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South Ayrshire Town Centre Assessment

Troon 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 Troon 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 168 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 44 responses were received (26% 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 Troon 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 regional chains. They were typically small, with 85% having less than 5 full-time equivalent employees. Businesses had been trading for variable periods of time. They draw 38% of their business from outwith Troon and its surrounding villages including 19% of their business from outwith South Ayrshire.

The issues that Troon business respondents were most likely to raise as positive aspects of Troon town centre as a business location included the good range and type of shops plus parking. Issues most likely to be raised as negative aspects of Troon town centre as a business location were parking (suggesting some mixed views on this subject) and empty shops.

The issues rated positively by a majority of respondents included: a safe / secure environment (91% give a positive rating), access by public transport (85%), street cleaning (80%) a positive feel to the place (73%) and variety of shops and services (68%). Ratings are somewhat poorer in relation to parking issues including available car parking near shops (although 48% do give this a positive rating), time restrictions on car parking (32%).

In most cases, the number of outlets of a given type was considered to be about right. This was the case in relation to: takeaway food shops (84%), betting shops (66%), discount / pound shops (61%), large / chain stores (61%), small / independent shops (57%) and restaurants / cafes (55%). There were, however, two instances were a majority of respondents felt there were too many such outlets. These were: charity shops (77% of respondents felt there were too many of these) and non-retail shops such as hairdressers (55%).

Overall, 66% of respondents gave a positive view of Troon town centre as a place to do business.

36% of businesses in Troon town centre indicate that their business performance has performed better over the past year compared to 18% that consider their performance to have worsened over this time.

Businesses were very likely to rent their premises rather than own them (this was the case for 75% of respondents). A significant proportion plan to refurbish existing floor space over the next 3 years (37%) with 12% planning to sell the business as a going concern.

In terms of their marketing approach, businesses were quite likely to use social media (59%), a business website (509%) and the local press (34%) but somewhat less likely to use other communications channels.

39% of Troon businesses indicate that they are members of business organisations; 27% indicate that they had accessed business support, advice or training over the past 5 years.

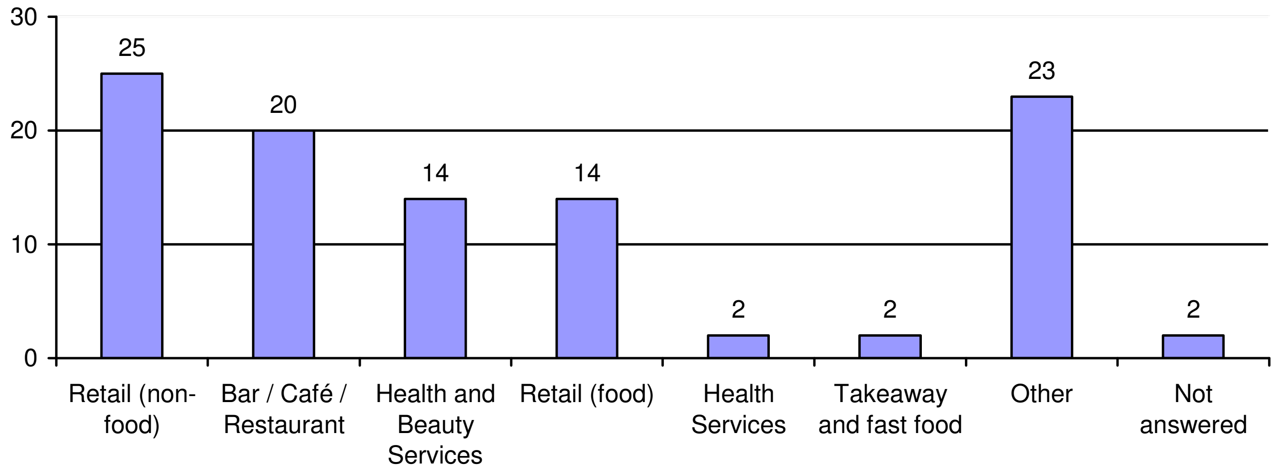
The final comments made by Troon businesses in response to the survey related most commonly to the costs of doing business along with parking and the perceived need to more effectively market the town.

