

Appendix 4 - Burnley & Padiham Town Centres: Business Survey 2012

Dear Sir/Madam

Burnley Borough Council wants to know your views about Burnley town centre. Your views are sought as part of a wider 'health check' of the centre, which will help to inform a future strategy for improving retail, leisure and cultural facilities. We would be grateful if you would contribute to this exercise by completing this questionnaire and returning it as soon as possible in the pre-paid envelope provided. The questionnaire should take no longer than five minutes to complete. **Please return by Friday 23 November 2012.**

All responses will be treated in the strictest confidence and no information on individual businesses will be released. By providing us with the information we seek, you will help the Council shape its redevelopment and planning policies to foster growth and prosperity within the centre.

If you have any queries on the questionnaire or its purpose, please do not hesitate to call Katie Webb at Nathaniel Lichfield & Partners, the company which is co-ordinating the research for the Council, on 0161 837 6130.

The survey results presented here are the results of both the Burnley and Padiham surveys. The columns labelled 'Burnley' relate to the responses returned by Burnley businesses, and the columns labelled 'Padiham' relate to the responses returned by Padiham businesses.

QA. In which of these other centres do you have business premises?

Centre	Burnley Survey	Padiham Survey
Burnley	-	9%
Padiham	11%	-
Colne Road	4%	6%
Briercliffe Road	4%	0%
Accrington Road	0%	0%
Harle Syke	0%	0%
Pike Hill	4%	2%
Rose Grove Lane/Lowerhouse Lane	0%	0%
Padiham Road, Burnley	4%	17%
Coal Clough Lane	4%	2%
Manchester Road	7%	0%
Parliament Street	0%	0%
Lyndhurst Road	0%	0%
Abel Street, Daneshouse	0%	0%
No Response	64%	64%

Note: NLP considers that respondents may have misinterpreted the 'Padiham Road, Burnley' response, leading to an unrealistically high proportion of responses for this centre.

Q1. What is the status of your business?

	Burnley	Padiham
A sole proprietorship	18%	34%
A partnership	4%	17%
A private limited company	68%	40%
A public limited company	4%	4%
A cooperative/social enterprise	4%	0%
Don't know	0%	0%
No Response	4%	6%

Q2. What type of business is the main business operating from your premises?

	Burnley	Padiham
Food retail	11%	9%
Non-food retail	32%	17%
Coffee shop/café	7%	2%
Restaurant	4%	8%
Pub/bar	4%	2%
Bank	7%	0%
Financial service e.g. building society	0%	4%
Recreation e.g. Amusement centre	0%	0%
Leisure e.g. Cinema	0%	0%
Legal services e.g. Solicitors	0%	2%
Other service e.g. Hairdresser, beauty salon	7%	13%
Industry	0%	0%
Council office/Advice centre	0%	0%
Other office use	7%	2%
Other	18%	38%
No Response	4%	4%

Q3. How long has your business been operating from the premises?

	Burnley	Padiham
Less than 1 year	7%	6%
1 to 5 years	18%	17%
6 to 10 years	11%	11%
Over 10 years	39%	32%
Over 25 years	18%	23%
Over 50 years	0%	8%
No Response	7%	4%

Q4. Are your premises leased or owner occupied?

	Burnley	Padiham
Leased	68%	30%
Owner occupied	29%	62%
Other	4%	8%
No Response	0%	0%

Q5. How many staff do you employ?

	Burnley	Padiham
Full time		
Only business owner	8%	27%
Less than 5	75%	57%
6-10 employees	4%	11%
11-25 employees	13%	5%
26-50 employees	0%	0%
50 + employees	0%	0%
Part time		
Only business owner	0%	0%
Less than 5	79%	97%
6-10 employees	8%	3%
11-25 employees	8%	0%
26-50 employees	4%	0%
50 + employees	0%	0%
Total		
Only business owner	7%	23%
Less than 5	59%	44%
6-10 employees	15%	23%
11-25 employees	11%	7%
26-50 employees	4%	2%
50 + employees	4%	0%

Q6. Which type of customers does your business primarily rely on?

