



## Fermanagh Area Plan 2007

- Monitoring



## Enniskillen - Shopper Views & Retailer Views Surveys 2010

Report Date: October 2010

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## 1.0 INTRODUCTION

**1.1 Planning Policy Statement 5 (PPS 5) Retailing and Town Centres** outlines the regional policy on Town Centres and retail development. The objectives of the PPS are:

- *“to sustain and enhance the vitality and viability of Town Centres;*
- *to focus development, especially retail development in locations where the proximity of businesses facilitates competition from which all consumers are able to benefit and maximises the opportunity to use means of transport other than the car;*
- *to maintain an efficient, competitive and innovative retail sector; and*
- *to ensure the availability of a wide range of shops, employment services and facilities to which people have easy access by a choice of means of transport”*

(A Draft PPS 5 on Retailing, Town Centres and Commercial Leisure Developments was published for public consultation in July 2006.)

**1.2** PPS 5 requires **Town Centre health checks** to be carried out which will assist in identifying any early signs of decline in the centre, to help inform local policies and proposals, and to provide a basis for future monitoring of Town Centre performance, vitality and viability. ‘Vitality’ is a measure of how busy a centre is and ‘viability’ is a measure of its capacity to attract ongoing investment for maintenance, improvement and adaptation to changing needs.

**1.3** The Town Centre health check is an important aid to understanding the Town Centre and supports the development plan-making process by increasing awareness of Town Centre change. **Surveys of Shoppers and of Retailers** are both important elements of such a Health Check – in order to assist in monitoring and to assess the effectiveness of Town Centre improvements and setting priorities. The completion of health checks allows an overall assessment to be made of each Town Centre, whether it is robust and vital, ‘holding its own’ or in decline.

Therefore, these two surveys have been undertaken **by Planning Service** as part of the background papers for the preparation of a Town Centre Strategy that can be used for any future Area Plan for Fermanagh. Additionally, these findings will feed into the **Enniskillen Town Centre Masterplan** document which is currently being prepared by the Department of Social Development (DSD) through consultants Scott Wilson & TPA.

## SHOPPERS VIEWS IN ENNISKILLEN TOWN CENTRE, JUNE 2010

### 2.0 Survey Method

As a requirement of PPS 5 (Retailing and Town Centres) in carrying out a Town Centre health check, a survey was undertaken to obtain the views of shoppers in Enniskillen Town Centre. In order to obtain these views an on-street survey was undertaken. This type of survey had the benefit of targeting a sample of shoppers who were shopping in Enniskillen Town Centre, in preference to a door-to-door or postal type survey where respondents may not actively shop in Enniskillen Town Centre.

**2.1** In order to maximise statistical validity, a sizeable sample of 400 shopper surveys was completed. This convenience sample allows us to have reasonable confidence that the output of the survey will be broadly reflective of the entire population of the Enniskillen shopper catchment. To provide a representative sample over the key shopping days, surveys were undertaken on Thursday 17<sup>th</sup> June, Saturday 19<sup>th</sup> June and Friday 25<sup>th</sup> June 2010.

**2.2** The survey was carried out over 5 locations within the Town Centre, on High Street, Townhall Street, East Bridge Street, Belmore Street and inside the Erneside Shopping Centre. Shoppers were stopped randomly by Planning Service staff members and were asked to complete the survey. A copy of the Survey form is attached at the end of this Chapter.

**Chart 1: Survey Locations**

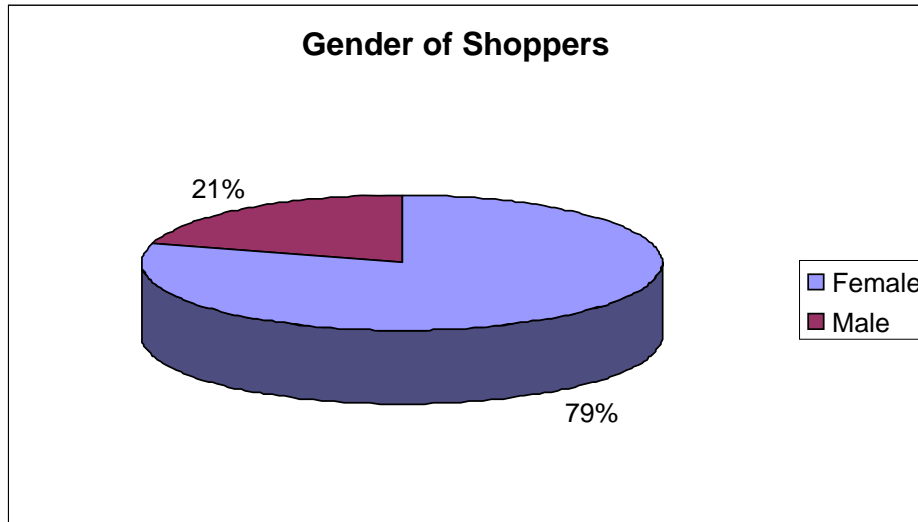


**2.3** It is notable that the majority of shoppers were surveyed on High Street, Townhall Street and the Erneside Shopping Centre. Belmore Street and East Bridge Street were quiet streets and the number of shoppers was quite low in comparison.

### 3.0 Gender and Age Profile of Shoppers

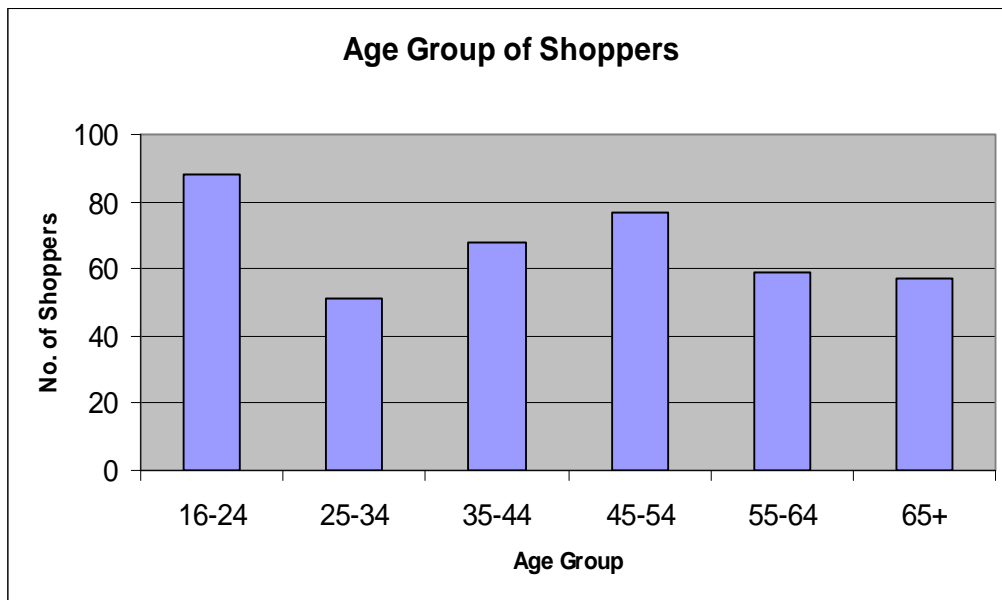
3.1 The survey had 318 female shoppers (79%) and 82 male shoppers (21%). This is fairly reflective of the general trend of more women than men shopping in Town Centres.

Chart 2: Gender of Shoppers



3.2 The age category of respondents was reasonably well spread across all the age groups, though the lowest number of respondents was from the 25-34 age category.

Chart 3: Age of Shoppers



## 4.0 Goods / Services that Shoppers Purchase

4.1 When shoppers were asked what they were shopping for in Enniskillen Town Centre, most respondents stated that they were shopping for comparison goods (47%), followed by convenience goods (36%) and retail services (17%). Comparison goods are defined as occasional purchases such as clothes, books, mobile phones, jewellery and white goods. This includes non-food items which are classed both as bulky and other durable. Convenience goods are defined as daily small essentials, mostly food and groceries, confectionery from supermarkets, butchers, bakeries, chemists, newsagents and health food shops. Retail services can be defined as non-product purchases. These can include using restaurants, public houses, hairdressers, beauticians, dry cleaners, car repairs, financial services at banks and post offices and travel agents. The high percentage of shoppers purchasing comparison goods possibly indicates that Enniskillen is an important town for comparison and specialist goods.

**Chart 4: Type of Goods/Services Purchased**



## 5.0 Reason for Shopping

5.1 In response to the question, '*what is the main reason for shopping in Enniskillen Town Centre?*', many respondents referred to the good choice of shops. There are a wide range of reasons why shoppers come to Enniskillen, with 'local and handy' being the highest reason. Other reasons include that 'the town has the right shops', it is 'easy to access' and shoppers are 'used to it'. Other wide-ranging reasons included that 'Enniskillen is good value for money', people see it as 'a good day out', other people work and go to school in Enniskillen, some people are visiting on holiday, socialising, to support local business, and to go to the doctors / hospital.

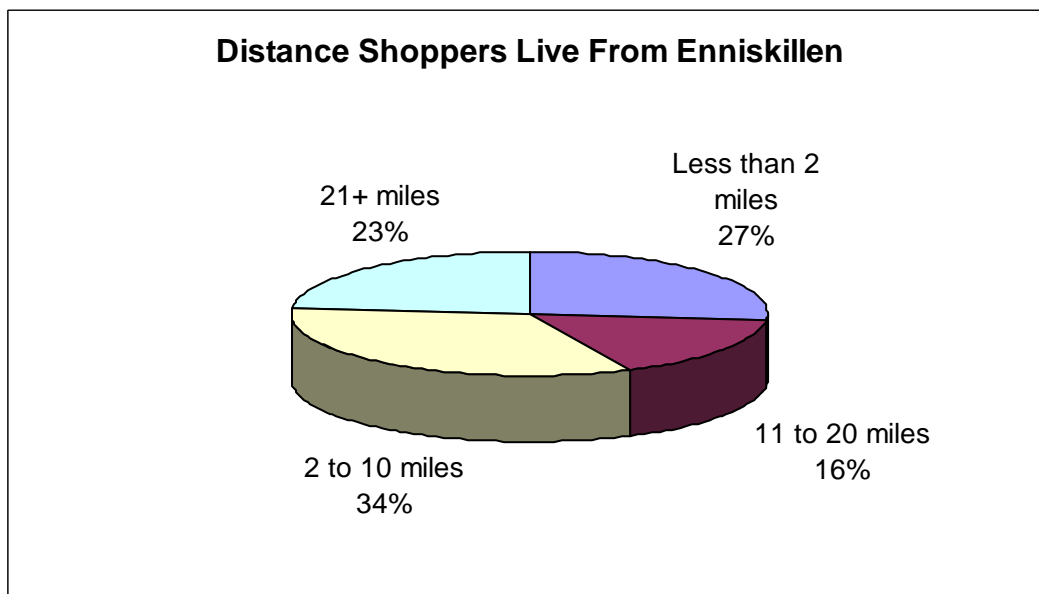
**Chart 5: Main Reason for Shopping**



## 6.0 Residential Location of Shoppers

**6.1** This can be further analysed from the question relating to distance shoppers travel to Enniskillen. When asked how far from Enniskillen Town Centre shoppers live, 27% of respondents stated that they live less than 2 miles away and 34% live between 2-10 miles away. There are also quite a high percentage of shoppers that live further way, with 16% travelling between 11-20 miles and 23% travelling over 21 miles. Not surprisingly, this shows that Enniskillen is attractive to local people and also people that live a considerable distance from the town and are part of a large catchment area.

**Chart 6: Distance Shoppers Live from Enniskillen**



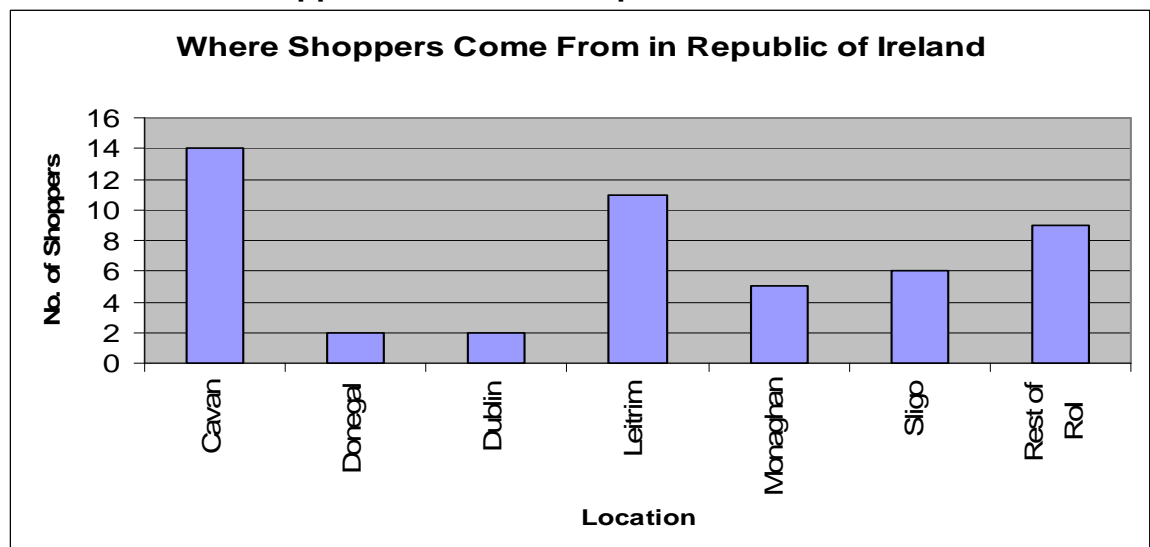
**6.2** When shoppers were asked where they came from, it was noticeable that they covered a wide geographical area, which also indicates that

Enniskillen is an important and attractive town to shop. By using post codes, shoppers could be categorised into the nearest town / settlement in Northern Ireland. For shoppers from the Republic of Ireland, shoppers were categorised by county. Although, a high number of shoppers surveyed (137 people) were from Enniskillen, the other 263 people came from elsewhere in County Fermanagh, as well as from other counties both in Northern Ireland and the Republic of Ireland. In Northern Ireland, shoppers came from as far away as Bangor, Newcastle, Belfast, Derry, and Lisburn and in the Republic of Ireland shoppers came from the nearby counties of Cavan, Leitrim, Monaghan, Sligo and Donegal, as well as from Dublin and a wider area.

**Chart 7: Where Shoppers are From in Northern Ireland**



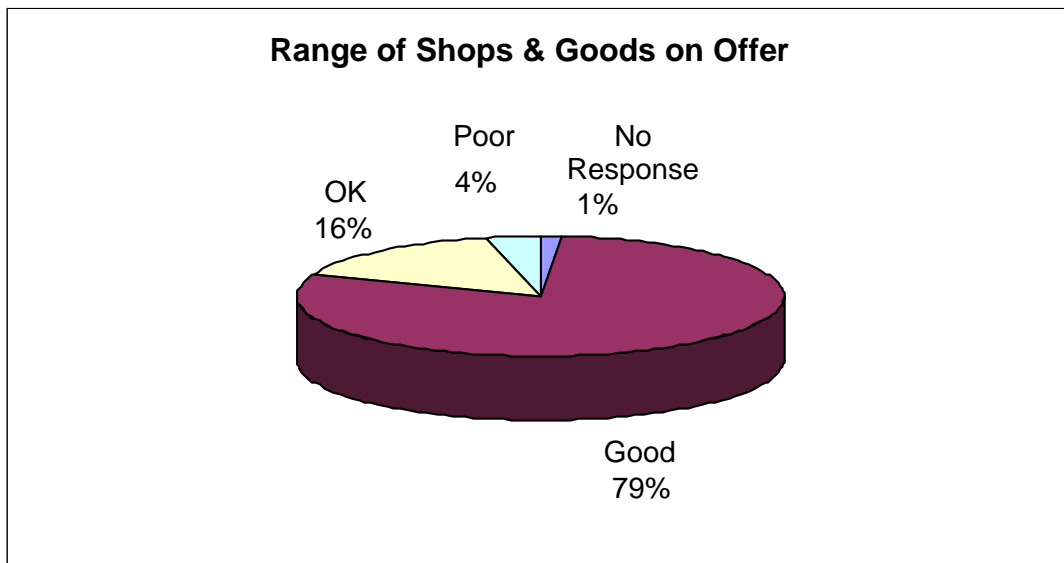
**Chart 8: Where Shoppers are From in Republic of Ireland**



## 7.0 Range of Shops & Goods

7.1 When shoppers were asked how they would describe the range of shops and goods on offer, they were asked to state if they were good, ok or poor. The majority of shoppers (79%) stated that they were very satisfied with the range available, 16% stated that they were OK and only 4% stated that the range of shops and goods on offer was poor. The main reason in relation to the poor response was that more clothes shops are needed with suggestions for Primark and more 'big-named chain stores'. There was also a response to have another shopping complex and a food court in the Erneside Shopping Centre and the need for a wedding shop.