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 43



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

3.2 As shown in Figure 3.2 below, the great majority of respondent businesses (86%) were independent with the others that provided a response being part of a UK-wide or regional chains.

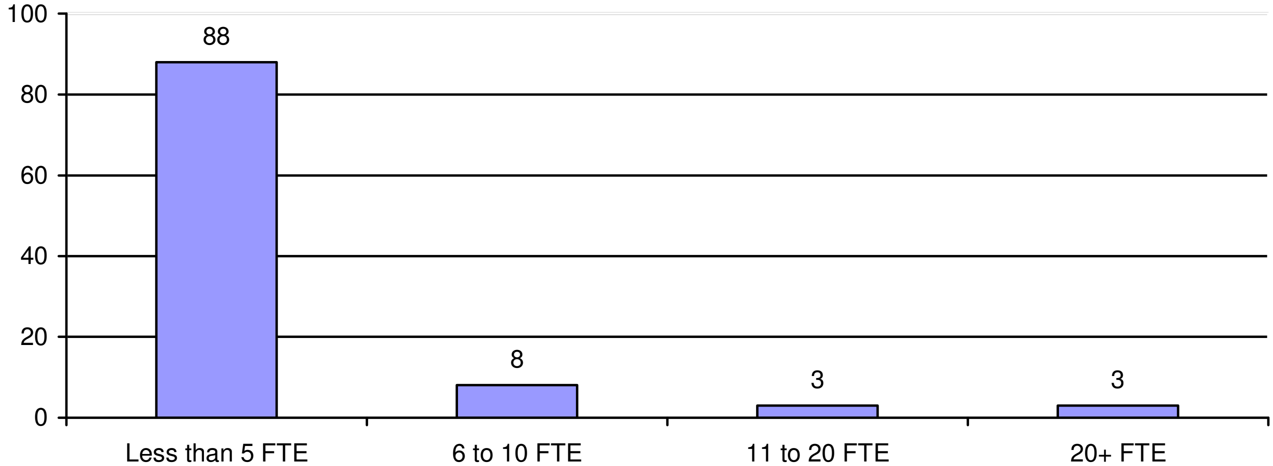
Figure 3.2 Ownership status

Which of the following best describes the business's ownership status? Base 43

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 40

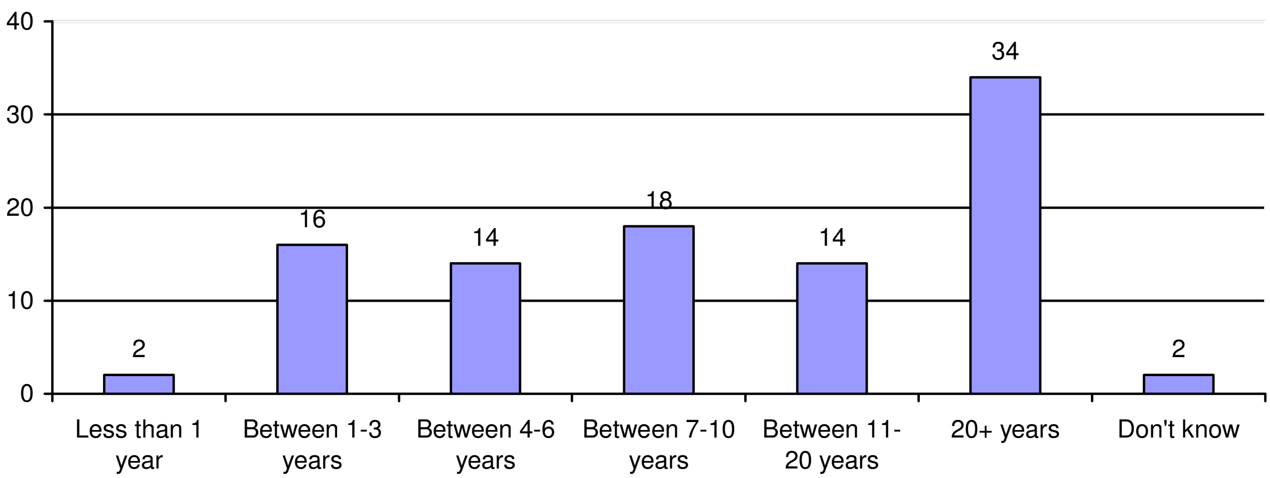


The total number of full-time equivalent employees amongst the 40 businesses that provided this information was 150. The mean number of employees was 4 and the median number 3 (all numbers have been rounded to the nearest whole number and a part-time job is assumes to be 0.5 times a full-time job).

