



The Heart of Our Town:
Ballinasloe
Town Centre Survey & Review

January 2017



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Executive Summary

Start of a long journey

This survey undertaken in November 2016 provides an update on facts and perceptions about Ballinasloe town centre as the ‘heart’ of a wider community. It does this by gathering the same information recorded during a ‘baseline’ survey undertaken in 2014 and ‘benchmarking’ findings against average performance figures for similar types of towns.

“Turning-around a town centre is a long-term journey that takes place against a wider backcloth of national and international economic, technological and social change.”

Two years may seem a long time but don’t expect the fortunes of the town centre to have been transformed over this period. Turning-around a town centre is a long-term journey and one that has to take-place against a wider backcloth of national and international economic, technological and social change. Simply ‘putting the brakes on’ and re-thinking approaches can be success itself in these early years.

What we look for in revisiting a town two years in to a transformational journey are signs that its ‘town team’ are properly engaged with businesses and other stakeholders; that a common sense of purpose is emerging; that facts and figures point to more positive trends and that priorities and ambitions for the town are moving on as local confidence increases.

A ‘great’ local town again

A phrase that I have often used in discussions with Ballinasloe’s new town team over the last two years is “let’s make it a good, local town again”. Actually after tracking recent progress that has included imaginative events and businesses beginning to come together, let’s step-up that ambition: “Let’s make Ballinasloe a great local town again”!

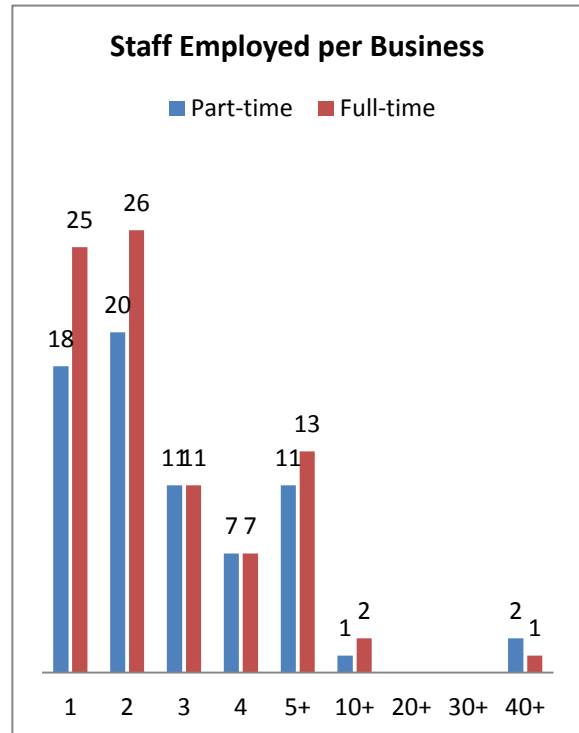
With improved transport links and online offerings, no town centre can any longer expect loyalty based on a monopoly in meeting local needs. A town centre has to attract customers and meet their needs for goods, services and leisure by providing a high quality and distinctive experience. Achieve this and there will be a much more marketable product to attract visitors from further afield.

“With improved transport links and online offerings no town centre can any longer expect loyalty based on a monopoly in meeting local needs.”



The updated data for 2016 reconfirms the following things about the town, its current role and the base that exists from which to re-invent Ballinasloe as a great local town once again:

- There remains a good spread of different types of businesses in the town centre with a higher than average proportion of retail (57%).
- Town centre businesses are collectively both a significant employer and customer base, with 618 staff working in the 93 businesses sampled.
- There is a very high proportion of independent retailers (87%) and correspondingly a low number of multiples. This provides important distinctiveness but will also cause some shoppers -especially amongst younger generations- to look to other centres or on-line to access well-known brands.



“Town centre businesses are collectively both a significant employer and customer base.”