	Burnley	Padiham
Local residents	68%	57%
Other residents of Lancashire	0%	15%
Office employees	7%	0%
Tourist/leisure visitors	0%	0%
Other	7%	4%
No Response	18%	25%

Q7. Why is your business located in **Burnley**/Padiham?

BURNLEY	Burnley main reason	Burnley other reason	Rank
Affordable rent	4%	0%	8
Availability of short term leases	0%	0%	-
Good accessibility	7%	0%	6
Availability of free car parking in centre	0%	0%	-
Close to other businesses	4%	4%	7
Serves local market	25%	4%	1
To be within the central area	7%	21%	4=
High level of pedestrians (footfall) past premises	14%	18%	2=
Business already set up when I took over	18%	11%	2=
Other	14%	7%	4=
No Response	7%	36%	-

Note: The 'Rank' is based on weighted results with 'Main Reason' scored 2x 'Other Reason'. Rank 1 denotes the most commonly cited reason.

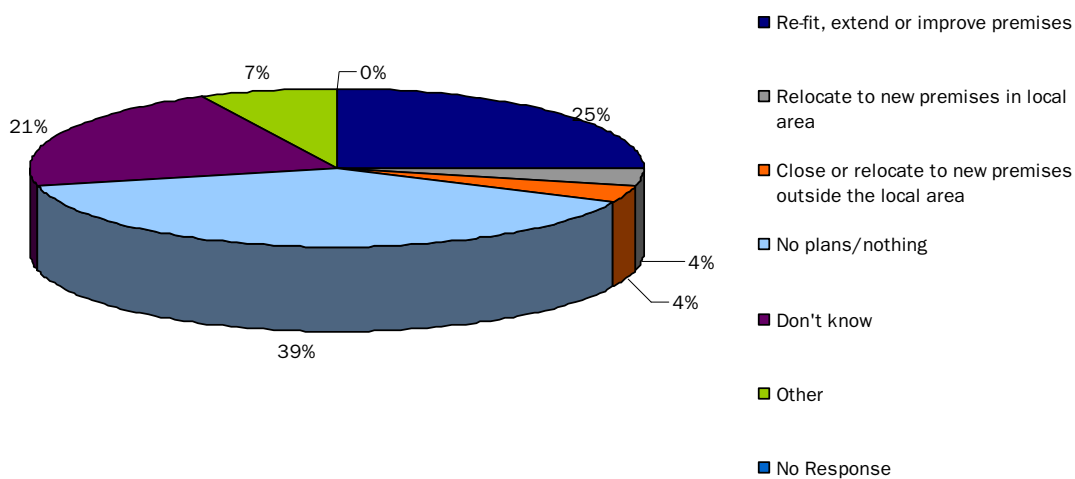
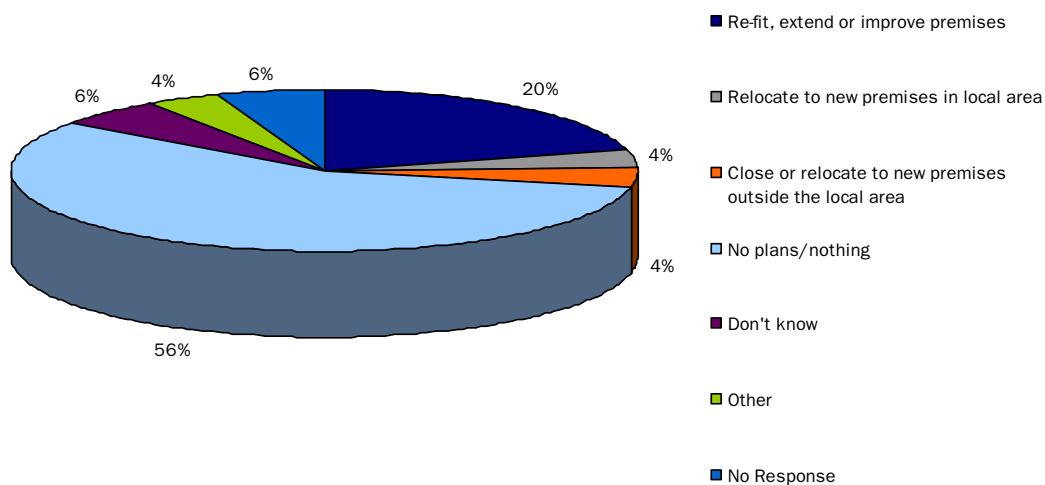
Q7. Why is your business located in Burnley/Padiham?