3.4 A spread of business ages were apparent in the survey. 34% had been trading for 20+ years and a further 14% for between 11 and 20 years. However, 50% of businesses had been trading for 10 years or fewer.

Figure 3.4 Length of time trading

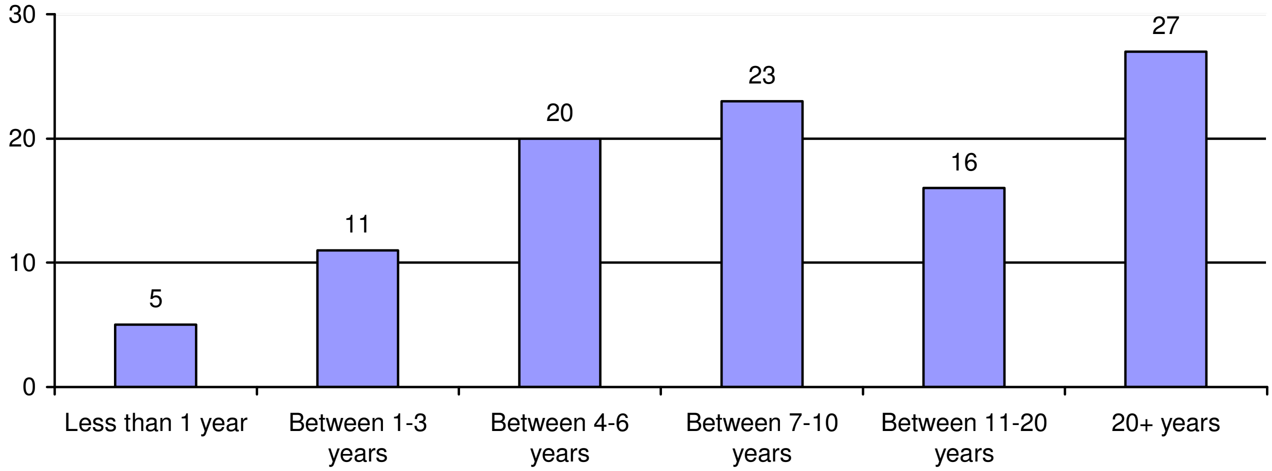
How long has your business been trading for? Base 43



3.5 A broadly similar pattern is apparent in terms of the period of time that the businesses have traded in Troon town centre. As shown in Figure 3.5, 27% of businesses have been trading in the town centre for 20+ years and a further 15% for between 11 and 20 years. However, 61% of businesses had been trading in Troon town centre for 10 years or less.

Figure 3.5 Length of time trading in Troon town centre

How long has the business traded in Troon town centre? Base 43



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. 44 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: 44	
	%
Residents of Prestwick and its surrounding villages	62
Residents from elsewhere in the South Ayrshire Council area	19
Visitors from outwith South Ayrshire	19

4.0 VIEWS ON TROON TOWN CENTRE

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

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

Issue	**1st rank (base: 43 comments)**	**2nd rank (Base: 41 comments)**	**3rd rank (31 comments)**
Good range and type of shops	19%	27%	23%
Parking	19%	10%	6%
Location / convenience / access issues	16%	7%	19%
Good footfall / busy area	16%	7%	6%
Good physical and natural environment	14%	10%	13%
Customer base / community	9%	29%	29%
Compact / easy to get around	7%	5%	6%
General positive comments	2%	2%	0%
Other	2%	2%	3%

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 Troon as a business location relate to the good range and type of shops and also to parking. Issues related to customer base / community were quite commonly cited though generally not as the top issue. 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 Troon 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 Troon town centre