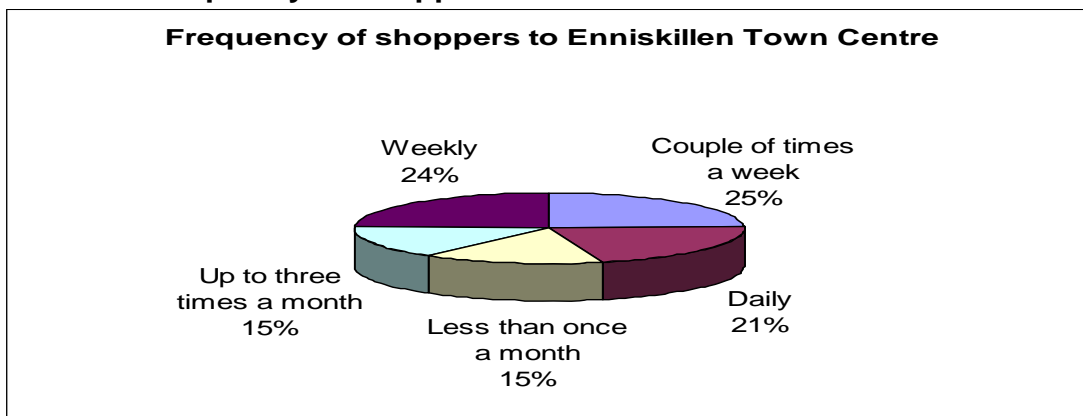
**Chart 9: Range of Shops/Goods on Offer in Enniskillen**



## 8.0 Frequency of Shopping

8.1 In relation to how often shoppers come into Enniskillen Town Centre specifically to shop, the highest percentage (25%) stated that they shop a couple of times a week, followed by weekly at 24%, and daily at 21%. Other people came into Enniskillen less frequently with 15% up to three times a month and 15% less than once a month.

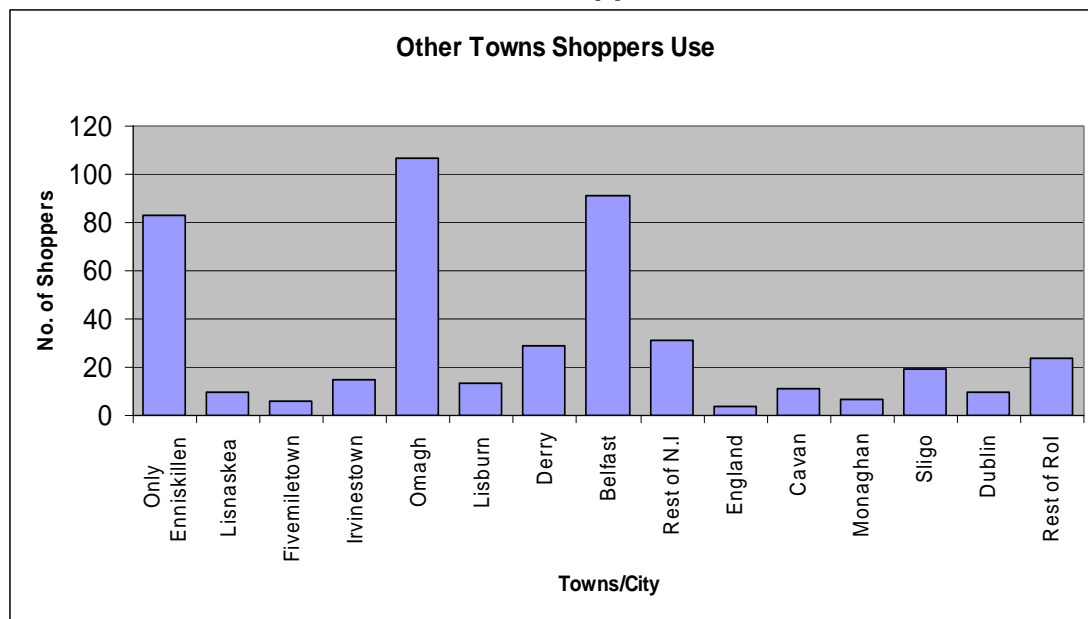
**Chart 10: Frequency of Shoppers to Enniskillen Town Centre**



## 9.0 Alternative Shopping Towns

**9.1** The shoppers were also asked about shopping habits and specifically if they would shop in any other town other than Enniskillen. It was interesting to note that 83 shoppers from 400 shoppers surveyed stated that they only shop in Enniskillen and don't shop anywhere else. This confirms that the town can cater for a wide variety of needs. However, of the respondents that do shop elsewhere, Omagh was the most popular choice as stated by 107 shoppers as the town they would go to shop other than Enniskillen. This was followed by Belfast with 91 shoppers and Derry with 29 shoppers. There are a number of other towns that people go to shop including Irvinestown, Lisnaskea, Fivemiletown, Kesh, Ballinamallard, Lisburn, Newry, Armagh, Portadown and Ballymena. Shoppers also use the Republic of Ireland and towns such as Cavan, Sligo, Monaghan, Galway, Blanchardstown, Longford, Letterkenny, Ballyshannon, Bundoran, Dundalk and Carrick-on-Shannon. Some of these have been classified in the chart into the Rest of Northern Ireland and the Rest of the Republic of Ireland. A small number of people stated Dublin, London and New York.

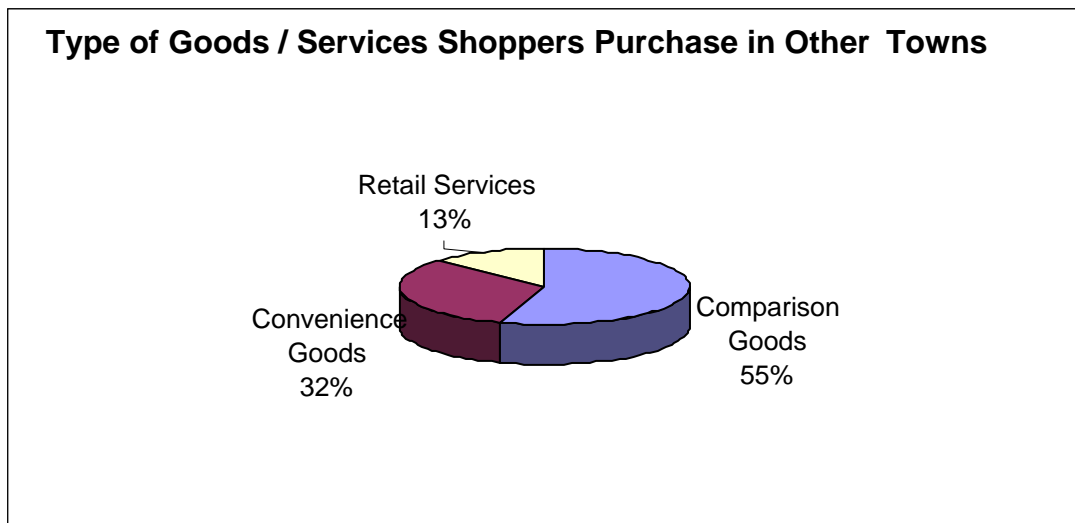
**Chart 11: Alternative Towns which Shoppers Use**



## 10.0 Goods / Services that Shoppers Purchase in Alternative Towns

**10.1** The shoppers who use other places to shop mostly buy comparison goods (55%) followed by convenience goods (32%) and retail services at (13%). Therefore, it can be concluded that shoppers in Enniskillen who also shop elsewhere cover a wide area in both Northern Ireland and the Republic of Ireland and mostly buy comparison goods.

**Chart 12: Type of Goods / Services Purchased in Alternative Town**



**11.0 Reason for Shopping in Alternative Town**

**11.1** In terms of the main reason for shopping in other places, most respondents stated that it had a ‘good choice of shops’, followed by the town or city being ‘local and handy’. The other reasons included ‘having the right shops’, ‘being used to it’ and ‘easy to access’. A number of other reasons for shopping elsewhere included shoppers living there, a day out, somewhere different, good value for money, visiting family, and more variety.

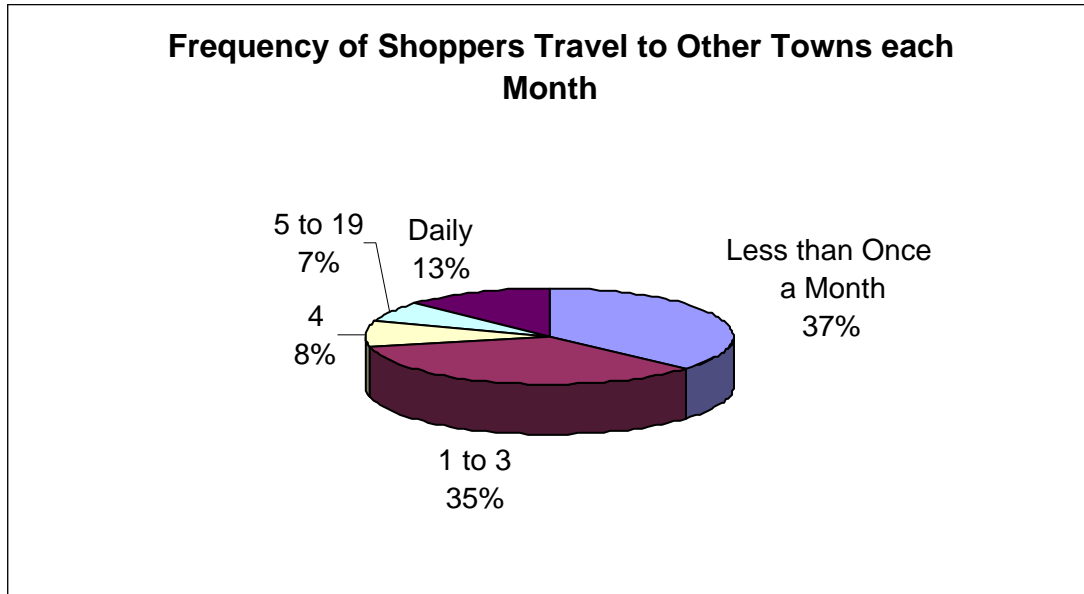
**Chart 13: Main Reason for Shopping in Alternative Town**



## 12.0 Frequency of Shopper Travel to Alternative Town

12.1 When shoppers were asked how often per month they go there, the majority of shoppers (37%) stated less than once a month and 35% stated 1-3 times a month. Few shoppers shop in other places on a more frequent basis.

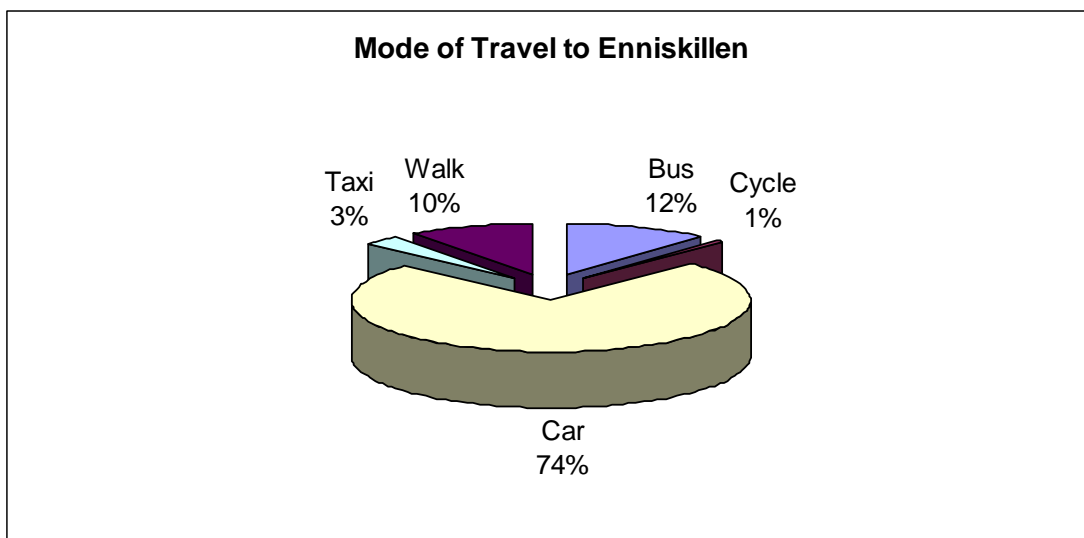
Chart 14: Frequency of Shoppers to Alternative Town



## 13.0 Mode of Travel to Enniskillen

13.1 When asked how shoppers normally travel to Enniskillen, the majority (74%) come by car. A small percentage at 12% travel by bus and the others come by taxi, walk and cycle.

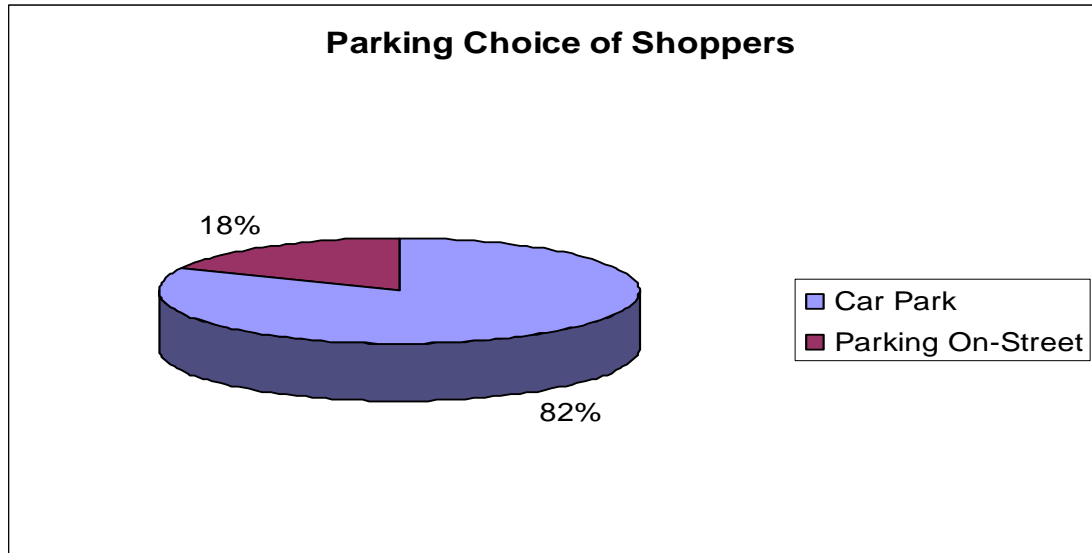
Chart 15: Mode of Travel



## 14.0 Parking

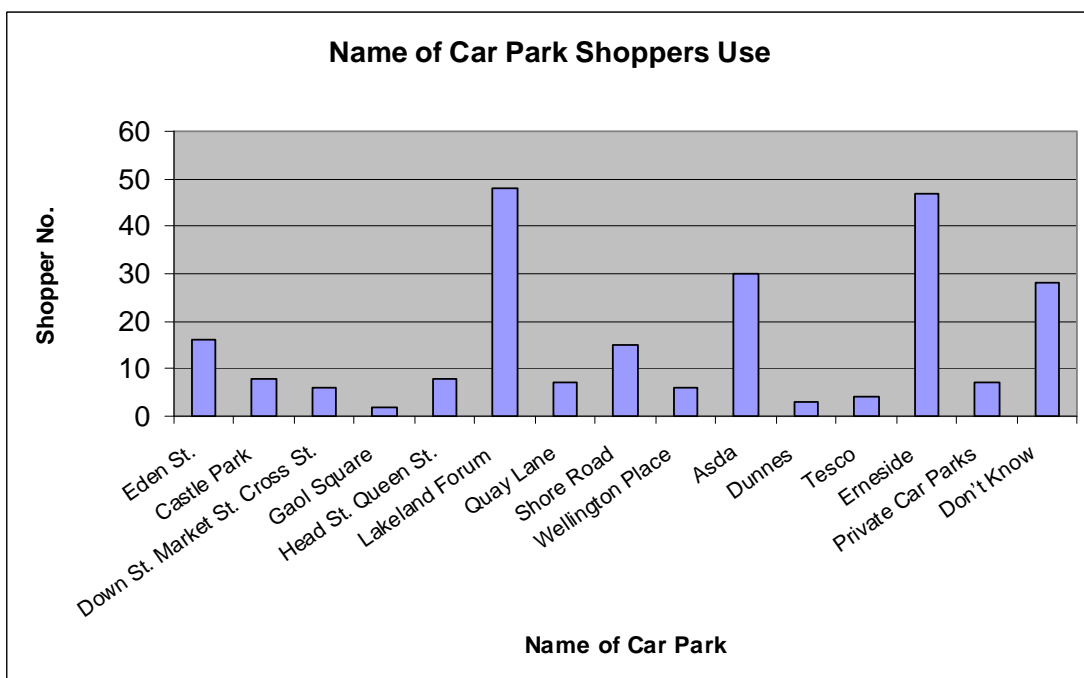
14.1 Of the shoppers who travel by car, the majority (82%) park in a car park, with only 18% parking on-street.

Chart 16: Parking Choice



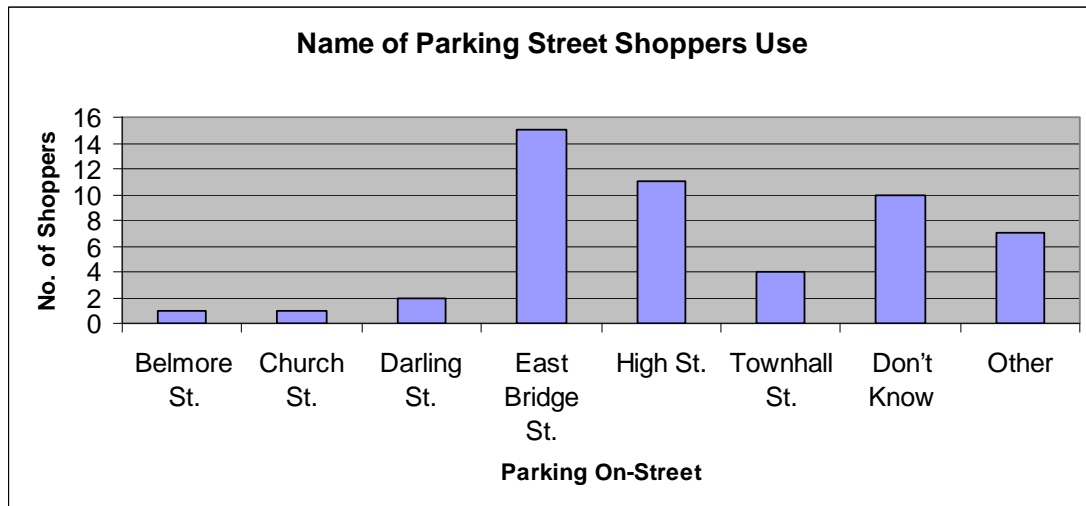
14.2 Of the shoppers who use a car park, the Lakeland Forum, Erneside and Asda are the most popular. A number of people did not know the name of the car park they use. Other car parks used include Eden Street, Castle Park, Down Street / Market Street / Cross Street, Gaol Square, Head Street / Queen Street, Quay Lane, Shore Road and Wellington Place. A number of people use the supermarket car parks at Dunnes and Tesco and some private car parks mostly connected with place of work.

