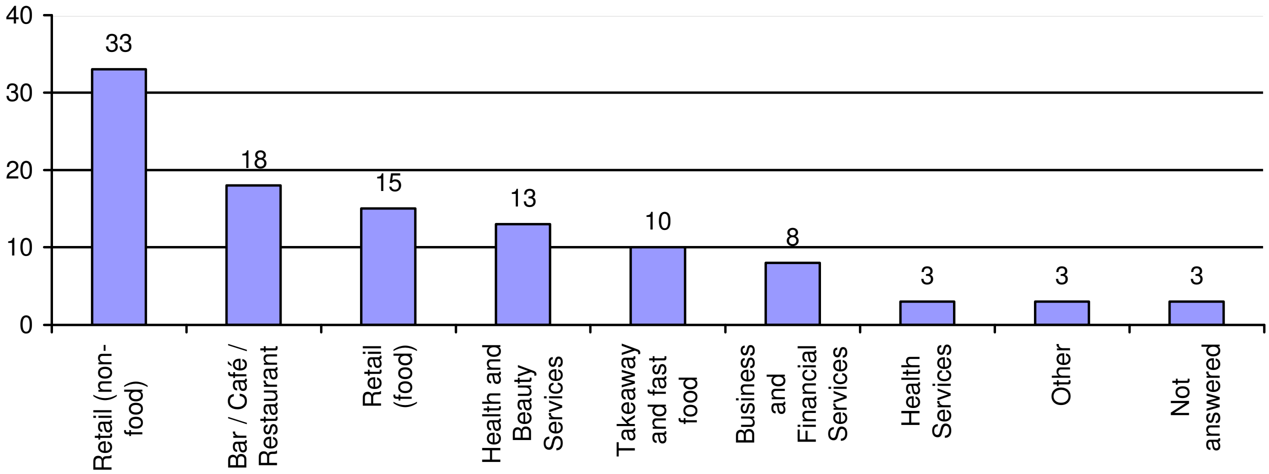
The final comments made by Prestwick businesses in response to the survey reinforce the above themes with these comments most commonly being about parking as well as the degree of business competition faced.

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 40

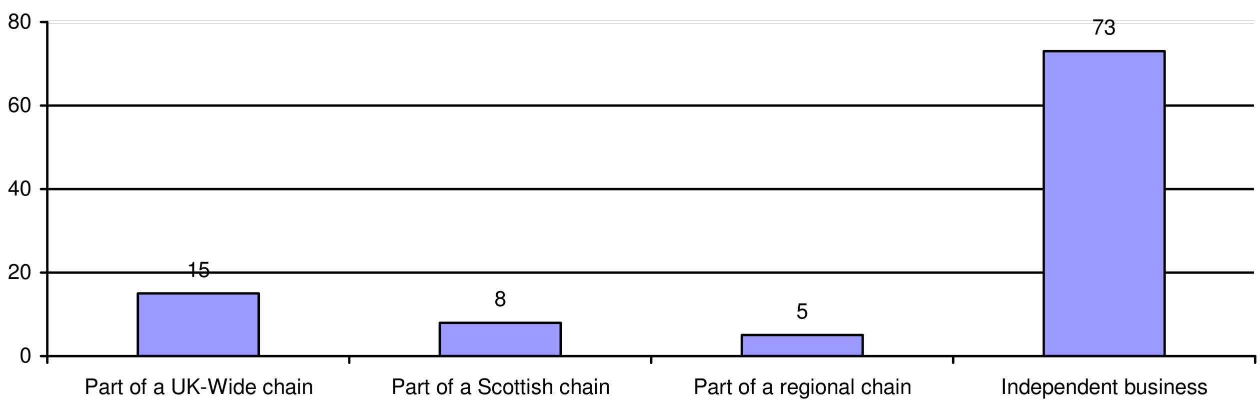


Most commonly, respondents were either in the retail (non-food) sector or were bars / cafes / restaurants but with health and beauty, and other sectors also well represented.

3.2 As shown in Figure 3.2 below, the great majority of respondent businesses (71%) were independent with the others that provided a response being part of a UK-wide or regional / Scottish chains.