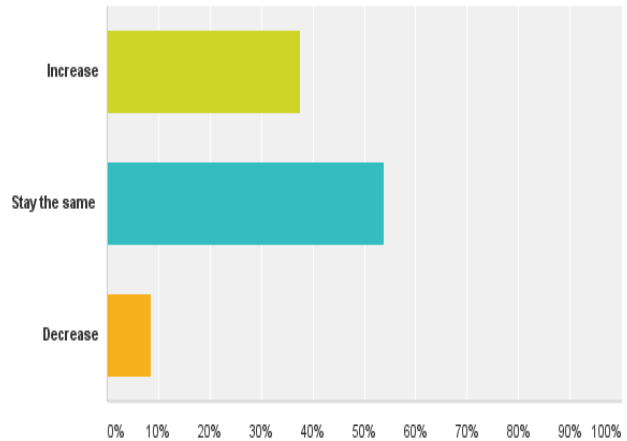
- The vast majority of shops are comparison retailers (88%) and this suggests some vulnerability to competition from neighbouring centres and on-line retail.
- There has been a slight decrease in the proportion of convenience shops (12%) over the last two years from an already low base. Importantly there is still more than one butcher, a greengrocer and unusually a fishmonger that can help generate regular footfall.
- Two major high street banks, the Credit Union and other commercial services are important parts of the business mix and the town’s function as a local service centre.
- Despite a small increase over the last two years (from 3% to 5%), the proportion of restaurants and cafes remains low and could be limiting day-time ‘dwell times’. Conversely, there is a high proportion of drinking establishments (8%).
- The range of public services appears moderate for a town striving to provide a key local service centre function that attracts regular footfall from the surrounding area.

Changing business performance and confidence

This survey involved visiting every business in Ballinasloe town centre at least twice to get their feedback on the performance and confidence of their own businesses and the town as a whole. Once again, we are grateful for the phenomenally high response (66% compared to a normal 'good' rate of return of 25% in other towns). This is what businesses told us about their changing performance and confidence:

Q7 Over the next 12 months do you think turnover will...

Answered: 93 Skipped: 5



- The number of businesses where turnover has stayed the same or increased over the last year is up to 79% and this compares favourably with the situation in 2014 (71%) as well as with benchmark averages (70%).
- Profitability has stayed the same or increased in 75% of businesses over the last year and this compares favourably with the situation in 2014 (68%) as well as with benchmark averages (67%).
- There is cause for future optimism by the fact that 91% of businesses in Ballinasloe expect turnover to stay the same or increase over the next 12 months and this compares favourably with 2014 (82%) as well as with benchmark averages (79%). Importantly the proportion of businesses projecting a decline in turnover has reduced from 16% in 2014 to 9% in 2016.
- When asked to respond to the statement that Ballinasloe has a bright future, only 20% agreed and a further 50% were undecided. In a town like Ballinasloe where business owners are intrinsically a part of the local community, they need to be collectively involved in shaping the town's future and understanding the role of their businesses within in it.

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In terms of the *positives* and *negatives* about being located in the town centre businesses told us:

- *Positives:* The potential for local customers (66%) is consistently considered the strongest positive aspect of being located in Ballinasloe town centre. Transport links (41%), geographical location (39%), retail mix (39%) and car parking (36%) are all characteristics valued by more than a third of businesses.
- *Negatives:* Competition from out-of-town retails is now ranked as the biggest negative aspect of trading in the town centre followed by parking (50%), the wider prosperity of the town (50%), the appearance of the town centre (41%) and competition from other localities (39%).

“The potential for local customers (66%) is consistently considered the strongest positive aspect of being located in Ballinasloe town centre.”

When asked to respond to the statement that “*Ballinasloe has a bright future*”, only 20% of businesses agreed and a further 50% were undecided. This perhaps points the critical importance of local partners and businesses continuing to work together to realistically address issues and change expectations. In a town Like Ballinasloe where business owners are intrinsically a part of the local community need, they need to be collectively involved in shaping the town’s future and understanding the role of their businesses within in it.

