

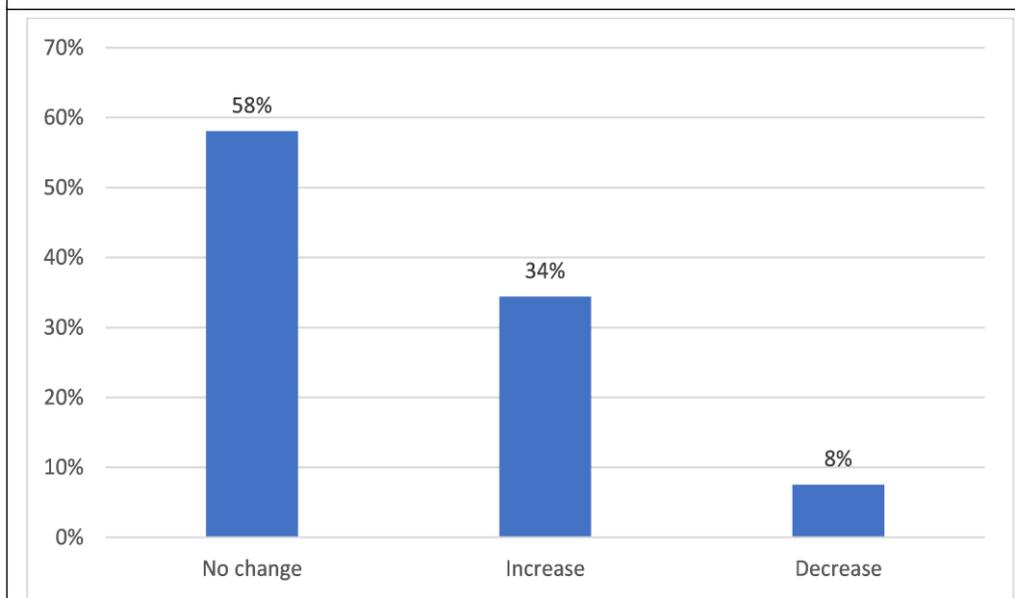
BID Leamington Survey Analysis & Emerging Narrative 2022

Surveys were carried out across a range of businesses from all sectors and sizes in Leamington Spa during the month of September and October 2022. This analysis reflects the feedback of 102 surveys collected at that time (2nd November, 2022). In total, we now have heard from just over 130 businesses and the combined analysis will inform our 2023-2028 business plan.

1. Business Feedback

Despite the economic uncertainty and current cost of living challenges, the confidence in being able to keep or increase number of staff for businesses in Leamington Spa is strong. 92% of businesses surveyed anticipate that there will be either no changes to the number of staff or numbers of staff will increase in the next year. Only 8% of the businesses surveyed stated that they planned to decrease their number of staff.

Fig 1: In the next year, do you envisage staff numbers changing?



2. Marketing, Promotions, Events

In the survey, marketing and promotion came out as being an important activity for businesses. When asked what projects they would like the BID to consider, the project that came second in the ranking was 'More projects that give Royal Leamington Spa national exposure', with 93% of businesses saying that they would like to see the BID consider this. 'Promotion and awareness of reasons to visit' also ranked in the top six in terms of importance to businesses, with 80%.

In terms of the individual projects and activities, four out of the top nine for perceived value to businesses were all marketing and promotion related activities. These were 'Creative Promotions & Competitions' at 77%, 'PR Campaigns & Major Project' at 76%, 'The Royal Leamington Spa Brand: Developing and marketing our town as a destination' at 73% and 'Digital & Social Media Advertising' at 72%.

When asked if there were any other projects that they would like BID Leamington to consider, comments that came under the category of 'Marking and promotion' were the second most mentioned topic and 90% of businesses identified they 'would like to see the return of the Leamington Lights' and 88% saying they wanted 'more BID run events in future', along with help to capitalise on event that are not run by BID (78%). Comments included 'The provision to place A Boards on pavement', 'More night promotions' and 'Social media and online advertising'.