Figure 3.2 Ownership status

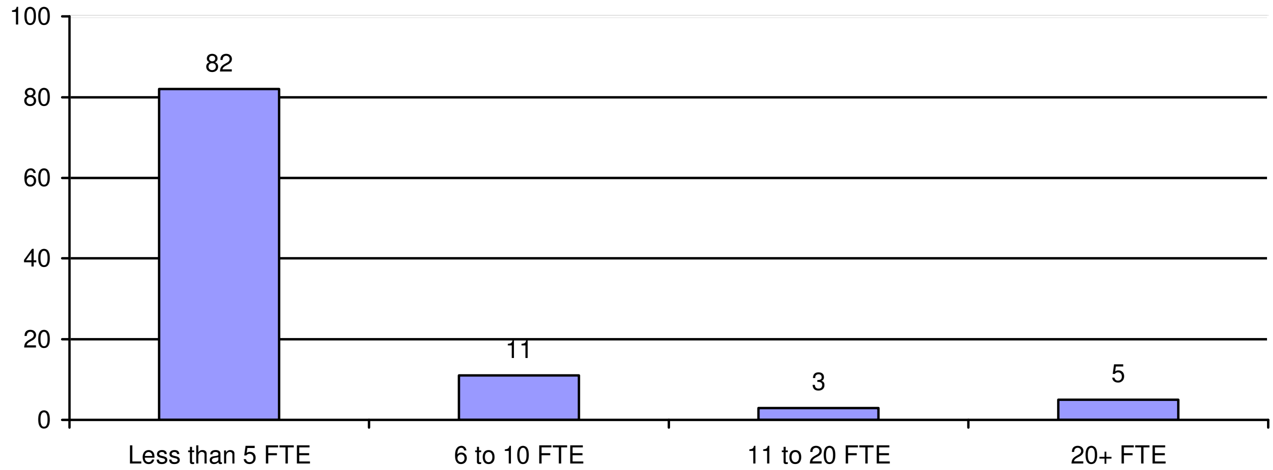
Which of the following best describes the business's ownership status? Base 40



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 38

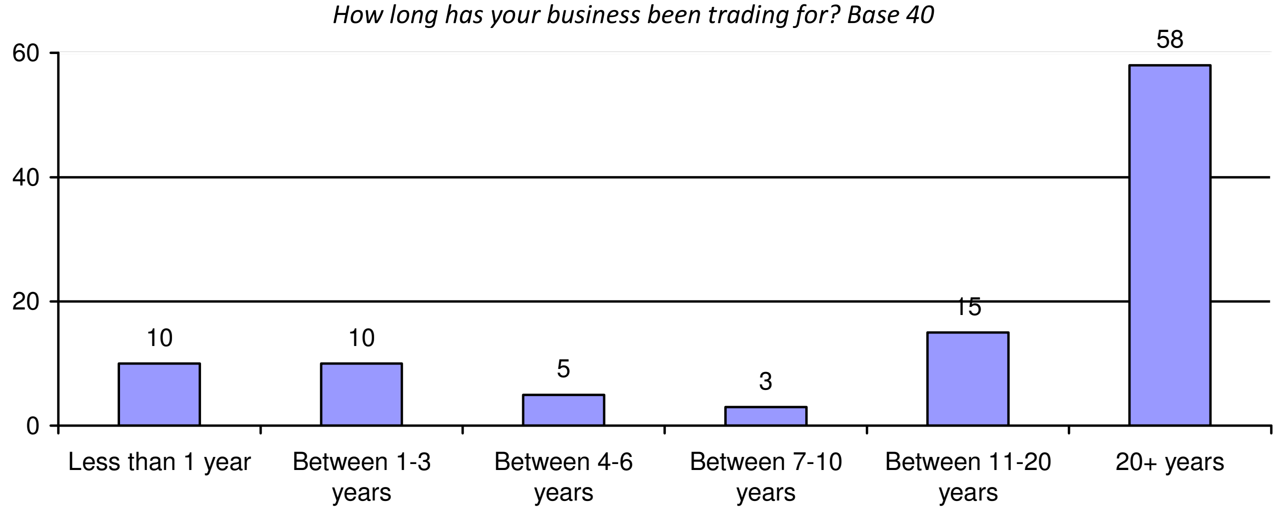


The total number of full-time equivalent employees amongst the 38 businesses that provided this information was 159. The mean number of full-time equivalent employees was 4 and the median number 2 (all numbers have been rounded to the nearest whole number and a part-time job is assumed to be 0.5 times 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, 58% of businesses had been trading for 20+ years and a further 15% for between 11 and 20 years.