Taking a customer-led perspective

If we are to aspire to meet customers’ needs for goods, services and leisure whilst providing a high quality experience, it’s important to ask them what they think of current provision! This is what 153 mid-week town centre users told us about themselves, how they use the town, likes/dislikes and things they would like to see improve:

Positives: Respondents were reassuringly positive about key aspects of the experience for a town aspiring to once again be a ‘great local town’, including: access to services (88%); customer service (83%); convenience (80%); and ease of walking around (90%). In deed it seems users’ perceptions of these aspects of the town centre experience have improved over the last two years and all are rated higher than comparable benchmarks.



“Respondents were reassuringly positive about key aspects of the experience for a town aspiring to once again be a ‘great local town’, including: access to services; customer service; convenience; and ease of walking around town.”

Other notable improvements (>10% increase) in users' perceptions about the town centre include cafes/restaurants (67%), transport links (75%) and car parking (58%) where a majority now view these as positive aspects of the town centre experience and in a way that compares favourably with benchmarks.

Negatives: Town centre users, in contrast to businesses, were most negative about the retail offer (56%) with a slight increase in this sentiment over the last two years.

Other negative aspects worth focusing on because perceptions have worsened and/or they compare unfavourably with benchmarks, are the town's physical appearance (48%), cultural activities/events (44%), cleanliness (40%), leisure facilities (38%), pubs/bars/nightclubs (33%) and markets (43%). Many of these are aspects of the town centre that it is necessary to strengthen to improve perceptions of the town centre as a place to choose for a 'day-out' or to linger.

At the time of these mid-week surveys, most of the town centre users were in-town for work (25%); leisure (25%), convenience shopping (24%) and access to services (17%). Only 5% of users stated that they were in town for comparison shopping (compared to 10% in 2014), whilst 88% of retailers offer comparison goods.

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Spending in the town centre appears relatively high compared to averages for small towns in the UK with 70% of town centre users saying they spend over €12.01 on a normal. This relatively high spend may in part be accounted for by linked trips to supermarkets. Combined with the fact that 85% of the town centre users sampled visited the town at least once a week, this suggests a key role as a local service centre.

We now know from footfall counts that the numbers of potential customers out-and-about in Ballinasloe are modest compared to similar-sized towns and that levels drop considerably across different parts of the town.

Supplementary questions about Ballinasloe indicated that once again nearly two thirds of users (63%) would currently recommend a visit to the town centre. They are less optimistic looking forward with under one third (31%) agreeing that it has a bright future and only 2% strongly agreeing compared to 9% in 2014. Such apparent pessimism may well reflect wider economic concerns expressed elsewhere as part of this survey. When asked to select three words that best described Ballinasloe, the most popular choices remain local (66%), convenient (61%), friendly (54%) and quiet (48%). These responses give a realistic portrayal of the town by existing users that can help in re-enforcing and promoting its strengths.

“Nearly two thirds of users (63%) would currently recommend a visit to the town centre.”

Next steps and future priorities

Both businesses and town centre users were asked to give their top two future priorities for improving the town's economic performance. The diagram below gives a summary of the aggregated responses for both stakeholder groups.



Here we reflect a little on these priorities, any insights provided by the survey work and potential next steps for the town team and partners to consider.

The parking conundrum

Parking remains prominent in both businesses' and customers' minds, with an increasing number of stakeholders even seeing it as strength. From the data we already have a lot of information that points to remedies:

- parking availability is very good overall although this is greatly aided by free, private provision alongside paid-for, on-street and local authority parking.
- the 'mixed' parking offer between public/private and paid/free would be confusing to the unfamiliar visitor and this is compounded by inconsistent signage to, within and from car parks. Proposals are, however, in place which can address much of this and add clarity.
- flexibility or the removal of on-street parking charges remain a key priority for many Ballinasloe businesses despite in other responses it being considered more widely as a positive of trading in the town.
- the key issue is the balance that must be struck between using parking tariffs

"The key issue is the balance that must be struck between using parking tariffs (costs and time restrictions) to manage the supply and demand."