PADIHAM	Padiham main reason	Padiham other reason	Rank
Affordable rent	9%	2%	5=
Availability of short term leases	0%	0%	-
Good accessibility	11%	9%	2=
Availability of free car parking in centre	8%	6%	5=
Close to other businesses	2%	8%	8
Serves local market	6%	8%	7
To be within the central area	9%	8%	4
High level of pedestrians (footfall) past premises	2%	6%	9
Business already set up when I took over	25%	13%	1
Other	15%	2%	2=
No Response	13%	40%	-

Note: The 'Rank' is based on weighted results with 'Main Reason' scored 2x 'Other Reason'. Rank 1 denotes the most commonly cited reason.

Q8. What current plans do you have to change your business?

	Burnley	Padiham
Re-fit, extend or improve premises	25%	21%
Relocate to new premises in local area	4%	4%
Close or relocate to new premises outside the local area	4%	4%
No plans/nothing	39%	57%
Don't know	21%	6%
Other	7%	4%
No Response	0%	6%

Business Operator Plans to Change Business in Burnley

Business Operator Plans to Change Business in Padiham


Q9. What are the issues constraining the operation and performance of your business?

BURNLEY	Burnley most important issue	Burnley 2nd most important issue	Burnley 3rd most important issue	Rank
Rents/overheads	32%	4%	14%	1
Level of trade/lack of visitors/customers	18%	14%	7%	3
Quality or size of premises	0%	0%	4%	13=
Staff recruitment/retention	0%	0%	0%	-
Availability of business/customer parking	14%	29%	7%	2
Competition from other businesses in the centre	7%	4%	4%	4
Competition from other businesses in other town centres	0%	7%	11%	6
Lack of business finance	0%	7%	0%	8=
Security issues (crime/vandalism)	0%	4%	7%	8=
Problems associated with anti-social behaviour	4%	4%	11%	5
Advice on how to improve the operation of the business	0%	0%	0%	-
Poor location of premises	0%	0%	4%	13=
Poor quality of the local environment	0%	7%	7%	7
Inability to find time to develop business	0%	0%	4%	13=
Lack of good transport links	0%	0%	0%	-
Poor accessibility	0%	0%	0%	-
Shortage of skilled labour	4%	0%	0%	10=
Childcare issues	0%	0%	0%	-
Don't know/nothing Other	0%	4%	4%	10=
Other	4%	0%	0%	10=
No Response	18%	18%	18%	-

Note: The 'Rank' is based on weighted results with 'Most Important Issue' scored 3x and '2nd Most Important Issue' scored 2x 'Other Reason'. Rank 1 denotes the most commonly cited issue.

PADIHAM	Padiham most important issue	Padiham 2nd most important issue	Padiham 3rd most important issue	Rank
Rents/overheads	6%	9%	6%	4
Level of trade/lack of visitors/customers	40%	13%	9%	1
Quality or size of premises	6%	0%	6%	7
Staff recruitment/retention	0%	2%	2%	12=
Availability of business/customer parking	9%	17%	0%	3
Competition from other businesses in the centre	9%	15%	6%	2
Competition from other businesses in other town centres	2%	8%	8%	6
Lack of business finance	0%	4%	6%	8=
Security issues (crime/vandalism)	0%	0%	8%	11
Problems associated with anti-social behaviour	0%	2%	0%	16
Advice on how to improve the operation of the business	0%	0%	0%	-
Poor location of premises	2%	0%	0%	12=
Poor quality of the local environment	2%	2%	4%	8=
Inability to find time to develop business	0%	0%	2%	17
Lack of good transport links	0%	0%	0%	-
Poor accessibility	0%	2%	2%	12=
Shortage of skilled labour	0%	2%	2%	12=
Childcare issues	0%	0%	0%	-
Don't know/nothing Other	9%	0%	2%	5
Other	2%	0%	4%	10
No Response	13%	25%	36%	-

Note: The 'Rank' is based on weighted results with 'Most Important Issue' scored 3x and '2nd Most Important Issue' scored 2x 'Other Reason'. Rank 1 denotes the most commonly cited issue.