Chart 17: Location of Car Parks



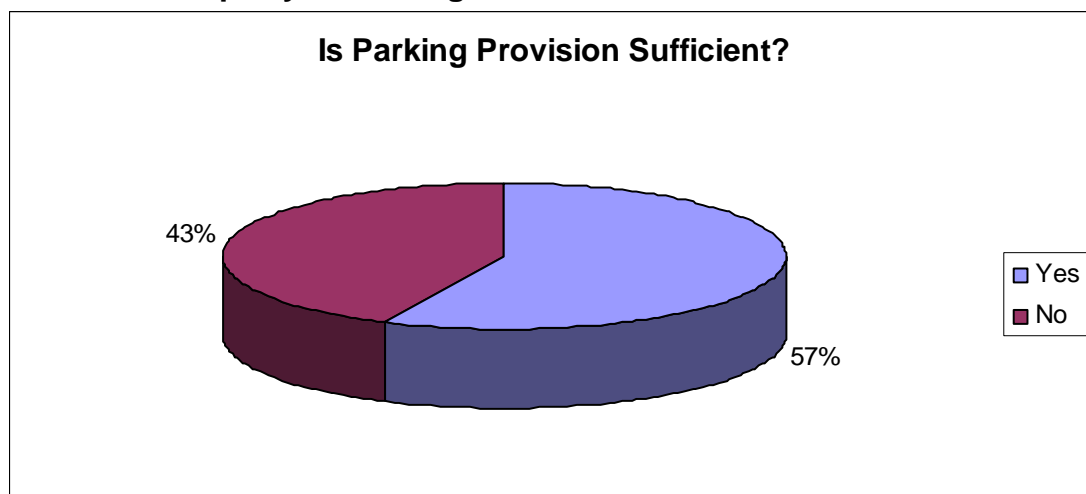
**14.3** Of the shoppers who park on-street, the most popular locations are East Bridge Street, High Street and Townhall Street. Other shoppers use Belmore Street, Church Street, Darling Street. A number of people did not know the name of the street they parked in.

**Chart 18: Location of On-street Car Parking**



**14.4** The key question asked to those shoppers who used the car to get to Enniskillen was whether they felt parking provision was sufficient. Whilst 57% of shoppers were satisfied, a high percentage of shoppers (43%) stated that parking provision is not good.

**Chart 19: Adequacy of Parking**

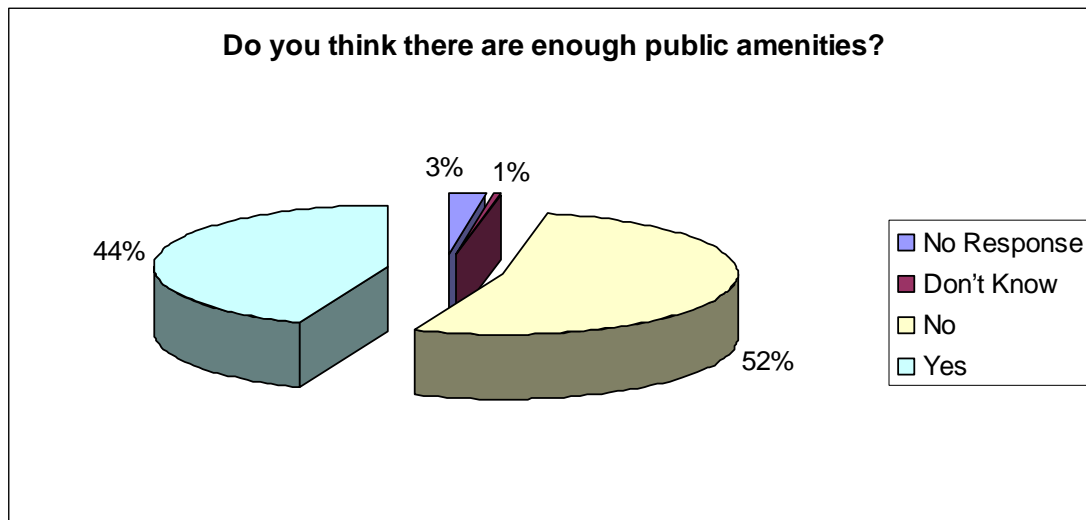


**15.0 Public Amenities**

**15.1** In relation to the question 'do you think there are enough public amenities in Enniskillen Town Centre e.g. toilets, bins, seats, handrails,

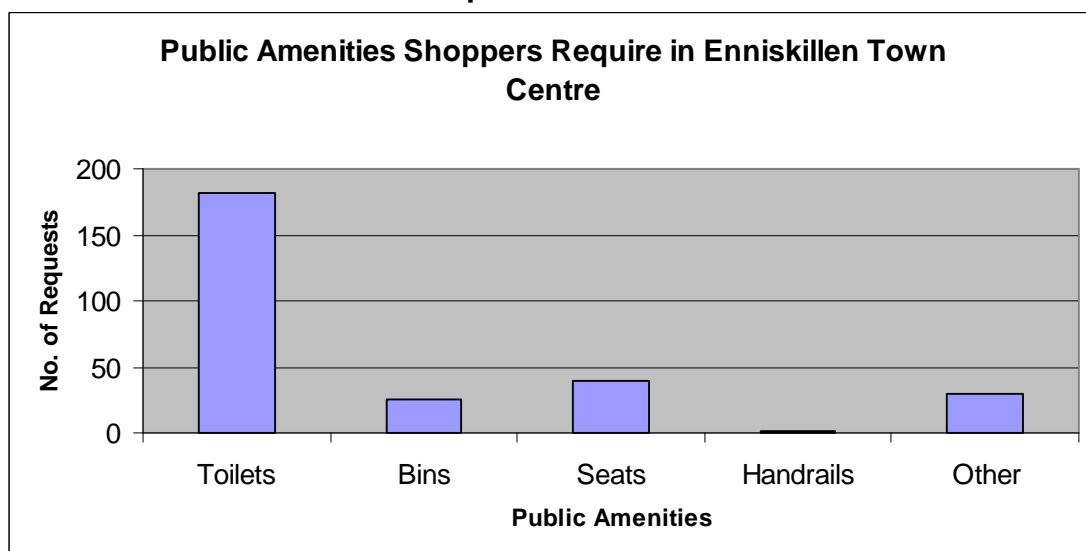
streetlights?', 212 shoppers (52%) answered 'no' whilst 176 shoppers (44%) answered 'yes' that there are enough public amenities.

**Chart 20: Public Amenities**



**15.2** It was important to find out from the shoppers that answered 'no' (to the question on public amenities) what they felt is required. There were 182 requests to have toilets, 40 requests for more seats and 26 requests to have more bins with only 1 request to have handrails. There were 29 requests for other public amenities including more parking / free parking / disabled parking, child facilities such as play facilities and parent changing facilities, more / better signage, facilities for disabled people, lower pavements and cycle lanes.

**Chart 21: Public Amenities Required**

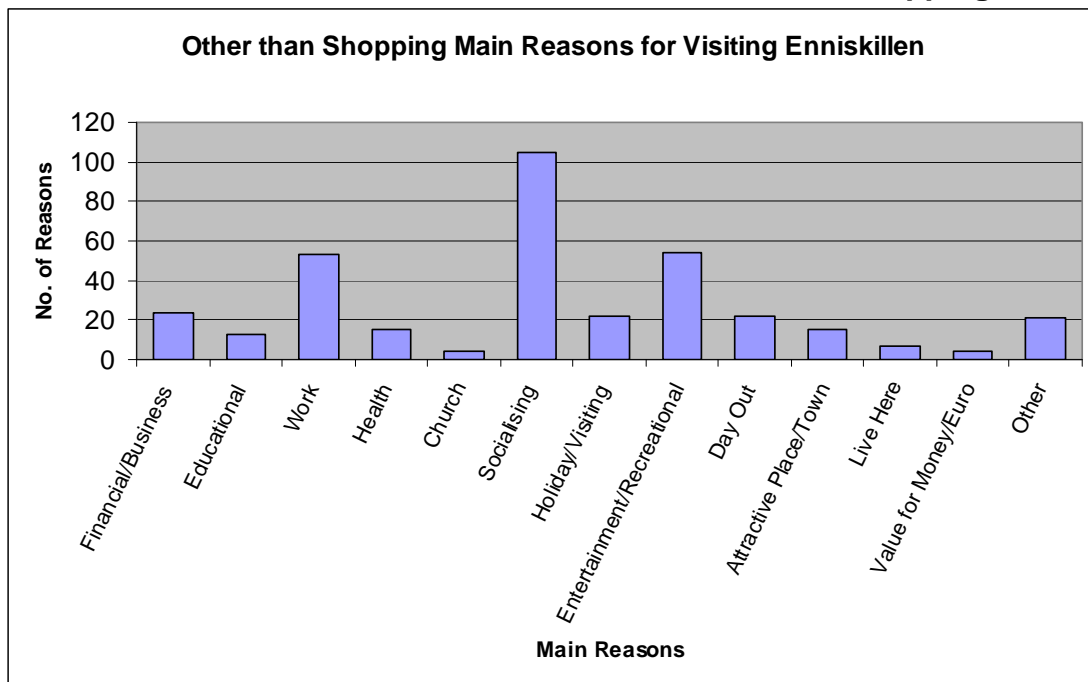


## 16.0 Main Reasons Other Than Shopping to go to Enniskillen

**16.1** It was important to find out what other facilities or services also brought people to Enniskillen Town Centre, complementary to its shopping offer. The

main reasons identified were socialising, with 105 responses. This was followed by entertainment / recreation / leisure with 54 responses identified including cinema, leisure centre, golf club, castle and for a walk. 53 responses identified that the main reason other than shopping was work. Other main reasons given were for carrying out financial activities such as the bank, post office, solicitors, for health reasons with visit to doctors / hospital / dentist. A number of people came to Enniskillen for a day out and to take advantage of the exchange rate between the Euro / Pound. Some people came to Enniskillen as it is an attractive place with nice scenery, townscape and the lakes. Other reasons given other than shopping included, to go to the church, to go to school and that they live here.

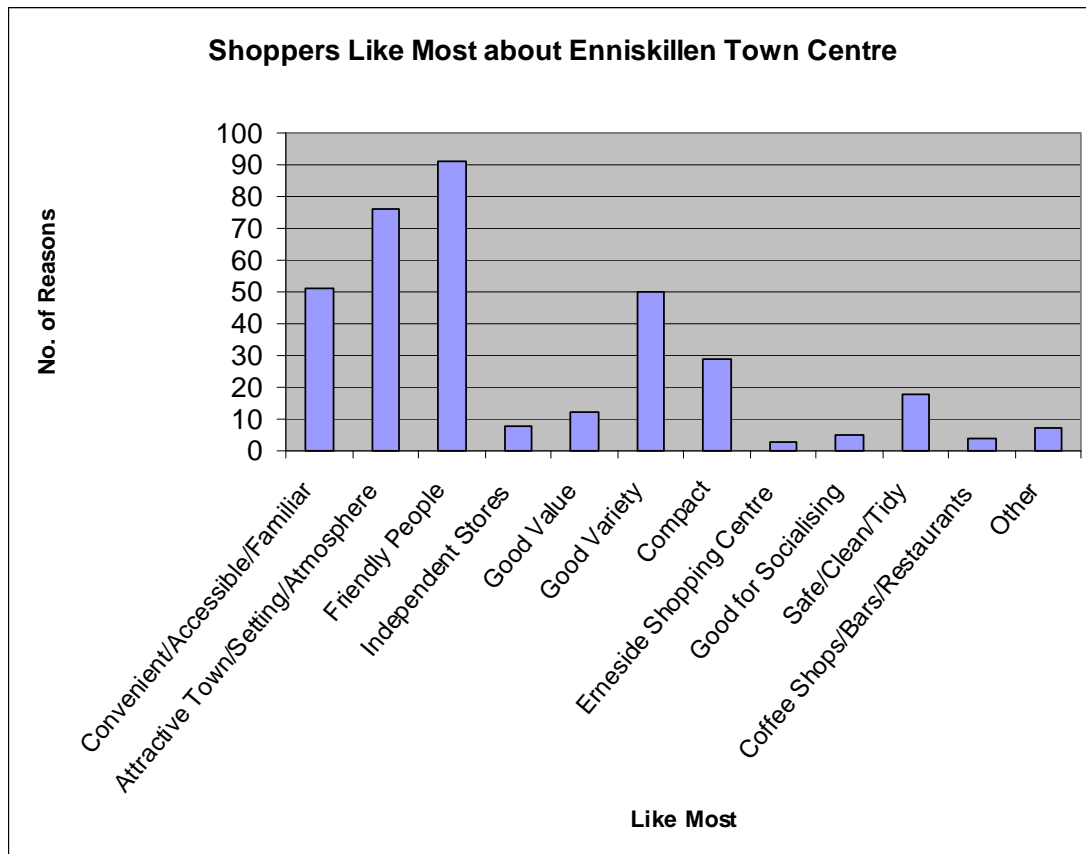
**Chart 22: Main Reasons to Visit Enniskillen Other Than Shopping**



## 17.0 Like Most about Enniskillen Town Centre

17.1 Shoppers were asked what they like most about Enniskillen Town Centre; the key themes, in order of the number of reasons given, include the friendly people, followed by Enniskillen being an attractive town with attractive setting / atmosphere and historic character. The third most popular answer was that the town was convenient / accessible / familiar. This was followed by the reason that the town offers a good variety of shops and services. A number of other things people like about Enniskillen included the traditional and independent shops, that the town was compact with all shops on one street, that the town was safe, clean and tidy. Some shoppers liked the coffee shops, bars and restaurants and the Erneside Shopping Centre. The town was also seen as good value for money and had good tourist attractions being a nice town and setting with the lakes, jetties, boats and the castle. Some 40 shoppers from the 400 shoppers surveyed were not able to say what they specifically liked about Enniskillen Town Centre.

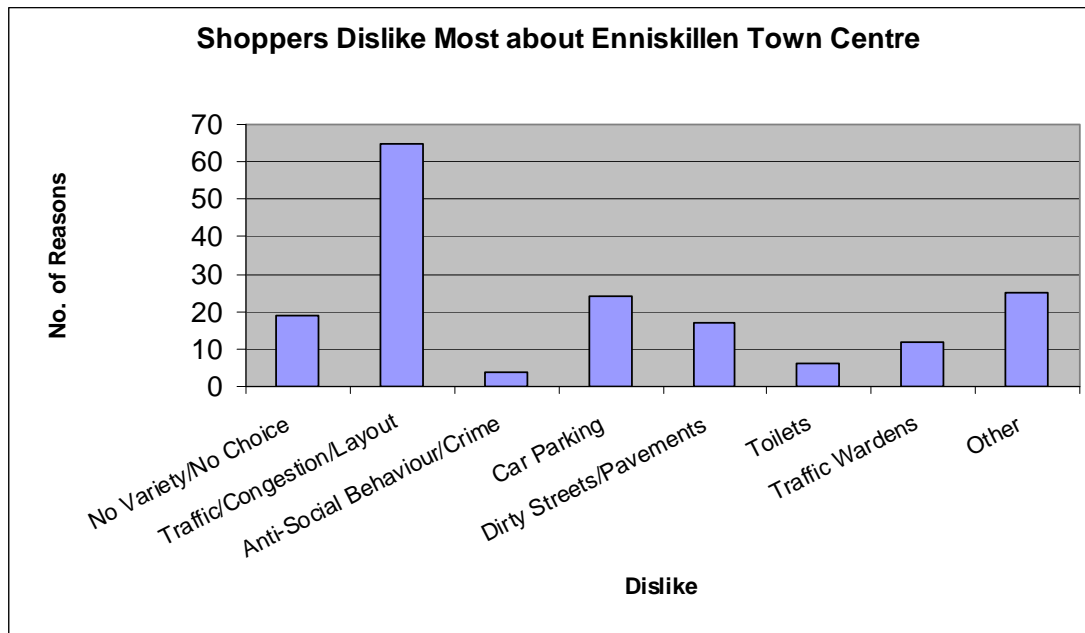
**Chart 23: Shoppers Like Most about Enniskillen Town Centre**



**18.0 Dislike Most about Enniskillen Town Centre**

**18.1** When the question was asked about the things shoppers dislike most about Enniskillen Town Centre, a wide range of problems were highlighted. The major dislike is with traffic, congestion and layout of road system with 65 reasons given. Opinions ranged from congestion on Sligo Road, congestion with through traffic, constant traffic jams, too much traffic, road layout confusing, traffic lights slow at changing, cars parked on both sides of Main Street and a lot of traffic around the main town. Following on from this dislike, the next most important dislike was car parking with 24 reasons given. The problems ranged from not enough parking spaces, not enough free parking, not enough pedestrian areas and too much parking around the Town Centre. Other dislikes in Enniskillen which people referred-to include dirty streets / pavements, traffic wardens, lack of toilets, no variety / choice and anti-social behaviour. A few shoppers felt that Enniskillen was isolated from the rest of Northern Ireland and less people go into the Town Centre now because of the location of Asda and Tesco. It was also felt that the Erneside Shopping Centre is quite far away from the Town Centre. This would highlight the impression that although Erneside is within the designated Town Centre, some people feel it is not part of the Town Centre.