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

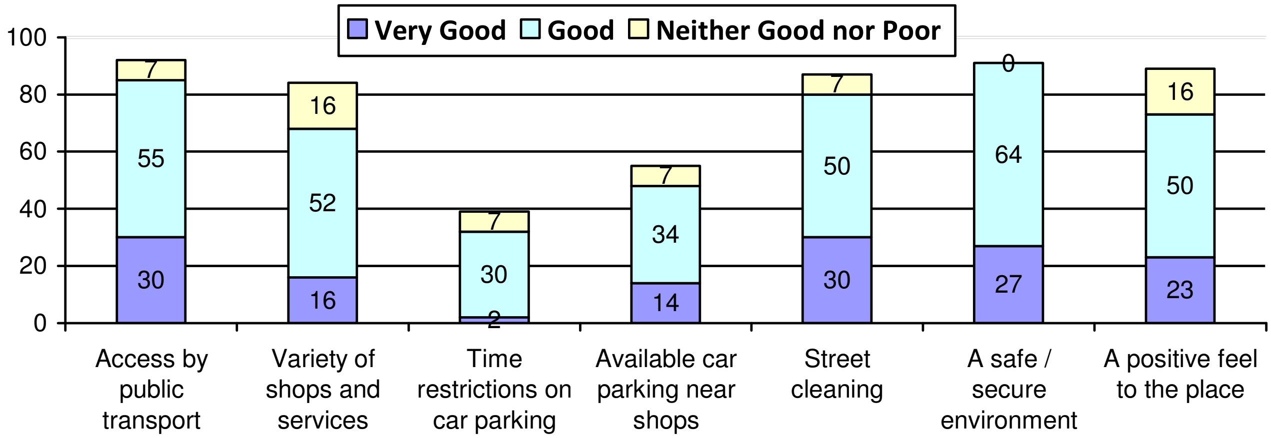
Issue	1st rank (base: 42 comments)	2nd rank (Base: 36 comments)	3rd rank (25 comments)
Parking	48%	22%	20%
Empty shops	12%	11%	12%
Poor range and type of shops / services	10%	17%	20%
Poor footfall / area not busy	7%	8%	4%
Poor physical and natural environment	5%	28%	8%
Congestion / heavy traffic	5%	8%	8%
Undesirable people	5%	3%	8%
Less convenient to access than other locations	5%	-	-
Business rates / lack of investment and support	2%	6%	16%
General negative comments	2%	-	4%
Other	2%	3%	4%

The most common issues that are mentioned as being least liked about Troon town centre as a business location include parking (suggesting some mixed views on this subject as a number of respondents raised this issue in positive terms) and empty shops. 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 43



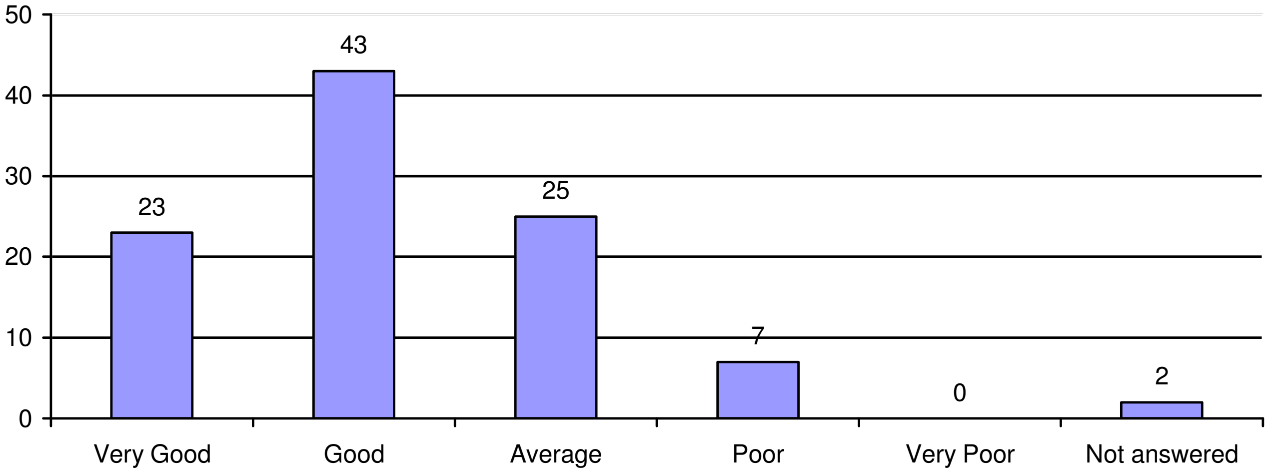
The issues rated positively by a majority of respondents included: a safe / secure environment (91% give a positive rating), access by public transport (85%), street cleaning (80%) a positive feel to the place (73%) and variety of shops and services (68%).