When businesses were asked how important they felt certain aspects were to the town generally, 'Events' scored highly with 96%. Not only this, it is clear that businesses know that these events happen in the town, as this was by far the highest scorer when businesses were asked if they were aware of BID Leamington's activities in each of the categories, with 73% saying that they were aware of the events. This was 14% higher than the next highest scoring category, which was 'Market and promote' at 59%.

3. Enhancing the Experience

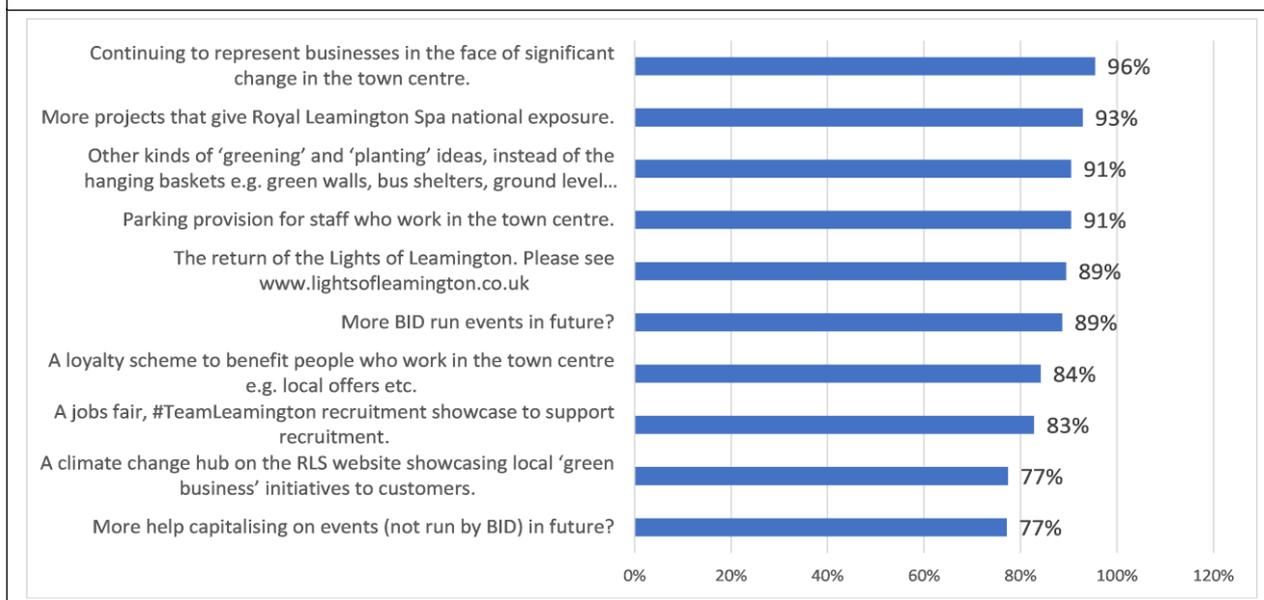
In the survey, when asked to rate activities in terms of value to their business and the town, by far the most beneficial project was 'Provision of Christmas Lights: Over 140 crossings & decorations & maintenance (joint funded)' with 88%. This was 10% higher than the second most beneficial project, which was also do to with enhancing the experience of Leamington Spa, 'Installing Annual Bunting, Banners and Ground Graphics e.g., Flowers, flags etc', where 78% of businesses said this was beneficial to them.

In terms of future projects for the BID to consider, 'Other kinds of 'greening' and 'planting' ideas, instead of the hanging baskets e.g., green walls, bus shelters, ground level trees or planters etc' scored highly with 91% of businesses saying that they would like the BID to consider this for the new term. It's clear from the survey results that the town already has a high standard for attractive greenery as 'Attractiveness of green spaces and floral displays' was at the bottom of the list of issues for businesses, with only 1% of those surveyed saying that this was either very poor or quite poor. However, as 'Attractiveness of green spaces and floral displays' scored highly in terms of importance with 85% and was in the top five in the rankings, it is important that the BID continues to keep up this high standard as businesses clearly see the value of this.