**Chart 24: Shoppers Dislike Most about Enniskillen Town Centre**



## 19.0 Improvements Shoppers Require

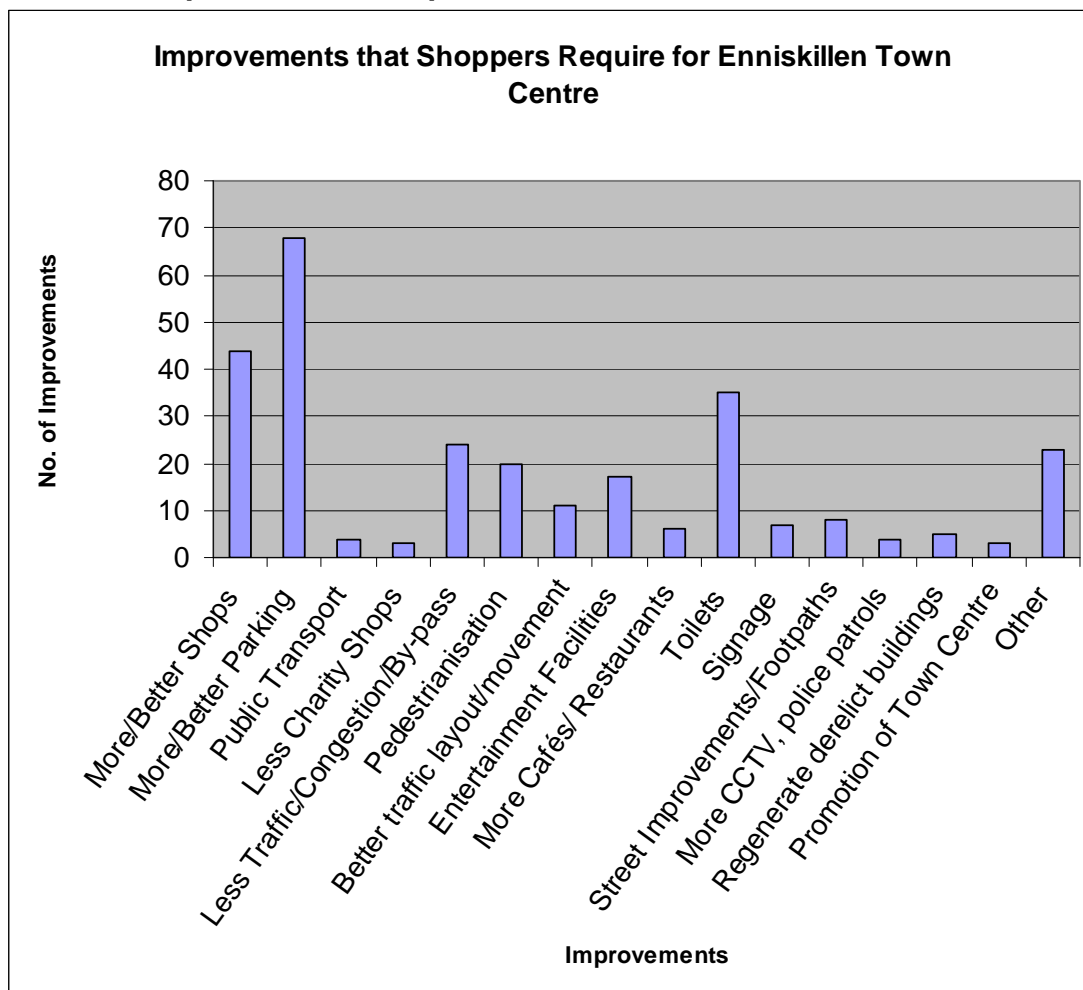
**19.1** Having asked the question about things shoppers dislike, it was then important to ask what improvements Enniskillen requires. Three key areas for improvement put forward were:

1. more / better parking is needed
2. need for more / better shops
3. need for public toilets.

Other important improvements proposed involve better traffic flow especially around the Bus Depot and Dunnes Stores, need for pedestrianisation of Town Centre, more entertainment facilities, less charity shops, more cafés / restaurants, more / better signage to car parks and toilets and especially to tourist attractions and the Buttermarket, street improvements, more cctv, regenerate derelict buildings such as the old cinema and more promotion of the town with events proposed.

Other suggestions put forward included a by-pass and bridge for the town, a multi-storey car park, park-and-ride facilities, better and more big-named shops with the need for Primark, Starbucks, Sainsburys, a music shop, shops for tourists, the need for entertainment and leisure facilities such as a bowling alley and skate park, eating places on waterfront, directions to public amenities, good book shops and more housing in Town Centre. It was even suggested that the town should be more compact with shops closer together. It was highlighted that Asda and Tesco are badly located which is causing traffic congestion. There was a request to increase the size of the Erneside Shopping Centre and that new shops should be independent and not chain stores. It was also warned that pedestrianisation could have a negative impact and this would take people away from the Town Centre.

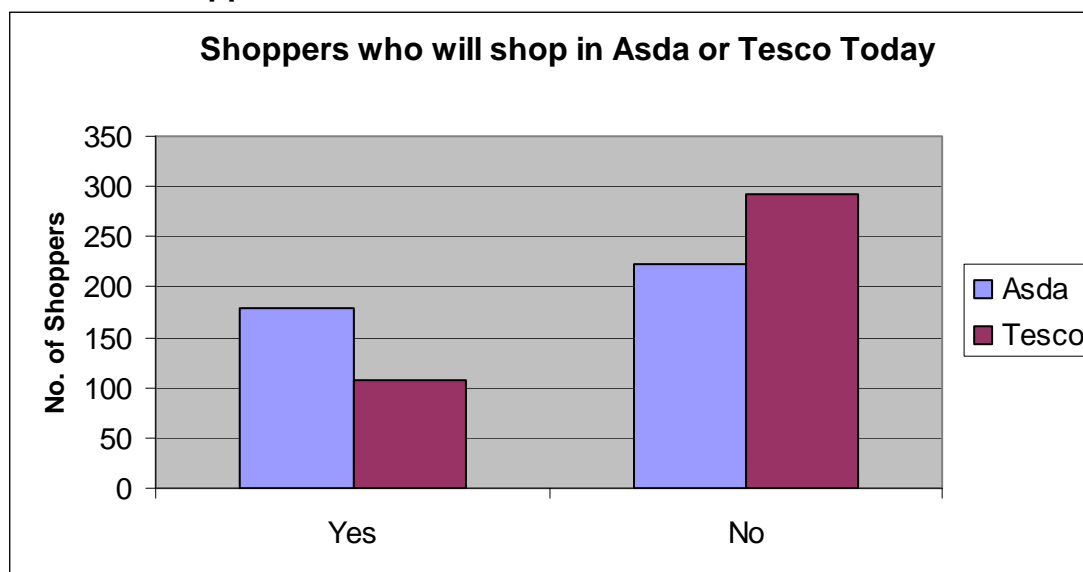
**Chart 25: Improvements Required for Enniskillen Town Centre**



## 20.0 Shopping in Asda and Tesco

**20.1** In order to assess the linkage between Asda / Tesco and the Town Centre, it was important to ask the question of the shoppers using the Town Centre if they have or will shop in Asda or Tesco on the same day. It was found that whilst a significant proportion of the Town Centre shoppers would also visit Asda / Tesco (36%), the majority from the Town Centre shoppers (64%) would not be going to these out-of-centre stores. Therefore, this sample survey suggests that there is not a particularly strong linkage between the existing Town Centre and these stores, especially not with the Tesco site.

**Chart 26: Shoppers in Asda / Tesco**



### **Summary of Key Findings**

- Shoppers surveyed cover a wide age group with a slightly higher number of 16-24 and 45-54 age groups.
- The majority of shoppers surveyed were female.
- A high number of shoppers come from Enniskillen. However, shoppers that do not live in Enniskillen come from a wide catchment area in both Northern Ireland and the Republic of Ireland from as far as Belfast and Dublin.
- Comparison goods are the most popular shopping purchase in Enniskillen Town Centre.
- The highest numbers of shoppers go to Enniskillen to shop a couple of times a week, followed by weekly and then daily.
- The main reason for shopping in Enniskillen Town Centre is that it is local and handy and that it also has a good choice of shops.
- 79% of shoppers surveyed said that the range of shops and goods on offer was good. Only 4% of shoppers said it was poor.
- From the 400 shoppers surveyed in the Town Centre, more said they would not shop in Asda / Tesco that day as opposed to those that would. This suggests that there is not a strong linkage between the Town Centre and these stores, especially with Tesco.
- A high number of shoppers would only use Enniskillen for shopping and would not use any other town. This shows that Enniskillen can cater for a variety of needs and is an attractive town to shop. From the people who would shop in another town, Omagh was the most popular location to shop, followed by Belfast and Derry. Shoppers also go to a number of towns in the Republic of Ireland, with Sligo, Cavan and Monaghan being popular choices. However, shoppers mostly only use these towns at a frequency of less than once a month followed by one

- The main reason for shopping in alternative towns is the good choice of shops followed by being local and handy. This suggests that a high number of people that come to Enniskillen live in other towns.
- A high percentage of shoppers live within 10 miles of Enniskillen. However, a high percentage of shoppers also live over 20 miles away. This indicates that Enniskillen has a large catchment area and is an important attractive town for shoppers from both Northern Ireland and the Republic of Ireland.
- The majority of shoppers travel to Enniskillen by car. Most of these shoppers park in a car park as opposed to on-street. The most popular car parks are the Lakeland Forum, Erneside Shopping Centre and Asda. The most popular on-street parking is on East Bridge Street and High Street. Just over half of the shoppers who travelled by car (57%) said parking provision is sufficient with a high percentage (43%) stating that parking is insufficient.
- Over half of the shoppers surveyed (52%) said that there are not enough public amenities. The majority of these require public toilets.
- The main reasons to bring people to Enniskillen Town Centre other than shopping are for socialising followed by entertainment / recreation / leisure activities and then work / employment.
- The main things shoppers like about Enniskillen are the friendly people, followed by the town's attractive setting and atmosphere, followed by the town being convenient, accessible and familiar.
- The main things shoppers dislike about Enniskillen are the traffic, congestion and traffic / road layout, followed by car parking.
- The main improvements needed for Enniskillen are more / better parking, followed by more / better shops and then provision of public toilets.

**Annex 1 - Copy of Shopper Survey Form**

## ENNISKILLEN TOWN CENTRE - SHOPPER SURVEY - June 2010

<b>SHOPPERS ONLY</b>		<b>Respondent Number:</b>					<b>Yes</b>	<b>No</b>	<b>Comment</b>
Q1. What are you shopping for in Enniskillen Town Centre today?	Convenience goods – (daily small essentials)								
	Comparison goods – (occasional purchases)								
	Retail services – (non-product purchases)								
Q2. How often do you come into Enniskillen Town Centre specifically to shop?	Less than once a month								
	Up to three times a month								
	Weekly								
	Couple of times a week								
	Daily								
Q3. What is your main reason for shopping in Enniskillen Town Centre?	Local & handy								
	Has a good choice of shops								
	Has the right shops (write in if named)								
	Easy to access (no problem getting to and back)								
	Used to it – habit								
	Other (write in)								
Q4. How would you describe the range of shops and goods on offer?	(Enter: Good - OK- Poor)								
Q4A. If POOR what is needed?									
Q5. Have you / Will you shop today in:						ASDA	Tesco		
Q6. Other than Enniskillen, what other town would you shop in most?									
Q7. How often per month do you go there?	< 1	1 to 3	4	5 to 19	Daily				
Q8. What do you buy there?	Convenience goods – (daily small essentials)								
	Comparison goods – (occasional purchases)								
	Retail services – (non-product purchases)								
Q9. What is your main reason for shopping there?	Local & handy								
	Has a good choice of shops								
	Has the right shops (name)								
	Easy to access (no problem getting to and back)								
	Used to it – habit								
	Other (write in)								
Q10. How far from Enniskillen Town Centre do you live?	< 2 miles	2 to 10	11 to 20	21+					
Q11. How would you normally travel to Enniskillen Town Centre?	Walk	Cycle	Taxi	Bus	Motorbike	Car			
If Car/Motorbike: Where would you normally park?	On-street (write street name)								
	Car park (write car park name)								
Is the parking provision sufficient?	(Enter "y" or "n")								
Q12. Do you think there are enough public amenities in Enniskillen Town Centre - e.g. toilets, bins, seats, handrails, streetlights, etc.?	(Enter "y" or "n")								
Q12A. If NO what is required?									
Q13. Other than shopping, what are the main reasons to bring you into Enniskillen Town Centre?									
Q14. What do you like most about Enniskillen Town Centre?									
Q15. What do you dislike most about Enniskillen Town Centre?									
Q16. What improvements would you like to see for Enniskillen Town Centre? (write in)									
Q17. Any other comments?									
Q18. Age Group	16 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+			
Q19. Gender						Male	Fem		
Q20. Post Code (or Town / County)									
<b>Date &amp; Time:</b>									
<b>Location:</b>									
<b>Interviewer:</b>									

## RETAILERS' VIEWS, ENNISKILLEN TOWN CENTRE, MAY 2010

### 1.0 Introduction

1.1 As a requirement of PPS 5 (Retailing and Town Centres) in carrying out a Town Centre Health Check, a survey was undertaken to obtain the views of existing retailers in Enniskillen Town Centre.

### 2.0 Survey Method

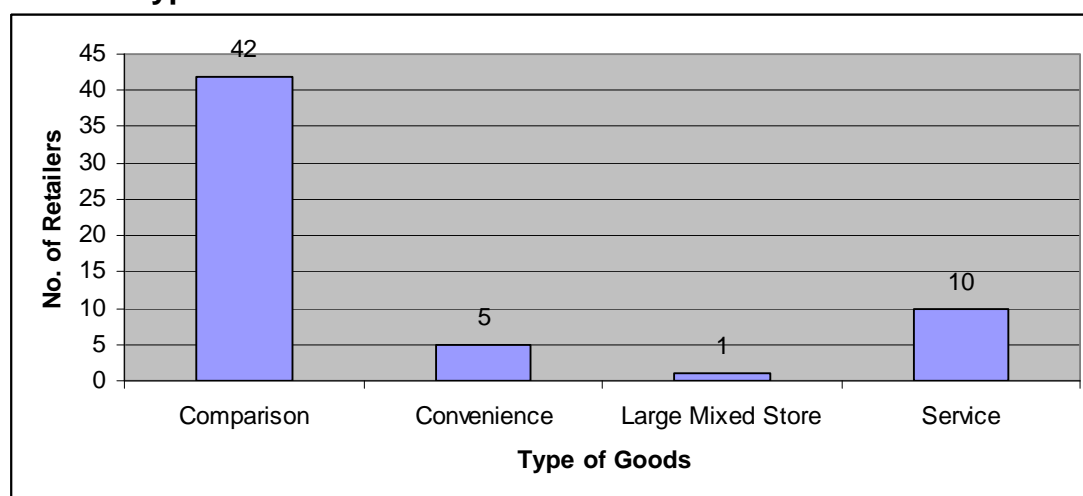
2.1 Two hundred and forty five surveys were hand delivered to all the retailers located within Enniskillen Town Centre, as well as the Asda and Tesco stores. The surveys were delivered on Tuesday 11<sup>th</sup> and Thursday 13<sup>th</sup> of May 2010 and the retailers were given a period of 2 weeks to complete the survey. Each survey included a stamped addressed envelope to facilitate achieving a statistically significant amount of returns. As all retailers in the Town Centre received a survey, this sample was all-inclusive and therefore not biased by sampling methods.

2.2 The following businesses were excluded as the focus of the survey was on retailing – amusement arcades, banks and building societies, bookmakers, estate agents, insurance brokers, pubs, dentists, hotels, advice centres, accountants, health centres and libraries.

2.3 Of the two hundred and forty five surveys issued, a total of fifty eight completed surveys were returned which gave a 24% response rate. This percentage of returns provides a reasonable basis on which to give reflective views of the retailers in Enniskillen Town Centre. Not every question was answered by all respondents; therefore the figures quoted are based on the number of respondents that answered each particular question. A copy of the Survey form is attached at the end of this Chapter.

