

TOWN CENTRE ECONOMIC BENCHMARKING

BALLINASLOE REPORT

Measuring the performance of town centres



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CONTENTS

EXECUTIVE SUMMARY	3
INTRODUCTION	9
THE APPROACH.....	9
THE SYSTEM	9
THE REPORTS	10
METHODOLOGY.....	10
KEY FINDINGS	11
KPI 1: COMMERCIAL UNITS; USE CLASS.....	11
KPI 2: COMMERCIAL UNITS; COMPARISON VERSUS CONVENIENCE	13
KPI 3: COMMERCIAL UNITS; TRADER TYPES	14
KPI 4; COMMERCIAL UNITS VACANCY RATES	16
KPI 5; MARKETS	16
KPI 6 AND 7: ZONE A RETAIL RENTS AND PRIME RETAIL PROPERTY YIELDS.....	17
KPI 8; FOOTFALL.....	17
KPI 9: CAR PARKING	19
KPI 10: BUSINESS CONFIDENCE SURVEY	21
QUESTIONS SPEIFIC TO BALLINASLOE	22
KPI 11: TOWN CENTRE USERS SURVEY	32
QUESTIONS SPECIFIC TO BALLINASLOE	36
KPI 12: SHOPPERS ORIGIN SURVEY	46
APPENDICES.....	49
Appendix 1: PARTICIPATING TOWNS IN 2013	49
Appendix 2: BALLINASLOE BUSNIESS UNIT DATA BASE.....	52
Appendix 3: CAR PARKING DATABASE	61
Appendix 4: SHOPPERS' ORIGIN DATABASE	75

Purpose

The purpose of Town Centre Economic Benchmarking is to collect standardised key performance indicators (KPIs) to help local organisations and businesses to better understand the function, trends and issues facing a town and its potential relative to similar towns elsewhere.

The approach is 'tried and tested' as it has been operating across over 200 towns in England and Wales for the last five years. This gives a wealth of experience and information to draw upon. Ballinasloe is the first Irish town to be Benchmarked in this way and has an important role in both piloting and promoting the transferability of the approach.

Ballinasloe Town Function

The Benchmarking key performance indicators (KPIs) for Ballinasloe help understand the town's current function and whether going forward the priority should be to strengthen this role or seek opportunities to diversify. What emerges are tensions between its seemingly historic function in providing comparison retail for a wider area, its day-to-day, local customer base and emerging competition from more readily accessible neighbouring and larger centres as well as the internet. Although in contrast a majority of shoppers are in town for convenience shopping, this role is partly liable to out-of-town competition. Notable KPIs that help further interpret this include:

- There is good spread of different types of businesses in Ballinasloe town centre with just over half (51%) being retail and this is comparable with similar sized towns in the UK. Financial and professional services (8%) are slightly unrepresented compared to other small towns (14%) and there are fewer restaurants and cafes (4%) but more drinking establishments (8%) than might be expected in a town of this size.
- There is a high proportion of retailers selling comparison goods (87%) compared to convenience goods (13%). This means that attention needs to be paid to competition with neighboring and larger centres as well as with on-line retail while there are fewer routine reasons for local people to visit the town centre.
- Ballinasloe has a significantly higher percentage of independent retailers (87%) compared to similar sized towns, whilst the number of multiples (9%) is significantly lower than for similar sized towns (25%). This may cause some shoppers -especially amongst younger generations- to look to other centres or on-line to access well-known brands.
- The potential for local customers (66%) is considered the strongest positive aspect of being located in Ballinasloe town centre with accessibility indicators including geographical location (50%), transport links (36%), car parking (35%) and the potential for tourist customers (31%) being the next ranked aspects. The suggestion from this is that whilst businesses see local customers as primarily their target market, some at least recognize the potential to attract business from further afield.

- At the time of these mid-week surveys, most of the town centre users were in-town for work (25%); convenience shopping (24%) and access to services (20%). Combined with the fact that 89% of the town centre users sampled visited the town at least once a week, this suggests it retains a role as a local service centre.
- The mix of town centre users includes a higher percentage of males (57%) than amongst comparable UK figures and this does not normally typify high spend on convenience shopping. There was a good spread of ages represented including a higher proportion of under 35's than typical for small towns.
- When asked to select three words that best described Ballinasloe, the most popular choices were friendly, local, quiet, and convenient. These responses give a realistic portrayal of the town by existing users as a local service centre.

Ballinasloe Town Trends

The analysis of KPIs for Ballinasloe town trends indicates a moderately busy town centre with healthy car park occupancy but uneven footfall distribution across the town and high vacancy rates especially in peripheral areas. Reassuringly, an increased majority of businesses are optimistic for the year ahead whilst a small number continue to show year-on-year declines in turnover and provide continued cause for concern. KPIs supporting this analysis are:

- Average footfall counts for the busiest part of Ballinasloe are comparable with other small towns for the busiest location on Main Street. Footfall levels drop considerably across different parts of the town, however, with low counts recorded for Dunlo Street (43) and Society Street (34). This indicates that town centre users are not migrating around the town on normal mid-week mornings.
- Ballinasloe's vacancy rate (15%) is high compared to other benchmarked towns. The town though does have a large number of units and many of these are small in size and in older properties and so are not best suited to the demands of the modern retailer.
- Average vacancy rates of 52-53% suggest an overall good availability of parking though further analysis reveals that public car parks have 207 of these spaces (30% of the total) and are 74% vacant, whilst private car parks have 131 spaces (19% of the total) and are only 38% vacant. The private parking is thus significantly alleviating any pressure on town centre parking.
- There are fairly even proportions between businesses showing a mixture of different levels of trading performance over the last year. The spread is very similar to performance in other small towns with 71% having increased or maintained their turnover. Importantly, an increased majority of businesses (84%) are optimistic that turnover will be maintained or increased in the year ahead. Whilst this is a positive picture, concern should remain for the 16% of businesses expecting to show a year-on-year decline in turnover.

Current Issues and Priorities

The surveys of businesses and town centre users highlight positive and negative current perceptions and point to potential future priorities. Town centre users, in contrast to businesses, are markedly more positive compared to last year and other towns nationally.

Positives

- Businesses in Ballinasloe are most positive about the potential for local customers (66%) followed by the opportunities offered by its accessibility including geographical location, transport links, car parking and the potential for tourist customers being the next ranked aspects. Though modest in response, affordability of business premises and housing emerge as relatively more positive compared to similar towns.
- Responses from town centre users questioned about key characteristics of the town centre necessary to create a good trading environment and footfall are very positive about ease of walking around town (79%), safety (73%), customer service (71%), access to services (70%) and convenience (68%). Restaurants (57%) and leisure facilities (51%) are also all viewed favourably by town centre users with figures better than comparative UK averages..
- Nearly two thirds of users (63%) would currently recommend a visit to the town centre though they are less optimistic looking forward with only one third (32%) agreeing that Ballinasloe has a bright future.

Negatives

- The prosperity of the town scores markedly low (23%) compared to averages for small towns across the UK.
- Car parking (57%) is considered the most negative aspect of being located in the town centre by businesses but this is comparable to responses from other small towns (53%). Competition from out-of-towns retailers (55%), prosperity of the town (45%) and physical appearance (37%) are perceived as the only other significantly negative aspects.
- Town centre users in Ballinasloe have limited negative sentiments with retail offer (50%), physical appearance (47%), car parking (47%) and cultural activities (36%) the most significant criticisms and comparable to or only slightly worse than to be expected for a town of this size.
- When asked to respond to the statement that Ballinasloe has a bright future, only 25% of businesses and 32% of users agreed. A further 41% of businesses were

undecided and this perhaps highlights the critical importance of authorities and local partners working with businesses to boost this modest optimism.

Priorities

When businesses were provided with the opportunity to make suggestions to improve the town's economic performance, a broad range of comments were made including:

- *Parking:* As typical of most towns, responses to the survey of Ballinasloe featured calls to improve parking, with a very strong emphasis on removing or reducing charges. Within this, there was some recognition of the value of charges and enforcement in restricting long-term occupation of spaces.
- *Economy:* Unusually for a survey of this nature, there were a significant number of businesses that identified a link between the wider economy of Ballinasloe and the town centre. Calls to attract a large new employer to the town doubtless reflect the impact felt from recent closures.
- *Appearance:* There was significant recognition from businesses surveyed about the need to improve the appearance of the town including empty and newly leased business units.
- *Attractions and Tourism:* There was significant recognition amongst businesses of the need to attract visitors to the town through events, activities and enhanced tourism facilities.
- *Promotion:* There was also strong recognition and creative ideas expressed around new opportunities for collective marketing of the town by businesses.
- *Local Leadership and Partnership Working:* Echoing the calls for improved collective marketing, there were limited but assertive calls to learn lessons from the past and show clear leadership in tackling issues in future.
- *Retail Mix:* There was some recognition by businesses of the need to diversify the retail mix including calls for a key attractor retail outlet to draw people to the town. There were also limited calls to introduce restaurants and coffee shops to attract customers and increase their dwell time in the town.
- *Planning:* There were differences of opinions expressed about the value of proposed town enhancement relative to other ways of improving the customer experience.
- *Social:* Very unusually for a survey of this nature, there were very pointed calls from businesses to address anti-social behavior in the town centre, especially alcohol related.

Responses from town centre users reveal similar themes to businesses though not always with the same perspective:

- **Parking:** There are overwhelming and consistent calls from town centre users for the re-instatement of free parking with 63 out of 191 respondents ranking it within their top two priorities. Within this there is virtually no acceptance of a role for some level of parking restriction and control. This level and type of response is typical of town centre users that have experienced the recent introduction of car park charges and needs to be carefully considered alongside the earlier data on actual parking usage which gives a more neutral portrayal of the issues.
- **Leisure:** Alongside calls to diversify the retail mix, there was a similar level of responses suggesting that there should be improved leisure facilities in the town centre including in particular a cinema. Specific calls for activities for children and young people featured quite prominently amongst the suggestions for wider diversification of the town centre offer.
- **Retail Mix:** A significant number of town centre users considered that diversifying the retail mix was a future priority including some calls for well-known multiples alongside specialist clothes retailers. There were a moderate number of calls to improve the town centre offer by opening more cafes and restaurants as part of a diversified mix.
- **Employment and Economy:** Very unusually in a survey of this nature, and echoing calls from businesses, there was wide recognition amongst towns centre users of the need to improve the wider economy and employment on offer in the town.
- **Appearance:** There were a relatively high number of calls for a survey of this nature to improve various aspects of the town centre's appearance. Echoing these responses, a significant number of town centre users gave priority to the need improve the appearance of empty premises.
- **Access and Transport:** There were a variety of responses relating to different aspects of improving town centre access and transport including footpaths, cycle routes and roads.
- **Local leadership and partnership working:** A surprising number of town centre users called for improvements in different aspects of local leadership behind the scenes rather than tangible improvements to the town centre.
- **Social:** Very unusually for a survey of this nature, a number of respondents made pointed remarks about the need to improve ant-social behaviour including excessive drinking.

Shoppers' Origins and Cross-Marketing Opportunities

The large volume of data (1225 entries) collected for town centre shoppers for Ballinasloe from a mix of convenience retailers, local services and comparison retailers is very helpful in revealing the following key patterns:

- Town centre users from the local area are important customers for the town's businesses accounting for 45% of the use but is slightly less than might normally be expected for a town of this size. Not surprisingly a higher proportion of their visits are to convenience retailers or local services but two thirds of them visited

comparison retailers. Understanding this cross-over between convenience and comparison retail by local users may be significant in developing new approaches to cross-marketing and local loyalty promotion in future.