Figure 3.4 Length of time trading

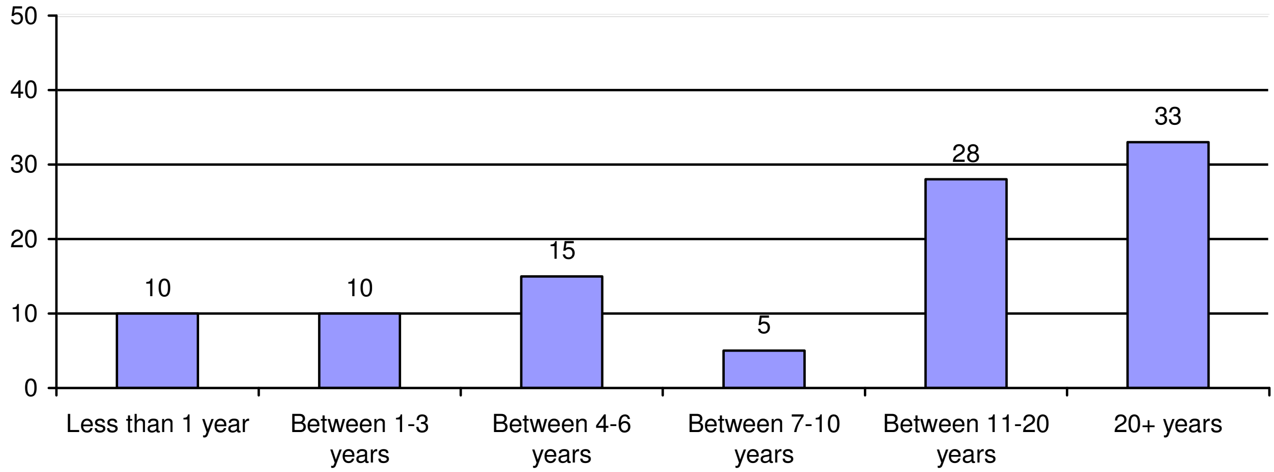
How long has your business been trading for? Base 40



3.5 A marginally different pattern is apparent in terms of the period of time that the businesses have traded in Prestwick town centre. As shown in Figure 3.5, 33% of businesses have been trading in the town centre for 20+ years and a further 28% for between 11 and 20 years. The implication is that some businesses have been established prior to locating in Prestwick town centre.

Figure 3.5 Length of time trading in Prestwick town centre

How long has the business traded in Prestwick town centre? Base 40



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. 39 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: 39	
	%
Residents of Prestwick and its surrounding villages	65
Residents from elsewhere in the South Ayrshire Council area	19
Visitors from outwith South Ayrshire	16

4.0 VIEWS ON PRESTWICK TOWN CENTRE

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

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

Issue	1st rank (base: 39 comments)	2nd rank (Base: 38 comments)	3rd rank (36 comments)
Good range and type of shops	31%	26%	14%
Location / convenience / access issues	23%	21%	11%
Good physical and natural environment	10%	13%	23%
Compact / easy to get around	10%	3%	9%
Good footfall / busy area	8%	13%	3%
Parking	8%	5%	3%
Customer base / community	5%	13%	26%
General positive comments	5%	0%	3%
Other	3%	5%	9%

It should be stressed that the figures quoted are the proportion of comments made in each priority rank (1st, 2nd, 3rd). The most commonly cited positive aspects of Prestwick as a business location relate to the good range and type of shops and also to location / convenience / access issues. The physical and natural environment is also commonly mentioned as a positive. 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 Prestwick 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 Prestwick town centre