Ratings are somewhat poorer in relation to parking issues including available car parking near shops (although 48% do give this a positive rating), time restrictions on car parking (32%).

4.4 When taken as a whole, 66% of business respondents gave a positive view overall about Troon town centre as a place to do business, with only 7% of 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 Troon town centre

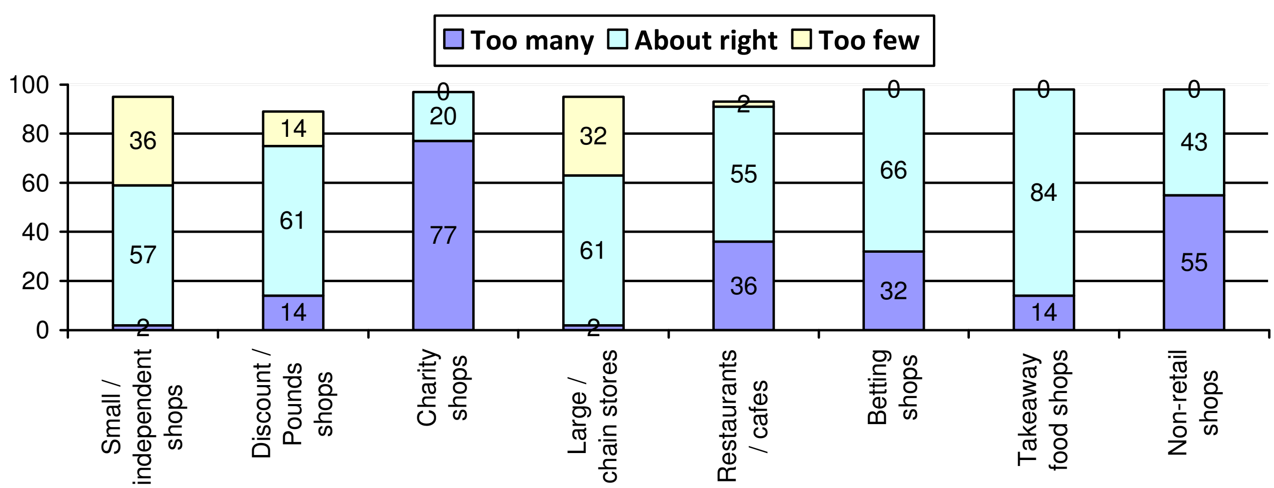
What is your overall view of Troon town centre as a place to do business? Base 43



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 43



In most cases, the number of outlets of a given type was considered to be about right. This was the case in relation to: takeaway food shops (84%), betting shops (66%), discount / pound shops (61%), large / chain stores (61%), small / independent shops (57%) and restaurants / cafes (55%).

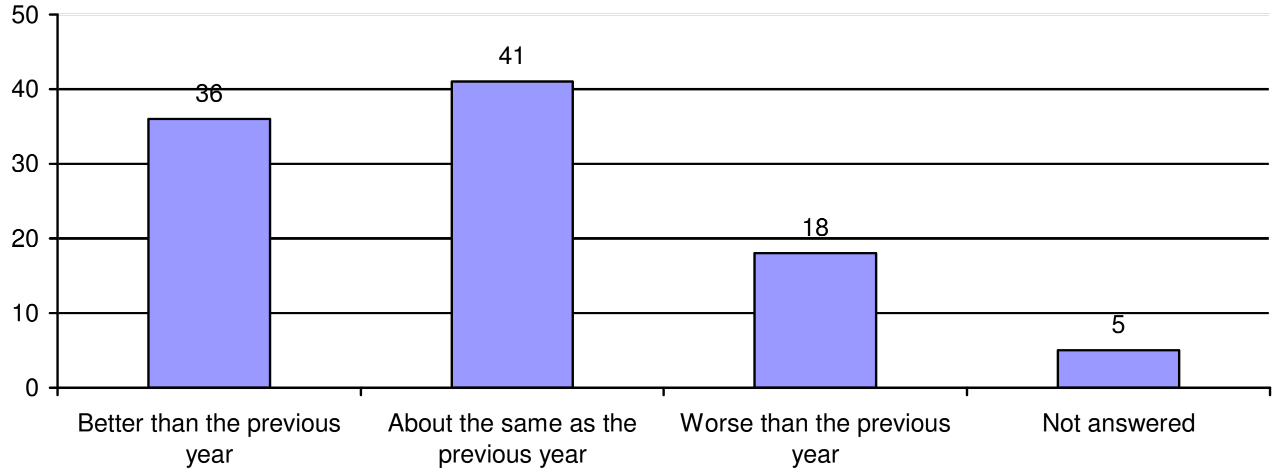
There were, however, two instances were a majority of respondents felt there were too many of such outlets. These were: charity shops (77% of respondents felt there were too many of these) and non-retail shops such as hairdressers (55%).