- A relatively small proportion of town centre users fall in to the intermediate category described as 'visitors'. Their pattern of spend is similar to local users.
- Compared to small towns of its size, Ballinasloe has a relatively high percentage of users who have travelled from over 25km (or approximately 30 minutes) away and are using local retailers. Whether these are tourists in the traditional sense cannot be determined fully from the data but it is likely that they have purposefully set-out to visit the town. The data clearly indicates that this group are undertaking comparison shopping in particular and it may be that they have loyalty to particular stores. The opportunity to cross-market to this group between different specialist comparison retailers is worth exploring. It is also important to this group that they are well-informed about local restaurants, cafes, pubs and other facilities that they might use during their stay in town.
- Relative to the 87:13% ratio between the number of convenience and comparison stores in Ballinasloe, this data suggests that convenience stores and local services are well-used.
- The data indicates that the comparison retail offer remains important to town centre users including especially those from further afield. Although the number of 'tourists' is only a third of the overall number of users recorded, they account for nearly the same amount of comparison shopping visits as locals. It is probable that these visitors from further afield will be higher spending on any one visit because they are likely to have made a special trip to the town or a specific retailer.

INTRODUCTION

THE APPROACH

Town Benchmarking managed by the People and Places Partnership has been developed to address the real issues of how to understand measure, evaluate and ultimately improve town centres. The approach offers a simple way of capturing data on Key Performance Indicators (KPIs) selected by those involved in town centre management. By having the tools to measure performance, strategic decision making is both encouraged and improved. By considering performance, forward strategies and action planning can be more focused and effective.

The approach is 'tried and tested' as it has been operating across over 200 towns in England and Wales for the last five years. This gives a wealth of experience and information to draw upon. Ballinasloe is the first Irish town to be benchmarked in this way and has an important role in both piloting the transferability of the approach and comparing trends across the Irish Sea.

THE SYSTEM

The Benchmarking system is divided into two sections:

- Large Towns; consisting of those localities with more than 250 units
- Small Towns; consisting of those localities with less than 250 units

Towns, depending on their size, contribute to either the Large or Small Town analysis. **Ballinasloe** with 165 units is classed as a ~~Small~~**Large** Town. The analysis provides data on each KPI for the Benchmarked town individually and in an overall context. The overall figures are the average for all the towns which participated in Benchmarking during 2013. Data for 2014 will become available in March 2015. Ballinasloe will therefore be benchmarked in the first instance against the performance of small towns from across the United Kingdom. In time this will be updated with data for 2014. The aspiration is that more Irish towns will be benchmarked in 2015 and that future trends for Ballinasloe will be compared against these.

THE REPORTS

The Annual Town Benchmarking reports provide statistical analysis of each of the KPI's. Individual towns are encouraged to add their own commentary to the analysis, noting specific patterns or trends and using local knowledge to provide specific explanations. The reports are used by a variety of key stakeholders such as local authorities, town and parish councils, local partnerships and universities to;

- Benchmark clusters of towns to ascertain high performers / under achievers
- understand their locality in a Regional, National and Typology context
- measure town centre performance year on year
- identify strengths, weaknesses, and opportunities for improvement
- measure the impact of initiatives and developments within the town centre
- act as an evidence base for funding applications
- create an action plan for town centre improvements

METHODOLOGY

Each KPI is collected in a standardized manner as highlighted in the Table below.

KEY PERFORMANCE INDICATOR	DATA COLLECTION METHODOLOGY
KPI 1: Commercial Units; Use Class	Visual Survey
KPI 2: Commercial Units; Comparison/Convenience	Visual Survey
KPI 3: Commercial Units; Trader Type	Visual Survey
KPI 4: Commercial Units; Vacancy Rates	Visual Survey
KPI 5: Markets	Visual Survey
KPI 6 and 7: Zone A Rents/ Prime Retail Property Yield	Commercial Agent
KPI 8: Footfall	Footfall Survey on a Market Day and Non Market Day
KPI 9: Car Parking	Audit on a Market Day/Non Market Day
KPI 10: Business Confidence Surveys	Postal Survey
KPI 11: Town Centre Users Surveys	Face to Face Surveys/ Online Survey
KPI 12: Shoppers Origin Surveys	Shoppers Origin Survey

Before any KPI data is collected the core commercial area of the town centre is defined. The town centre area thus includes the core shopping streets and car parks attached or adjacent to these streets.

KEY FINDINGS

KPI 1: COMMERCIAL UNITS; USE CLASS

It is important to understand the scale and variety of the “commercial offer” throughout the town. A variety of shops and a wide range of services in a town are important to its ability to remain competitive and continue to attract customers. Sustaining a balance between the different aspects of buying and selling goods and services ensures that the local population (and visitors from outside) can spend time and money there, keeping the generated wealth of the town within the local economy. Importantly, it forms the employment base for a substantial proportion of the community too, helping to retain the population rather than lose it to nearby towns and cities.

The following table provides a detailed breakdown of each of the Use Classes as defined in the UK.

CLASS	TYPE OF USE	CLASS INCLUDES
A1	Shops	Shops, retail warehouses, hairdressers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes
A2	Financial and Professional Services	Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices
A3	Restaurants and Cafes	Food and drink for consumption on the premises- restaurants, snack bars and cafes
A4	Drinking Establishments	Public houses, wine bars or other drinking establishments (but not nightclubs)
A5	Hot Food Takeaways	Sale of hot food for consumption off the premises
B1	Businesses	Offices (other than those that fall within A2) research and development of products and processes, light industry appropriate in a residential area
B2	General Industrial	Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste)
B8	Storage and Distribution	Warehouses, includes open air storage
C1	Hotels	Hotels, boarding and guest houses where

		no significant element of care is provided (excludes hostels)
C2	Residential Institutions	Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.
C2A	Secure Residential Institution	Use for a provision of secure residential accommodation, including use as a prison, young offenders institution, detention centre, secure training centre, custody centre, short term holding centre, secure hospital, secure local authority accommodation or use as a military barracks.
D1	Non Residential Institutions	Clinics, health centres, crèches, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, church halls, law court. Non residential education and training centres.
D2	Assembly and Leisure	Cinemas, music and concert halls, bingo and dance halls (but not nightclubs), swimming baths, skating rinks, gymnasiums or area for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used).
SG	Sui Generis (Unique Establishments)	Theatres, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/ or displaying motor vehicles. Retail warehouse clubs, nightclubs, laundrettes, taxi business, amusement centres, casinos, haulage yards, transport depots, veterinary clinics, dog parlours, tanning and beauty salons and tattoo studios.

The table overleaf provides a detailed analysis of the commercial offering in the town centre by Use Class. The figures are presented as a percentage of the **165** occupied units recorded.

There is good spread of different types of businesses in Ballinasloe town centre with just over half (51%) being retail and this is comparable with similar sized towns in the UK. Financial and professional services (8%) are slightly unrepresented compared to other small towns (14%), although major high Street banks are present. There are fewer restaurants and cafes (4%) but more drinking establishments (8%) than might be expected in a town of this size.

	UK Small Towns %	Ballinasloe Number	Ballinasloe %
A1	53	84	51
A2	14	14	8
A3	8	5	3
A4	4	14	8
A5	5	7	4
B1	3	2	2
B2	0	0	0
B3	0	0	0
C1	1	3	2
C2	0	0	0
C2A	0	0	0
D1	6	3	2
D2	1	1	1
SG	5	6	4
Not Recorded	0		

KPI 2: COMMERCIAL UNITS; COMPARISON VERSUS CONVENIENCE

A1 Retail units selling goods can be split into two different types Comparison and Convenience.

Convenience goods – low-cost, everyday items that consumers are unlikely to travel far to purchase. Defined as;

- food and non-alcoholic drinks
- tobacco
- alcohol
- newspapers and magazines
- non-durable household goods.

2. **Comparison goods** – all other retail goods.

- Books
- Clothing and Footwear

- Furniture, floor coverings and household textiles
- Audio-visual equipment and other durable goods
- Hardware and DIY supplies
- Chemists goods
- Jewellery, watches and clocks
- Bicycles
- Recreational and Miscellaneous goods
- Hairdressing

The presence of a variety of shops in a town centre is important to its ability to remain competitive and continue to attract customers. A balance of both comparison and convenience retail units is therefore ideal in terms of encouraging visitors / potential customers.

The following table provides a percentage of the A1 Shops which sell mainly Comparison Goods/ Convenience Goods.

	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Comparison	79	73	87
Convenience	21	11	13

There are a high proportion of retailers selling comparison good (87%) compared to convenience goods (13%). This means that attention needs to be paid to competition with neighboring and larger centres as well as with on-line retail while there are fewer routine reasons for local people to visit the town centre

KPI 3: COMMERCIAL UNITS; TRADER TYPES

The vitality of a town centre depends highly on the quality and variety of retailers represented. National retail businesses are considered key attractors and are particularly important in terms of attracting visitors and shoppers to a town. However, the character and profile of a town often also depends on the variety and mix of independent shops that can give a town a “unique selling point” and help distinguish it from other competing centres. A sustainable balance of key attractors and multiple names alongside local independent shops is therefore likely to have the greatest positive impact on the vitality and viability of a town.

The following shops are considered Key attractors by Experian Good in a UK context but the list needs re-defining for Ireland.

Department Stores	Clothing
BHS	Burton
Debenhams	Dorothy Perkins
House of Fraser	H & M
John Lewis	New Look
Marks and Spencer	Primark (Pennies)
	River Island
Mixed Goods Retailers	Topman
Argos	Topshop
Boots	
TK Max	Other Retailers
WH Smith	Carphone Warehouse
Wilkinson	Clarks
	Clintons
Supermarkets	HMV
Sainsbury's	O2
Tesco	Superdrug
Waitrose	Phones 4 U
	Vodafone
	Waterstones

Multiple traders have a countrywide presence and are well known household names. Regional shops are identified as those with stores / units in several towns throughout one geographical region only and Independent shops are identified as those that are specific to a particular town.

The following table provides a percentage of the A1 Shops which are Key Attractors, Multiples, Regional and Independent to the locality.

	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Key Attractor	6	1	1
Multiple	19	7	8
Regional	7	3	4
Independent	68	73	87

The important thing to note from this data is that Ballinasloe has a significantly higher percentage of independent retailers (87%) compared to similar sized towns. Whilst the list of Key Attractors needs redefining, the number of multiples as a whole (9%) is significantly lower than for similar sized towns in the UK (25%). This may cause some shoppers – especially amongst younger generations- to look to other centres or on-line to access well-known brands. Charities with a national presence are included in the multiples percentage but are identified separately in the business use database in the appendix.

KPI 4; COMMERCIAL UNITS VACANCY RATES

Vacant units are an important indicator of the vitality and viability of a town centre. The presence of vacant units over a period of time can identify potential weaknesses in a town centre, whether due to locational criteria, high rent levels or strong competition from other centres.

The following table provides the percentage figure of vacant units from the total number of commercial units.

	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Vacancy Rate	8	25	15

Ballinasloe's vacancy rate (15%) is high compared to other benchmarked towns. The town though does have a large number of units and many of these are small in size and in older properties are so are not all suited to the demands of the modern retailer.

KPI 5; MARKETS

Good quality markets provide competition and choice for consumers. A busy and well-used street market can therefore be a good indicator of the vitality of a town centre. Conversely, if a market is in decline (e.g. empty pitches reducing numbers), it can be an indication of potential weaknesses in the town centre e.g. a lack of footfall customers due to an inappropriate retail mix or increased competitor activity. Street markets can also generate substantial benefits for the local economy. Markets can also provide a local mechanism for a diverse range of local enterprises to start, flourish and grow, adding to the sustainable mix of shops services on offer throughout the town.

The following table provides the average number of market traders at regular (at least once a fortnight) weekday markets within the locality.

	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Av. No.	17	-	-

This data was not collected for Ballinasloe as there is no regular mid-week market.

KPI 6 AND 7: ZONE A RETAIL RENTS AND PRIME RETAIL PROPERTY YIELDS

The values for prime retail property yield and Zone A rentals are the “industry” benchmarks for the relative appeal of a location with its users and with the owners or investors in property. All real estate has a value and this value is based on the return on investment that can be levered out of the site. As these indicators rise and fall, they provide a barometer of success or failure and, because the same property dimensions are assessed to determine them, they can be used as an indicator of improving or declining fortunes for towns. In how attractive it is to businesses. Conversely, where rents are falling it can be an indicator of decline.