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

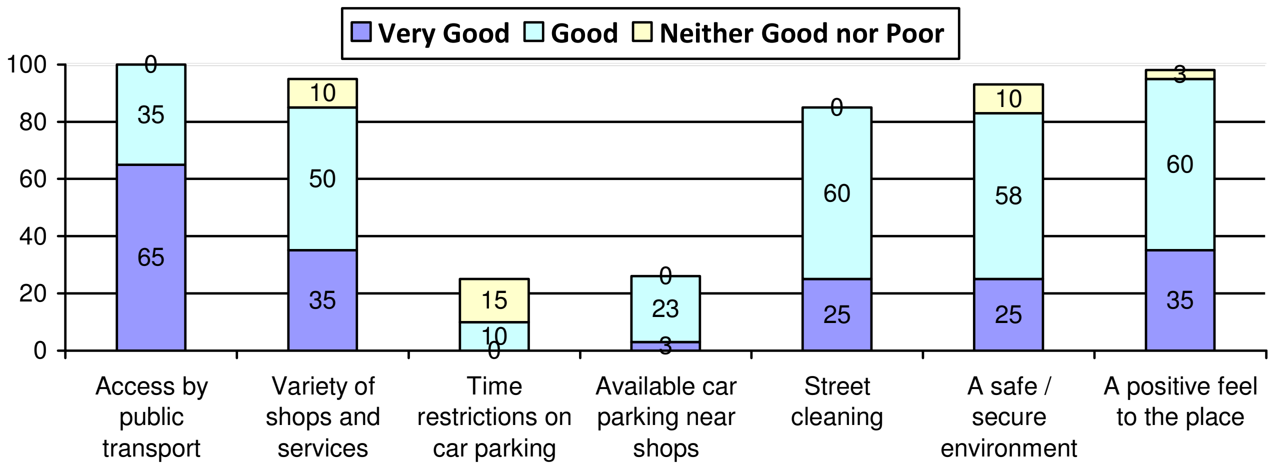
Issue	1st rank (base: 38 comments)	2nd rank (Base: 31 comments)	3rd rank (19 comments)
Parking	79%	19%	11%
Congestion / heavy traffic	11%	19%	16%
Poor physical and natural environment	5%	19%	32%
Empty shops	-	6%	5%
Business rates / lack of investment and support	-	13%	5%
Poor range and type of shops / services	-	13%	5%
Undesirable people	-	3%	11%
Poor footfall / area not busy	-	3%	-
General negative comments	-	-	-
Less convenient to access than other locations	-	-	5%
Other	5%	3%	11%

The most common issues that was mentioned as being least liked about Prestwick town centre as a business location was, by some distance, parking. Congestion / heavy traffic and negative aspects of the physical natural environment were also noted by some. 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 Prestwick town centre with regard to each of the following? Base 40



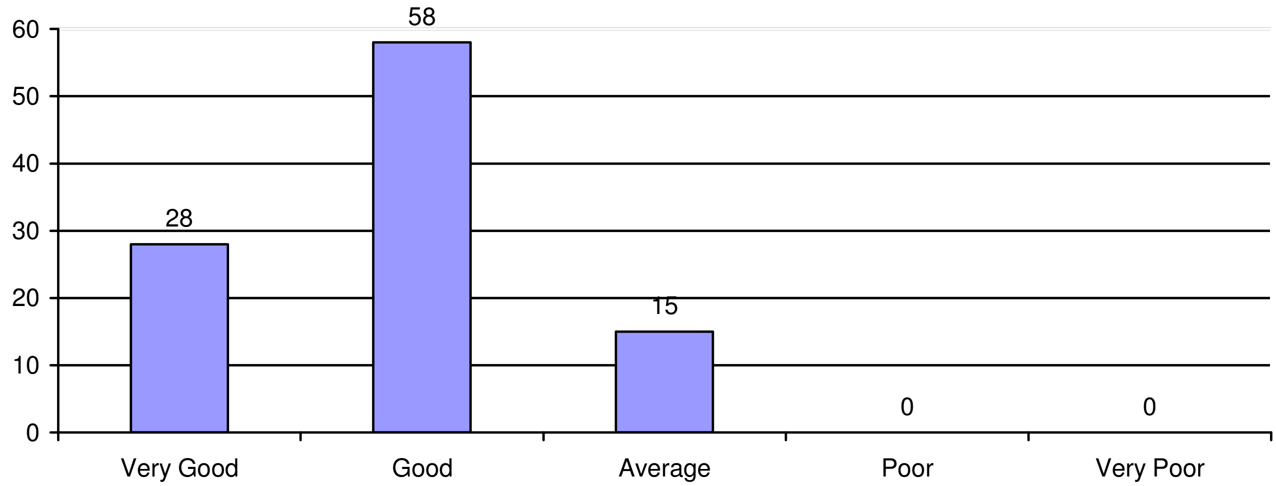
The issues rated positively by a majority of respondents included: access by public transport (100% give a positive rating), a positive feel to the place (95%), variety of shops and services (85%), street cleaning (85%) and a safe / secure environment (83%).