Another important part of enhancing the experience of Leamington Spa is tackling crime and anti-social behaviour. The aspect that businesses ranked as the worst issue was 'Begging, rough sleeping, drug, and street drinking issues', with 64% of businesses saying this was either very poor or quite poor. Crime and safety related issues also ranked highly in terms of importance for businesses. At the top of the ranking was 'Personal safety during the day', with 85% of businesses saying this was important to them, whilst ranked third was 'Business Crime / Shop theft' at 83%. Even though these aspects ranked highly for importance, it seems that currently they are not too much of an issue for businesses, as only 3% said that 'Personal safety during the day' was either very poor or quite poor. 22% of businesses said that 'Business Crime / Shop theft' was either very poor or quite poor.

Parking was also a key issue that was highlighted in the survey, as two out of the top three issues for businesses were to do with parking. 'Cost of parking' was ranked the second highest, with 60% of businesses saying this was either very poor or quite poor, followed in third place by 'Availability of business/customer parking' with 43%. When asked to give any general views on what they felt would help Leamington to thrive in future, comments that fell under the category of 'Access' were mentioned most, with comments such as 'I think parking prices do have an impact on people coming into the town' and 'The parking situation: lack of, cost and time availability to park all needs to change'.

Fig 2: Top ten future projects ranked by businesses as beneficial



4. Supporting Business

From the surveys, it is clear that business support is imperative to the businesses in Leamington Spa, as 'Providing support' was ranked highest in terms of importance with 97%. 'Providing support' did however score lowest in terms of awareness, with only 44% of businesses saying that they were aware of the BID's support activities and services. This may suggest that the BID could do more to shout out about the support that they do provide, so more businesses become aware that the support is available to them. This was further backed up in the survey when businesses were asked if they realised that without the BID, none of the initiatives mentioned in the survey would happen. 62% of businesses stated that they were not aware of this, whilst only 38% stated that they were aware.

In the survey, businesses were also asked to rank specific aspects in terms of importance to their business, and ranked the second highest was 'Support from BID Leamington (through Covid and beyond)', as 84% of businesses said that this was important to their business.

In terms of the individual projects and activities that the BID has delivered to support businesses, it's clear from the survey results that some initiatives have been more beneficial to businesses than others. 'Regular Email Updates: Providing business-critical information and advice' scored highly in terms of perceived value to businesses, with 71%. The second most beneficial project to businesses in the support category was 'Hosting regular meetings, networking and information events' with 63%. Some of the support projects that did not score highly for perceived value to business were 'Business Training & Networking: Organising training and a business toolbox of advice' at only 45% (this was also third bottom in the overall list of projects), and 'Arranged 'Health and Wellbeing' Support: For business staff through Covid and beyond' at 47%. This demonstrates that moving forward the BID will be able to take this feedback on board and focus on continuing and developing the activities that businesses find valuable.