Zone A rents are normally expressed as £/€ per sq. ft. and the Prime Retail Property Yield as a net percentage figure. Local property expertise indicates that in the case of rural towns like Ballinasloe, however, there is never a reference to square footage. Most agents will quote circa €600.00 to €750.00 per month for a retail unit. Zone A rentals would therefore approximate to €6 to €8 per sq.ft. for good quality units. In addition there has been little or nothing transacting in the last 7 or 8 years in the category of prime retail properties. Many of the retail units are operated by the owner and one or two employees. Taking account of Property Yield would be 10%.


	UK Small Towns	Ballinasloe
Zone A Rents	27	€6 to €8
% Yield	8%	10%


KPI 8; FOOTFALL

The arrival and movement of people, whether as residents, workers, visitors or a shopper is vital to the success of the majority of businesses within the town centre. The more people that are attracted to the town, the better it trades and the more prosperous the businesses in it become, provided there is ample available disposable income in that population. Measuring passing people in a consistent manner in the same place, at the same time builds up a picture of the town, its traders and their relative success over the weeks and months.

The following table provides the average number of people per 10 minutes between 10am and 1pm from the busiest footfall location in the town, Main Street, compared against similar locations in the UK.

	Time	Market Day/ Busy Day Count 16/10/14	Time	Non Market Day/ Quiet Day Count 14/10/14
	10.00 - 10.10	48	10.00 - 10.10	38
	11.00 - 11.10	68	11.00 - 11.10	47
	12.00 - 12.10	67	12.00 - 12.10	64
	Comments	Overcast and mild.		Sunny autumn day

Count Point Location: Society Street, count between Brodericks & Utah				
	Time	Market Day/ Busy Day Count	Time	Non Market Day/ Quiet Day Count
	10.30 - 10.40	34	10.30 - 10.40	23
	11.30 - 11.40	52	11.30 - 11.40	38
	12.30 - 12.40	45	12.30 - 12.40	41
	Comments	Overcast and mild.		Sunny autumn day

Count Point Location: Main Street, count between Credit Union and Vacant unit opposite				
	Time	Market Day/ Busy Day Count	Time	Non Market Day/ Quiet Day Count
	10.45 - 10.55	87	10.45 - 10.55	79
	11.45 - 11.55	89	11.45 - 11.55	92
	12.45 - 12.55	79	12.45 - 12.55	78
	Comments	Overcast and mild.		Sunny autumn day

Count Point Location: Dunlo Street, count between P.Clarke & Kathleens			
Time	Market Day/ Busy Day Count 16/10/14	Time	Non Market Day/ Quiet Day Count 14/10/14
10.15 - 10.25	32	10.15 - 10.25	31
11.15 - 11.25	39	11.15 - 11.25	48
12.15 - 12.25	55	12.15 - 12.25	51
Comments	Overcast and mild.		Sunny autumn day

	UK Small Towns	Ballinasloe Number
Market/ Busy Day	122	85
Non Market/ Quiet Day	90	83

Average footfall counts per ten minutes in for the busiest part of Ballinasloe are comparable on the two days surveyed with no appreciably busier day. For both days, the levels recorded are comparable with other small towns for the busiest location on Main Street. Footfall levels drop considerably across different parts of the town with low counts recorded for Dunlo Street (43) and Society Street (34). This indicates that town centre users are not migrating around the town on normal mid-week mornings.

KPI 9: CAR PARKING

A large proportion of spending customers in a town centre come by car. In the rural setting, the car tends to be an essential tool, used by both those who come to spend and those who come to work. The provision of adequate and convenient car parking facilities is therefore a key element of town centre vitality. An acceptable number of available spaces with a regular, quick turn-over for shoppers are the ideal while adequate longer stay, less convenient spaces for local owners/ workers and visitors must be considered too.

The following tables provide a summary of the Car Parking offering broken down into the;

- Provision of total number of spaces in designated car parks
- Provision of total number of short stay, long stay and disabled spaces in designated car parks
- Percentage of vacant spaces in designated car parks on a Market/ Busy Day and on a Non Market/ Quiet Day.
- Provision of total number of on street car parking spaces
- Provision of total number of on street short stay, long stay and disabled spaces
- Percentage of vacant on street spaces on a Market/ Busy Day and on a Non Market/ Quiet Day.
- Overall provision of car parking spaces
- Overall provision of total number of short stay, long stay and disabled spaces
- Overall percentage of vacant spaces on a Market/ Busy Day and on a Non Market/ Quiet Day.

	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Car Parks Total Spaces	88	686	70
Short Stay Spaces: (4 hours and under)	47	40	4
Long Stay Spaces: (Over 4 hours)	41	633	65
Disabled Spaces:	4	13	1
Not Registered	8	-	-
Vacant Spaces on a Market Day:	30	391	40
Vacant Spaces on a Non Market Day:	38	390	40
Illegal Spaces on a Market Day:	n/a	2	n/a
Illegal Spaces on a Non Market Day:	n/a	2	n/a
On Street			
Total Spaces:	12	288	30
Short Stay Spaces: (4 hours and under)	56	280	29
Long Stay Spaces: (Over 4 hours)	36	-	-
Disabled Spaces:	4	8	1
Not Registered	4	-	-
Vacant Spaces on a Market Day:	14	115	40
Vacant Spaces on a Non Market Day:	22	125	43
Illegal Spaces on a Market Day:	n/a	-	-
Illegal Spaces on a Non Market Day:	n/a	2	-
Overall			
Total Spaces:	n/a	974	n/a
Short Stay Spaces: (4 hours and under)	48	328	34
Long Stay Spaces: (Over 4 hours)	40	646	66
Disabled Spaces:	4	21	2
Not Registered	7	-	-
Vacant Spaces on a Market Day:	28	506	52
Vacant Spaces on a Non Market Day:	36	515	53
Illegal Spaces on a Market Day:	n/a	2	0.2
Illegal Spaces on a Non Market Day:	n/a	4	0.4

The survey shows that there are 974 car park spaces in Ballinasloe that can be subdivided in to:

- Off-street parking accounting for 70% of spaces with a 4% to 65% split between short and long-stay along with 1% disabled parking. This is provided by a mix of chargeable public and free private car parks.

- On-street parking accounts for 30% of the total spaces in the town and all of this is short-stays (29%) or disabled (1%) parking. The proportion of on-street parking spaces (30%) is high compared to average figures for small towns in the UK.

Average vacancy rates of 52-53% suggest an overall good availability of parking and that availability of spaces is not a limiting factor. Further analysis, however, reveals that public car parks have 207 of these spaces (30% of the total) and are 74% vacant, whilst private car parks have 131 spaces (19% of the total) and are 38% vacant. Private parking is free of charge whereas on-street and local authority parking have to be paid for. The private parking is thus significantly alleviating any pressure on town centre parking as without this provision, there would only be 192 vacant spaces spread between on-street and council car parks which equates to a near critical 19% vacancy rate.

KPI 10: BUSINESS CONFIDENCE SURVEY

In regards to the 'business confidence' by establishing the trading conditions of town centre businesses, stakeholders can focus their regeneration efforts on building on existing strengths and addressing any specific issues. The following percentage figures are based on the 95 returned Business Confidence Surveys, offering an exceptional response rate and authoritative insights.

	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Nature of Business			
Retail	59	54	61
Financial/ Professional Services	18	13	15
Public Sector	2	1	1
Food and Drink	12	12	13
Other	10	9	10
Type of Business			
Multiple Trader	11	9	10
Regional	6	5	6
Independent	83	73	84
How long has business been in town			
Less than a year	7	2	2
One to Five Years	21	9	10
Six to Ten Years	15	11	12
More than Ten Years	57	68	76
Compared to last year has your turnover			
Increased	38	30	35
Stayed the Same	34	31	36
Decreased	28	24	28
Compared to last year has profitability			

Increased	30	29	34
Stayed the Same	37	29	34
Decreased	33	27	32
Over the next 12 months do you think your turnover will			
Increase	44	36	42
Stay the Same	40	36	42
Decreased	16	14	16

Has your business suffered from any crime over the last 12 months	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Yes	26	25	28
No	74	65	72
Type of Crime			
Theft	72	19	79
Abuse	13	5	21
Criminal Damage	39	10	42
Other	6	1	4

QUESTIONS SPECIFIC TO BALLINASLOE

The following question was asked in order to provide a business perspective to a question recently asked during the on-line survey of local residents

Do you agree with the following statement? "Ballinasloe is a town with a bright future for the decade ahead?"	Ballinasloe Number	Ballinasloe %
Strongly agree	8	9
Agree	14	16
Uncertain	36	41
Disagree	19	22
Strongly disagree	11	13

What are the positive aspects of the Town Centre?	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Physical appearance		20	23
Prosperity of the town	45	20	23
Labour Pool	10	1	1
Environment		11	13
Geographical location	49	44	50
Mix of Retail Offer	39	34	39
Potential tourist customers	41	27	31
Potential local customers	78	58	66
Affordable Housing	8	17	19
Transport Links	26	32	36
Car Parking	39	31	35
Rental Values/ Property Costs	16	22	25
Market (s)	18	13	15
Events/Activities	-	20	23
Marketing/ Promotions	-	13	15
Local Partnership Organisations	-	10	11
Other	5	1	1
What are the negative aspects of the Town Centre?			
Physical appearance	-	31	37
Prosperity of the town	17	38	45
Labour Pool	6	18	21
Environment		1	1
Geographical location	7	2	2
Mix of Retail Offer	19	17	20
Potential tourist customers	7	12	14
Potential local customers	3	3	4
Affordable Housing	10	4	5
Transport Links	14	4	5
Car Parking	53	48	57
Rental Values/ Property Costs	35	12	14
Market (s)	10	5	6
Local business competition	18	9	11
Competition from other places	33	22	26
Competition from out-of-town shopping	-	46	55
Competition from the internet	39	21	25
Events/Activities	-	10	12
Marketing/ Promotions	-	8	10
Local Partnership Organisations	-	4	5
Other	7	3	4

The vast majority of the businesses that responded were independent (84%) and well established (88%) having operated in the town for more than six years. There was a reasonable spread across sectors with retailers representing 61% of those participating in the survey.

There are fairly even proportions between businesses showing a mixture of trading success over the last year and the spread is very similar to performance in other small towns with 71% having increased or maintained their turnover. Importantly an increased majority of businesses (84%) are optimistic that turnover will be maintained or increased in the year ahead. Whilst this is a positive picture, concern should remain for the 16% of businesses expecting to show what is presumably a year-on-year decline in turnover.

The potential for local (66%) is considered the strongest positive aspect of being located in Ballinasloe town centre with geographical location (50%), retail mix (39%), transport links (36%) and car parking (35%) and the potential for tourist customers (31%) being the next ranked aspects and the only ones valued by more than a quarter of businesses. The suggestion from this is that whilst businesses see local customers are primarily their target market, some at least recognize the potential to attract business from further afield. The prosperity of the town scores markedly low (23%) compared to averages for small towns. Though modest in response, affordability of business premises and housing emerge as relatively more positive compared to UK averages at least.

Car parking (57%) is considered the most negative aspect of being located in the town centre and competition but this is comparable to responses from businesses in other small towns. Competition from out-of-towns retailers (55%), prosperity of the town (45%) and physical appearance (37%) are perceived as the only other significantly negative aspects.

When asked to respond to the statement that Ballinasloe has a bright future, only 25% agreed though a further 41% were undecided. This perhaps highlights the critical importance of authorities and local partners working with businesses to ensure the most can be done to boost the optimism felt by those businesses that are as yet uncertain.

FUTURE PRIORITIES

What two suggestions would you make to improve the economic performance of the town?

This Benchmarking Survey provided very authoritative and insightful responses about future priorities from the 95 participating businesses.

Parking

Parking is very often the main priority expressed by businesses in Town Benchmarking and the survey of Ballinasloe was no exception with a very strong emphasis from participating

on removing or reducing charges. Within this, there was some recognition of the value of charges and enforcement in restricting long-term occupation of spaces.

