

# Plymouth City Centre Company



## Business Survey Draft

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**Appendices with tables are to be found in a separate document.**

## 1.0 Introduction / Background

### 1.1 The research issue

The Plymouth City Centre Business Improvement District (BID) was established in April 2005 with the aim of increasing footfall and sales in the City Centre, particularly attracting higher spending 'A, B and C<sub>1</sub>' shoppers.

The BID, managed by the Plymouth City Centre Company, has with the businesses in the area, identified and set up projects to improve priority areas:

- A Better Promoted City Centre
- A Cleaner City Centre
- A More Attractive City Centre
- A Safer City Centre
- A More Welcoming City Centre

The project has now been running for three years, and it is essential that the progress is monitored. This questionnaire was originally conducted in 2006 with this being the second time that it has been run, with only minor modifications to the script and questions.

### 1.2 Research objectives

The key research objectives were to:

- Establish whether businesses in the BID zone remain supportive of and engaged with the project
- Measure satisfaction and improvement with the specific measures that Plymouth Centre Company undertakes.
- Compare the results with the baseline set of perception indicators identified in the previous survey to measure progress over the period of the BID term
- Determine whether businesses are going to continue to support and vote for the BID to continue.

### 1.3 Method

Marketing Means conducted a survey amongst 147 businesses (almost entirely retail) which operate within the area of Plymouth City Centre covered by the BID. The survey was multi-method, with 29 businesses completing the survey online, 21 via a postal survey and 97 over the telephone.

Survey responses were analysed using SPSS.

## 2.0 Notes

### 2.1 Acknowledgements

Marketing Means would like to thank Patrick Knight for his help with this project.

### 2.2 Authors and publication

Marketing Means wrote this report in September 2008.

Any press release or publication of the findings of this survey requires the approval of the author / Marketing Means. Approval would only be refused if it were felt that it was inaccurate or a misrepresentation.

### 2.3 About reading this report

#### **Rounding**

Figures for graphs have been rounded and may not add up to 100%.

### 3.0 Priority 1: A Better Promoted City Centre

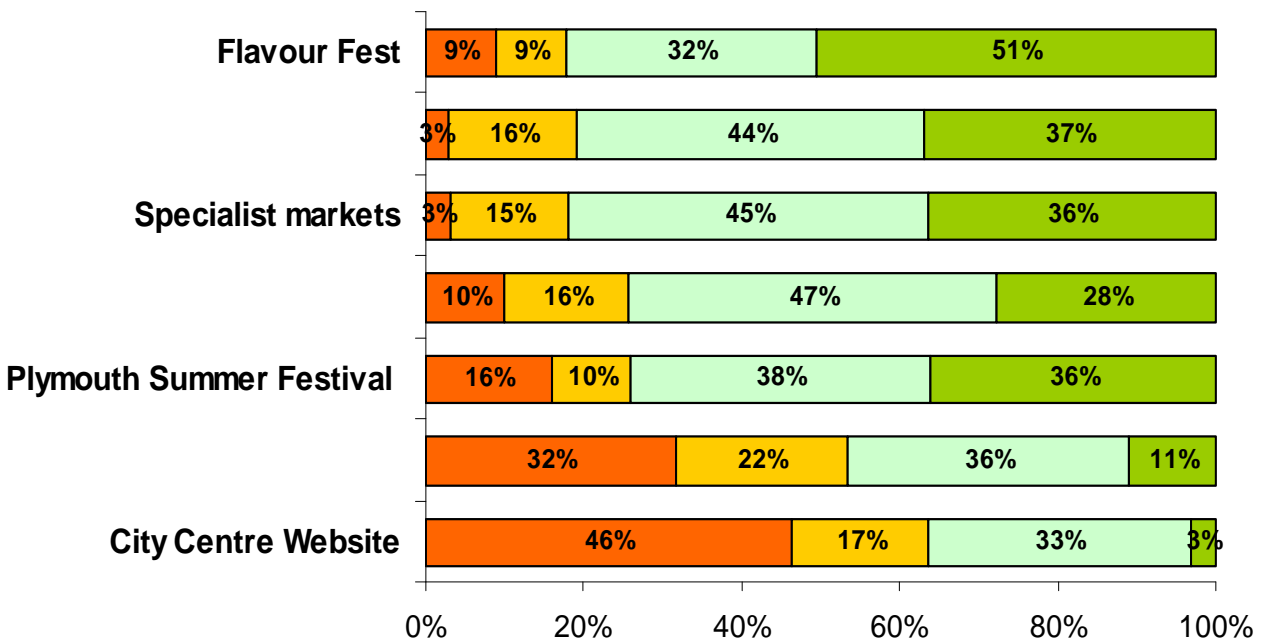
#### 3.1 Rating of events impact on promotion of the city centre