5.0 BUSINESS PERFORMANCE AND EXPECTATONS

5.1 As part of the section on attitudes to Troon 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 43



It is notable that 36% of businesses in Troon town centre indicate that their business performance has performed better over the past year compared to 18% that consider their performance to have worsened over this time.

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 8

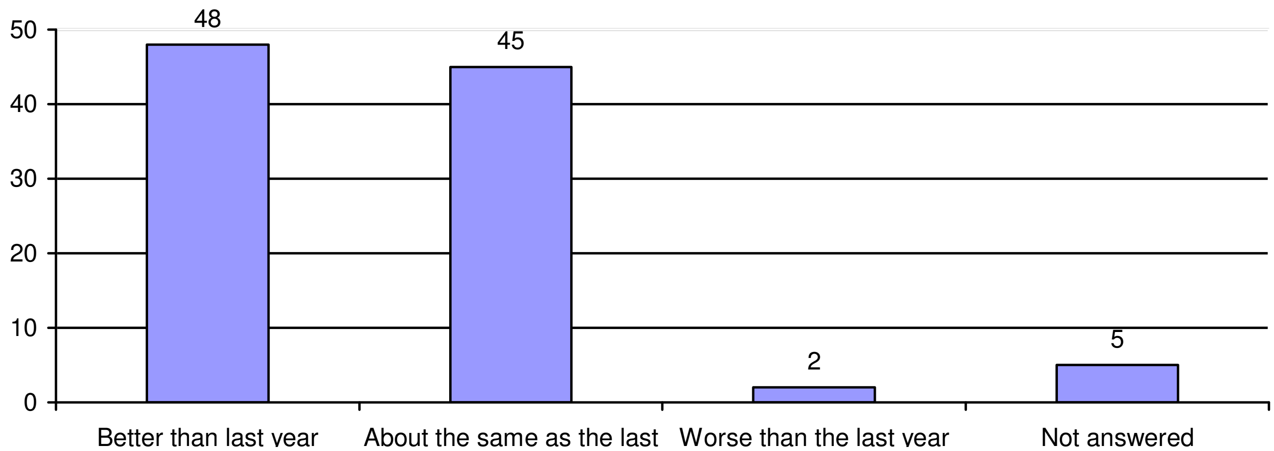
Reason	% of comments
Economic downturn / less money	75
Footfall / customer base	38
Specific circumstances of the particular business	13
Other	13

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 44



Troon businesses are clearly optimistic about the future with 46% of businesses expecting their performance to improve over the next year compared to only 2% 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 5.4 Reasons for future business expectations