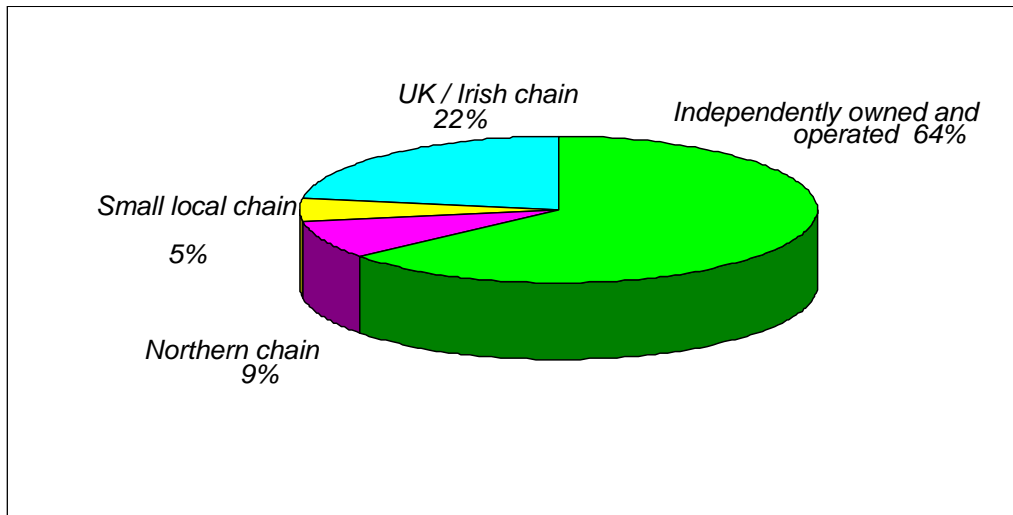
### 3.0 Retailer Profile

Chart 1: Type of Goods



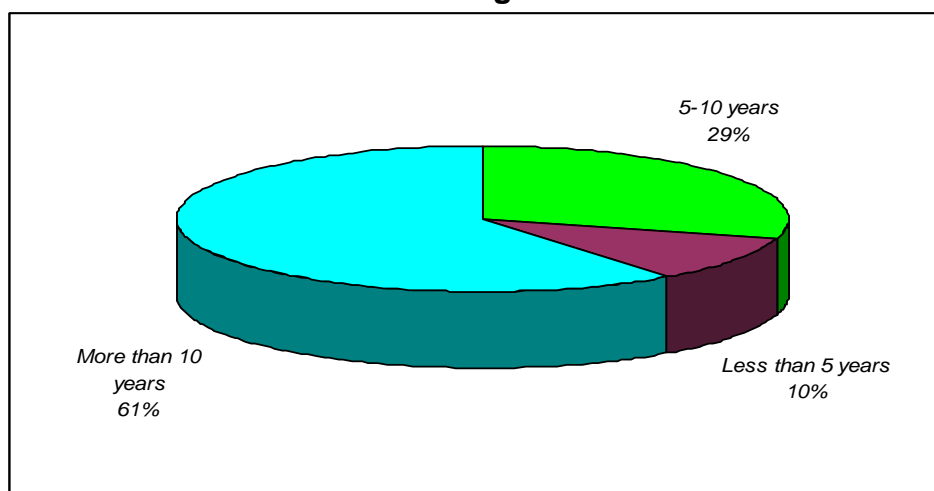
**3.1** Over 72% of the retailers who responded to the survey sold comparison goods. This includes non-food items which are classed both as bulky and other durable. This pattern is generally the predominant characteristic of Town Centre retailing. Only 17% of the retailers were involved in retail service businesses, including hairdressers, travel agents, taxi hire, etc. The remaining 11% sold convenience goods or were large mixed stores, which includes supermarkets, chemists, newsagents, etc.

**Chart 2: Type of Business**



**3.2** The largest proportion of retailers (64%) are independently owned and operated - which would reflect the perception of there being a strong independent sector in the town. The remainder are part of a chain, with UK / Irish chains being the predominant type and includes stores such as DV8, Boots and Burton. Northern Irish chain stores make up 9% of the responding retailers in Enniskillen Town Centre and these included S. D. Kells, Bargain Books and charity shops. A further 5% of retailers were classified as part of a small local chain, such as Kane Pharmacy.

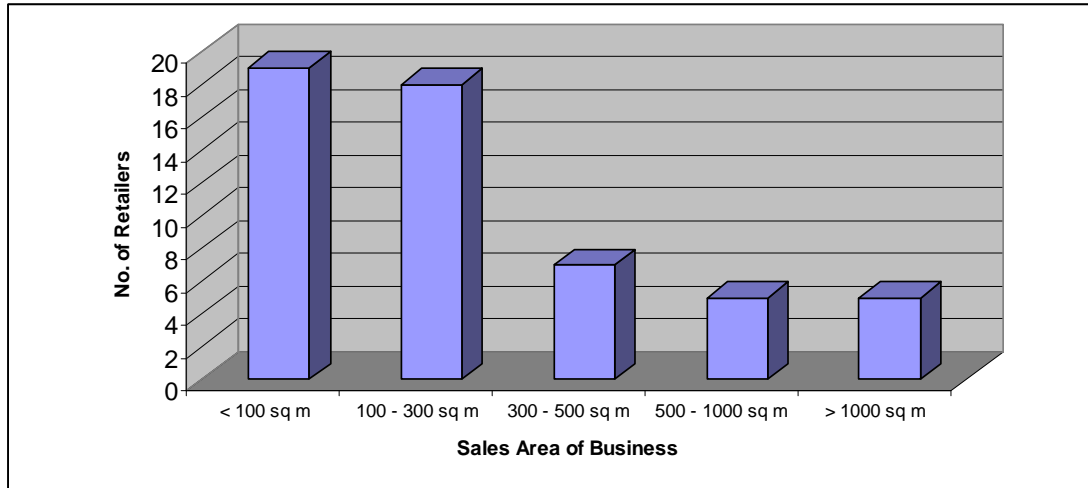
**Chart 3: Number of Years Trading in Enniskillen**



**3.3** The majority (61%) of retailers surveyed have operated their business in Enniskillen Town Centre for over ten years, with 29% trading in the town between five and ten years. The remaining 10% are in Enniskillen less than five years. These figures suggest that while the majority of retailers have been in the town over ten years, Enniskillen has also been attracting new retailers in recent years.

#### 4.0 Accommodation

**Chart 4: Sales Area**

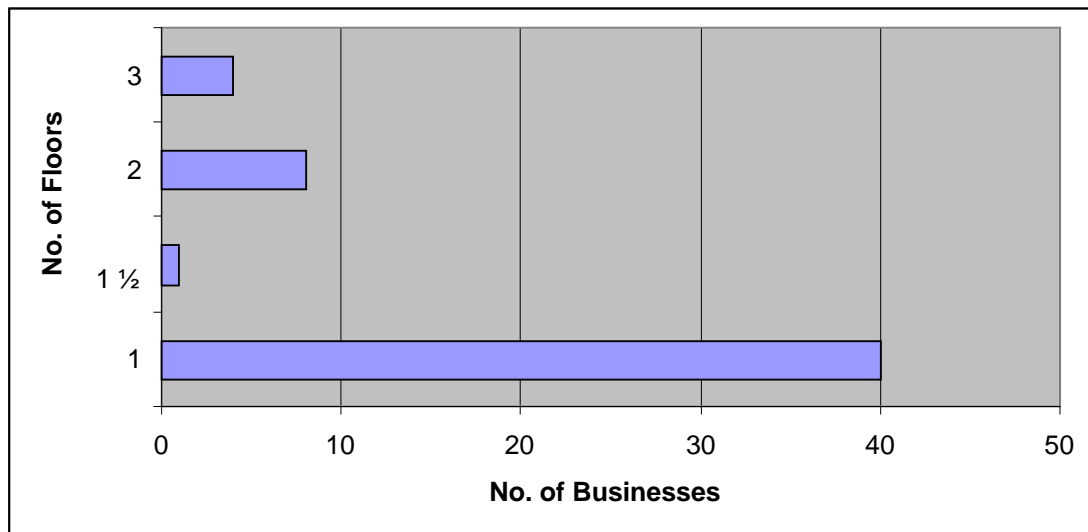


**4.1** The majority of responding retailers (35%) in Enniskillen have a sales area of less than 100m<sup>2</sup>, and 33% of retailers have a sales area of 100 – 300m<sup>2</sup>. Only 9% of retailers have a sales area of over 1,000 m<sup>2</sup>, which sell comparison and convenience goods.

**4.2** Approximately 75% of retailers lease their premises, while the remaining 25% own their property. Some 68% of retailers who sell comparison goods lease their premises, with just 32% in ownership of their premises. All those who responded in the service sector also lease their premises.

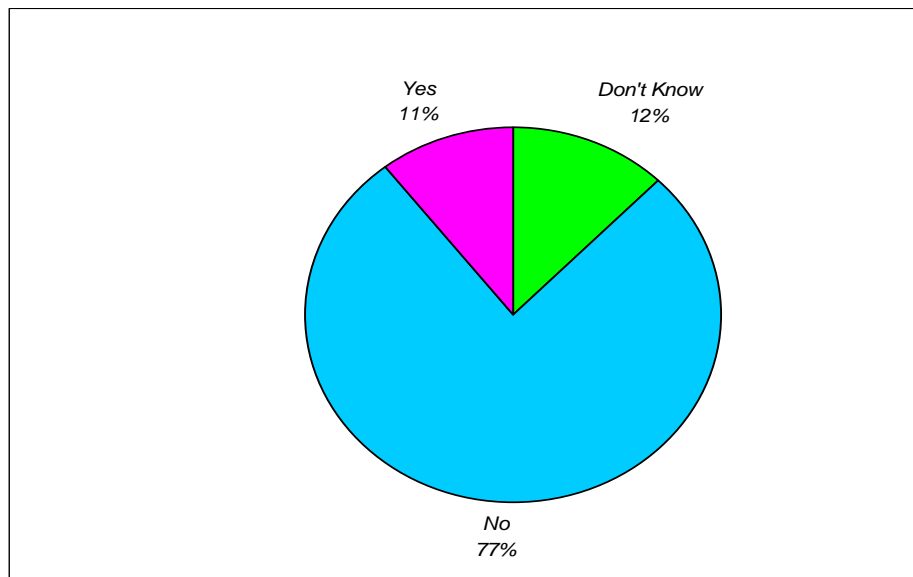
**4.3** It was found that when sales area and ownership status of the business premises were compared, all of the smallest premises (< 100m<sup>2</sup>) are leased. For premises between 100 – 300m<sup>2</sup>, 39% of retailers owned these with the remainder leasing them. In all larger premises, i.e. those over 300m<sup>2</sup>, 28% of retailers owned the premises with the rest being leased. Notably, all premises over 1,000m<sup>2</sup> are leased by retailers – no premises of this size are owned.

**Chart 5: Number of Floors**



**4.4** In regard to sales areas and number of floors, of those retailers operating their business from premises in floor area of less than 100m<sup>2</sup>, 94% are on one floor. This trend is emulated for the other floor areas, where the majority of retailers operate from just one floor. However, for those businesses with a sales area of 500 - 1000m<sup>2</sup>, just 40% operate from 1 floor with 20% operating from 2 floors and 40% operating from 3 floors.

**Chart 6: Percentage of Retailers Considering Relocation**



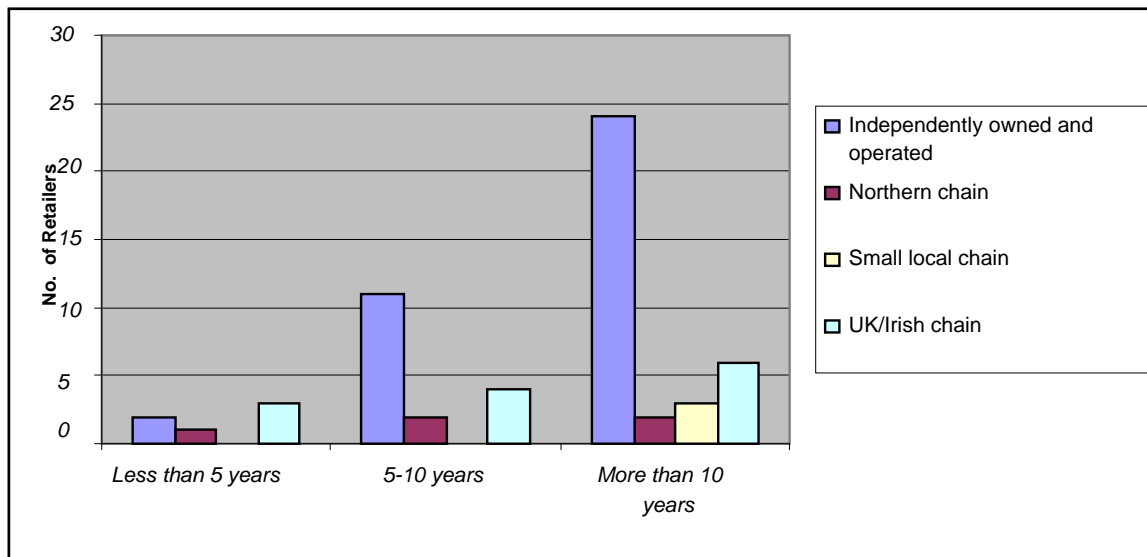
**4.5** When asked if they would consider relocating their businesses, 77% of retailers are content with their business in the town and are not considering relocating elsewhere. Of the 11% considering relocating, the main reason stated was their desire to be in a 'Town Centre location'. It should be highlighted that all of those surveyed were in the Town Centre boundary as designated in the Fermanagh Area Plan 2007. It is therefore notable that some of these retailers actually felt that they were located outside Enniskillen

Town Centre. Other reasons cited for relocation included larger premises and more footfall. Notably, one multiple retailer felt that relocation to Erneside would be better for them so that they would be with other multi-nationals in one location.

**4.6** Retailers were asked a series of questions in order to establish where their business has operated since 2005. Approximately 90% have operated from the same premises and 5% have relocated from another location, with the remainder of retailers having begun trading in the town since 2005. This suggests a relative stability of retailing in the town.

## 5.0 Business Performance & Employment

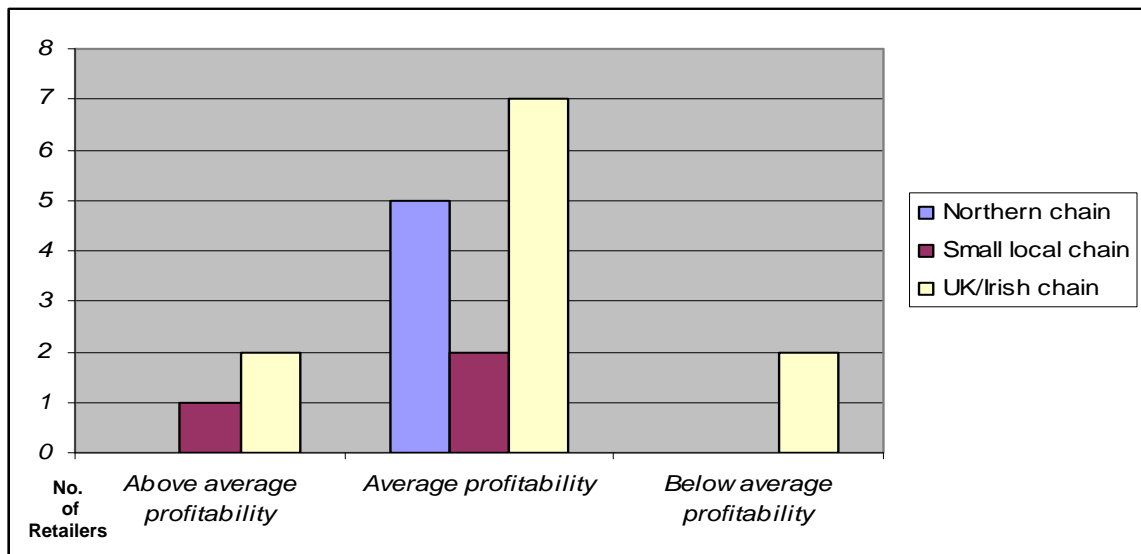
**Chart 7: Ownership of Business & Number of Years Trading in Enniskillen Town Centre**



**5.1** Six retailers in Enniskillen are only established in the town less than five years and of these, the largest group is those businesses which are identified as a UK / Irish Chain. Thirty-five retailers are operating in Enniskillen more than ten years, which are mainly independently owned and operated retailers.

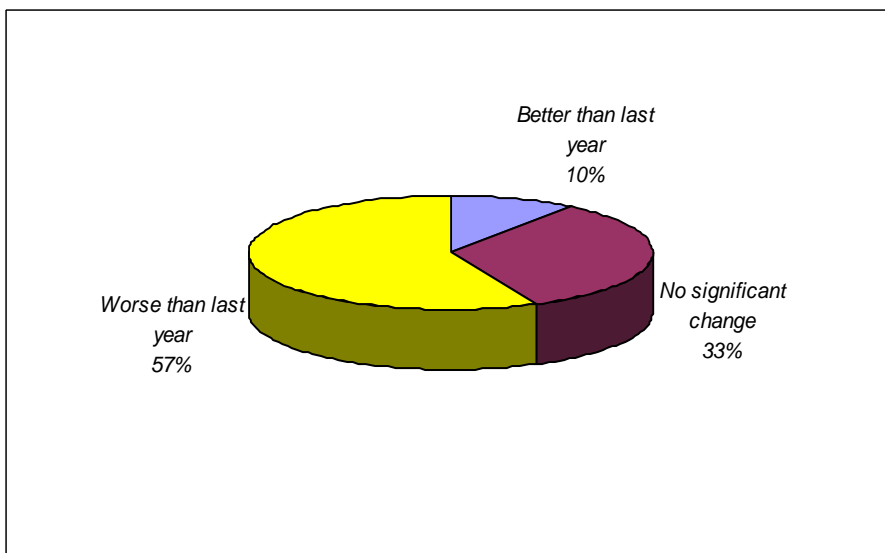
**5.2** Therefore, the last five years has seen an increase in the number of chain type / multiple stores to Enniskillen. This recent phenomenon may be attributed to new retail outlets provided at the Erneside Shopping Centre since it has been extended.

**Chart 8: Multiples & Profitability**



**5.3** Of the nineteen retailers who responded to this part of the survey and are part of a chain, 74% are achieving average profitability in Enniskillen when compared to other outlets in their chain. Some 10% are below average profitability and these consist of small local and UK / Irish chains. 16% of retailers are above average profitability and this comprises of small local chains and UK / Irish chains.