Q1 “To what extent do you think that the following actions have improved the promotion of the city centre over the last 12 months?”

As can be seen from the chart below, respondents think that ‘Flavour Fest’ (83%), ‘Entertainments and markets at Christmas’ (81%) and ‘specialist markets’ (81%) have been the events most likely to have improved the promotion of the City Centre.

The City Centre Website (36%) and the Independent Quarter Marketing Initiative (47%) are the actions that respondents have had the least impact on promotion of the city centre.

Rating of events impact on promotion of the city centre



	City Centre Website	'Independent Quarter'	Plymouth Summer	Wimbledon 'Big Screen'	Specialist markets	Entertainments and	Flavour Fest
Improved a great deal	3%	11%	36%	28%	36%	37%	51%
Improved slightly	33%	36%	38%	47%	45%	44%	32%
Not improved	17%	22%	10%	16%	15%	16%	9%
Not aware of this	46%	32%	16%	10%	3%	3%	9%

■ Not aware of this 
 ■ Not improved 
 ■ Improved slightly 
 ■ Improved a great deal

### Comparisons to 2006

The overall figures for the promotional activities remain very similar to 2006, with Flavour Fest (86% in 2006) and the specialist markets (84% in 2006) seeing small falls in their ratings. The largest fall has been for the Wimbledon Big Screen, which received very high ratings in 2006 (90%).

The Big Wheel and Rides at Christmas, that were not included this year, received very high ratings in terms of people saying it improved promotion of the City Centre (58%). No other event has had such high ratings either in 2006 or 2008.

*(Full tables: Appendix 1, Table 1)*

## 3.2 Activity that has delivered the best impact on the business

### “Which activity do you think delivered the best impact on your business?”

Just under a third of respondents (32%) said ‘Flavour Fest’ was the activity that had delivered the best impact on their business, followed by ‘entertainments and markets at Christmas’ (24%) and ‘Plymouth Summer Festival’ (19%).

### Comparisons to 2006

Again, the Big Wheel and Rides at Christmas, that were not included this year, had 41% saying that it was the activity that had the highest impact on their business. Flavour Fest has, however, become more well recognised, having moved from the fifth rated to the top rated activity.

*(Full tables: Appendix 1, Table 2)*

## 3.3 Impact and attitudes to activities aimed at increasing footfall

### “Last year the BID has hosted 6 ‘events’ in the City centre specifically aimed at increasing footfall.”

Just under a third of respondents (30%) said they did experience higher footfall at the time the activities were held, with 54% saying that they did not.

Only 2% of those that responded said that they sponsored the activities this year.

A fifth (19%) said they would consider sponsoring events in the future.

### Comparisons to 2006

There were not significant changes in any of the responses from 2006.

*(Full tables: Appendix 1, Table 3)*

### 3.4 Overall satisfaction with BID area promotion

“Overall, how satisfied have you been with the promotion of the BID area over....?”  
 The same proportion of respondents (78%) said that they have been satisfied with promotion both over the last 12 months and for the last three years.

#### Comparisons to 2006

78% represents a significant fall in the satisfaction levels regarding promotion from 2006, where 93% of respondents said they were satisfied.