(costs and time restrictions) to manage the supply and demand for on-street, ‘pop-and-shop’ parking in particular.

- calls to remove on-street parking tariffs completely would likely lead to a ‘free-for-all’ and transfer cars from car parks to occupy on-street spaces valued by businesses and their customers.

Next steps: It will be important to try and engage parking managers and business representatives in a realistic dialogue about flexibility with tariffs for on-street ‘pop-and-shop’ whilst generating funds to improve the consistency of signage to, within and from car parks.

Employment, development and the wider economy

Unusually for a survey of this kind, strategic issues such as employment, the economy, planning and development were very prominent amongst stakeholders’ priorities for improving the town centre. It is undeniable that the prosperity of the town centre and wider economic and housing development are inextricably linked and the advancement of both should move forward in parallel.

Equally though, it is important not to use wider economic uncertainty as a reason to stall investment and initiative to improve the town centre for the following reasons:

- the vibrancy of the town centre and local community are key in determining the attractiveness of the area to major investors
- existing businesses and potential small-scale start-ups cannot wait for some of these wider economic considerations to be determined. It is important to work within and build-on the current position and collectively promote the existing strengths of the town
- without a vibrant town centre and businesses that provide a quality experience, any new income is more likely to be spent in other accessible centres or on-line. Circumstances have changed and any new of higher paid employees would no longer be a ‘captive’ audience

“Without a vibrant town centre and businesses that provide a quality experience, any new income is more likely to be spent in other accessible centres or on-line.”

Next steps: Understand and engage with strategic partners such as Galway County Council’s strategic planning and economic development roles to promote inward investment and plan for necessary new housing or infrastructure in a way that underpins the town centre’s role.

Promoting and managing the retail mix

We know from this and previous surveys that existing town users, and especially ‘non-users’ are not entirely satisfied with the retail mix that the town centre provides. We also know that some businesses recognise this issue themselves and understand the importance of a strong, collective offer of what might be considered the town-wide ‘department store’!

As has already been documented, we know a lot from the survey about existing businesses and town centre users' habits including an apparent mismatch between a composition of 88% comparison retailers and a 5% base of comparison shoppers. We also know from more detailed analysis and observation that the town has a rich variety of independent businesses including specialist comparison retailers, commercial services, drinking establishments and key convenience goods. Leisure is moderately represented through community services and private restaurants.

“The town has a rich variety of independent businesses including specialist comparison retailers, commercial services, drinking establishments and key convenience goods.”

The priority in taking things forward should be to continue to enhance and promote the current offer in a way that builds on recent success. This will include bringing the town 'on-line', businesses participating in events, window displays, customer service training, expanding participation in the Sports Hub provision and creating further themed promotional material including 'viral video shorts' of sectors such as fashion, lifestyle, local food, nightlife.

Ballinasloe's vacancy rate (18%) is high compared to other benchmarked towns but this figure represents a decrease on levels for 2014 (19%). Though the town has a large number of units not well-suited to the demands of the modern retailer, there is an indication of current activity in the commercial property market for the town.

“Ballinasloe's vacancy rate (18%) is high compared to other benchmarked towns but this figure represents a decrease on levels for 2014 (19%).”

Promotional activity of existing businesses could be augmented by a pro-active programme of re-letting empty shops including a premises conditions audit, engagement with landlords and letting agents, help with essential refurbishments, short-term lets, possible rent/rates reductions, pop-up shops and business mentoring.

Next steps: The town team can build on its existing work to help improve the on-street, in-print and on-line promotion of existing businesses through a programme that also looks at pro-actively diversifying the retail mix and filling empty shops.