- *"Remove paid parking"*
- *"Get rid of pay parking, have 1-2 hour free parking"*
- *"More free car parking. Free parking for first half hour"*
- *"Remove paid parking." "Car parking charges should be discontinued. Rates should be lowered for existing and new business."*
- *"1 hour free parking"*
- *"The paid parking has a negative effect on the town and I firmly believe it should be abolished"*
- *"Have free parking days e.g. Saturdays to encourage more people into the town."*
- *"Parking is a problem. Rates are too high"*
- *"Remove paid parking"*
- *"Free 2 hour parking min and rates"*
- *"2 hour free parking"*
- *"Free parking needed especially on Saturdays"*
- *"Abolish paid parking"*
- *"Free car parking"*
- *"Parking"*
- *Free parking for one hour"*
- *"Free parking in the square and on the main roads, this would help businesses have more customers"*
- *"Free parking until midday every day. Saturday market re-organised and invested in or get rid of it. Free parking on a Saturday"*
- *"Pay parking has a detrimental effect on trade-strongly suggest minimum of 1 hour free parking each day"*
- *"Free car parking"*
- *"Remove parking charges".*
- *"Pay parking is a big problem from listening to customers"*
- *"Limited free parking"*
- *"Paid parking should be done away with or at least the price should be lowered e.g. Birr town is 50c per hour and the town is bursting"*
- *"The town could do with a hour free parking to bring in customers"*
- *"Pay parking has a detrimental effect on business and must be abolished completely, sooner rather than later"*

- *"Change the current parking charges- there is merit in parking charges to prevent long term parking but it is a deterrent to conducting business"*
- *"No parking fees."*
- *"Get rid of all paid parking for a start"*
- *"Eliminate paid parking"*
- *"Free parking for 1st (half hour to hour) to allow people to do business. Rates are far too high especially in this yard where they are the same as on Main Street"*
- *"Free parking areas."*
- *"Get rid of paid parking"*
- *"Introduce 1/2 hour free parking"*
- *"First 30 minutes car parking for customers or complete free parking. Look at Westport"*
- *"Free town centre parking but making some provision that people working in the town must park in designated car parks as is the case now"*
- *"Charging for parking should be got rid of or else give 3 hours free every morning"*
- *"Review the parking charges as people are obsessed with them. This negativity discourages them from coming into the town"*
- *"Get rid of paid parking"*
- *. I suggest that paid parking is reviewed to encourage people to spend time in town.*
- *"Get rid of paid parking on street."*
- *"Free parking for the first home."*
- *"Maybe to offer free parking on Saturdays"*
- *"Free parking for all of December."*

Economy

Unusually for a survey of this nature, there were a significant number of businesses that recognised the link between the wider economy of Ballinasloe and the town centre. Calls to attract a large new employer to the town doubtless reflect the impact felt from recent closures.

- *New employment needed; a new factory would help"*
- *"More local trade helping each other. Investment"*
- *"More local employment so local people will spend money locally. Factory"*
- *"Job opportunities"*
- *"Need to attract a major multinational type business that can provide large scale local employment."*

- *Attract more industry. Money to be given to individuals to improve their business/ set up their businesses, rather than being spent on useless amenities i.e. Town Library improvement"*
- *"More employment preferably a factory with jobs"*
- *Lobby local representatives for industry in Ballinasloe town and hinterland"*
- *"Dunlo Street is suffering from premises bought for investment and no plan in place for developing new businesses"*
- *"Small traders' organisation. Trader group. Group to attract employment to the town."*
- *"Businesses need to pull together and think outside the box!"*
- *"I suggest that Ballinasloe creates jobs for the people who can then in turn spend money in the town"*
- *"Get jobs. Put someone with political clout into government regardless of politics."*
- *A strong business organisation i.e. Chamber of Commerce something to bring the businesses together and networking."*
- *"Establish a Chamber of Commerce. Courses for traders"*
- *"Need for more employment. Need for towns people to shop locally."*
- *"New industry"*
- *"Let other businesses in not block them as has been done for years in Ballinasloe"*
- *Attract a manufacturing outlet to the town to give employment. Encourage the town's population to support the local businesses."*
- *"Multinational company needed x2"*
- *"New industry"*
- *"Some concentration to reduce number of empty commercial units. A new medium sized employer would be hugely beneficial but same could be said for most midland towns"*

Appearance

There was significant recognition from businesses surveyed about the need to improve the appearance of the town including empty and newly leased business units.

- *"Council could do with more bins and tidy up town"*
- *"Appearance of shop fronts if business owners don't appear to be proud of their premises how can they expect to attract custom"*
- *"Rates bill could be reduced for one year where business owners significantly improve shop facades"*
- *"Clean and improve the appearance of the town"*

- *"Give facelift to all rundown shop fronts"*
- *"More colour outside of shops"*
- *"Tidy up and landscape the approach roundabouts into town"*
- *"Please have all empty and derelict business and houses cleaned up, painted and upgraded. Please supply rubbish bins on all streets. Repairs to footpaths and streets."*
- *"Appearance of town must be improved."*
- *"Improve the physical appearance and public perception of town"*
- *"Visual impact of town as you drive in"*
- *"Newly purchased premises within the town need to have a plan in place to use that property or at least refurbish the façade"*
- *"Absolutely no service provided, no street lights, no bins, no cleaning"*
- *"Improve physical appearance, particularly unoccupied properties"*
- *"Incentives given to open small shops on streets. Some chain stores on or off Main Street to attract customers into town"*

Attractions and Tourism

There was significant recognition amongst businesses of the need to attract visitors to the town through events, activities and enhanced tourism facilities.

- *"Create events and festivals outside of Horsefair e.g. National fishing competitions, boat rallies, cultural heritage events, allowing town to become not boxed in as the town of Horse Fair e.g. create media awareness outside of the fair"*
- *"Late opening. Sunday opening."*
- *More diversity to attract diverse communities. More festivals. Introduce food into drinking establishments."*
- *"Enhancement of tourist amenities including Marina, Dublin, Galway Cycle way, October Fair. Enhancement of services of commuters to Galway/ Athlone. Focus on positive aspects of town like gyms,, soccer, rugby, athletics, drama, library, golf etc."*
- *"Create new activities that still attract people to come into town"*
- *"Attracting more tourism to the town by taking advantage of all the facilities and heritage we have here. Groups getting together to organise and advertise the above."*
- *" I have a major issue with the location of the playground.....is a beautiful park used only by the drunks"*
- *"Use of river amenities i.e. walks, cycle ways, fishing, on water activities"*
- *"Ballinasloe Fair and Festival receive more public funding as all business get boost from it at the hardest time of the year for most."*

Promotion

There was strong recognition and creative ideas expressed around collective new opportunities for collective marketing of the town by businesses.

- *"Allow advertising on the motorway"*
- *"An initiative to encourage retailers to take up vacant units. Special preference to Dunlo St, as this forms an immediate impression on cars passing the town. This street needs to more inviting when viewed from the N6"*
- *I suggest that Ballinasloe publicize assets and inform people from town and surrounding area what Ballinasloe has to offer i.e. web page which Ballinasloe Newsletter regularly updated."*
- *"Advertise as a shopping centre. Each business pay 200 Euros per year into an advert pool"*
- *"Better highlighting of the leisure/ sports facilities in the town for families and young people. Better cultural facilities. Promote town as a tourist town. Library is a positive."*
- *Better marketing of town as a place to do business. Introduce 'crazy Friday' once a month where by businesses have a huge range of specials."*
- *"I think that the local people don't support local businesses. Businesses in the town should suggest to their employees to support local businesses. Banks etc should support them. If every person in Ballinasloe supported by 5 Euros per week I would have a great business."*
- *"That all businesses get together and maybe pick a day once a month and have really good special offers and deals with lots of advertisement, and keep it all going on a regular basis"*
- *"To keep people in the town for all their Xmas shopping if all businesses opened for the four Sundays leading up to Xmas"*
- *"All organisations/ groups would work together for the betterment of the town and not just their own interests. A better broadband service and a good town website which could properly market the town and be a one stop shop for all info re the town e.g. upcoming events, sport, promotions)"*
- *"More info to people that what is in the town"*

Local Leadership and Partnership Working

Echoing the calls for improved collective marketing, there were limited but assertive calls to learn lessons from the past and show clear leadership in tackling issues in future.

- *Incentives new and existing businesses i.e. break in rates, help with shop front appearance etc. Pro active Chamber of Commerce to get businesses working together and to promote the town we need to educate the people of Ballinasloe and*

its surrounding areas as to the range of quality businesses and professional services available in the town and in some way try to instill them with a sense of loyalty and pride."

- *"There's nothing to suggest. Years back the local council turned down a huge shopping centre in favour of their own businesses. Now Athlone which could not be compared to Ballinasloe has that shopping centre and its economy is prospering, while this town is going down because of certain people's greed. At the end of the day, people will rather drive to Athlone or Galway."*
- *"Strong retail group"*
- *"Town needs more political power. Need a local TD to front campaign for new business"*
- *"Combine all organisations to sell town as one unit"*

Retail Mix

There was some recognition by businesses of the need to diversify the retail mix including calls for a key attractor retail outlet to draw people to the town.

- *"Pop up shoe shops not fair on shoe shops that are open all year and paying rates"*
- *"Attraction of larger retail outlets in the town centre"*
- *Too many of the same businesses in the town instead of different i.e. more clothes shops, businesses need to bond together which they don't. Businesses that are struggling need help. (money)"*
- *"Ballinasloe needs more variety of shops in the town centre in order to bring in customers"*
- *"Better mix of shops"*
- *"Saturday trade is slow I think a lot of people head off to Athlone Shopping Centre"*
- *"An anchor type large retail outlet"*
- *Base one or two up-market or multiple stores in the town centre"*

Cafes and Restaurants

There were limited calls from businesses to introduce restaurants and coffee shops to attract customers and increase their dwell time in the town

- *Get rid of pop up restaurants. Too many Supermarkets fast foods. Polish shops really not doing businesses, don't see why they are open. Need a few night time dining restaurants other than pubs. Council do with cinema. Nothing for 18-25-30 years olds to do, only go to a pub- not all our youth want that"*
- *"More coffee shops"*
- *"Try to develop the food service industry particularly at night. Lack of restaurants a major drawback"*

- *"Good night time restaurant."*

Access and Signage including

There were limited and varied calls from businesses to improve access around the town.

- *"Improve signage"*
- *"Fix roads"*
- *"Pedestrianise the square."*
- *"Improve public transport into town i.e. local bus."*

Rents and Rates

There were a relatively limited number of calls for business rates reduction relative to what might typically be expected from such surveys.

- *"Reduction on rates."*
- *"Reduction for town centre"*
- *"Rates bill could be reduced for one year where business owners significantly improve shop facades"*
- *"Rates decrease incentive preferably owners who improve the facade of their property"*

Market

- *"Varied and vibrant weekly farmers market"*
- *"A larger market at weekends; a Sunday market at a reduced stall rates"*

Planning

There were differences of opinions expressed about the value of proposed town enhancement relative to other ways of improving the customer experience.

- *"Improve the street landscape to attract prime retail outlets. Construction of the Bank Road at the rear of Main Street to link in with Society Street"*
- *"Defer town enhancement project for 3-5 years as it will destroy businesses and add to further closures- consider town facelift e.g. street lighting, refresh buildings, paint exteriors, shop fronts etc. Definitely no need for trees, seating etc which will leave less car parking spaces"*
- *"Start and finish town enhancement programme. Finish off Marina development to include electrical hook up. Peoples Park opposite the Marina modeled on the playground in Loughrea"*
- *"Vacant houses"*

- *"Development of empty buildings in the town e.g. At Cross Square".*

Social

Very unusually for a survey of this nature, there were very pointed calls to address anti-social behaviour in the town centre, especially alcohol related.