(Full tables: Appendix 1, Table 4)

## 4.0 Priority 2: A Cleaner City Centre

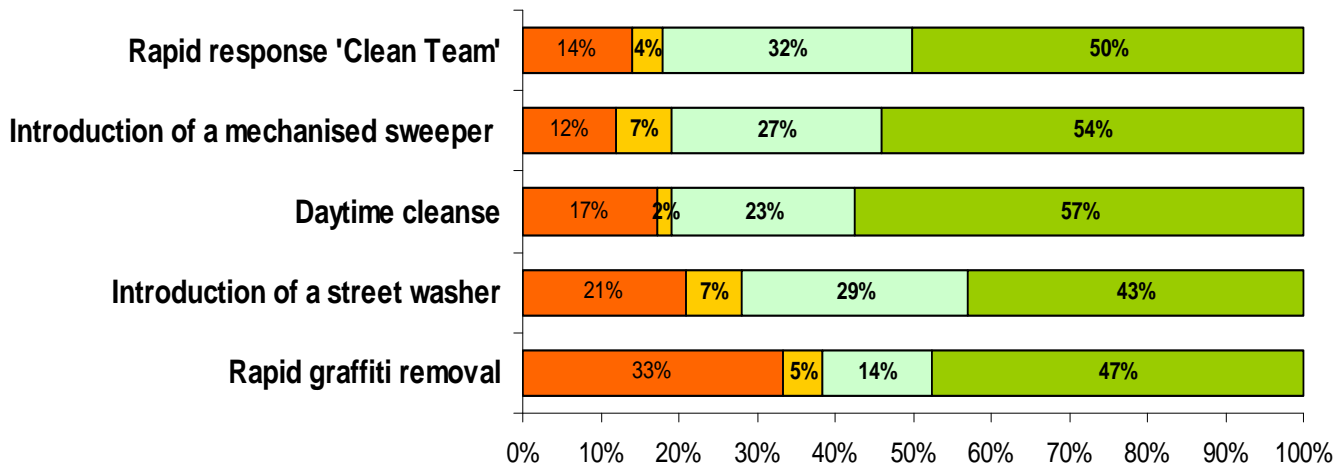
### 4.1 Rating of actions to improve the cleanliness of the city centre

“To what extent do you think that the following actions have improved the level of cleanliness of the City Centre over the last 12 months?....”

The rapid response ‘Clean Team’ (82%), the introduction of a mechanised sweeper (81%) and ‘daytime cleanse’ (80%) are all rated very highly.

In comparison, the rapid graffiti removal (61%) has relatively low ratings.

Rating of activities to improve cleanliness



	Rapid graffiti removal	Introduction of a street washer	Daytime cleanse	Introduction of a mechanised sweeper	Rapid response 'Clean Team'
Improved a great deal	47%	43%	57%	54%	50%
Improved slightly	14%	29%	23%	27%	32%
Not improved	5%	7%	2%	7%	4%
Don't know / Not aware of this	33%	21%	17%	12%	14%

### Comparisons to 2006

The figures represent a significant fall for all aspects from 2006 where all aspects bar the rapid graffiti removal (79%) had over 90% thinking that they had improved cleanliness.

*(Full tables: Appendix 1, Table 5)*

## 4.2 Overall satisfaction with BID area cleanliness

### “Overall, how satisfied have you been with the promotion of the BID area over....?”

96% said that they have been satisfied with cleanliness over the last 12 months and a similar number (93%) for the last three years. Interestingly though there has been an increase in the level of satisfaction with cleanliness - 46% said that they were very satisfied over the last 12 months compared to 37% over the last 3 years.

### Comparisons to 2006

Satisfaction with cleanliness has fallen 3% from 2006, but this is well within the confidence intervals for this survey, and with virtually all respondents saying that they were satisfied, it is almost impossible to gain any improvement.

*(Full tables: Appendix 1, Table 6)*

### “Overall, to what extent do you consider the City Centre is cleaner now compared to before the BID was established in 2005....?”

61% said ‘a great deal’ and 37% said ‘slightly’. 3 respondents said ‘no change’.

### Comparisons to 2006

There has been no significant change in responses to this question (+3% from 2006). However, this continuing perception of improvement that is seen from this question and the previous question shows that the introduction of the measures in 2005 is continuing to bear results, and that the falling perceptions of impact are more that they are now becoming an expected part of the cleaning of the City Centre.