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

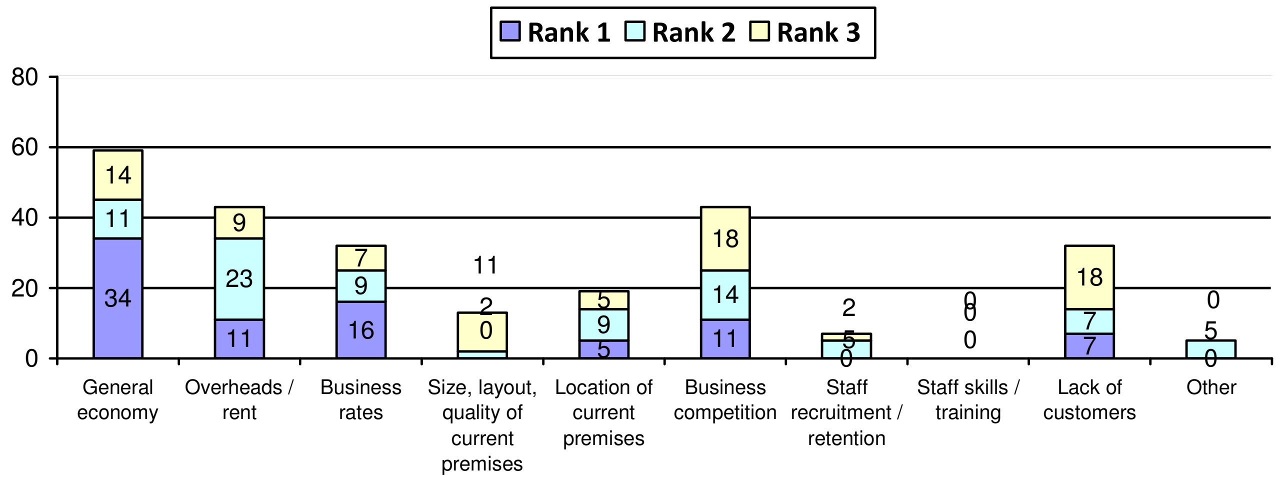
Business performance expected to be better than last year
"Word of mouth business mainly - business increasing." *"More shops opening - more visitors."*
Business performance expected to be about the same as last year
"The economy is the main factor; providing more parking would help, not reducing it!" *"People going elsewhere, like Glasgow."*
Business performance expected to be worse than last year
"Don't see improvements on the horizon which will help."

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 43



Whilst a broad set of such challenges are important it is clear that the general economy (ranked as top priority by 34% of respondents in the top 3 priorities by 59%) and, to a somewhat lesser extent business competition (top priority for 11% of respondents and in the top 3 for 43%) are key issues. A number of other issues are also identified including overheads / rents (top priority for 11% and in the top 3 for 43% of respondents), business rates (top priority for 16% and in the top 3 for 32% of respondents) and lack of customers (top priority for 7% and in the top 3 for 32%).

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 18 respondents from Troon, with the most common sources of such competition being from within the town centre itself (78%), out of town shopping centres (17%) and the internet (11%).

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 23% of respondents indicated that their premises were owned but most (75%) indicated that they rented their premises; a further 2% (1 respondent) did not answer this question.

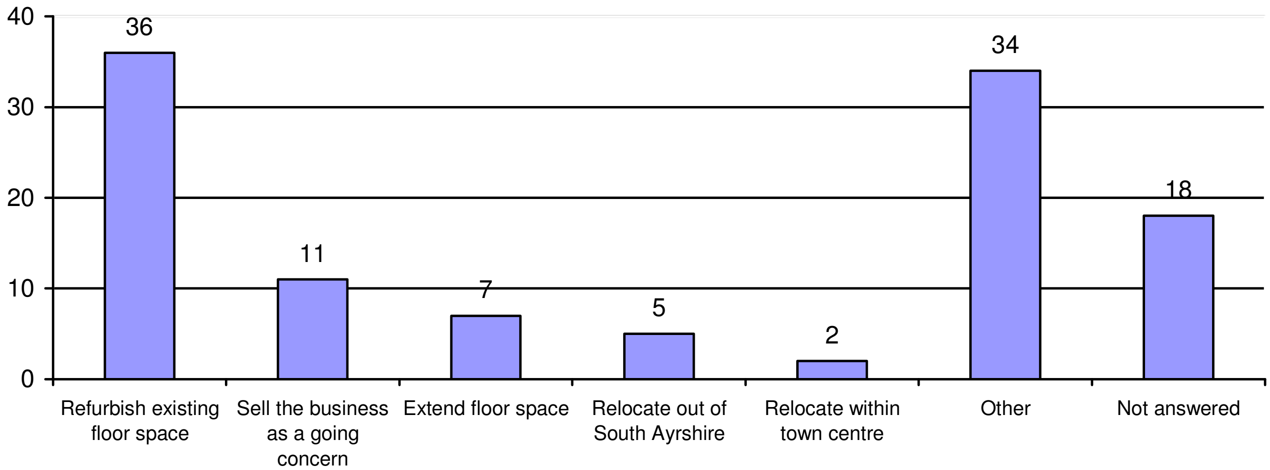
6.3 The floor space occupied by respondent businesses ranged from 21 square feet to 3,500 square feet. The average figure amongst the 19respondents that answered this question was 913 square feet.