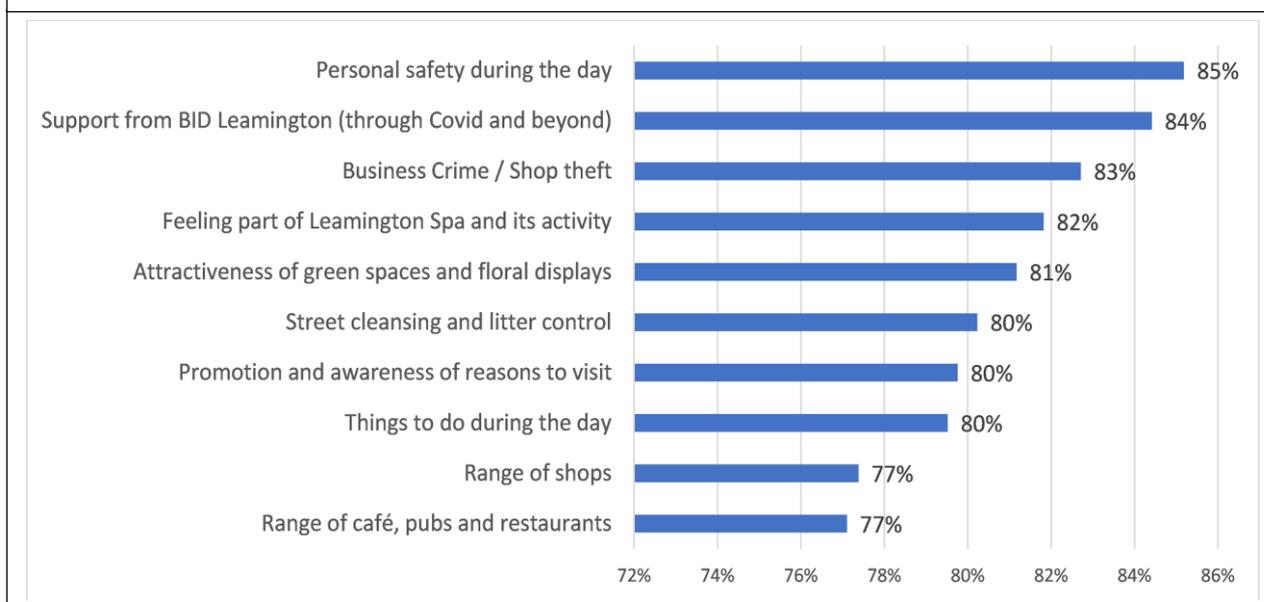
5. Influencing and Inspiring

In the survey, when businesses were asked to rate activities in terms of value to their business, the project that ranked second highest was ‘Campaigning & Lobbying: On parking provision, grants, out of town retail, business rates etc’, with 78% of businesses saying this was important to them. Also scoring highly falls under the category of influencing and inspiring was ‘Monitoring Town Centre Health: Analysing our footfall data, car park tickets, vacant units etc’, with 76%.

The importance of the BID’s ability to act as a collective voice for businesses in the town centre was also highlighted in the survey when businesses were asked if they would like the BID to consider certain projects for the future, and ‘Continuing to represent businesses in the face of significant change in the town centre’ ranked at the top of the list, with 96% of businesses saying they would like the BID to consider this.

Town centre developments and the BID’s relationship with key stakeholders to influence this is also a key part of this objective, and in the survey, ‘Commercial attractiveness’ was a key theme that was mentioned by many businesses as an issue for the town centre. When asked to give further views in the open-ended questions, businesses mentioned numerous times about the commercial attractiveness of the town to draw visitors in. Comments included ‘Rents/rates need to be lower to encourage wider range of retailers’, ‘Fill empty units to encourage retail opportunities’ and ‘More variable retailers - no more cafes or restaurants’. These comments were further backed up when businesses were asked to rank aspects of the town from very poor to very good, and ‘Range of shops’ ranked as the fourth worst issue for businesses saying this was either very poor or quite poor.