*(Full tables: Appendix 1, Table 7)*

## 5.0 Priority 3: A More Attractive City Centre

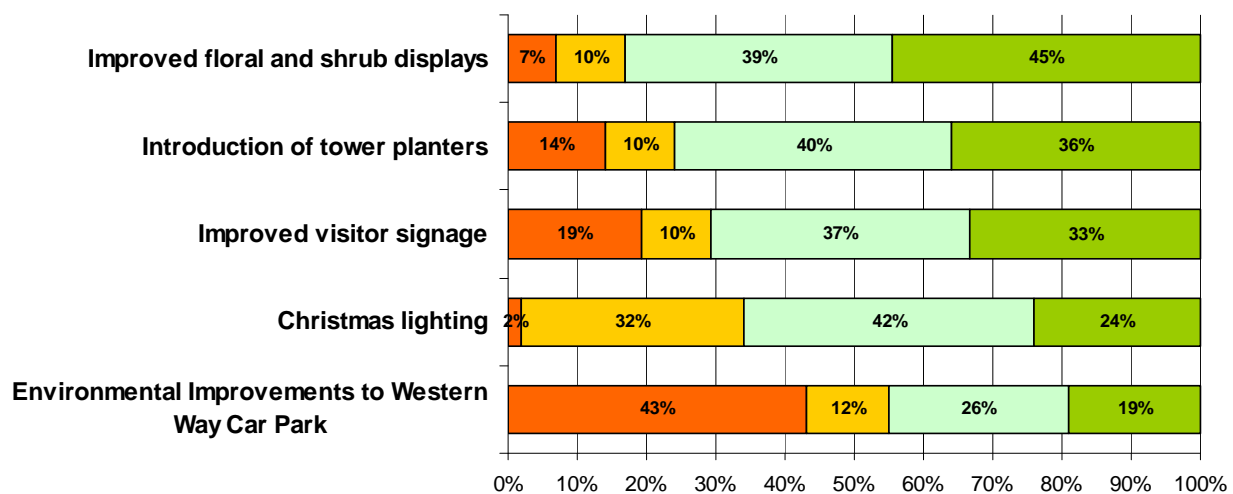
### 5.1 Rating of actions to improve the attractiveness of the BID area

“To what extent do you think that the following actions have improved the attractiveness of the City Centre over the last 12 months?”

Improved floral shrub displays (84%) and the introduction of flower planters (76%) are the aspects that respondents think have improved the attractiveness of the BID area in the last 12 months.

Environmental improvements to the Western Way Car Park had the lowest ratings (45%).

Rating of actions to improve attractiveness of the BID area



	Environmental Improvements to Western	Christmas lighting	Improved visitor signage	Introduction of tower planters	Improved floral and shrub
Improved a great deal	19%	24%	33%	36%	45%
Improved slightly	26%	42%	37%	40%	39%
Not improved	12%	32%	10%	10%	10%
Not aware of this	43%	2%	19%	14%	7%

(Full tables: Appendix 1, Table 8)

### Comparisons to 2006

Improved floral shrub displays has seen a slight improvement from the previous survey (+3%). All other aspects have seen a slight fall in ratings from 2006. Christmas lighting, which had attracted ratings of 91% in the previous survey has seen the largest fall, although this again probably reflects the idea that it experienced the big noticeable improvements in 2005 and was likely not to see more improvements.

## 5.2 Overall satisfaction with attractiveness of the BID area

**“Overall, how satisfied have you been with the attractiveness of the City Centre (BID) area over the last ...?”**

92% said that they have been satisfied with attractiveness over the last 12 months with slightly fewer (89%) for the last three years.

### **Comparisons to 2006**

There are no changes from the previous survey where satisfaction (91%).

*(Full tables: Appendix 1, Table 9)*

## 5.3 Awareness of the vision of the West End Regeneration

**“To what extent are you aware that...”**

30% of respondents were completely aware that the City Centre Company promoted a vision of the West End Regeneration, with 47% saying that they were ‘somewhat aware’.

Similarly, 30% were completely aware that the first phase of work will start on site in 2009 although fewer respondents (28%) said they were ‘somewhat aware’.