Q10. How do you feel the issue selected as 'most important' at Q9 could be addressed?

	Burnley	Padiham
More car parking	4%	6%
Cheaper car parking	21%	0%
Increased policing	0%	0%
Reduced overheads (rent/rates)	21%	8%
More national multiple retailers in centre	4%	0%
Reduction in number of takeaways	0%	2%
Promotion of centre to visitors	0%	8%
Promotion of centre to businesses	0%	0%
Environmental improvements	4%	6%
More community/business events	0%	0%
Other	21%	38%
No Response	25%	34%

Q11. Do you consider that Burnley/Padiham has any of the following, to the benefit of your business?

	Burnley	Padiham
Room to expand	5%	4%
Affordable premises to buy/rent	1%	6%
Affordable Rents	2%	5%
Good road network	9%	12%
Plentiful availability of car parking	9%	10%
Existing/potential employees living in area	4%	5%
Good bus services	13%	13%
Easy access for employees	11%	9%
Easy access for customers	16%	12%
A local demand for the product/service	11%	11%
Presence of other businesses	6%	6%
A variety of shops, services and entertainment	6%	2%
Other	1%	2%
No Response	6%	4%

Q12. How do you rate Burnley/Padiham in respect of the following?

	Burnley (Rank)	Padiham (Rank)
Rents/rates	17=	3
Availability of business/customer parking	13=	2
Traffic circulation	4	4
Safety during daytime	1	1
Safety during the evenings and at night	17=	14=
Crime and security	8	7
Range of shops and services available	11	10=
Quality of shops and services available	9	8
Range of sports/leisure, entertainment or arts and cultural facilities	7	13
Quality of sports/leisure, entertainment or arts and cultural facilities	5=	9
Quality of public open spaces, street furniture and landscaping	2	6
Liveliness/street life/character	12	17
Level of street cleansing and litter	3	5
Centre management and maintenance	5=	12
Condition/appearance of older buildings	13=	18
General shopping environment	10	14=
Interest shown by Council/local authorities	15	16
Marketing/promotion of the centre	19	19
Interest shown by landlord owners	21	21
The way businesses work together	20	10=
Events in the centre	16	20

Note: The 'Rank' is based on total ratings for each answer. Rank 1 denotes the most commonly cited response.

Q13. In general, do you consider that over the last year Burnley/Padiham has...?

	Burnley	Padiham
Improved	0%	28%
Stayed the same	21%	15%
Declined	71%	53%
Don't know	4%	0%
No Response	4%	4%

Q14. What measures do you think would improve **Burnley**/Padiham?

	Burnley
Increased choice/range of shops	16%
More national multiples	6%
Foodstore in Centre	1%
More independent/specialist retailers	9%
Improved public spaces	0%
Cheaper/more flexible parking	26%
Improved street cleaning	0%
Improved public transport	0%
More sports/leisure or entertainment facilities	1%
More arts or cultural facilities	1%
More quality restaurants/cafes	3%
More organised events	1%
Greater promotion/marketing of the centre	7%
Expansion of the shopping centre	6%
Improved security	4%
Improved traffic management	7%
Other	0%
No Response	10%

Q14. What measures do you think would improve Burnley/**Padiham**?

	Padiham
Increased choice/range of shops	18%
More national multiples	4%
More independent/specialist retailers	19%
Improved public spaces	3%
Cheaper/more flexible parking	5%
Improved street cleaning	5%
Improved public transport	0%
More sports/leisure or entertainment facilities	4%
More arts or cultural facilities	2%
More quality restaurants/cafes	1%
More organised events	4%
Greater promotion/marketing of the centre	14%
Expansion of the shopping centre	4%
Improved security	3%
Improved traffic management	3%
Other	3%
No Response	9%

Note: Respondents in Padiham were not provided with the option 'Foodstore in the centre' due to recent opening of the Tesco Extra store.

Q15. (Padiham Survey Only) Are you aware Padiham now has a Town Centre Initiative and Town Centre Manager?