Fig 3: Top ten aspects ranked by businesses as important

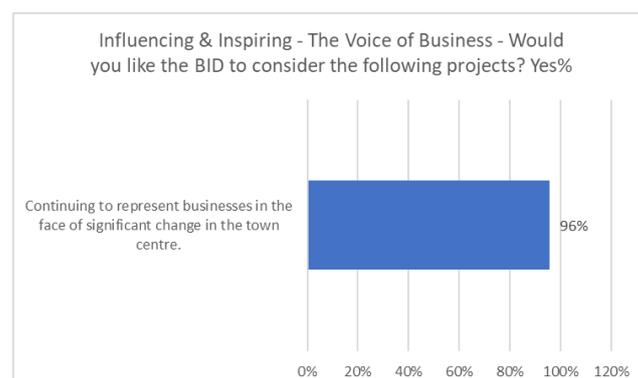
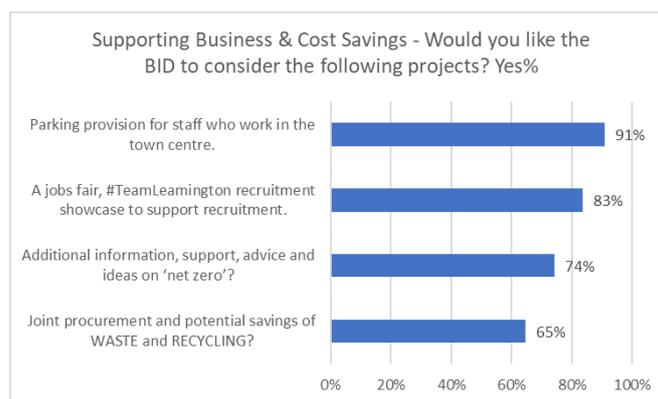
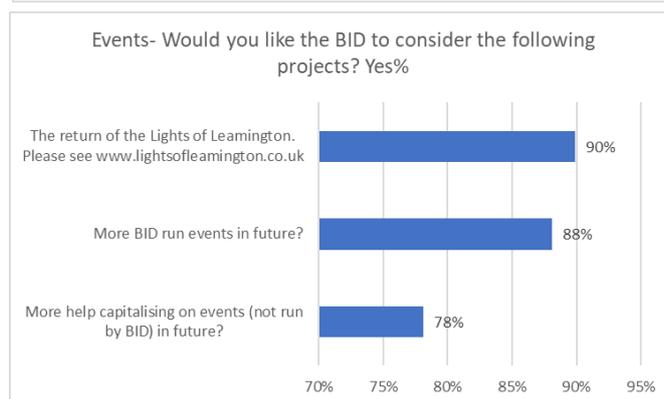
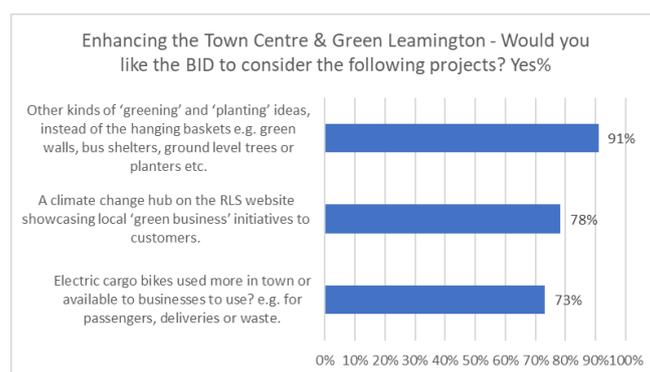
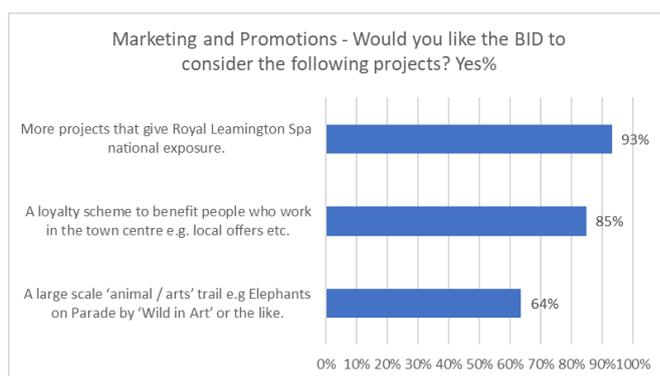


6. Looking Forwards – An Emerging Vision

Looking forwards, it is clear there are high levels of support for many of the activities that are already being delivered, alongside some project areas to promote further, adapt or develop. We also know that even where there is a majority view, there is not total consensus, so we remain committed to listening to everyone.

Feedback suggests the existing four strategic pillars (Promoting, Enhancing, Supporting, Influencing) remain appropriate, but that within this there is room to evolve. In addition to the future project areas identified above, below is a summary of future looking feedback received. A project area from the ‘comments’ that many businesses would like us to consider relates to our ‘environment’ and the town centre sustainability and net-zero agenda. This was backed up by 78% supporting a ‘climate change hub’, 91% looking for ‘additional greening’ and 74% looking for information and advice on net zero. Within supporting, recruitment such as a jobs fair - 83%, and employee support - 91%, such as benefits, employee car parking, were also strongly supported as possible future project areas.

This calls for a vision, objectives and narrative that builds on the existing work of the BID whilst addressing the pressing challenges we face around ensuring our town centre remains safe, attractive and welcoming, championing environmental sustainability, supporting the resilience of the retail and leisure sector, and embracing opportunity that comes with attracting additional office and residential space in walking and cycling distance of our town centre.



Date: 2nd November, 2022