*(Full tables: Appendix 1, Table 10)*

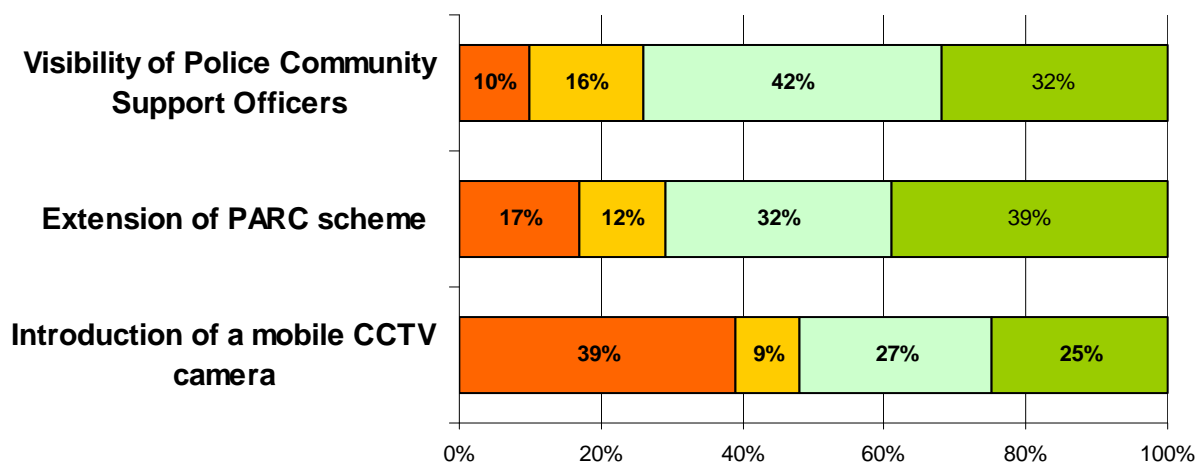
## 6.0 Priority 4: A Safer City Centre

### 6.1 Rating of actions to improve the sense of safety of the BID area

“To what extent do you think that the following actions have improved the sense of safety of the City Centre over the last 12 months?”

Visibility of Police Community Support Officers (74%) was the aspect that respondents rated as having the most positive impact on the sense of safety of the City Centre, followed by extension of the PARC scheme (71%).

Rating of actions to improve the sense of safety of the BID area



	Introduction of a mobile CCTV camera	Extension of PARC scheme	Visibility of Police Community Support Officers
Improved a great deal	25%	39%	32%
Improved slightly	27%	32%	42%
Not improved	9%	12%	16%
Not aware of this	39%	17%	10%

### Comparisons to 2006

Like the other priority areas there has been a general falling away of respondents saying that there had been improvements due to actions over safety compared to the previous survey in 2006. The visibility of Police Community Support Officers has a similar level of 74% overall to 2006’s rating of the introduction of uniformed wardens (78% overall), but the extension of the PARC scheme is significantly lower (down 13% from 71%). Similarly ratings for the mobile CCTV are down from 68% in the previous survey to 52% in this survey.

(Full tables: Appendix 1, Table 11)

## 6.2 Overall satisfaction with safety of the BID area

**“Overall, how satisfied have you been with the safety of the BID area over....?”**

85% said that they have been satisfied with safety over the last 12 months with slightly fewer (83%) for the last three years. There has been, however, 10% more respondents saying that they are very satisfied with the safety of the BID area over the last 12 months (30% vs. 20%).

### **Comparisons to 2006**

Satisfaction with the overall safety with the City Centre has fallen slightly (down 4% from 89%), although within the limits of the confidence of the survey.

*(Full tables: Appendix 1, Table 12)*

## 6.3 Stock losses and shrinkage

**“Has your Plymouth store's stock losses / shrinkage decreased, increased or stayed the same since the BID?”**

70% said that there had been no change in the amount of stock losses and or shrinkage since the establishment of the BID.

There was, however a slightly higher proportion of respondents (18%) who said that their losses had reduced compared to those who said that they had increased in the three year period (12%).

*(Full tables: Appendix 1, Table 13)*

## 7.0 About BID communication with your business

### 7.1 ‘Checkout’ Magazine

**“Do you (personally) receive 'Checkout', the Plymouth City Centre Company newsletter?”**

72% of respondents said that they do receive ‘Checkout’.