6.4 73% of businesses indicated that they occupied a single floor in the building they occupied whilst 9% 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 44



A significant proportion of businesses indicated an intention to refurbish existing floor space (36%) but with 11% indicating that they planned to sell their business as a going concern. 3 respondents gave reasons why they would plan to relocate; these reasons included reduced turnover (2 respondents), reduced footfall in the town centre (2 respondents), overheads / rent (1 respondent) and business rates (1 respondent). 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 B listed and the other did not stipulate the category of listing.

7.0 BUSINESS SUPPORT

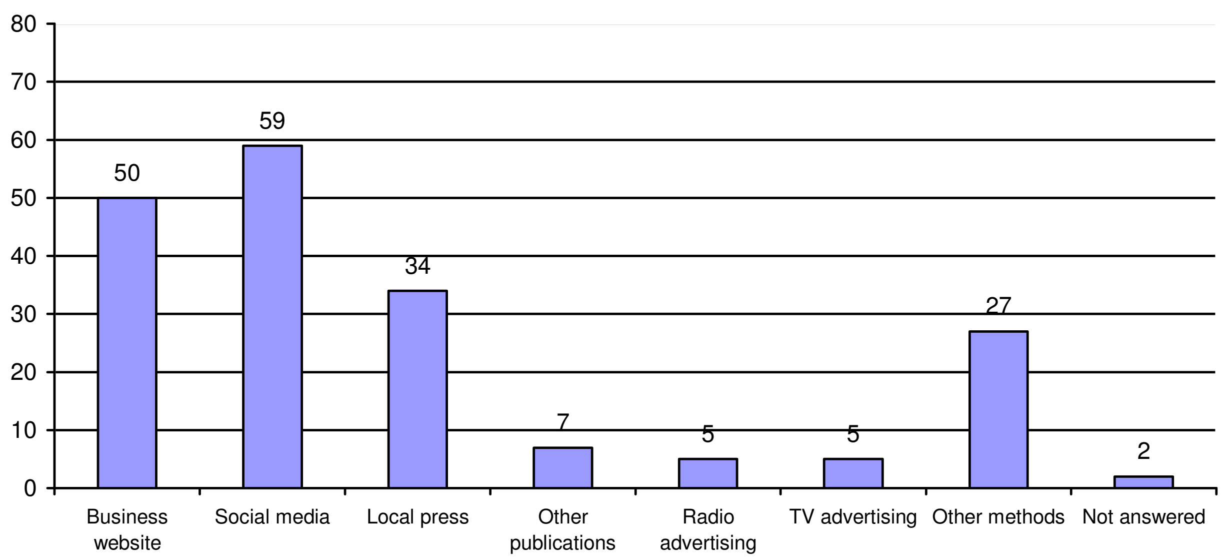
7.1 39% of respondents (17 businesses) indicated that they were members of business organisations. The details of these organisations are listed in full in the appendices. These most commonly included the Federation of Small Businesses (8 respondents) with a range of other local and trade bodies being mentioned by 1 or 2 respondents, with these organisations sometimes being described in very general terms.

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 44



Businesses were quite likely to use social media (59%), a business website (50%) and the local press (34%) but somewhat less likely to use other communications channels.

7.3 27% of respondents (12 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 number of references to the Business Gateway plus individual references to specific training courses and meetings.

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 / or access to 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 17 comments (some comments are attributed to more than one heading)

Issue	% of comments made
Costs of doing business	29%
General positive comments	18%
Issues related to parking	18%
Need to market the town	18%
Need for a plan / vision for the town	12%
Competition	6%
General negative comments	6%

Costs of doing business were commonly raised in these final comments along with a broad range of other issues. A number of comments were made about the need to better market the town and for there to be a clearer plan / vision for it. A full listing of these comments is contained in the appendices.