Appearance and empty premises

The appearance of the town and the blight caused by redundant premises and empty shops featured prominently amongst survey responses from customers and businesses. This is an important part of boosting confidence and the appeal of the town centre to existing users, visitors and potential investors. Although to date not evidenced by significant improvements on the ground, there will hopefully be a period of intense activity within the next two years as Galway Councils' long-planned Town Centre

Enhancement Scheme is implemented. It will be important to make the most of this opportunity in the following ways:

- clearly communicating any potential disruption to business representatives and customers through flexible planning and effective communications throughout
- taking the opportunity to systematically enhance existing shop-fronts to complement streetscape improvements
- targeting the restoration and re-letting of key empty premises to coincide with the enhancement works
- taking the opportunity to install essential orientation boards and signage to improve visitor access in a way that coincides with phased improvements
- organising promotional campaigns and events to celebrate the phased ‘re-opening’ of a more attractive town centre

Next steps: Close liaison between Galway County Council, the town team and business representatives will be essential to ensure that this ‘good news’ story has a positive impact and opportunities and necessary investment are pursued to complement and complete the overall effect.

“There was strong recognition from town centre users about the importance of increasing the town centre’s profile and attracting footfall by developing an events programme).”

Leisure and events

There was strong recognition from town centre users about the importance of increasing the town centre’s profile and attracting footfall by developing an events programme and wider leisure activities including provision for young people in particular.

The town team and other partners have fast been developing expertise in this area with new events such as the festive celebrations, the piloting of the Sports Hub scheme and the development of the community cinema. It will be important to continue this work in a way that raises the profile of the town and its businesses to infrequent visitors and increases regular footfall. Hospitality-related businesses including hotels, restaurants, cafes, take-aways and bars obviously have a key part to play in this. In view of the number of comments about provision for young people, further engagement with schools, sports clubs and youth groups may help identify opportunities.

Next steps: The town team should continue its work with other community groups and businesses to develop an annual programme of activities that raises the town centres profile and increases footfall.

“It is both very encouraging and unusual that a survey like this receives significant numbers of stakeholder responses recognising the importance of local leadership and showing an appetite for partnership working.”

Local leadership and joint working

It is both very encouraging and unusual that a survey like this receives significant numbers of stakeholder responses recognising the importance of local leadership and showing an appetite for partnership working. Partnership working has been an instinctive part of the team's progress over the last two years with a great track record in working with community groups, engaging businesses and maintaining relations strategic-level organisations such as Galway County Council. It is important that this approach continues and that the town team continues to maintain good communications, involves more and more businesses in collective solutions and uses the strengths and capacity of existing community-based organisations.

An identified priority for the next two years is to strengthen working relations with GCC officers and members around the Enhancement Scheme, potential access and parking improvements and engagement in wider economic development. The suggestion is that a memorandum of understanding is created and joint action plan agreed for regular six monthly reviews.

Next steps: The town team should continue to marshal local involvement from community groups and businesses whilst giving extra priority to strengthening strategic relations and influence with Galway County Council.

“An identified priority for the next two years is to strengthen working relations with GCC officers and members around the Enhancement Scheme, potential access and parking improvements and engagement in wider economic development.”



Introduction

The Approach

Purpose

The town centre surveying and benchmarking approach used here was developed to help understand, measure, evaluate and ultimately improve the economic viability of communities. The approach has been used increasingly widely since 2004 and offers a simple way of capturing data on town centre Key Performance Indicators (KPIs) selected by those involved in town centre revitalisation. Measuring performance in this way helps in action planning be more focused and effective to directly improve town centres. Making comparisons with national averages and historic data helps gauge recent changes in performance in the context of wider trends.

Schedule

In order to compare most accurately across towns and over a number of years key performance indicators (KPIs) are measured at set times of year. For Ballinasloe, a first baseline survey was undertaken in late October 2014 and the same survey was repeated in early November 2016.