Ratings are significantly poorer in relation to parking issues: available car parking near shops (26% give a positive rating), time restrictions on car parking (10%).

4.4 When taken as a whole, 86% of business respondents gave a positive view overall about Prestwick town centre as a place to do business, with no respondents expressing an outright negative view (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 Prestwick town centre

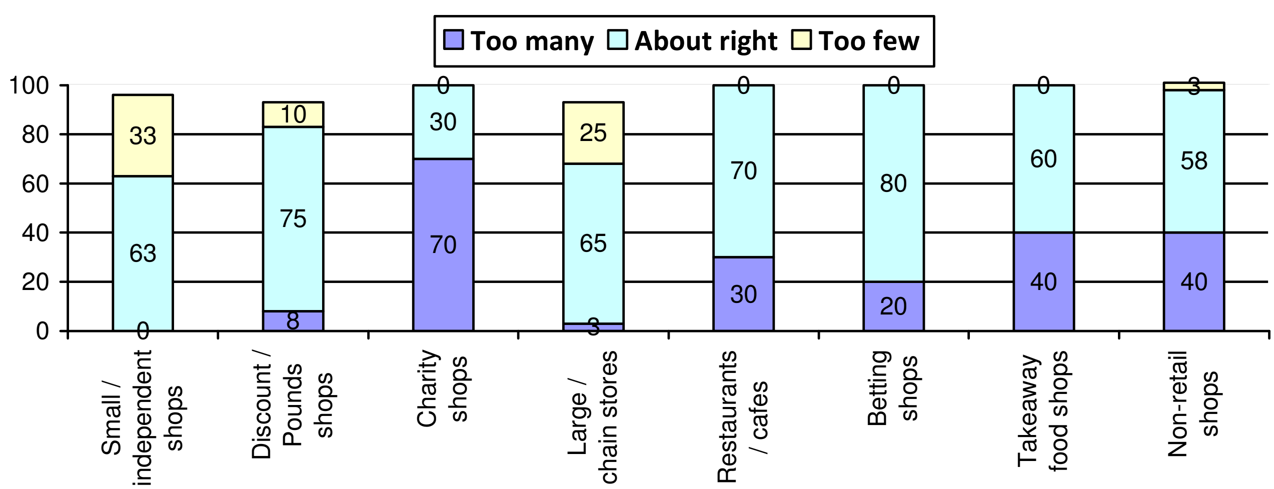
What is your overall view of Prestwick town centre as a place to do business? Base 40



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 Prestwick town centre? Base 40



70% of respondents felt that there wee too many charity shops in Prestwick town centre.

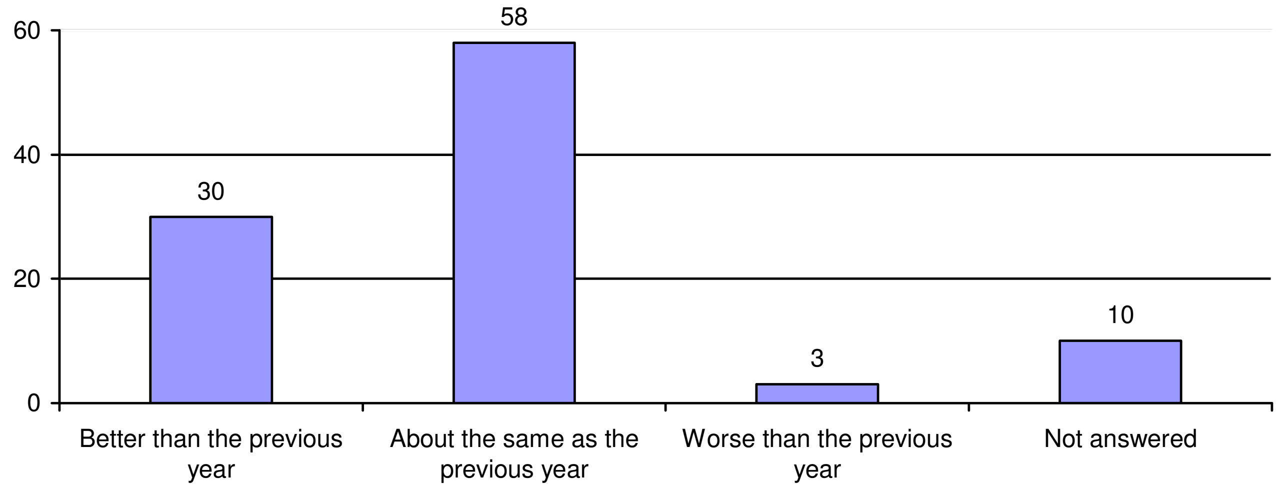
In all other cases, the number of outlets of a given type was considered to be about right by a majority of respondents. This was the case in relation to: betting shops (80%), discount / pound shops (75%), restaurants / cafes (70%), large / chain stores (65%), small / independent shops (63%), takeaway food shops (60%) and non-retail shops such as hairdressers (58%).