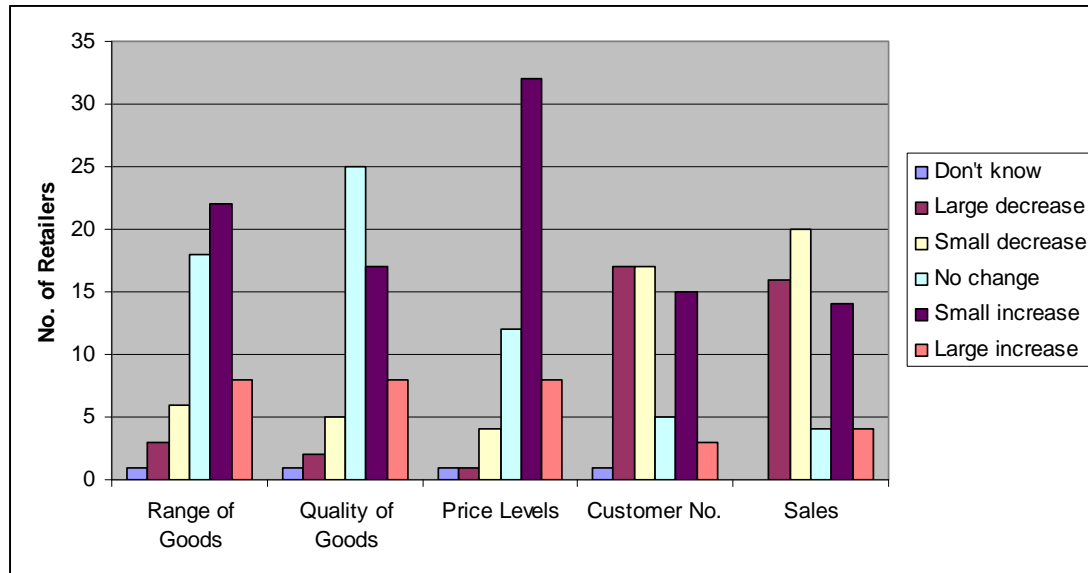
**Chart 9: Profitability of Business**



**5.4** The retailers in Enniskillen Town Centre were asked what their expectations were for the general profitability of their business for the year ahead. Over half of retailers believed that their profitability for the following year would be worse than last year, with just 10% of the opinion that profitability would be better than the previous year, whilst 33% felt that there would be no significant change to their business. The main reason for retailers' opinions of poor profitability in the year ahead was because of the

poor economic climate, as well as the loss of trade from the Republic of Ireland. For those retailers who believed that the year ahead would be better, they believed this would be due to relocation or new / refitted premises, as well as new product development. Of those who gave reasons for no significant change, the majority of retailers believed the continued unstable or poor economic climate made trading conditions more difficult.

**Chart 10: Changes in Retailing in Enniskillen since May 2008**

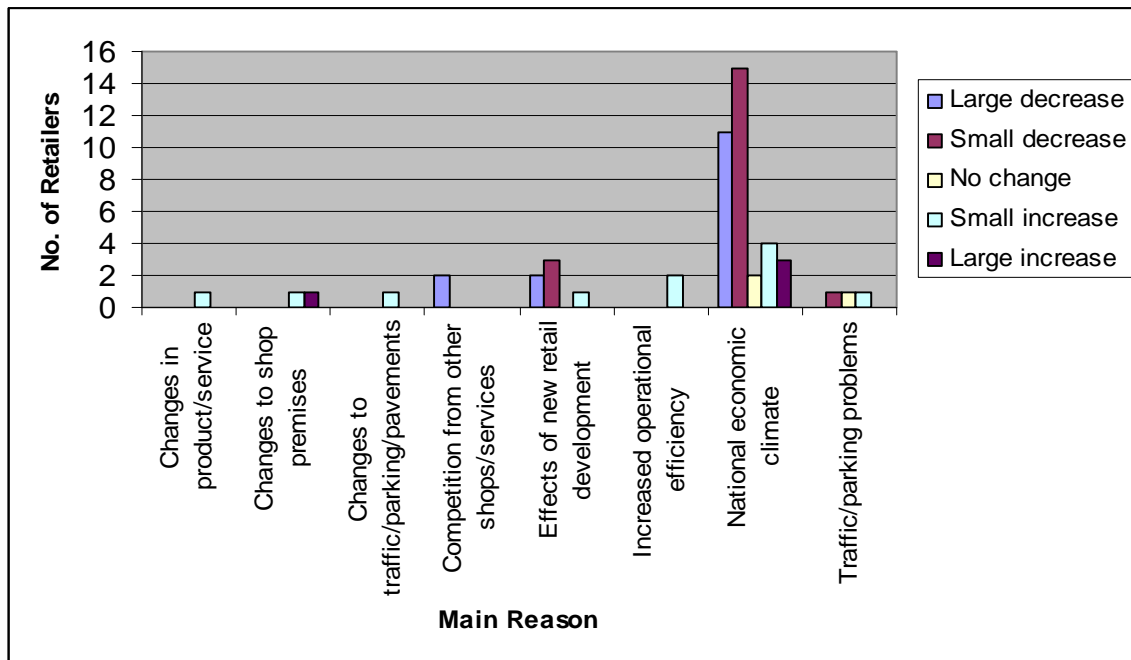


**5.5** Retailers were asked to identify the level of change that has occurred to, or within their business over the last two years and answers were quite varied. Generally the majority of retailers felt there was no real change in their range of goods or in the quality of their goods, though the number of customers and sales levels had fallen significantly. Most of the retailers stated that there had been a small increase in price levels.

**5.6** Overall, 43% of retailers had an increase in the quality of goods and 52% experienced an increase in the range of goods. Only 21% of retailers felt there was no change in price levels of goods. As stated above, the biggest change felt by retailers in Enniskillen was decreased number of customers, and number of sales which accounts for 59% and 62% respectively.

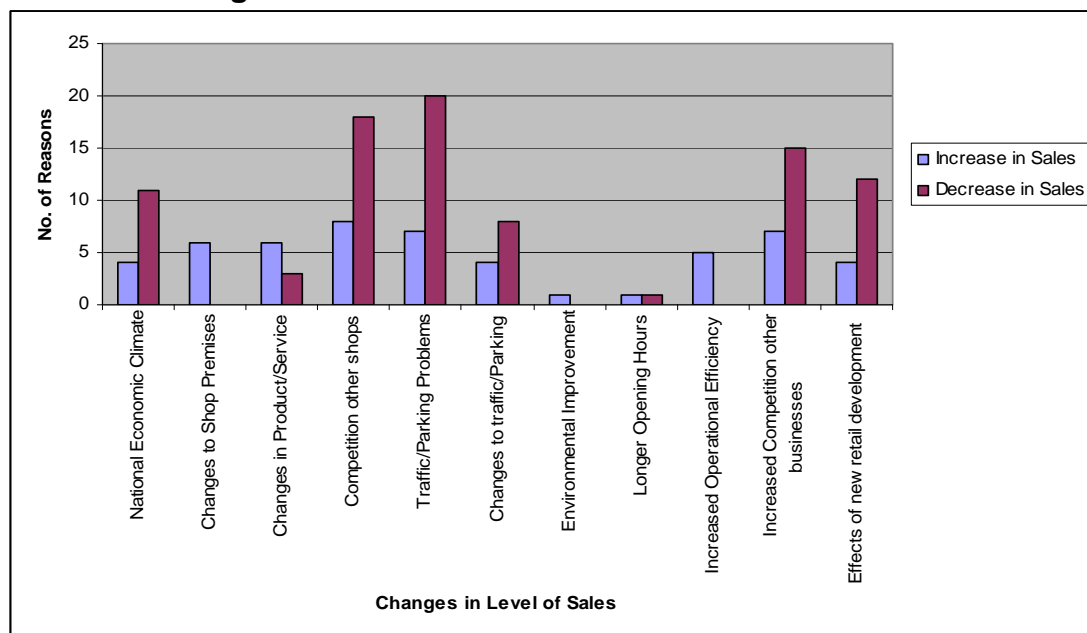
**5.7** The most notable main reason given by over 44% of retailers for a decrease in sales was the national economic climate. However, 12% of retailers also felt that the national economic climate had encouraged an increase in sales. This may be due to the number of shoppers travelling from the RoI to avail of cheaper prices of goods, or possibly because of more traders targeting the 'lower end of the market'. Also, 9% of retailers believed that new retail development, such as ASDA, Tesco and the extension to Erneside Shopping Centre led to a decrease in their sales. A small number of retailers believed the main reason for an increase in sales was because of changes in their premises, while 3% of retailers believed that competition from other retailers had led to a large decrease in their sales.

**Chart 11: Changes in Sales and Main Reason**



**5.8** When asked what other reasons contributed to changes in sales, the most important reasons for a decrease in level of sales were competition from other shops, traffic / parking problems, the effects of new retail development and the national economic climate. Of the retailers that stated that they had an increase in level of sales, the most important reasons given included competition from other shops, changes to shop premises, traffic / parking problems and changes in product and services.

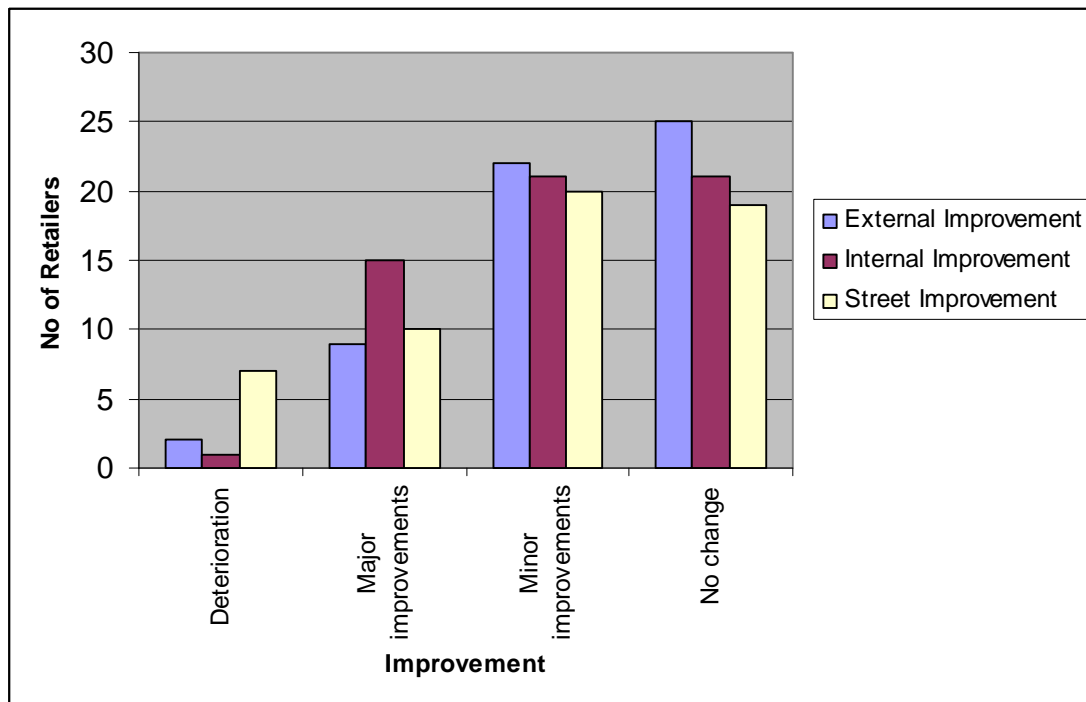
**Chart 12: Changes in Sales & Other Reasons**



## 6.0 Investment in the Business

6.1 The level of investment in any business premises is seen as an important indicator of the owner's commitment and confidence in this location. Therefore, the retailers in Enniskillen Town Centre were asked to identify any investment in their premises since May 2005; this included external and internal improvements to their premises and whether any street or road improvements had been implemented outside their premises. When minor and major improvements were combined, 53% of the responding retailers in Enniskillen Town Centre have had some type of external improvement to their premises, including extensions, renovation, repairs or painting. Approximately 62% of retailers had some type of internal improvement to their premises and 53% of retailers have had some type of improvement carried out to the street / road outside their premises. However, 12% of retailers feel the street or road outside their premises has deteriorated since 2005 and is in need of repair and maintenance. Significantly, a fairly high percentage of retailers have had no improvements carried out to the outside of their premises (43%), inside of their premises (36%) or street / road (33%) outside their premises.

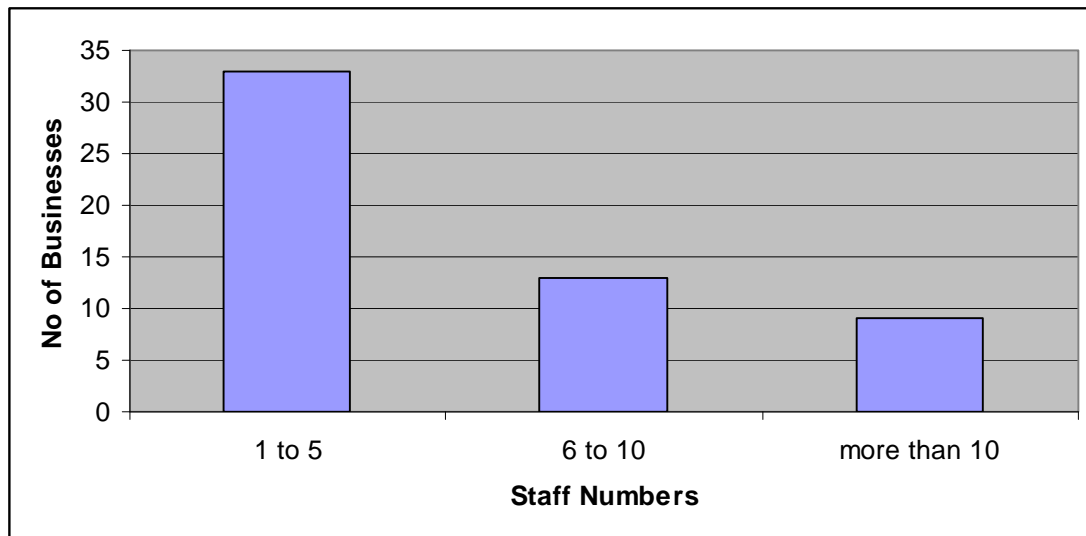
**Chart 13: Level of Improvement to External & Internal Premises & Street**



## 7.0 Numbers Employed

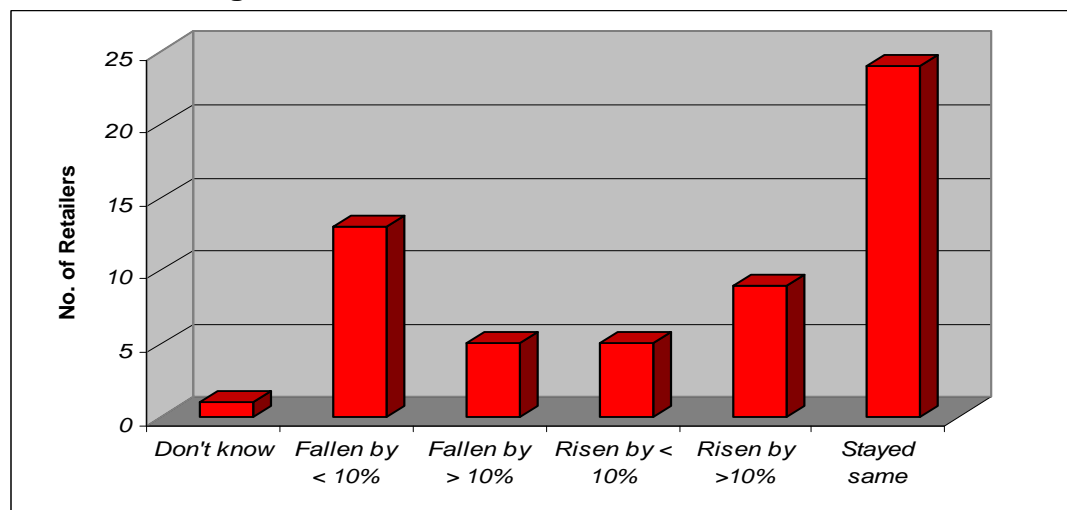
7.1 The majority of retailers answered the question regarding the number of permanent staff employed by their business. Their responses indicated that 60% of retailers employ between 1 and 5 staff on a permanent basis, 23% employ between 6 to 10 staff permanently and 16% of retailers employ over ten staff - of which one retailer employs eighty permanent staff, and another employs one hundred permanent staff.