**“To what extent do you read 'Checkout'?”**

29% of respondents who receive the magazine said that they read the magazine in depth, with a further 25% saying that they read the main articles. 38% said that they ‘skim’ the magazine. Only 7% of respondents say they never read ‘Checkout’.

### **Comparisons to 2006**

The proportion of respondents receiving ‘Checkout’ has increased significantly since 2006, up 17% from 55% in 2006.

The proportion of those receiving it reading the magazine in depth has remained the same (29%).

*(Full tables: Appendix 1, Tables 14&15)*

## 7.2 Methods of contact

**“Which of these methods have you used to contact the BID within the last 12 months?”**

Over half of respondents said that they have not contacted the BID within the last 12 months (53%).

The most frequent methods of contacting the BID are ‘call to the office’ (22%) and ‘personal visit from project staff’ (21%). 17% have used the BID Hotline.

### Comparisons to 2006

The amount and methods that respondents use to contact the BID appear to have remained approximately the same, although they were recorded slightly differently in the last survey.

*(Full tables: Appendix 1, Tables 16)*

## 7.3 The BID Hotline

**“If you have used the BID Hotline, could you please rate in terms of the response you received.”**

25 of the 29 respondents rated the BID Hotline as very or fairly good.

**“To what extent are you aware that you can use the BID Hotline to raise issues about:”**

37% of respondents said they were completely aware that safety issues can be raised on the BID Hotline, with 23% saying they were somewhat aware.

38% of respondents said they were completely aware that cleansing issues can be raised on the BID Hotline, with 21% saying they were somewhat aware.

32% of respondents said they were completely aware that management of the BID can be raised on the BID Hotline, with 20% saying they were somewhat aware.

### Comparisons to 2006

There were 32 respondents in the previous survey who rated the Hotline, with 30 saying it was good. This probably means that the rating has not really changed since 2006.

*(Full tables: Appendix 1, Tables 17&18)*

## 7.4 Extent that opinions are included in the management of the BID

**“To what extent has the BID saved your business money (including staff time) by providing a Hotline to help your company resolve problems?”**

18% of respondents thought that the management of the BID and City Centre take a great deal of notice with 58% saying that they think a little notice is taken.

### **Comparisons to 2006**

There were no significant differences between the answers in this survey and 2006, with proportion saying that they did think their opinions were included up 3% from 15%, well within the confidence intervals.

*(Full tables: Appendix 1, Table 19)*

## 7.5 Money saved through resolution of issues through BID Hotline

**“To what extent has the BID saved your business money (including staff time) by providing a Hotline to help your company resolve problems?”**

63% of respondents said that they did not know whether any money had been saved by using the Hotline to resolve problems, with 33% saying that £0 had been saved.

Of the 6 respondents who said that they had saved money, one said that they had save £1000.

*(Full tables: Appendix 1, Table 20)*

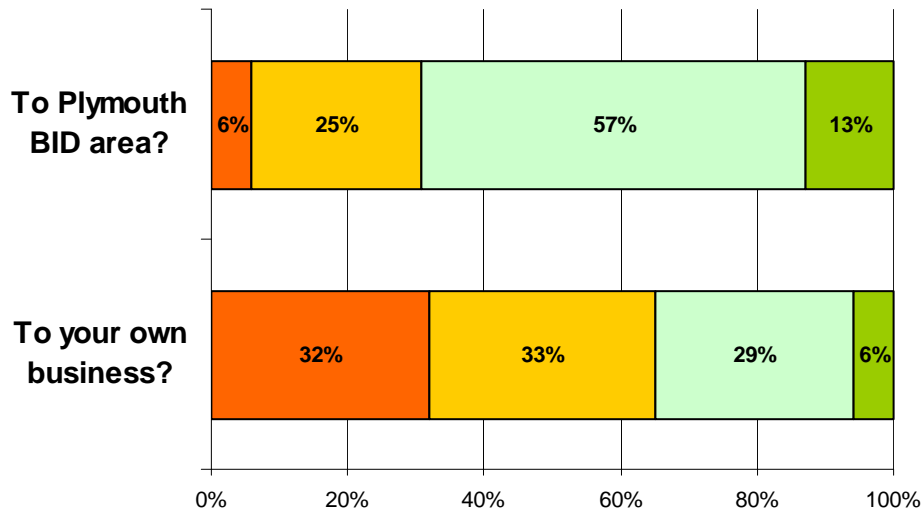
## 8.0 The future

### 8.1 Influence the BID has had on attracting customers

“How much influence do you think the BID has had over the last 12 months in attracting customers to...”