5.0 BUSINESS PERFORMANCE AND EXPECTATONS

5.1 As part of the section on attitudes to Prestwick 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 40



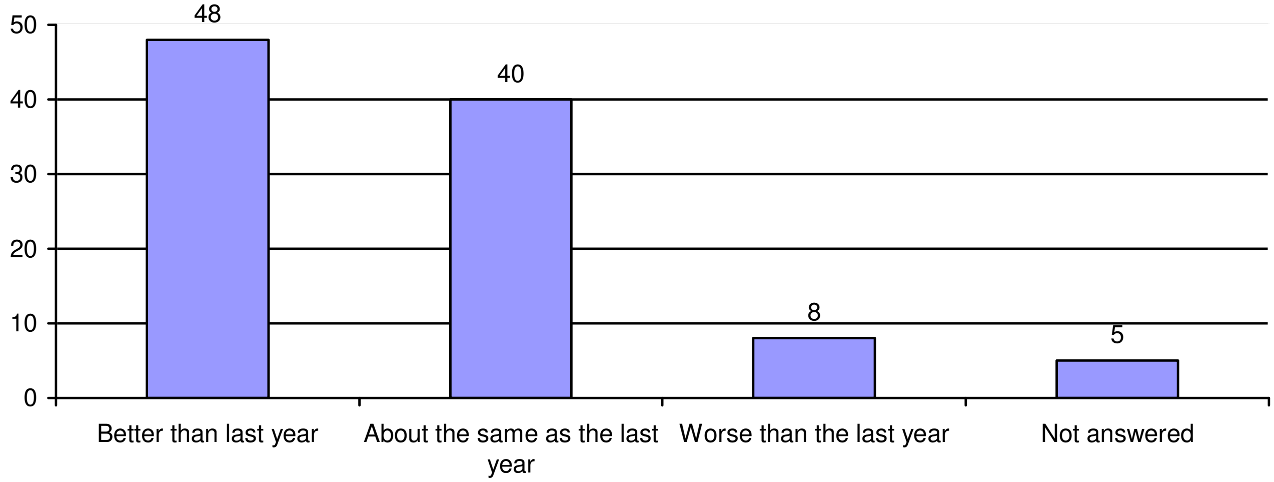
It is notable that 30% of businesses in Prestwick town centre indicate that their business performance has performed better over the past year compared to only 3% that consider their performance to have worsened over this time.

5.2 Only one respondent indicated that their performance had worsened. There was no reason given for this.

5.3 Businesses were then asked how they expected their business to perform over the next year. The results are summarised in Figure 5.2 below:

Figure 5.2 Expected business performance

How would you expect the business to perform over the next year? Base 40



Prestwick businesses are clearly optimistic about the future with 48% of businesses expecting their performance to improve over the next year compared to only 8% that expect their performance to worsen.