**Chart 14: Number of Staff Employed Permanently**



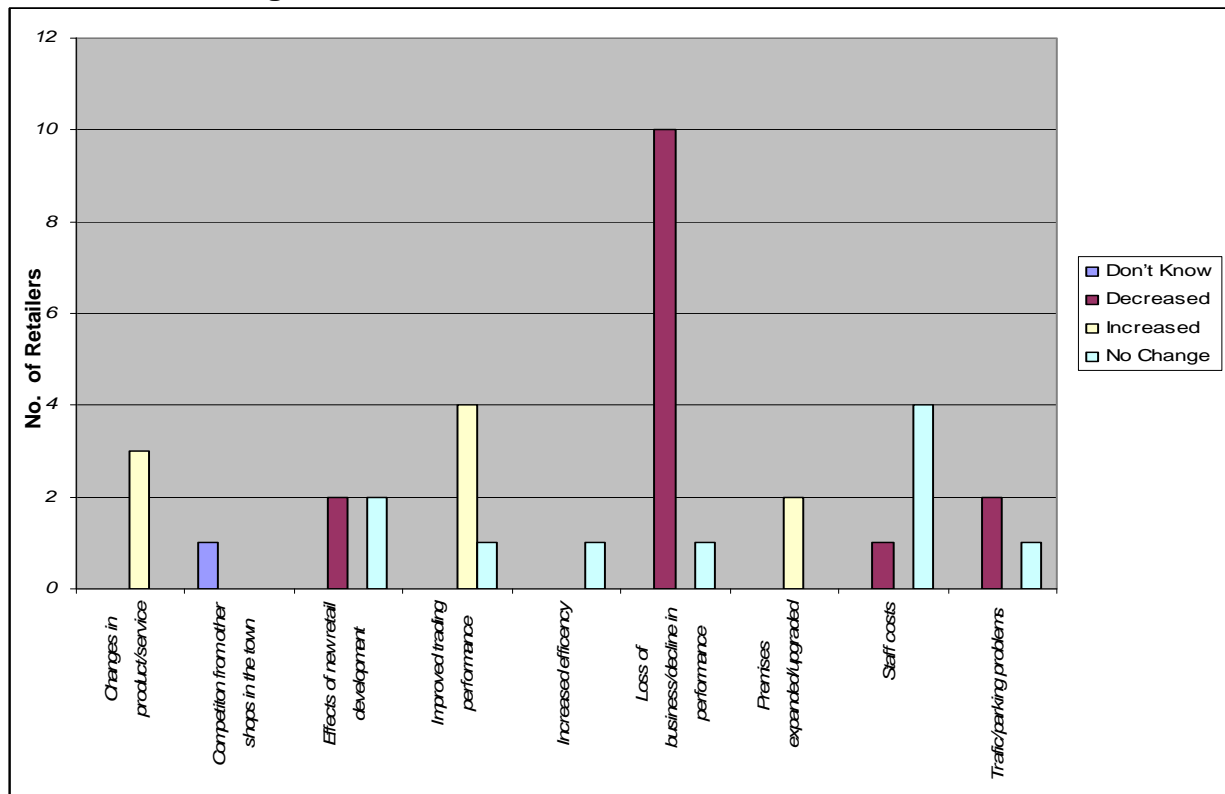
**7.2** Only twenty-four retailers responded to the question regarding the number of temporary staff employed and the replies indicated that (79%) employ 1-5 temporary staff. The largest number of staff employed on a temporary basis by one retailer is 11 temporary staff. Of those retailers who answered the question regarding part-time staff numbers, 70% said they employ 1-5 part time staff and 18% employ 6-10 part time staff. Approximately 12% employ over 10 part-time staff with three retailers employing 25, 33 and 53 staff on a part time basis.

**Chart 15: Changes in Staff**



**7.3** All retailers answered the question on the subject of the change in the number of staff since May 2005. Just 25% had a rise in staff with 31% of retailers reducing their number of staff. This means that just under half of retailers (42%) employ the same number now as they did in 2005.

**Chart 16: Change in Staff Number and Main Reason**



**7.4** Only thirty-five retailers answered both questions regarding the change in staff and the main reason for it. Notably, 28% of retailers have said that they have decreased staff numbers due to loss of business or decline in performance, and 6% claim that staff numbers were reduced because of the effects of new retail development.

**7.5** In terms of staff increases, numbers were lower with just 11% stating they had increased their number of staff due to increased trading performance in their business with 6% cited the expansion or upgrading of their premises as the main reason for the increase in staff numbers. Some 29% of retailers reported no change in staff numbers and stated that increased efficiency, effects of new retail development, improved trading performance, business decline, staff costs and parking as their main reasons.

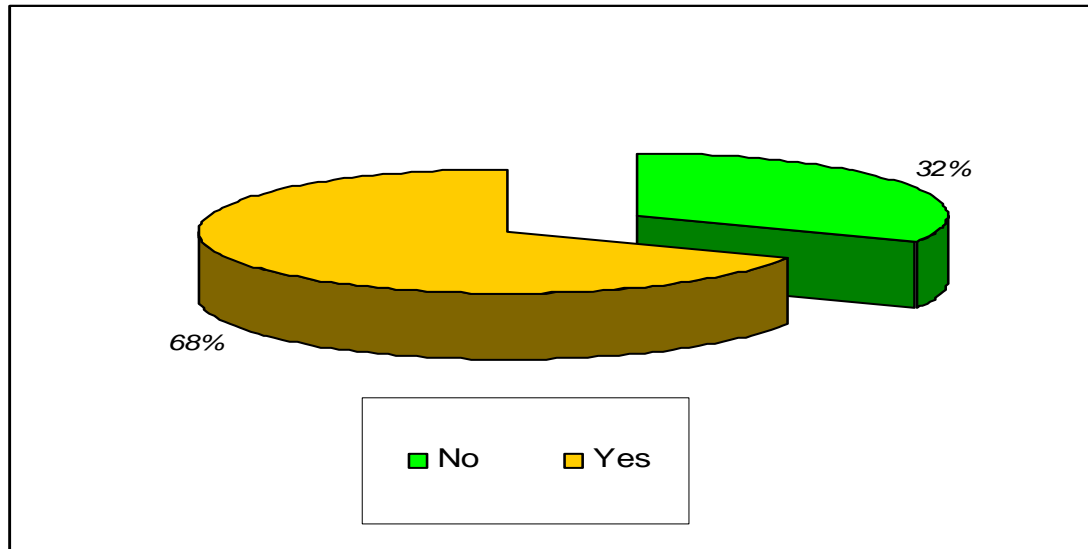
**7.6** Only thirty-two retailers provided responses for other reasons for a change in staff numbers. The reasons given for staff numbers falling were effects of new retail development, loss of business / decline in performance, traffic parking problems and staff costs. The main reason for staff numbers rising is changes in product / services, improved trading performance and premises being expanded / upgraded.

## **8.0 Retailer Opinions**

**8.1** A clear majority, 68% of retailers are in favour of additional retail floor space being provided in the Town Centre; however, it was mainly those

companies known as multiples or multi-nationals that expressed this opinion. Retailers who believed that additional floor space should not be provided were concerned that there were already shop units vacant and that these should be filled first, thus improving the appearance and vitality of the Town Centre.

**Chart 17: Retailers Opinion on Additional Floor Space**

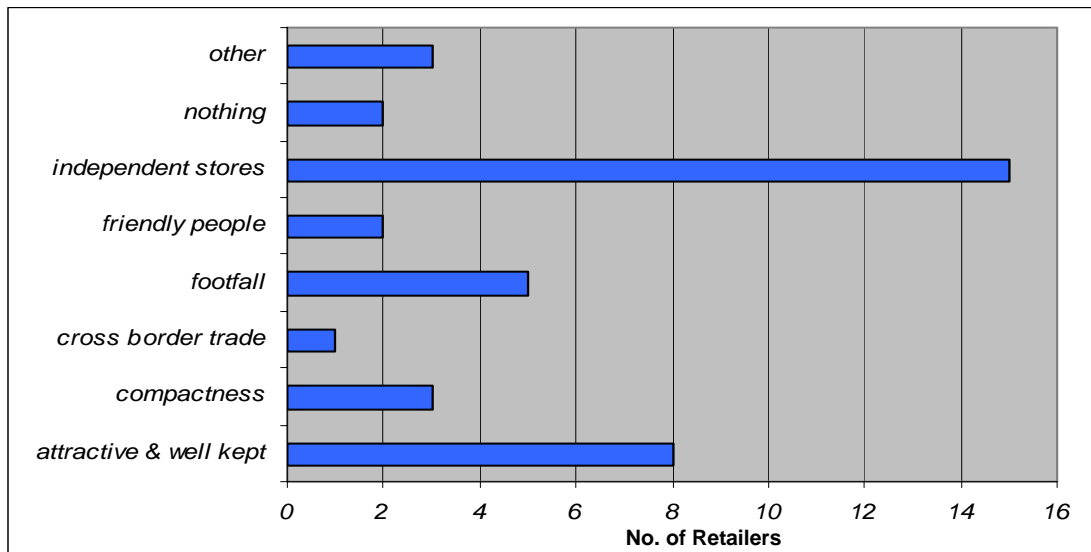


**8.2** Retailers were asked what they thought was the main retailing attraction of Enniskillen. ASDA was said to be the strongest anchor store followed by B&M Bargains and Mercers Jewellers. Marks & Spencer and Boots were fourth and fifth attractions. Other stores that were named as big attractions to the town include Tesco, W. Elliot and Houstons. Retailers also thought that restaurants were important in attracting people to the town. These findings demonstrate the attraction of both convenience and comparison goods in the Town Centre, as well as retail services.

**8.3** When retailers were asked whether they would like to see other retailers locating in the Town Centre, 50% stated that additional shops / retailers would improve the retail offer and attraction of the Town Centre to shoppers with 43% stating that they would not like to see additional retailers locating in the Town Centre. In particular, retailers such as a DIY store such as Homebase or B&Q, a music store such as HMV, JJB Sports and H&M were mentioned. It is also notable that some retailers who operated along the main street / older area of the town did not consider Erneside to be in the Town Centre - as they felt that shops such as M&S, Argos and Next should be located within the Town Centre. (These retailers are already located in the Erneside Shopping Centre which is part of the designated Town Centre.)

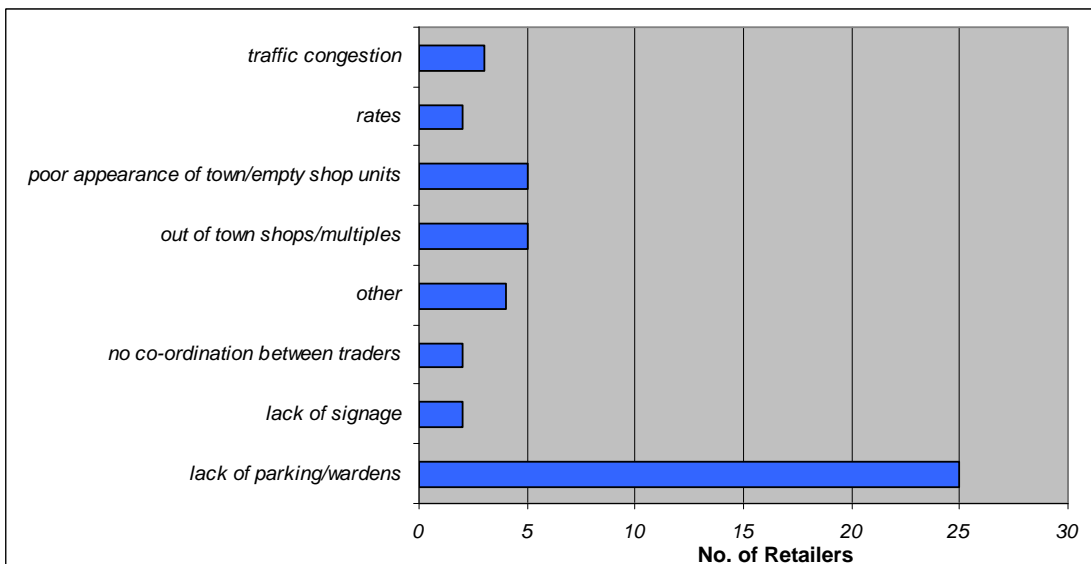
**8.4** When retailers were asked if they would be in favour of additional retail floor space being provided in the Town Centre to enable new retailers to locate in the centre, 67% of the respondents would be in favour and 31% would not.

**Chart 18: What Retailers Like Most about Enniskillen Town Centre**



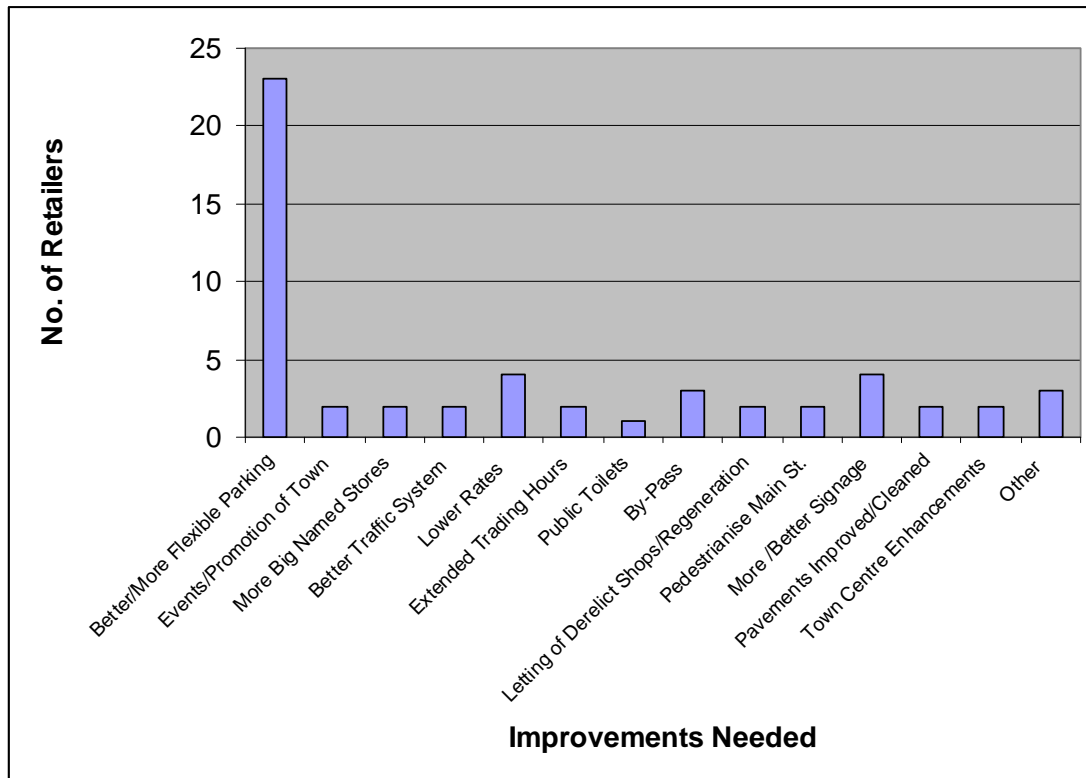
**8.5** Of those retailers who responded to what they liked most about Enniskillen Town Centre from a retailer’s point of view, 38% said they liked the independent stores which still trade in the town. Some 21% of retailers liked that fact that the Town Centre was attractive in terms of streetscape and was also well kept / maintained. Footfall and compactness also featured as retailers’ likes in Enniskillen Town Centre.

**Chart 19: What Retailers Like Least about Enniskillen Town Centre**



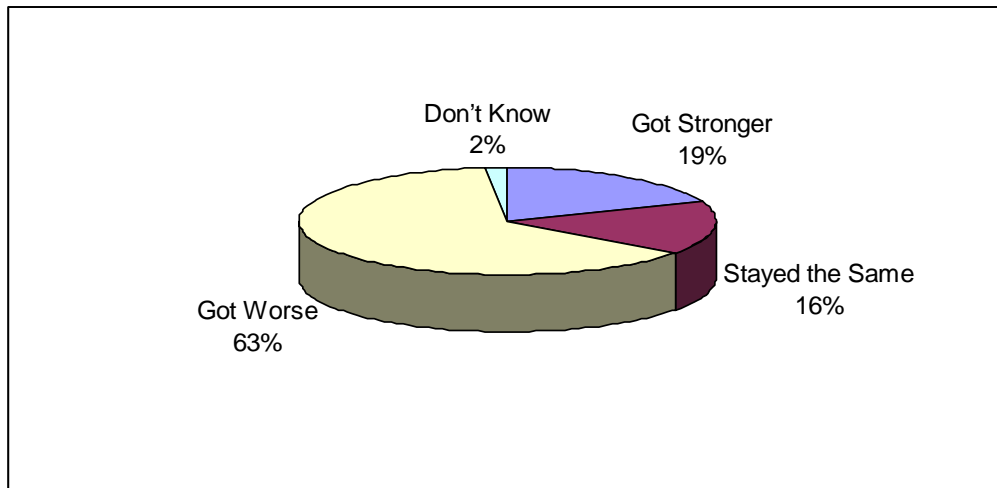
**8.6** An overwhelming majority (52%) of retailers disliked the lack of car parking and inflexibility of traffic wardens in the Town Centre, while 10% disliked out-of-town shops of multiples such as Asda and Tesco. Retailers also commented on the poor appearance of some retail units and the number which were currently vacant. Lack of signage promoting the Town Centre and unity in trading hours was also a concern / dislike of retailers in town, as was traffic congestion.