- *"Public order problems. There are people openly walking through the town during the day clearly drunk and portrays a bad image. Town centre regeneration."*
- *"It is imperative drinkers on streets and parks are not allowed to do this. Horrible image on streets, people have actually left town on arrival and gone to stay elsewhere"*
- *"Get rid of all the winos"*
- *"Stop the practice of street drinking particularly at the marina and access to the town from the marina"*
- *Should be invested in activities that would add value to the young people. More credit allowance for young entrepreneurs with innovative ideas"*
- *"Some of the locals can be quite intimidating for people especially the elderly. The local guards should do more and make their presence felt in the town."*
- *"Get the winos off the streets."*
- *"Deal with the anti social behaviour drunks etc. better image."*

Crime and safety

- *"Remove the anti social behaviour from the marina and park- don't feel safe in either of those places"*

Customer Service

There was some recognition of the value of good quality customer service

- *"Better all round customer relations. More positive messages from the retailers". More joint/ town centre marketing campaigns. Less negativity"*
- *"Keep families in the town centre and encourage them to spend. Give them a reason to come into the town centre. Business owners need to address their produce offering on an ongoing basis instead and always going on about the town and lack of support from customers/ locals."*
- *"Customer care workshops it helps to advertise the business and organisations that are here."*

The aim of the Town Centre Users Survey is to establish how your town is seen by those people who use it. By asking visitors, of all types, a more detailed picture can be obtained as what matters to regular visitors can be very different to someone who has never been to the place before.

The following percentage figures are based upon the 191 completed Town Centre User Surveys which represents an excellent response and provided authoritative findings.

*Please note qualitative comments have been copied directly from respondents

	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Gender			
Male	38	109	57
Female	62	84	44
Age			
16-25	8	20	10
26-35	10	29	15
36-45	17	37	19
46-55	19	26	13
56-65	20	46	23
Over 65	26	37	19
What do you generally visit the Town Centre for?			
Work	15	44	25
Convenience Shopping	42	43	24
Comparison Shopping	5	18	10
Access Services	17	36	20
Leisure	13	25	14
Other	9	13	7

How often do you visit the Town Centre?	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Daily	29	91	46
More than once a week	39	61	31
Weekly	15	23	12
Fortnightly	5	4	2
More than once a Month	3	3	1
Once a Month or Less	7	12	6
First Visit	2	6	3
How do you normally travel into the Town Centre?			
On Foot	37	44	22
Bicycle	2	10	5
Motorbike	1	1	1
Car	53	130	65
Bus	6	7	4
Train	1	1	1
Other	1	7	3
On average, on your normal visit to the Town Centre how much do you normally spend?			
Nothing	3	4	2
€0.01-€6.00	13	12	6
€6.01-€12.00	26	32	16
€12.01-€25.00	32	61	30
€25.01-€65.00	20	57	28
More than €65.00	6	35	17

What are the positive aspects of the Town Centre?	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Physical appearance	56	84	44
Cleanliness	-	113	59
Retail Offer	49	70	36
Customer Service	-	137	71
Restaurants	44	109	57
Access to Services	75	135	70
Leisure Facilities	28	99	51
Cultural Activities	24	74	38
Pubs/ Bars/ Nightclubs	37	87	45
Transport Links	43	119	62
Ease of walking around town centre	75	152	79
Convenience e.g. near where you live	70	131	68
Safety	48	140	73
Car Parking	46	88	46
Markets	34	78	40
Other	7	0	0
What are the negative aspects of the Town Centre?			
Physical appearance	29	82	47
Cleanliness	-	54	31
Retail Offer	42	88	50
Customer Service	-	29	17
Restaurants	28	46	26
Access to Services	10	19	11
Leisure Facilities	37	44	25
Cultural Activities	37	63	36
Pubs/ Bars/ Nightclubs	27	41	23
Transport Links	22	31	18
Ease of walking around town centre	9	13	7
Convenience e.g. near where you live	8	25	14
Safety	13	26	15
Car Parking	39	82	47
Markets	29	58	33
Other	12	4	2

QUESTIONS SPECIFIC TO BALLINASLOE

What three of the following words would you use to describe Ballinasloe?	Ballinasloe Number	Ballinasloe %
Local	108	56
Good value	27	14
Quirky	11	6
Convenient	62	31
Friendly	101	51
Independent	24	13
Accessible	66	34
Quiet	88	44
Charming	13	7

The most popular choices were local (56%), friendly (51%), quiet (44%) and accessible (34%).

Would you recommend a visit to the Town's Centre?	Ballinasloe Number	Ballinasloe %
Yes	123	63
No	71	37

Do you agree with the following statement? "Ballinasloe is a town with a bright future for the decade ahead?"	Ballinasloe Number	Ballinasloe %
Strongly agree	18	9
Agree	45	23
Uncertain	48	24
Disagree	58	29
Strongly disagree	28	14

The mix of town centre users includes a higher percentage of males (57%) than amongst comparable UK figures. There was a good spread of ages represented including a higher proportion of under 35's than typical for small towns.

At the time of these mid-week surveys, most of the town centre users were in-town for work (25%); convenience shopping (24%) and access to services (20%). Combined with the fact that 89% of the town centre users sampled visited the town at least once a week, this suggests a key role as a local service centre.

Nearly two-thirds of town centre users travelled by car (65%) and a significant number walked (22%). Spending in the town centre appears relatively high compared to averages for

small towns in the UK with 75% of town centre users saying they spend over €12.01 on a normal visit and this is higher than comparable national figures for small towns (58%).

Ballinasloe town centre users are very positive about ease of walking around town (79%), safety (73%), customer service (71%), access to services (70%) and convenience (68%). Restaurants (57%) and leisure facilities (51%) are also all viewed favourably by town centre users with figures better than comparative UK averages.

Town centre users in Ballinasloe have milder, negative sentiments with retail offer (50%), physical appearance (47%), car parking (47%) and cultural activities (36%) the most significant criticisms and comparable to or only slightly worse than to be expected for a town of this size. All other town centre characteristics receive negative perceptions of a third or less to indicate a strong positive balance of sentiments.

Supplementary questions about Ballinasloe indicate that whilst nearly two thirds of users (63%) would currently recommend a visit to the town centre, they are less optimistic looking forward with only one third (32%) agreeing that it has a bright future. When asked to select three words that best described Ballinasloe, the most popular choices were friendly (57%), local (56%), quiet (44%), and convenient (43%). These responses give a realistic portrayal of the town by existing users than can help in understanding and promoting the town. The underlying sentiment appears to reinforce Ballinasloe's primary function as a local service centre but point to concerns about its future and limitations about its wider appeal.

FUTURE PRIORITIES

What two suggestions would you make to improve the town centre?

This Benchmarking Survey provided very authoritative and insightful responses about future priorities from the 95 participating businesses.

Parking

There are overwhelming and consistent calls from town centre users for the re-instatement of free parking with 63 out of 191 respondents ranking it within their top two priorities. Within this there is virtually no acceptance of a role for some level of parking restriction and control. This level and type of response is typical of town centre users that have experienced the recent introduction of car park charges and merits careful consideration alongside the earlier data on parking usage.

- *"Free parking"*
- *"Cheaper parking needed. Half an hour free"*
- *"Parking too expensive."*
- *"Free parking."*
- *"Free parking. Half hour parking free"*
- *"Parking issue- signs, free parking"*

- *"Free car parking"*
- *"Parking free for a period of time."*
- *"Free parking"*
- *"Free parking"*
- *"Parking"*
- *"Parking for free for 2 hours"*
- *"Car park, No parking park."*
- *"More parking at train station."*
- *"Free parking/ more lenient parking"*
- *"Concession for parking for half hour"*
- *"Reduce paid parking,*
- *"Only have it for 1 hour in the morning."*

Retail Mix

A significant number of town centre users also considered that diversifying the retail mix was a future priority including some calls for well-known multiples alongside specialist clothes retailers.

- *"Bigger shops e.g. Duns"*
- *"Shops e.g. Pennies"*
- *"Sports shops too expensive"*
- *"Shopping centre food ventures"*
- *"More shops"*
- *"Pennies in town."*
- *"Shopping centre"*
- *"More interesting shops"*
- *"More pubs and shops"*
- *"More clothes shops. More market days and markets"*
- *"Open smaller shops for young people"*
- *"More shops"*
- *"Hardware store. B and Q. Dunns, / Pennies"*
- *"A lot of shops that could open up"*
- *"More shopping centres"*
- *"More shoe shops"*
- *"Open more shopping"*
- *"More shoe shops. Especially kids"*
- *"Shopping centre. More shoe shops"*
- *"Better quality shops"*
- *"Shopping centre. Motor facilities."*
- *"Tesco destroyed our town"*
- *"Better retail offers"*
- *"More bigger clothes shops."*
- *"Make new housing."*
- *"More shopping centres."*

- *"Better value."*
- *"More retail."*
- *"Improve market"*
- *"More large shops in the town centre."*
- *"Better prices"*
- *"Improve the market."*
- *"Open up shop"*
- *"More shops"*
- *"New shops"*
- *"Shopping centre"*

Customer Service

There were a modest number of responses suggesting possible improvements in customer service as part of an improved town centre offer.

- *"Longer business hours"*
- *"Customer care"*
- *"Customer care course for owners."*
- *"Shops open at 1pm "*
- *"The shops should not refuse people"*

Leisure

Alongside alls to diversify the retail mix, there were a similar level of responses suggesting that there should be improved leisure facilities in the town centre including in particular a cinema.

- *"Cinema"*
- *"More facilities."*
- *"Cinema/ Leisure"*
- *"Gym"*
- *"More facilities to open"*
- *"More leisure facilities"*
- *"Cinema"*
- *"Adult leisure facilities"*
- *"Cinema. Summer festival"*
- *"More Leisure, Restaurants, Cinema"*
- *"Cinema"*
- *"Cinema"*
- *"More cinema"*
- *"Leisure centre for older people."*
- *"More recreational services"*
- *"More facilities. Maybe a cinema"*
- *"Cinema"*
- *"More nightclubs"*

- *"Nightlife, night out for over 55's. Over 55s club*
- *"Leisure centres."*

Pubs and Restaurants

There were a moderate number of calls to improve the town centre offer by opening more cafes and restaurants as part of a diversified mix.

- *"More cafes/ Tea shops"*
- *"More coffee shops"*
- *"Good quality restaurant"*
- *"Great hotels, offer loyalty cards for meals"*
- *"More cafe/ restaurants"*
- *"Improve pubs."*

Activities for Young People

Specific calls for activities from children and young people featured quite prominently amongst the suggestions for wider diversification of the town centre offer.

- *"More recreational facilities for children"*
- *"Leisure facilities for young people"*
- *"Activities for kids cinema"*
- *"More children's events in town"*
- *"More facilities for young people"*
- *"More facilities for young people"*
- *"More activities for kids,*
- *"Place for young kids to use energy"*
- *"Activity centre for small children.*
- *"Youth centres"*

Attractions and Tourism

Amongst the responses from existing town centre users, were a modest number showing recognition of the opportunity to attract new visitors to the town.

- *"Tourist office with more tech. Ballinasloe app."*
- *"More events to get people into the town"*
- *"Develop heritage."*
- *"Improve the cultural activities"*
- *"More town events"*
- *"Family Days. Paint. Clean. Families. Markets"*
- *"More effort to attract tourists."*

Employment and Economy

Very unusually in a survey of this nature, there was wide recognition amongst towns centre users of the need to improve the wider economy and employment on offer in the town. This highlights the impacts still felt from recent closure of major employers.

- *"Employment"*
- *"Employment"*
- *"More employment"*
- *"No factories now"*
- *"No industry"*
- *"Employment"*
- *"More jobs"*
- *"More industry and retail."*
- *"Employment"*
- *"Industry into the town"*
- *"Employment"*
- *"More industry and retail outlets"*
- *"Employment"*
- *"Employment"*
- *"Industry"*
- *"Employment"*
- *"More businesses/ factory"*
- *"Incentive to start business"*
- *"More employment."*
- *"More employment"*
- *"More employment"*
- *"More work."*
- *"More jobs"*
- *"More jobs through factories etc."*
- *"All industries gone."*

Appearance

There were a relatively high number of calls for a survey of this nature to improve various aspects of the town centre's appearance.