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 5.3 Reasons for future business expectations

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

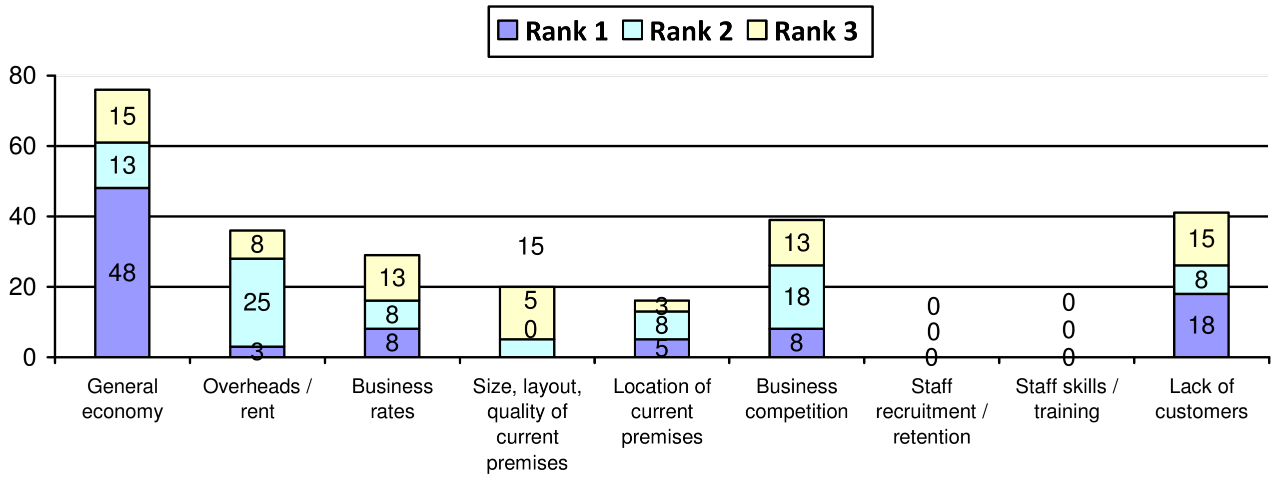
Business performance expected to be better than last year
"Attracting more tourists to the area." *"Economy improving."*
Business performance expected to be about the same as last year
"For business to increase, we need higher footfall. We manage, and no more!" *"Business still not returned to 5 or 6 years ago when it was better."*
Business performance expected to be worse than last year
"Parking and supermarkets." *"Getting worse every year."*

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 5.4 below:

Figure 5.4 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 40



Whilst a broad set of such challenges are important it is clear that the general economy (ranked as top priority by 48% of respondents in the top 3 priorities by 76%) and, to a somewhat lesser extent, lack of customers (top priority for 18% and in the top 3 for 41% 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 15 respondents from Prestwick, with the most common sources of such competition being from within the town centre itself (60%), nearby town centres (27%), Glasgow City Centre (27%) and the internet (20%).

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 53% rented; a further 3% (1 respondent) did not answer this question.

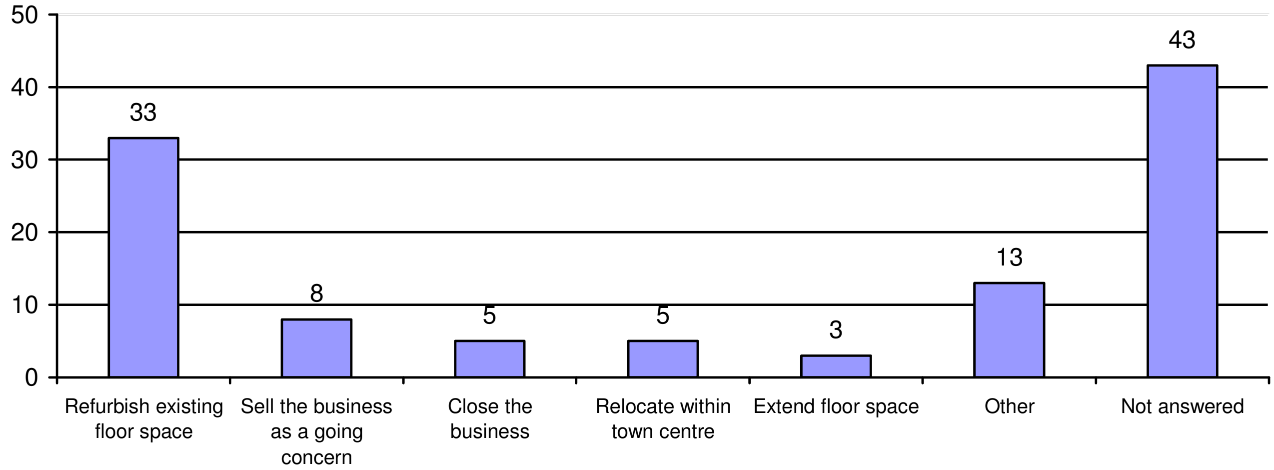
6.3 The floor space occupied by respondent businesses ranged from 50 square feet to 2,368 square feet. The average figure amongst the 11 respondents that answered this question was 768 square feet.