**Chart 20: Improvements Needed for Enniskillen Town Centre**



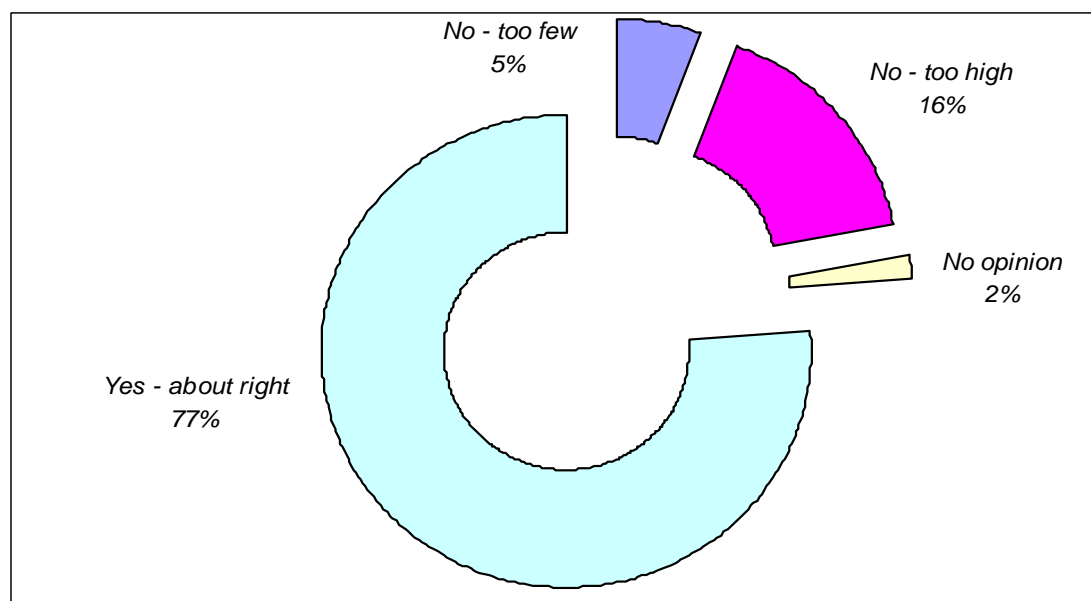
**8.7** Approximately 42% of retailers suggested additional car parking spaces and more flexible parking as the most important improvements they would like to see in the Town Centre. A number of retailers suggested improvements such as more events should be planned / promoted for the Town Centre, more big-named stores should locate e.g. Primark, as well as lower rates and provision of a better traffic system. Some retailers suggested extending the trading hours, the letting of derelict shops and regeneration, to pedestrianised 'main street', getting a by-pass for the town, and more / better signage for locals and tourists. It was also suggested that public toilets are needed, the pavements should be improved / cleaned and some Town Centre enhancements are required.

**Chart 21: Trading Performance**



**8.8** When asked how they think the trading performance of Enniskillen Town Centre has changed since 2005, 63% of retailers believed the trading performance of the town has become weaker, with only 19% of retailers believing that trading performance has got stronger. Some 16% of retailers stated that trading performance has remained the same since 2005.

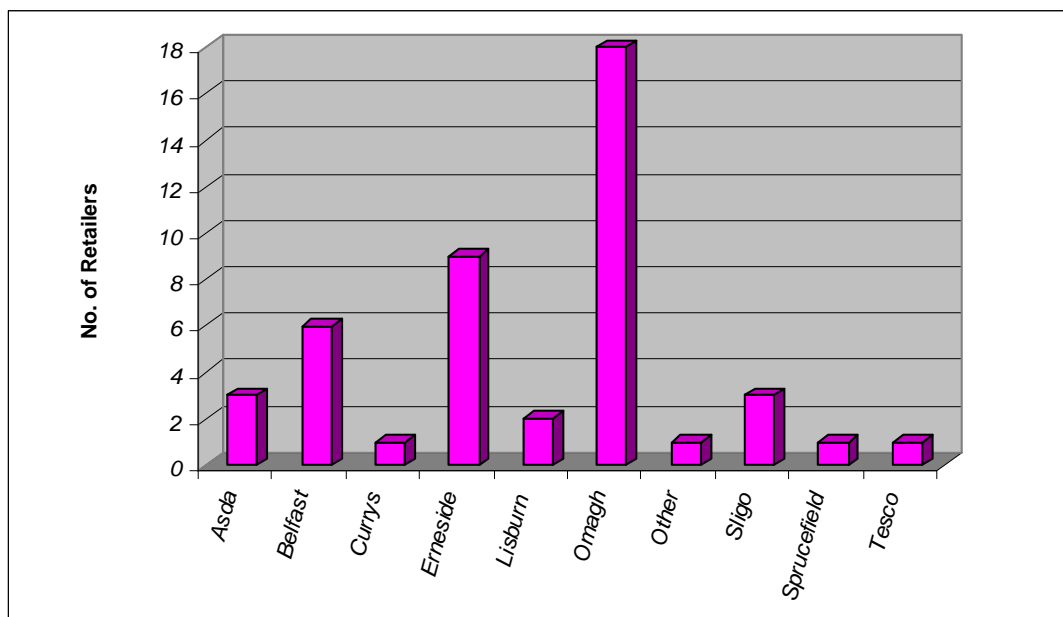
**Chart 22: Number of Service Businesses**



**8.9** Retailers were asked if they felt the number of service businesses in the town was acceptable. As can be seen from the chart above, 77% stated it was about right with just 16% stating that there were too many in the Town Centre. Of these retailers, 50% felt there were too many household services such as hair salons and dry cleaners. One third believed there are too many catering services such as public houses, take-aways and restaurants, whilst 17% of retailers believed there were too many financial services such as banks and estate agents. No retailers raised concern with regard to the number of leisure services.

**8.10** When asked to rank rival towns or retail locations for shopping, Omagh (with 40%) was the greatest concern in regard to a rival town, followed by Belfast, Sligo and Lisburn. Other retail locations of concern included Erneside, Asda and Tesco. Again, it should be pointed out that responding retailers along the main street / older area of the town do not appear to regard Erneside Shopping Centre as a Town Centre location, which is why it then appears as a 'rival retail location'.

**Chart 23: Rival Towns / Retail Locations to Enniskillen Town Centre**



## 9.0 Summary of Key Findings

- Over 70% of retailers who participated in the survey sell comparison goods.
- Over 70% of retailers who participated in the survey rent / lease the premises as opposed to owning the premises.
- The majority of retailers (35%) have a sales area of less than 100m<sup>2</sup> followed by 33% with a sales area between 100 – 300m<sup>2</sup>.
- The majority of retailers (68%) operate from one floor only.
- From the retailers surveyed, 77% are not considering relocation, with 11% considering relocation. The main reasons given for relocation are need for space, more parking, bigger premises and more foot fall. Locations to move to include Erneside Shopping Centre, closer to Town Centre and out of town.
- Since May 2005, 90% of retailers have operated from the same premises and 5% have relocated from other premises. 5% have begun trading in the Town Centre.
- In relation to the level of change in retailing over the last 2 years, it was found that the range of goods had improved or was much the same and the

- The main reason for a decrease in sales and therefore customers was the national economic climate. However, some retailers also felt that the economic situation had encouraged sales with shoppers travelling from the Republic of Ireland to avail of the cheaper prices of goods. Other high ranking reasons for changes in sales were the competition from other shops/services and traffic and parking problems in the town.
- Since 2005, over half of retailers (53%) in Enniskillen Town Centre have had some type of external improvement to their premises, including extensions, renovation, repairs or painting. 43% have carried out no improvement. In terms of internal improvements carried out, 62% have carried out both minor and major improvements. 53% have had minor and major works carried out to the street/road outside the premises.
- The majority of retailers indicated that they have seen a decline in staff numbers (31%) since 2005, as a result of poor trading and decline in performance due to the current economic climate. They also attributed the loss of trade and therefore staff to competition from new retail development. Just 25% of retailers have increased staff numbers and 42% employ the same number of staff as 2005.
- In order to assess business confidence, retailers were asked to give their expectations for profitability for the year ahead; 57% stated that they expected profits to be worse and only 10% expected profits to be better with 33% expecting no change in profits. A range of reasons was given for expecting profits to be worse than last year including, the economic climate, competition, drop in cross-border trade, parking restrictions, unemployment and negative effect of the extension to the Erneside Shopping Centre.
- Most of the businesses in Enniskillen Town Centre (64%) are independently owned and operated with the majority trading in the town over ten years. The rest are part of a chain either UK / Irish or small local chain.
- Of those multiples trading in Enniskillen who responded to the survey, all the Northern Irish chains achieve average profitability, and all small local chains achieve average and above average profitability. A small number of retailers admitted having below average profitability; these were part of UK / Irish chains.
- Of the retailers who responded to what they liked most about Enniskillen Town Centre, 38% said the independent stores, 21% said the Town Centre was attractive in terms of streetscape and was well maintained. Compactness and footfall were also high ranking likes.
- Of the retailers who responded to what they disliked most about Enniskillen Town Centre, 52% highlighted the lack of parking and inflexibility of traffic wardens. 10% disliked out-of-town multiples such as Asda and Tesco. Retailers also highlighted the lack of signage promoting the key attractions and empty / vacant shop units. No co-ordination between traders with lack of an action plan, high rates and too many banks and charity shops were other dislikes.
- A range of improvements are needed and highlighted by retailers. The key concern (42%) was better / more flexible parking. Other improvements needed are events for the town, more big-named stores, lower rates, better

- The most important existing retailers to attract shoppers into the Town Centre are, Asda, B&M Bargains, Boots, Mercers Jewellers, Marks & Spencer, Tesco, W Elliot, Grahams Menswear, Dunnes, Houstons, independents shops and restaurants.
- When retailers were asked if they think the trading performance of the Town Centre has changed compared to 5 years ago, 63% think it has got worse, 19% of retailers think trading has got stronger and 16% say that it has stayed the same.
- When retailers were asked if there were any particular retailers they would like to see locating to the Town Centre that would improve the attraction of the centre to shoppers, more than 50% stated yes. The main retailers mentioned were in particular a DIY store such as Homebase or B&Q, a music store such as HMV, JJB Sports and H&M. It is also notable that some retailers who operated along the main street / older area of the town did not consider Erneside to be in the Town Centre as they felt that shops such as M&S, Argos and Next should be located within the Town Centre. (These retailers are already located in the Erneside Shopping Centre which is part of the designated Town Centre.)
- 68% of retailers are in favour of additional retail floor space being provided in the Town Centre and 32% are not in favour.
- When retailers were asked if they think the present number of service businesses in the town is acceptable e.g. banks, estate agents, hairdressers, dry cleaners, cafes, pubs, travel agents, video shops, etc., the majority (77%) said yes that it is about right. Only 16% stated that there were too many service businesses. Most of these stated that there were too many hair salons, catering services and financial services e.g. banks, and estate agents.
- The main rival towns or retail locations are Omagh, Belfast, Sligo, Derry and Lisburn. Competing retail locations include Asda, Tesco, Dunnes in Enniskillen, and Omagh Retail Park. Sprucefield in Lisburn was also mentioned. The Erneside Shopping Centre was also mentioned although it is part of Enniskillen Town Centre.

**Annex 1 - Copy of Retailer Survey Form**



- (iii) Price levels have been subject to:
- (a) Large increase
  - (b) Small increase
  - (c) No change
  - (d) Small decrease
  - (e) Large decrease
  - (f) Don't know
- (iv) The number of customers has been subject to:
- (a) Large increase
  - (b) Small increase
  - (c) No change
  - (d) Small decrease
  - (e) Large decrease
  - (f) Don't know
- (v) The level of sales has been subject to:
- (a) Large increase
  - (b) Small increase
  - (c) No change
  - (d) Small decrease
  - (e) Large decrease
  - (f) Don't know

- (vi) From the list below, indicate any reasons for the changes in the level of sales (turnover) at this business over the past two years and which you would say is the main reason:

Note: Tick as many boxes as you like under "Reasons". However, ensure only one box is ticked under "Main Reason".

	Reasons	Main Reason
(a) The national economic climate	<input type="checkbox"/>	<input type="checkbox"/>
(b) Changes to shop premises	<input type="checkbox"/>	<input type="checkbox"/>
(c) Changes in product/service	<input type="checkbox"/>	<input type="checkbox"/>
(d) Competition from other shops/services	<input type="checkbox"/>	<input type="checkbox"/>
(e) Traffic/parking problems	<input type="checkbox"/>	<input type="checkbox"/>
(f) Changes to traffic/parking/pavements	<input type="checkbox"/>	<input type="checkbox"/>
(g) Environmental improvement	<input type="checkbox"/>	<input type="checkbox"/>
(h) Longer opening hours	<input type="checkbox"/>	<input type="checkbox"/>
(i) Increased operational efficiency	<input type="checkbox"/>	<input type="checkbox"/>
(j) Increased competition from other businesses	<input type="checkbox"/>	<input type="checkbox"/>
(k) Effects of new retail development	<input type="checkbox"/>	<input type="checkbox"/>

- (6) In order to identify investment in the shop premises, please identify which of the following answers best applies to this business:

- (i) Since May 2005, has the outside of these shop premises been subject to:
- (a) Major improvement (i.e. extension or renovations)
  - (b) Minor improvement (i.e. repairs and painting)
  - (c) No change
  - (d) Deterioration (i.e. lack of repair work where needed)
  - (e) Don't know

- (ii) Since May 2005, has the inside of the premises been subject to:
- (a) Major improvement (i.e. refurbishment or extensive refitting)
  - (b) Minor improvement (i.e. re-decoration)
  - (c) No change
  - (d) Deterioration (i.e. lack of repair work where needed)
  - (e) Don't know

- (iii) Since May 2005, has the street/road outside the premises been subject to:
- (a) Major road/street works or environmental improvement
  - (b) Minor works such as changes to parking/servicing restrictions
  - (c) No change
  - (d) Deterioration (i.e. lack of street maintenance and repair)
  - (e) Don't know

(7) In order to identify any changes in employment in the retail/service sector can you please provide the following information with regards to this/ your business:

- (i) How many staff are employed on: (a) A permanent basis \_\_\_\_\_  
 (b) A temporary basis \_\_\_\_\_  
 Of these staff, how many work: (a) Full time \_\_\_\_\_  
 (b) Part time \_\_\_\_\_

- (ii) Since May 2005 the number of staff has:
- (a) Risen by more than 10%
  - (b) Risen, but by less than 10%
  - (c) Stayed the same
  - (d) Fallen by less than 10%
  - (e) Fallen by more than 10%
  - (f) Don't know

(iii) From the list below, indicate any reasons for the change in employment at this business over the past 2 years and which you would say is the main reason:

Note: Tick as many boxes as you like under "Reasons". However, ensure only one box is ticked under "Main Reason".

	Reasons	Main Reason
(a) Improved trading performance	<input type="checkbox"/>	<input type="checkbox"/>
(b) Loss of business/decline in performance	<input type="checkbox"/>	<input type="checkbox"/>
(c) Premises expanded/ up-graded	<input type="checkbox"/>	<input type="checkbox"/>
(d) Changes in product/service	<input type="checkbox"/>	<input type="checkbox"/>
(e) Staff costs	<input type="checkbox"/>	<input type="checkbox"/>
(f) Competition from other shops in the town	<input type="checkbox"/>	<input type="checkbox"/>
(g) Traffic/parking problems	<input type="checkbox"/>	<input type="checkbox"/>
(h) Changes to traffic/parking/pavements	<input type="checkbox"/>	<input type="checkbox"/>
(i) Longer opening hours	<input type="checkbox"/>	<input type="checkbox"/>
(j) Increased efficiency	<input type="checkbox"/>	<input type="checkbox"/>
(k) Competition from other businesses outside the town	<input type="checkbox"/>	<input type="checkbox"/>
(l) Effects of new retail development	<input type="checkbox"/>	<input type="checkbox"/>

(8) In order to assess business confidence, can you please complete the following as appropriate:

(i) Looking at the year ahead, what are your expectations for the general profitability of this business:

- (a) Better than last year
- (b) No significant change
- (c) Worse than last year

(ii) Please give a reason for your response:

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(9) In order to assess the characteristics of your business, please identify:

(i) Whether your business is:

- (a) Independently owned and operated
- (b) Part of a small local chain
- (c) Part of a Northern Ireland chain
- (d) Part of a UK/Ireland chain

(ii) Compared to other outlets in your chain, whether your business in the town centre is achieving:

- (a) Above average profitability
- (b) Average profitability
- (c) Below average profitability
- (d) Not part of a chain

(iii) The length of time that the business has operated in the town:

- (a) Less than 5 years
- (b) 5 to 10 years
- (c) More than 10 years

(10) As a retailer, what do you like most about the town centre?

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(11) As a retailer, what do you like least about the town centre?

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(12) As a retailer, what improvements would you like to see in the town centre?

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(13) Which existing retailers, if any, do you consider are the most important in attracting shoppers into the town centre? (*That is, which stores are the main "anchors"; please list up to 3*)

1. 

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2. 

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3. 

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- (14) Compared to five years ago, how do you think the trading performance of the town centre has changed?
- (a) Has got a lot stronger
- (b) Has got a little stronger
- (c) Has stayed about the same
- (d) Has got a little worse
- (e) Has got a lot worse
- (f) Don't know / have not been here five years
- (15) Are there any particular retailers that you would like to see locating in the town centre that would improve the retail offer and attraction of the centre to shoppers?
- (a) Yes
- (b) No
- (16) If you answered YES at Q15, please specify which ones:
- \_\_\_\_\_
- \_\_\_\_\_
- (17) Would you be in favour, or not, of additional retail floor space being provided in the town centre to enable new retailers to locate in the centre?
- (a) Yes
- (b) No
- (18) Given what you know about other town centres, do you think the present number of service businesses (e.g. banks, estate agents, hairdressers, dry cleaners, cafes, pubs, travel agents, video shops, etc.) in the town centre is acceptable or not?
- (a) No - Too high
- (b) Yes - About right
- (c) No - Too few
- (19) If you said NO (Too high) at Q18 - what types of service businesses cause you most concern? *(please tick all those that apply)*
- (a) Financial Services (banks, building societies, estate agents, etc.)
- (b) Household Services (hairdressers, dry cleaners, laundrettes, etc.)
- (c) Catering Services (cafes, takeaways, pubs, wine bars, restaurants, etc.)
- (d) Leisure Services (travel agents, betting shops, video shops, etc.)
- (20) What towns or retail locations do you regard as the main rivals in shopping terms? *(if more than one, please rank in descending order)*
1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Thank you for taking the time to complete our questionnaire.**

**Please return in the stamped addressed envelope, as soon as possible, no later than Friday 28<sup>th</sup> May 2010**