KEY PERFORMANCE INDICATOR	METHODOLOGY
Core Economic Indicators	
Commercial Units	
KPI 1: Use Class	Visual Survey
KPI 2: Comparison/Convenience	Visual Survey
KPI 3: Trader Type	Visual Survey
KPI 4: Vacancy Rates	Visual Survey
Cross-town Trends	
KPI 5: Markets	Visual Survey
KPI 6 & 7: Zone A Retail Rents	Valuation Office Agency/ Local Agents
KPI 7: Prime Retail Property Yields	Valuation Office Agency/ Local Agents
KPI 8: Footfall	Footfall Survey on a Market & Quiet Day
KPI 9: Car Parking	Audit on Market and Quiet Day
Stakeholder Surveys	
KPI 10: Business Confidence Surveys	Drop-in Survey
KPI 11: Town Centre Users Surveys	Face to Face Surveys/ Online Survey
KPI 12: Shoppers Origin Surveys	Shoppers Origin Survey



Key Findings

Commercial Units

KPI1: 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 range of services in a town are important to it remaining competitive and attractive to customers.

The following table provides a detailed analysis of the commercial offering in the town centre by Use Class. The figures are presented as a percentage of the 150 occupied units recorded. In this table and throughout this report, comparisons are included to the same data sets recorded in 2014.

The table in Appendix 1a provides a detailed description for each of the Use Classes. There were 182 business premises identified in the town centre and these are listed in Appendix 1b. There were 32 vacant business units recorded in the audit.

	National Small Towns %	Ballinasloe % (2014)	Ballinasloe (number)	Ballinasloe %
A1: Shops	52%	58%	86	57%
A2: Financial and Professional Services	14%	12%	18	12%
A3: Restaurants and Cafes	8%	3%	8	5%
A4: Drinking Establishments	4%	8%	13	8%
A5: Hot Food Takeaways	5%	5%	7	5%
B1: Businesses	3%	2%	3	2%
B2: General Industrial	1%	0	0	0
B8: Storage and Distribution	0	0	0	0
C1: Hotels	1%	2%	2	1%
C2: Residential Institutions	0	0	0	0
C2A: Secure Residential Institution	0	0	0	0
D1: Non-residential Institutions	6%	2%	6	3%
D: Assembly and Leisure	1%	2%	3	2%
SG: Sui Generis ("unique" establishments)	6%	5%	8	5%
Not recorded	0	0	0	0

There remains a good spread of different types of businesses in Ballinasloe town centre with over half (57%) being retail and this is higher than averages for similarly-sized towns

taken from UK data. Financial and professional services (12%) are slightly lower compared to other small towns (12%), although importantly major High Street banks and a Credit Union are present. Non-residential institutions, assembly/leisure and unique 'Sui Generis' establishments collectively give an indication of the community function of a town centre and account for 10% of premises compared to 13% for benchmark towns.

There has been a small but significant increase in the number and proportion of restaurants and cafes from 3% to 5% though this is still lower than comparable benchmarks and may limit 'dwell times'. Conversely, there are more drinking establishments (8%) than might be expected in a town of this size.

KPI2: Commercial Units; Comparison versus Convenience

A1 retail units or shops can be split into two different types: Comparison and Convenience. The balance of comparison and convenience retail units is a good indicator of a town's function and the balance of its appeal to local shoppers and visitors.

Convenience goods -low-cost, everyday items that consumers are unlikely to travel food and non-alcoholic drinks:

- tobacco
- alcohol
- newspapers and magazines
- non-durable household goods.

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
- jewelry, watches and clocks
- bicycles
- recreational and Miscellaneous goods
- hairdressing

The table indicates that the vast majority of businesses in Ballinasloe town centre are comparison retailers (88%) and that this is a slightly higher proportion than other benchmarked small towns. Whilst this percentage of comparison retailers indicates Ballinasloe is an established local shopping destination, it suggests a vulnerability to competition from neighbouring centres and on-line retail. This high proportion of



comparison retailers also needs to be considered against the proportion of comparison shoppers later recorded through the town centre users' survey.

There has been a minor decrease in the proportion of convenience shops over the last two years and this trend could become critical if it continues. Importantly, there remains more than one butcher, a greengrocer and unusually a fishmonger in the town centre.