- *"Improve footpaths."*
- *"Appearance."*
- *"Litter control."*
- *"Create employment by getting people on the dole to paint and clean the town and finish unfinished houses"*
- *"Paint job. Gardens"*
- *"Used to be lovely"*
- *"Don't change. Modern everywhere. History is great"*

- *"More flowers"*
- *"Cleanliness."*
- *"Maintenance of flower beds"*
- *"Cleanliness"*
- *"Physical appearance."*
- *"Statues at church need paint. Brighten up."*
- *"More children's shops for shoes. Clarkes or something."*
- *"Properly clean up. Lick of paint."*
- *"Better general maintenance."*

Redundant Buildings and Empty shops

Echoing the responses about the general appearance of the town centre, a significant number of town centre users gave priority to the need improve the appearance of empty premises.

- *"Shop fronts need to be brightened up"*
- *"Shop fronts. Clean up Main Street"*
- *"Empty properties."*
- *"Facelift of the buildings"*
- *"Brighten up closed buildings"*
- *"Revamping shops."*
- *"Money for town refurbishment"*
- *"Shop appearance"*
- *"Shop fronts painted"*
- *"Renovate some of the tired buildings"*
- *"Derelict building."*
- *"Clean up the shops"*
- *"Use derelict units"*
- *"Facelift of the shops."*
- *"Improve derelict building"*
- *"Closed shops are a problem"*

Access and Transport

There were a variety of responses relating to different aspects of improving town centre access and transport including footpaths, cycle routes and roads".

- *"Improve paths"*
- *"Bad pathways should be improved"*
- *Traffic lights to cross"*
- *" Road works"*
- *"Access from Loughrea"*
- *"Cyclists control"*
- *"Develop cycle way"*

- *"Dangerous junctions."*
- *"More bus stops."*
- *"Untapped resources. Nearest town to motorway"*
- *"River is cut off. Planning to have a walkway around river, it's lost completely."*
- *"Footpaths, Roads"*
- *"Roundabout dangerous"*
- *"Parkway is uneven."*
- *"Make footpaths wheelchair accessible"*
- *"Pedestrianised square"*
- *"More bicycles"*
- *"Improve footpaths"*
- *"Less steps"*
- *"Improve roads"*

Local leadership and partnership working

A surprising number of town centre users called for improvements in different aspects of local leadership behind the scenes rather than tangible improvements to the town centre.

- *"A coordinating body for activities"*
- *"No town council"*
- *"Shop owners/ councillors should be new/ get rid of old ones"*
- *"Too much money given to Council, None put into the town"*
- *"Interaction between business people and local authority. Encourage the direction the town should take"*
- *"Business owners make a better effort. They should lose negativity on paid parking, Business owners putting off customers with negativity"*
- *"A good politician. To campaign to keep hospital a mile outside the village"*
- *"Like to see locals support town instead of complaining"*
- *"Leave it up to the council."*
- *"Chamber of Commerce set up and look into improving town centre"*
- *"More pride in town."*
- *"A good politician"*
- *"Get a serious politician"*
- *"Positive attitude."*
- *"Package the positive. Be more friendly"*
- *"Lost a lot of amenities, need these back. Dead town. More of a focus."*
- *"Fresh ideas."*

Planning and Development

There was a small number of wider planning and development-related issues raised.

- *"Modernise town/ services"*

- *“Develop the marina”*
- *“Housing”*

Rents and Rates

A small number of town centre users suggested that there was a need to reduce business rates.

- *“Reduce commercial rates.”*
- *“More businesses. “Drop rates.”*
- *“Lower commercial rates”*
- *“Reduce rent charge.”*

Social

Very unusually for a survey of this nature, a number of respondents made pointed remarks about the need to improve anti-social behaviour including excessive drinking.

- *“Too many drunks a serious issue. “*
- *“Drinkers”*
- *“No drinkers on streets.”*
- *“Less drinkers.”*
- *“Something to be done about drinking on street”*
- *“Less drinkers on street.”*
- *“Police the pubs better”*
- *“Teenagers, no self respect.”*

Crime and Safety

Two responses mentioned issues relating to crime and safety.

- *“Safety.”*
- *“Crime should be improved.”*

KPI 12: SHOPPERS ORIGIN SURVEY

The Shoppers Origin Survey tracks the general area that your town centre's users originate from. The data can be used to target local marketing or promotional literature. It can also be used as evidence of the success of such campaigns by gauging the penetration into the population.

For the case of Ballinasloe, the settlement names gathered from businesses and paper based surveys are split into 3 categories to be able to compare with other towns. The categories are:

- Locals; those who live within the town and villages within 5km radius
- Visitors; those who live between 5 and 25km away
- Tourists; who live further than a 25km away

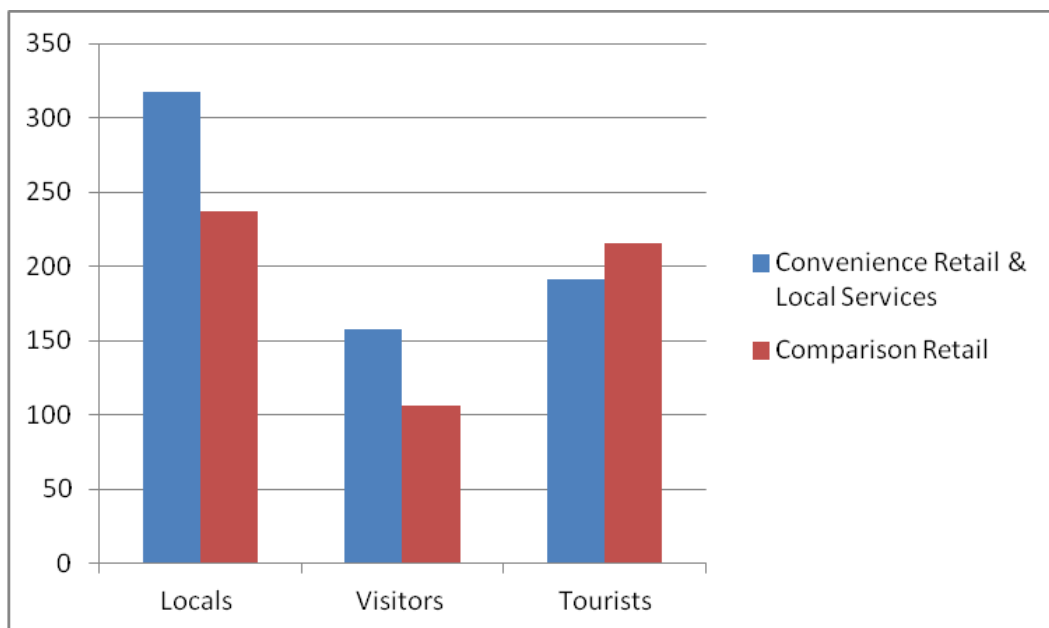
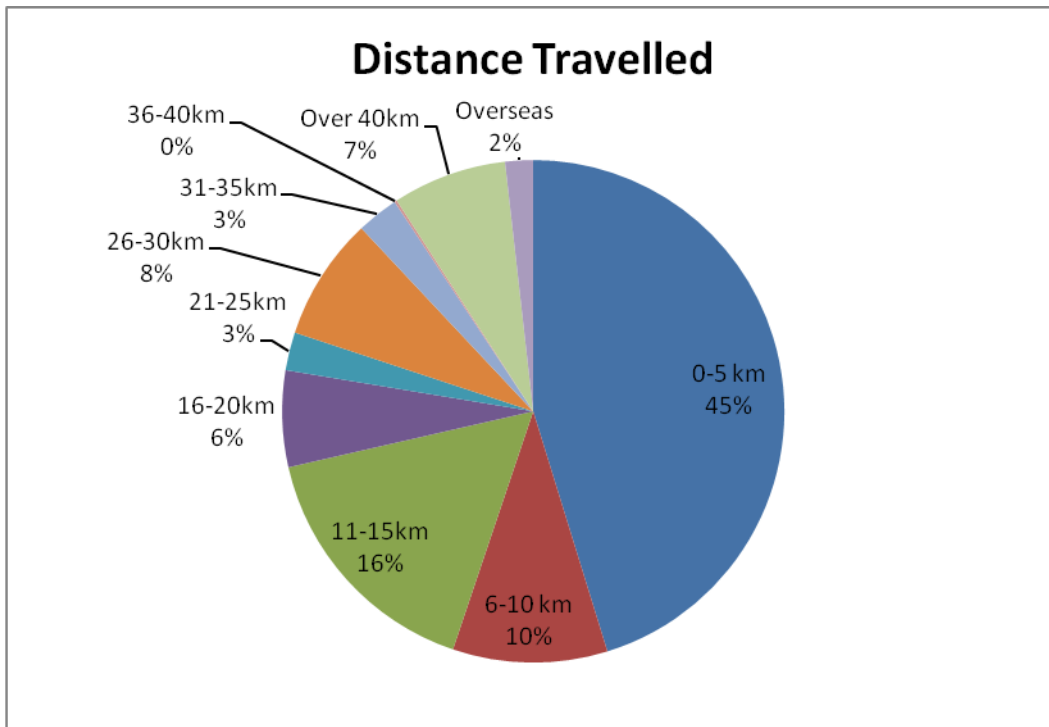
A large volume of data (1225 entries) was gathered for Ballinasloe from a mix of convenience retailers, local services and comparison retailers and this revealed the following overall pattern that is comparable with other small towns.

	UK Small Towns %	Ballinasloe Number	Ballinasloe %
Locals	53%	554	45%
Visitors	31%	264	22%
Tourists	16%	407	33%

Because of the wealth of data collected for Ballinasloe it is possible to further analyse and consider the different patterns for use of convenience retail and local services compared to comparison retail for town centre users of different origins. These are summarized in the table below.

	Convenience Retail & Local Services		Comparison Retail	
	Number	%	Number	%
Locals	317	26%	237	19%
Visitors	158	13%	106	9%
Tourists	191	16%	216	18%
Totals	666	54%	559	46%

The charts shown overleaf emphasise key points about the data collected for town centre user origin for Ballinasloe.



Key points that emerge from this analysis of town centre user origins for Ballinasloe are:

- Town centre users from the local area are important customers for the town's businesses accounting for 45% of the use but is slightly less than might normally be expected for a town of this size. Not surprisingly a higher proportion of their visits are to convenience retailers or local services but two thirds of them combine this with a visit to comparison retailers. Understanding this cross-over between

convenience and comparison retail by local users may be significant in developing new approaches to cross-marketing and local loyalty promotion in future.

- A relatively small proportion of town centre users fall in to the intermediate category described as 'visitors'. This may simply be a symptom that there are relatively small populations within 25km or that people are drawn to neighbouring centres such as Athlone and Galway. A higher proportion of such visitors to the town visit convenience stores and local services than undertake comparison shopping.
- Compared to small towns of its size, Ballinasloe has a relatively high percentage of users who have travelled from over 25km (or approximately 30 minutes) away and are using local retailers. This may be in part explained by the rural nature of the area and also the nearby motorway. Whether these are tourists in the traditional sense who have come to experience the town's heritage and leisure facilities cannot be determined fully from the data but it is likely that they have purposefully set-out to visit the town. The data indicates clearly that this group are undertaking comparison shopping in particular and it may be that they have loyalty to particular stores. They also spend in local convenience retailers. The opportunity to cross-market to this group between different specialist comparison retailers is worth exploring. It is also important to this group that they are well-informed about local restaurants, cafes and pubs that they might use during their stay in town.
- Relative to the 87:13% ratio between the number of convenience and comparison stores in Ballinasloe, this data indicates that convenience stores and local services are relatively well-used. This is likely to be accounted for by a larger volume of lower spending occasions but the data is also skewed by the fact that equal numbers of both types of stores were represented in the survey sample.
- The data indicates that the comparison retail offer is still important to town centre users including especially those from further afield. Although the number of 'tourists' is only a third of the overall number of users recorded, they account for nearly the same amount of comparison shopping visits as locals. It is probable that these visitors from further afield will be higher spending on any one visit because they are likely to have made a special trip to the town or a specific retailer.