Respondents are twice as likely to think that the BID has been successful at attracting customers to the BID area (70%) than to their own business (35%).

**Influence BID has had in attracting customers**



	To your own business?	To Plymouth BID area?
A great deal	6%	13%
A fair amount	29%	57%
Very little	33%	25%
None at all	32%	6%

### Comparisons to 2006

The proportion of respondents saying that the BID has influenced visiting to the City Centre is down 5% overall since the previous survey. There has, on the other hand been a more significant increase of 9% of respondents saying that the BID had an influence on attracting customers to their own business.

(Full tables: Appendix 1, Table 21)

## 8.2 Whether BID has had a positive impact on sales

**“To what extent do you think the BID has had a positive or negative impact on your sales?”**

Around half of respondents (49%) said that the BID had had no impact on their sales, with 40% saying that it had had a positive impact.

### Comparisons to 2006

Again, differences are within the limits of the confidence intervals of the surveys. However, there has been a slight increase in the proportion of respondents saying that the BID has had a positive effect on sales, up 4% from 2006.

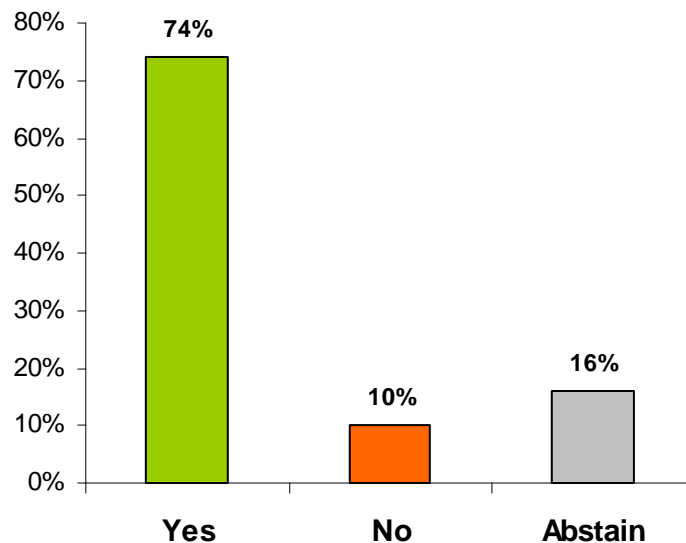
*(Full tables: Appendix 1, Table 22)*

## 8.3 Probable voting in the renewal ballot

**“The BID must be renewed to continue from 2010 to 2015 through a ballot, how do you think your business will vote?”**

74% of respondents said that they will vote to renew the BID in the ballot this year, 10% saying that they will vote not to renew the BID and 16% saying they will abstain.

**Probable voting in the renewal ballot**



*(Full tables: Appendix 1, Table 22)*

### Comparisons to 2006

There has been a significant fall in the proportion of respondents saying that they would vote in favour of keeping the BID for another three years, although most of those now say that they will abstain rather than saying that they will vote against the BID.

## 8.4 Level of levy businesses would opt for

**“Given the BID's level of delivery to date, what level would you opt for next year if you could?”**

68% of respondents said that they would vote to keep the current level of a 1% levy, with 18% saying they would reduce it to 0.5% and 9% saying they would increase it to 9%.

### Comparisons to 2006

There have been no changes in the proportions of respondents choice of levy level since 2006.

*(Full tables: Appendix 1, Table 24)*

## Conclusion

Overall there have been few changes in the attitudes of businesses in Plymouth City Centre as they remain broadly supportive of the scheme and the actions that are taken to improve the attractiveness of it as a shopping destination.

It is clear that that the activities and initiatives that were new to the BID area in 2005 are now, to many, an expected part of the service that businesses expect, and as such they have less impact on perception of improvement.

However, it is clear that the majority of respondents still see the value of the BID in maintaining and improving the perception of Plymouth City Centre as an important shopping destination.