	Padiham
Yes	75%
No	25%

Q16. (Q15. in Burnley Survey) Which of the following statements best describes your business's current trading performance?

	Burnley	Padiham
Good	25%	26%
Satisfactory	46%	47%
Poor	25%	25%
Don't know/No opinion	0%	0%
No Response	4%	2%

Q17. (Q16. in Burnley Survey) Over the last 12 months has your trading performance...?

	Burnley	Padiham
Improved	21%	21%
Stayed the same	32%	34%
Declined	36%	42%
Don't know/No opinion	7%	0%
Other	0%	2%
No Response	4%	2%

Q18. (Q17. in Burnley Survey) Over the next 12 months do you expect your business performance to...?

	Burnley	Padiham
Improve	36%	30%
Stay the same	32%	36%
Decline	21%	23%
Don't know/No opinion	4%	8%
No Response	7%	4%

Q19. (Q18. in Burnley Survey) Which centre or retail park do you consider to be your biggest competition?

	Burnley	Padiham
Burnley	0%	32%
Padiham	0%	0%
Nelson	0%	4%
Colne	0%	2%
Great Harwood	0%	2%
Accrington	4%	6%
Oldham	4%	0%
Blackburn	18%	11%
Preston	0%	0%
Bradford	0%	0%
Leeds	0%	0%
Manchester	14%	4%
Kirkgate Shopping Centre, Bradford	0%	0%
White Rose Shopping Centre, Leeds	0%	0%
The Mall, Blackburn	0%	3%
Trafford Centre, Greater Manchester	7%	2%
Other Retail Parks	0%	2%
Internet/Mail Order	0%	10%
Other	4%	5%
No Response	50%	15%

Appendix 4 - Burnley Market: Business Survey 2012

Dear Sir/Madam

Burnley Borough Council wants to know your views about Burnley market. Your views are sought as part of a wider 'health check' of the town centre, which will help to inform a future strategy for improving retail facilities. We would be grateful if you would contribute to this exercise by completing this questionnaire and returning it as soon as possible in the pre-paid envelope provided. The questionnaire should take no longer than five minutes to complete. **Please return by Friday 23 November 2012.**

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If you have any queries on the questionnaire or its purpose, please do not hesitate to call Nathaniel Lichfield & Partners, the company which is co-ordinating the research for the Council.

Q1. Why is your business located in Burnley market?¹

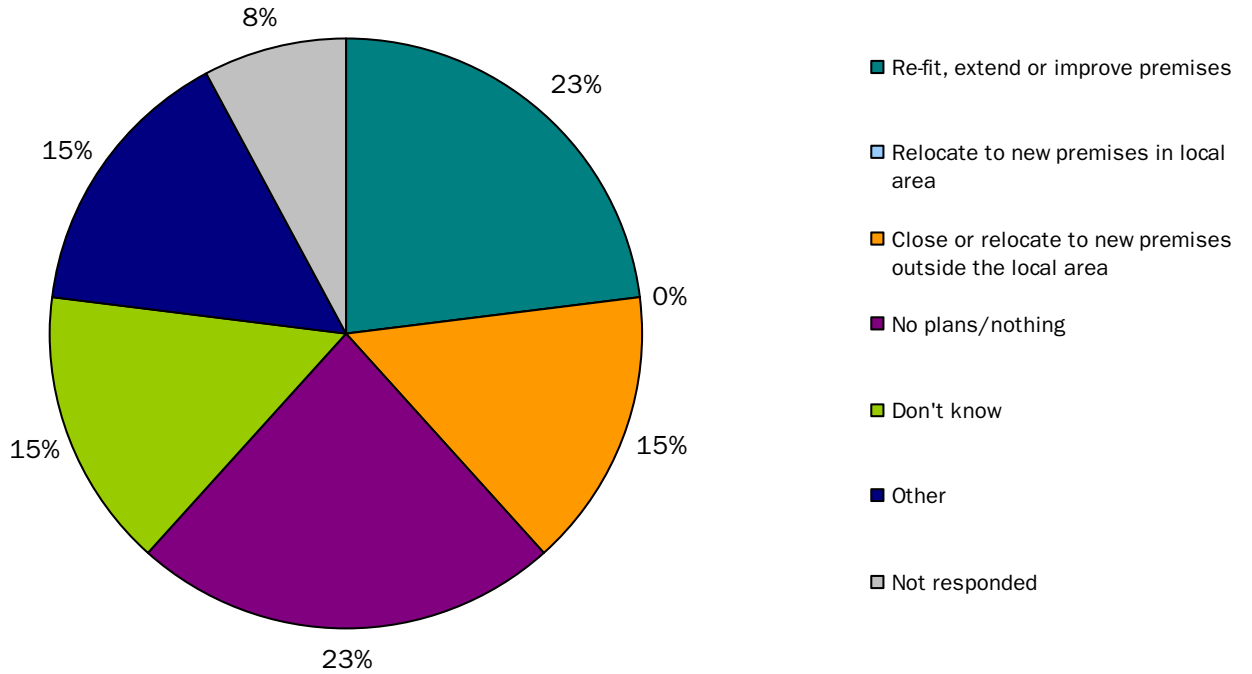
	Main reason	Other reason	Rank
Affordable rent	0%	23%	5
Availability of short term leases	0%	0%	-
Good accessibility	0%	0%	-
Availability of free car parking in centre	0%	0%	-
Close to other businesses	8%	15%	3=
Serves the local area	0%	8%	6
To be within the central area	8%	23%	2
High level of pedestrians (footfall) past stall	0%	0%	-
Business already set up when I took over	62%	8%	1
Other	15%	0%	3=
No Response	7%	23%	-