APPENDICES

Appendix 1: PARTICIPATING TOWNS IN 2013

The following towns all contributed to the Benchmarking System in 2013 are used in comparative data for this report.

Town Name	Small or Large	Region	Typology
Clay Cross	S	East Midlands	6
Melton	L	East Midlands	2
Bury St Edmunds	L	East of England	2
Diss	S	East of England	2
Ely	S	East of England	5
Huntingdon	S	East of England	4
Ramsey	S	East of England	4
St Ives	L	East of England	4
Wickham Market	S	East of England	2
Alnwick	S	North East	2
Amble	S	North East	6
Ashington	S	North East	6
Bedale	S	North East	2
Bedlington	S	North East	6
Berwick	L	North East	6
Blyth	S	North East	6
Cramlington	S	North East	6
Haltwhistle	S	North East	2
Hexham	S	North East	5
Hornsea	S	North East	2
Morpeth	S	North East	1
Ponteland	S	North East	1
Prudhoe	S	North East	6
Ripon	S	North East	2
Alsager	S	North West	1
Alston	S	North West	n/a
Appleby	S	North West	2
Buckley	S	North West	n/a
Colwyn Bay	L	North West	n/a
Congleton	S	North West	8
Connahs Quay	S	North West	n/a
Crewe	L	North West	n/a

Disley	S	North West	1
Flint	S	North West	n/a
Handforth	S	North West	n/a
Holmes Chapel	S	North West	8
Holywell	S	North West	n/a
Kendal	L	North West	2
Kirkby Stephen	S	North West	2
Knutsford	S	North West	5
Llangefni	S	North West	n/a
Macclesfield	L	North West	n/a
Middlewich	S	North West	4
Mold	S	North West	n/a
Nantwich	L	North West	2
Penrith	L	North West	2
Poynton	S	North West	n/a
Queensferry	S	North West	n/a
Rhyl	L	North West	n/a
Saltney	S	North West	n/a
Sandbach	S	North West	8
Shotton	S	North West	n/a
Wigton	S	North West	7
Wilmslow	L	North West	n/a
Wrexham	L	North West	n/a
Barrhead	S	Scotland	n/a
Forfar	S	Scotland	2
Bagshot	S	South East	4
Basingstoke (Top of Town)	S	South East	n/a
Hungerford	S	South East	4
Sandwich	S	South East	5
Stony Stratford	S	South East	n/a
Amesbury	S	South West	4
Blaenavon	S	South West	n/a
Bradford On Avon	S	South West	5
Callington	S	South West	2
Calne	S	South West	4
Chepstow	S	South West	n/a
Cirencester	L	South West	2
Corsham	S	South West	2
Cricklade	S	South West	8
Devizes	L	South West	2
Frome	S	South West	2

Liskeard	S	South West	2
Ludgershall	S	South West	4
Melksham	S	South West	2
Pewsey	S	South West	2
Royal Wootton Bassett	S	South West	8
Tavistock	S	South West	2
Trowbridge	L	South West	2
Warminster	S	South West	2
Westbury	S	South West	2
Westbury on Trym	S	South West	n/a
Wilton	S	South West	2
Winchcombe	S	South West	3
Alcester	S	West Midlands	2
Great Malvern	S	West Midlands	2
Ledbury	S	West Midlands	2
Ludlow	S	West Midlands	2
Newport	S	West Midlands	8
Southam	S	West Midlands	4
Tenbury Wells	S	West Midlands	2
Upton Upon Severn	S	West Midlands	3

Appendix 2: BALLINASLOE BUSINESS UNIT DATA BASE

Street Name	Number	Business Name	Use Class	Business Type (Comparison/ Convenience)	Business Type (Key Attractor/ Independent)	Additional Notes
Society Street	FR	Fusion Restaurant	A3	-	-	
Society Street	HW	Healthwise	A1	Comparison	Independent	
Society Street	DF	Donnellys Florists	A1	Comparison	Independent	
Society Street	NCBI	National Council for the Blind of Ireland	A1	Comparison	Multiple	
Society Street	JOR	Jorena's	A1	Comparison	Independent	
Society Street	BBIB	Bruen Bros Ins Brokers	A2	-	-	
Society Street		n/a	-	-	-	VACANT
Society Street	FE	Fletchers (Export)	A1	Comparison	Regional	
Society Street	SM	Supermacs	A5			
Society Street	BP	Brodericks Pharmacy	A1	Comparison	Independent	
Society Street	30	Michael McCullagh	A2			
Society Street	32	Animal Health Centre	A1	Comparison	Independent	
Society Street		n/a				VACANT
Society Street	DB	Downey's Bar	A4			
Society Street	C	Casino	SG			
Society Street	36	Society Fayre	A1	Convenience	Independent	
Society Street	NT	Noor Tandoori	A4			
Society Street	ST	Society Travel	A1	Comparison	Independent	

Society Street		n/a				VACANT
Society Street	GC	George Coyle	A2			
Society Street	ELB	Emerald Lounge & Bar	A4			
Society Street		n/a				VACANT
Society Street	UH	Unisex Hairdressers	A1	Comparison	Independent	
Society Street	THT	Town Hall Theatre	D2			
Society Street	3	High Society	A1	Comparison	Independent	
Society Street	GG	Geraroid Geraghty	A2			
Society Street	UH	Utopia Hairdesign	A1	Comparison	Independent	
Society Street	6	Avrils Beauty Rooms	A1	Comparison	Independent	
Society Street	7	Karibas	A3			
Society Street	8	The Pillar House	A4			
Society Street	IB	Image Boutique	A1	Comparison	Independent	
Society Street	10	J+S Photos	A1	Comparison	Independent	
Society Street	UO	Utah Outlet	A1	Comparison	Regional	
Society Street	11	Niall Hogan	A1	Comparison	Independent	
Society Street	JB	Johnsons Bookmakers	A2			
Society Street	TM	Top Man	A1	Comparison	Independent	
Society Street	CHP	Claire Healy Pharmacy	A1	Comparison	Independent	
Society Street	RB	Ryan's Bar	A4			
Society Street	JB	Joe's Bar	A4			
Society Street	TN	Top Notch	A1	Comparison	Independent	
Society Street	TKH	The Kebab House	A5			
Society Street		-				VACANT

Society Street (Sarsfield Rd)	SM	Supermacs	A5			
Society Street (Sarsfield Rd)	BC	Barry's Cycles	A1	Comparison	Independent	
Society Street (Sarsfield Rd)	BH	Barratts Hardware	A1	Comparison	Independent	
Society Street (Sarsfield Rd)	SH	Sopranos Hair	A1	Comparison	Independent	
Society Street (Society Court)	TTP	The Tattoo Parlour	SG			
Society Street (Society Court)	PS	Polski Sklep	A1	Convenience	Independent	
Society Street (Emmet Place)	EHDP	Emmet House Dental Practice	D1			
Bridge Street	2	Tranquillity Beauty Clinic	A1	Comparison	Independent	
Bridge Street	TOG	The Oat Gallery	A1	Comparison	Independent	
Harbour Road (Marina Point)	7	Haven Pharmacy	A1	Comparison	Independent	
Harbour Road (Marina Point)	PS	Polska Strefa	A1	Convenience	Independent	
Harbour Road (Marina Point)	3	Sports Warehouse	A1	Comparison	Independent	
Harbour Road (Marina Point)	PBS	Paul Byron Shoes	A1	Comparison	Multiple	
Harbour Road (Marina Point)	TCB	Tony Carroll Butcher	A1	Convenience	Independent	

Harbour Road (Marina Point)	EE	Eastern Electrical	A1	Comparison	Independent	
Harbour Road (Marina Point)	MPHC	Marina Place Health Centre	D1			
Harbour Road (Marina Point)	LS	LIDL Supermarket	A1	Convenience	Multiple	
Harbour Road (Marina Point)	CSH	Carlton Shearwater Hotel	C1			
River View (Townspark)	OC	Ollie Colohan	A1	Comparison	Independent	
River View (Cullens Yard)	Unit 6	Essence of Beauty	A1	Comparison	Independent	
River View (Cullens Yard)	Unit 5	Carisma Hair Design	A1	Comparison	Independent	
River View (Cullens Yard)	GRDC	Galway Rural Development Company	B1			
River View (Cullens Yard)	VAC	n/a				VACANT
River View (Cullens Yard)	Unit 1-2	Department of Social Protection	B1			
River View (Cullens Yard)	43	Tony Murphy Footwear	A1	Comparison	Independent	
St Michaels Square	CQM	Croffy Quality Meats	A1	Convenience	Independent	
St Michaels Square	AA	Angela's Attic	A1	Comparison	Independent	
St Michaels Square	TBB	The Bread Basket	A3			

St Michaels Square	CC	CostCutter	A1	Convenience	Multiple	
St Michaels Square	5	An Tain	A4			
St Michaels Square	MFG	Mulveys Fruit & Veg	A1	Convenience	Independent	
St Michaels Square	FS	First Stop	A1	Comparison	Independent	
St Michaels Square	JDC	Jack Duncan & Co	A2			
St Michaels Square	16	Pat Finn	A2			
St Michaels Square	GFD	Grenhams Funeral Directors	A1	Comparison	Independent	
St Michaels Square	2a	Allure Tattoo Parlour	SG			
St Michaels Square	KB	Kemal's Barbershop	A1	Comparison	Independent	
St Michaels Square	PHS	Passion Hair Salon	A1	Comparison	Independent	
St Michaels Square	PO	Post Office	A1	Convenience	Multiple	
St Michaels Square	PP	Paddy Power	A2			
St Michaels Square	SS	Sheridans Stores	A1	Comparison	Independent	
Dunlo Street	AIB	Allied Irish Bank				
Dunlo Street	GTT	Good Taste Takeaway	A5			
Dunlo Street	LP	Leahy's Pharmacy	A1	Comparison	Independent	
Dunlo Street	PCS	P. Clarke & Sons	A1	Comparison	Independent	
Dunlo Street		n/a				VACANT
Dunlo Street	6	Rothwell Staunton	A2			
Dunlo Street	MRO	Mary Rothwell Opticians	A1	Comparison	Independent	
Dunlo Street	ZZ	Zam Zam	A5			
Dunlo Street	PS	Parish Shop	A1	Comparison	Independent	
Dunlo Street	18	An Nonnch	A4			

Dunlo Street	CD	Chris Daly	A1	Comparison	Independent	
Dunlo Street	BDS	Billy's Discount Store	A1	Comparison	Independent	
Dunlo Street	Dunlo Centre	Ladbrokes				
Dunlo Street	CO	Carry Out	A1	Convenience	Multiple	
Dunlo Street	HA	Harney's	A1	Comparison	Regional	
Dunlo Street		n/a				VACANT
Dunlo Street		n/a				VACANT
Dunlo Street		n/a				VACANT
Dunlo Street	RGR	RGR Partners (Darren Goode)	A2			
Dunlo Street	FC	Footsteps Chiropody	SG			
Dunlo Street	GD	GARDA	D1			
Dunlo Street		n/a				VACANT
Dunlo Street	TSN	The Stork's Nest	A1	Comparison	Independent	
Dunlo Street	GDC	Goode Dry Cleaning	A1	Comparison	Independent	
Dunlo Street	KL	Kathleen's	A1	Comparison	Independent	
Dunlo Street	DT	The Dunlo Tavern	A4			
Dunlo Street	TB	Thomas Barber	A1	Comparison	Independent	
Dunlo Street	MFC	Morellis Fish & Chips	A5			
Dunlo Street	ENC	East Night Club	SG			
Dunlo Street	TAS	The Auld Sod	A4			
Dunlo Street	HD	Hubert Dolan	A1	Comparison	Independent	
Dunlo Street	TDS	The Deli Store	A3			
Dunlo Street	CF	Clare's Flowers	A1	Comparison	Independent	