6.4 65% of businesses indicated that they occupied a single floor in the building they occupied whilst 18% had more than one floor in the building, but with all floors occupied by their business. In 18% 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 40



A significant proportion of businesses indicated an intention to refurbish existing floor space (33%). 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 2 respondents indicated that they were housed within a Listed Building; of these, 1 indicated that the building was A listed and 1 that it was B listed.

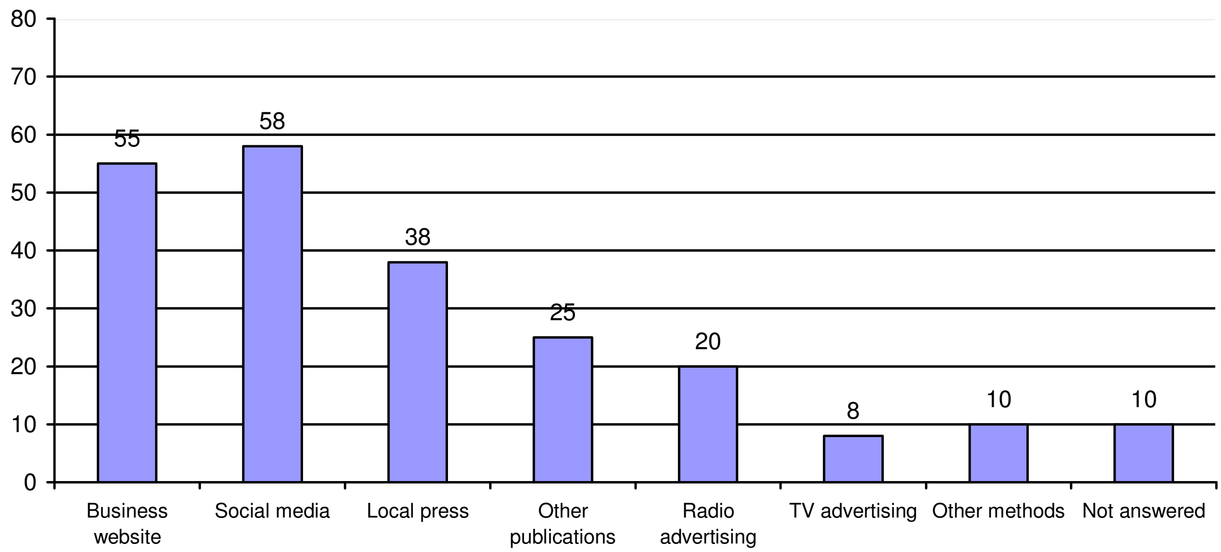
7.0 BUSINESS SUPPORT

7.1 38% of respondents (15 businesses) indicated that they were members of business organisations. The details of these organisations are listed in full in the appendices but most commonly included Ayrshire Chamber of Commerce (4 respondents), Federation of Small Businesses (4 respondents) and Prestwick Business Association (3 respondents) as well as a range of other bodies (which were not always specified clearly in the responses).

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 40



Businesses were quite likely to use social media (58%), a business website (55%) and the local press (38%) but somewhat less likely to use other communications channels.

7.3 Only 5% of respondents (2 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 reference to a specific qualification and to contact with the Business Gateway.

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 perceived lack of need and, on occasion, to the availability of in-house support.

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 10comments (some comments are attributed to more than one heading)

Issue	% of comments made
Issues related to parking	30%
Competition	20%
Need to market the town	10%
Other	30%
General positive comments	10%

A spread of issues was apparent within this small number of final comments, most commonly relating to parking but also a range of other issues, some of which were included in the “other” category as they were not easily classified. A full listing of these comments is contained in the appendices.