Note: The 'Rank' is based on weighted results with 'Main Reason' scored 2x 'Other Reason'. Rank 1 denotes the most commonly cited reason.

¹ Rounding errors may occur in the recording of responses to each question

Q2. What current plans do you have to change your business?

Intentions for Market Stall Operators in Burnley to Change their Business



Q3. What are the issues constraining the operation and performance of your business?

	Most important issue	2nd most important issue	3rd most important issue	Rank
Rents/overheads	15%	23%	8%	2
Level of trade/lack of visitors/customers	62%	15%	0%	1
Quality or size of premises	8%	0%	0%	5
Staff recruitment/retention	0%	0%	0%	-
Availability of business/customer parking	0%	15%	23%	4
Competition from other businesses in the centre	8%	15%	8%	3
Competition from other businesses in other town centres	0%	0%	15%	=6
Lack of business finance	0%	0%	8%	=8
Security issues (crime/vandalism)	0%	8%	0%	=6
Problems associated with anti-social behaviour	0%	0%	0%	-
Advice on how to improve the operation of the business	0%	0%	0%	-
Poor location of stall	0%	0%	0%	-
Poor quality of the local environment	0%	0%	0%	-
Inability to find time to develop business	0%	0%	0%	-
Lack of good transport links	0%	0%	0%	-
Poor accessibility	0%	0%	0%	-
Shortage of skilled labour	0%	0%	0%	-
Childcare issues	0%	0%	0%	-
Don't know/nothing Other	0%	0%	8%	=8
Other	0%	0%	0%	-
No Response	8%	23%	31%	-

Note: The 'Rank' is based on weighted results with 'Most Important Issue' scored 3x and '2nd Most Important Issue' scored 2x 'Other Reason'. Rank 1 denotes the most commonly cited issue.

Q4. How do you feel the issue selected as 'most important' at Q3 could be addressed?

	Response Rate
More car parking	0%
Cheaper car parking	15%
Increased policing	0%
Reduced overheads (rent/rates)	8%
More national multiple retailers in centre	0%
Reduction in number of takeaways	0%
Promotion of centre to visitors	8%
Promotion of centre to businesses	0%
Environmental improvements	0%
More community/business events	0%
Other	31%
No response	38%

Q5. Do you consider that Burnley market has any of the following, to the benefit of your business?