Dunlo Street	THG	The Hair Gallery	A1	Comparison	Independent	
Dunlo Street		n/a				VACANT
Dunlo Street	PAN	Panache	A1	Comparison	Independent	
Dunlo Street	TDI	The Duck Inn	A4			
Dunlo Street		n/a				VACANT
Dunlo Street	HH	Haydens Hotel	C1			
Dunlo Street		n/a				VACANT
Dunlo Street		n/a				VACANT
Dunlo Street	PM	Priority Meats	A1	Convenience	Independent	
Main Street	CC	Crumbs & Cream	A3			
Main Street	EW	Elite Windows	A1	Comparison	Independent	
Main Street	CHS	Carolines Hair Salon	A1	Comparison	Independent	
Main Street	16	n/a				VACANT
Main Street		n/a				VACANT
Main Street	DEB	D. Egan Bar	A4			
Main Street	GS	Gerry Stronge Photography	A1	Comparison	Independent	
Main Street	14	Keane Auctioneers	A2			
Main Street	PJS	Papa Johns/Supermacs	A5			
Main Street	FW	Fun World	SG			
Main Street	BO	Ballinasloe Opticians	A1	Comparison	Independent	
Main Street	PBS	Peter's Barber Shop	A1	Comparison	Independent	
Main Street		n/a				VACANT
Main Street	6	Cahalan	A1	Comparison	Independent	

Main Street	GP	Grenhams Pub	A4			
Main Street	GOL	Grenhams Off Licence	A1	Convenience	Independent	
Main Street	5	Kellers Travel	A1	Comparison	Independent	
Main Street	5	Kellers Furniture	A1	Comparison	Independent	
Main Street		n/a				VACANT
Main Street		n/a				VACANT
Main Street	MMH	Murphy's Medical Hall	A1	Comparison	Independent	
Main Street	LJP	Liam Jordan Photography	A1	Comparison	Independent	
Main Street	PPD	Phone & PC Doctor	A1	Comparison	Independent	
Main Street		n/a				VACANT
Main Street		n/a				VACANT
Main Street	JWC	John Wood & Co	A1	Comparison	Independent	
Main Street	E2	Euro2	A1	Comparison	Multiple	
Main Street	GH	Gullane's Hotel	C1			
Main Street	SF	Spain's Funeralcare	A1	Comparison	Independent	
Main Street	HCS	Harney Computer Solutions	A1	Comparison	Independent	
Main Street	MW	Michael Ward	A1	Comparison	Independent	
Main Street	BCU	Ballinasloe Credit Union	A2			
Main Street		n/a				VACANT
Main Street	JD	John Dolan	A2			
Main Street	VOD	Vodafone	A1	Comparison	Key Attractor	
Main Street	SF	Scannell Financial	A2			
Main Street	MM	Maud Millars	A4			
Main Street	WB	Willie Burke	A1	Comparison	Independent	

Main Street	SAL	Salmon's	A1	Comparison	Independent	
Main Street	BOI	Bank of Ireland	A2			

Appendix 3: CAR PARKING DATABASE

Name:	Lidl
On Street/ Car Park:	Car Park (Private)
Total Spaces:	100
Short Stay Spaces: (4 hours and under)	0
Long Stay Spaces: (Over 4 hours)	98
Disabled Spaces:	2
Charge: FREE (Sign advising for customers only but no warning of penalties)	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	36
Vacant Spaces on a Non Market/ Quiet Day:	65
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

FOR ALL COUNTS

Quiet Day: Tuesday 14/10/14. Weather: Sunny and Mild.

Busy Day: Thursday 16/10/14. Weather: Cloudy and Mild

Data Collected Between: 14.00 to 16.00 each day

Name:	Society Street
On Street/ Car Park:	Car Park (Local Auth)
Total Spaces:	70
Short Stay Spaces: (4 hours and under)	0
Long Stay Spaces: (Over 4 hours)	65
Disabled Spaces:	5
Charge:	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? 0.50 HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? 2.00 HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? 2.00
Vacant Spaces on a Market/ Busy Day:	60
Vacant Spaces on a Non Market/ Quiet Day:	61
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

Name: Ballinasloe	West Car Park (Opposite Marina)
On Street/ Car Park:	Car Park (Local Authority)
Total Spaces:	84
Short Stay Spaces: (4 hours and under)	0
Long Stay Spaces: (Over 4 hours)	84
Disabled Spaces:	5
Charge:	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? 0.50 HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? 2.00 HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? 2.00
Vacant Spaces on a Market/ Busy Day:	81
Vacant Spaces on a Non Market/ Quiet Day:	60
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

Name: Ballinasloe	West Car Park (Free) (Opposite Marina)
On Street/ Car Park:	Car Park (Local Authority)
Total Spaces:	54
Short Stay Spaces: (4 hours and under)	0
Long Stay Spaces: (Over 4 hours)	54
Disabled Spaces:	0
Charge: FREE (No sign advising this)	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? - HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? - HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? -
Vacant Spaces on a Market/ Busy Day:	20
Vacant Spaces on a Non Market/ Quiet Day:	24
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	2

Name: Ballinasloe	Fair Green (McNevin's Avenue)
On Street/ Car Park:	Car Park (Local Authority)
Total Spaces:	110
Short Stay Spaces: (4 hours and under)	0
Long Stay Spaces: (Over 4 hours)	108
Disabled Spaces:	2
Charge: FREE (No sign advising this)	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? - HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? - HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? -
Vacant Spaces on a Market/ Busy Day:	76
Vacant Spaces on a Non Market/ Quiet Day:	60
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	1

Name: Ballinasloe	McNevin Avenue
On Street/ Car Park:	On Street
Total Spaces:	28
Short Stay Spaces: (4 hours and under)	28
Long Stay Spaces: (Over 4 hours)	0
Disabled Spaces:	0
Charge:	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? 0.50 HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? 2.00 HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? 2.00
Vacant Spaces on a Market/ Busy Day:	14
Vacant Spaces on a Non Market/ Quiet Day:	18
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

Name: Ballinasloe	St Michael's Square
On Street/ Car Park:	On Street
Total Spaces:	92
Short Stay Spaces: (4 hours and under)	88
Long Stay Spaces: (Over 4 hours)	0
Disabled Spaces:	4
Charge:	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? 0.50 HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? 2.00 HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? 2.00
Vacant Spaces on a Market/ Busy Day:	43
Vacant Spaces on a Non Market/ Quiet Day:	48
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

Name: Ballinasloe	Main Street
On Street/ Car Park:	On Street
Total Spaces:	44
Short Stay Spaces: (4 hours and under)	43
Long Stay Spaces: (Over 4 hours)	0
Disabled Spaces:	1
Charge:	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? 0.50 HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? 2.00 HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? 2.00
Vacant Spaces on a Market/ Busy Day:	9
Vacant Spaces on a Non Market/ Quiet Day:	13
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	1

Name: Balinasloe	Dunlo Street
On Street/ Car Park:	On Street
Total Spaces:	74
Short Stay Spaces: (4 hours and under)	73
Long Stay Spaces: (Over 4 hours)	0
Disabled Spaces:	1
Charge:	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? 0.50 HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? 2.00 HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? 2.00
Vacant Spaces on a Market/ Busy Day:	25
Vacant Spaces on a Non Market/ Quiet Day:	26
Illegal Spaces on a Market/ Busy Day:	1
Illegal Spaces on a Non Market/ Quiet Day:	1

Name:	Society Street
On Street/ Car Park:	On Street
Total Spaces:	50
Short Stay Spaces: (4 hours and under)	48
Long Stay Spaces: (Over 4 hours)	0
Disabled Spaces:	2
Charge:	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? 0.50 HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? 2.00 HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? 2.00
Vacant Spaces on a Market/ Busy Day:	24
Vacant Spaces on a Non Market/ Quiet Day:	20
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	1

Name: Ballinasloe	Salmons Department Store
On Street/ Car Park:	Car Park (Private)
Total Spaces:	40
Short Stay Spaces: (4 hours and under)	40
Long Stay Spaces: (Over 4 hours)	0
Disabled Spaces:	0
Charge: FREE	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? - HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? - HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? -
Vacant Spaces on a Market/ Busy Day:	23
Vacant Spaces on a Non Market/ Quiet Day:	24
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

FOR ALL COUNTS:

Quiet Day: Tuesday 14/10/14. Weather: Sunny and Mild.

Busy Day: Thursday 16/10/14. Weather: Cloudy and Mild

Data Collected Between: 14.00 to 16.00 each day

Name: Ballinasloe	Marina Point
On Street/ Car Park:	Car Park (Private for shops and health centre)
Total Spaces:	65
Short Stay Spaces: (4 hours and under)	0
Long Stay Spaces: (Over 4 hours)	64
Disabled Spaces:	1
Charge: FREE	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? - HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? - HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? -
Vacant Spaces on a Market/ Busy Day:	25
Vacant Spaces on a Non Market/ Quiet Day:	26
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	1

Name: Ballinasloe	Gullane's Hotel
On Street/ Car Park:	Car Park (Private)
Total Spaces:	142
Short Stay Spaces: (4 hours and under)	0
Long Stay Spaces: (Over 4 hours)	142
Disabled Spaces:	0
Charge: FREE	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? - HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? - HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS? -
Vacant Spaces on a Market/ Busy Day:	66
Vacant Spaces on a Non Market/ Quiet Day:	62
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	1

Name:	Bank of Ireland
On Street/ Car Park:	Car Park (Private)
Total Spaces:	34
Short Stay Spaces: (4 hours and under)	34
Long Stay Spaces: (Over 4 hours)	0
Disabled Spaces:	0
Charge: FREE (Sign displayed says for customers only, max 1 hour)	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	4
Vacant Spaces on a Non Market/ Quiet Day:	8
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

111	Cavan								1	2	3	0%	
87	Clare		1								1	0%	
21	Clonmacnoise				1						1	0%	
7	Clontuskert		2	2			5	2			3	14	1%
41	Craughwell				2							2	0%
246	Derry									2		2	0%
204	Donegal			1								1	0%
151	Dublin			3	5	1				5		14	1%
19	Dysart		1		1	1						3	0%
20	Eyrecourt	4	1	4	4	2	1	1		3		20	2%
33	Ferbane					1						1	0%
61	Galway city		1	5	3		1				2	12	1%
47	Glenamaddy				1							1	0%
53	Gort							1	1			2	0%
198	Kerry								1			1	0%
13	Kilconnell	3	1	4	10	5	10	4		1		38	3%
120	Kilkenny					1						1	0%
21	Killimor	3		2	3	4	2			4		18	1%
20	Kilreekil			2	1			1				4	0%
12	Kiltormer	1		6	4		5			2		18	1%
13	Laurencetown	2	3		1		6	3		5	4	24	2%
74	Longford			1								1	0%

29	Loughrea	2		1	8	1	5	3	13		33	3%
46	Moate				3						3	0%
40	Monevea			1					1		2	0%
27	Mountbellew		2	1	2	5	4	1	1		16	1%
71	Moycullen		1								1	0%
20	Mullagh			4			1	1		1	7	1%
20	New Inn		3	1	6	1	3	3	4		21	2%
32	Newbridge					1	1	1			3	0%
18	Newtown		1								1	0%
53	Oranmore			1					1		2	0%
	Overseas		1	1			1	2		17	22	2%
31	Portunma		1	2	4	5	3	1	12	1	29	2%
45	Riverstown (Tipp)		1								1	0%
57	Roscommon			1	3		1	1			6	0%
14	Shannonbridge		1		2	2	1	2		9	17	1%
141	Sligo			1							1	0%
10	Taughhmaconnell	2	5	3	2	5	8	14	1	1	41	3%
55	Tuam		2	4	3	1	1	1	1		13	1%
206	tyrone									3	3	0%
30	Tynagh		1					1	2		4	0%
42	Woodford	1				2					3	0%
											1225	