	Response Rate
Room to expand	10%
Affordable premises to buy/rent	5%
Affordable Rents	12%
Plentiful availability of car parking	12%
Existing/potential employees living in area	5%
Good bus services	7%
Easy access for employees	5%
Easy access for customers	17%
A local demand for the product/service	10%
Presence of other businesses	2%
A variety of shops, services and entertainment	7%
Other	5%
No response	2%

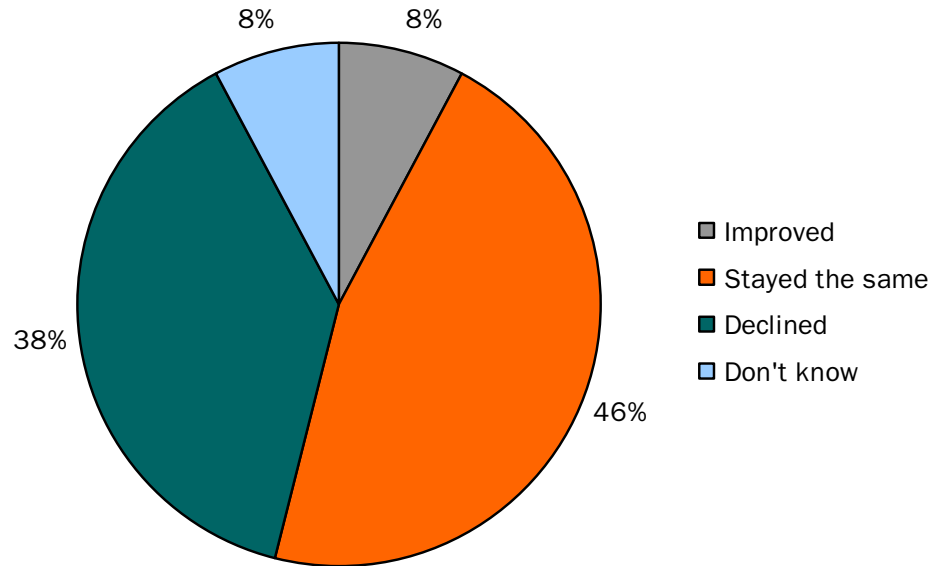
Q6. How do you rate Burnley market in respect of the following?

	Rank
Rents	15
Availability of business/customer parking	10
Traffic circulation	=11
Safety during daytime	=2
Crime and security	1
Range of stalls and services available	5
Quality of stalls and services available	7=
Liveliness/street life/character	14
Level of street cleansing and litter	4
Market management and maintenance	=2
Condition/appearance of Market Hall	6
General shopping environment	7=
Interest shown by Council/local authorities	=11
Marketing/promotion of the centre	9
The way businesses work together	13
Events in the Market	16

Note: The 'Rank' is based on total ratings for each answer. Rank 1 denotes the most commonly cited response.

Q7. In general, do you consider that over the last year Burnley market has...?

Burnley Market Opinions Over the Past Year



8. What measures do you think would improve Burnley market?

	Response Rate
Increased choice/range of stalls	9%
More specialist stalls	9%
Improved public spaces	0%
Cheaper/more flexible parking	21%
Improved street cleaning	0%
Improved public transport	3%
More quality cafes	0%
More organised events	9%
Greater promotion/marketing of the market	18%
Expansion of the market	3%
Improved security	3%
Improved traffic management	0%
A new Market Hall	12%
A street market	3%
Other	6%
No response	3%

Q9. Which of the following statements best describes your business's current trading performance?

	Response Rate
Good	8%
Satisfactory	38%
Poor	54%
Don't know/No opinion	0%
No Response	0%

Q10. Over the last 12 months has your trading performance...?

	Response Rate
Improved	23%
Stayed the same	23%
Declined	46%
Don't know/No opinion	8%
No Response	0%

Q11. Over the next 12 months do you expect your business performance to...?

	Response Rate
Improve	46%
Stay the same	15%
Decline	23%
Don't know/No opinion	15%
No Response	0%

Q12. Which town centre or retail park do you consider to be your biggest competition?

	Response Rate
Padiham	3%
Nelson	7%
Colne	0%
Great Harwood	3%
Accrington	10%
Oldham	0%
Blackburn	31%
Preston	3%
Bradford	0%
Leeds	0%
Manchester	14%
Kirkgate Shopping Centre, Bradford	0%
White Rose Shopping Centre, Leeds	0%
The Mall, Blackburn	3%
Trafford Centre, Greater Manchester	3%
Other Retail Parks	0%
Internet/Mail Order	7%
Other	14%
No Response	0%