	National Small Towns %	Ballinasloe % (2014)	Ballinasloe (number)	Ballinasloe %
Comparison	82%	87%	76	88%
Convenience	18%	13%	10	12%

KPI3: Commercial Units; Trader Types

The vitality of a town centre depends greatly 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 from further afield. The character and profile of a town often also depends, however, on the variety and mix of independent shops that can give it 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 Goad.

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

As commented in 2014, 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 averages 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.

	Nat. Small Towns %	Ballinasloe % (2014)	Ballinasloe (number)	Ballinasloe %
Key attractor	5%	1%	1	1%
Multiple	22%	8%	7	8%
Regional	7%	4%	3	4%
Independent	66%	87%	75	87%

KPI4: 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.

	Nat. Small Towns %	Ballinasloe % (2014)	Ballinasloe (number)	Ballinasloe %
Vacancy %	9%	19%	32	18%

Ballinasloe’s vacancy rate (18%) is high compared to other benchmarked towns but represents a decrease on adjusted levels for 2014 (19%). The town though does have a large number of units and many of these are small in size, are historic properties and in a seemingly poor condition that are not well-suited to the demands of the modern retailer.

There is an indication of current activity in the commercial property market for the town with several long-term empty premises displaying ‘sold’ signs. It is important to consistently monitor the vacancy rate to identify trends over time and in a small town, a small number of changes either way will have a significant impact on the figures.



Cross-Town Trends

KPI5: 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 and provide a local mechanism for a diverse range of local enterprises to start, flourish and grow to extend the sustainable mix of shops services on offer. There is no regular street market in Ballinasloe although there is a craft market in the Town Hall.

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. 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. This data was not available for Ballinasloe but could ne compiled through reguar cooperation with local property surveyors.

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 other towns.

	Nat. Small Towns	Ballinasloe (2015)	Ballinasloe
Monday (Main St)	99	83	72
Thursday (Main St)	111	85	81



This data indicates that average footfall counts for Ballinasloe are modest compared to similar-sized towns and that there has been a slight reduction compared to 2014 figures. More significant, as indicated previously, is the fact that footfall levels drop considerably across different parts of the town with much lower counts recorded for Dunlo Street and Society Street. This indicates that town centre users are not migrating around the town on normal mid-week mornings.

KPI 9: Car Parking

Usually, 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 longer-stay, more peripheral parking can meet the needs of workers and any day-visitors.

The table overleaf provides a summary of the car parking offer in the town. More detailed data for constituent car parks and on-street parking is included in appendix 2. The data is broken down into the following categories:

- Percentage number of spaces in designated car parks and on-street
- Percentage number of short stay, long stay and disabled spaces in designated car parks and on-street
- Percentage of vacant spaces in designated car parks on a Market/ Busy Day and on a non-market/ quiet day

The survey shows that there are 981 car park spaces in Ballinasloe that can be subdivided in to:

- Off-street parking accounting for 70% of spaces and within this a 17%:52%:2% split between short-stay, long-stay and disabled parking. This is provided by a mix of chargeable public and free private car parks which oddly are located next to each other.
- 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 is high compared to average figures for small towns and suggests a good ability to 'pop-and-shop' within the town centre.

	Nat. Small Towns %	Ballinasloe % (2014)	Ballinasloe (number)	Ballinasloe %
Car Parks				
Total spaces:	79%	70%	689	70%
Short stay spaces:	38%	4%	170	17%
Long stay spaces: (over 4 hours)	51%	65%	502	52%
Disabled spaces:	5%	1	17	2%
Not registered	6%	-	-	-
Vacant spaces on a busy day:	26%	57%	429	62%
Vacant spaces on a quiet day:	39%	57%	518	75%
On-Street Parking				
Total spaces:	21%	30%	292	30%
Short stay spaces:	70%	29%	283	29%
Long stay spaces: (over 4 hours)	22%	0	0	0
Disabled spaces:	5%	1%	9	1%
Not registered	3%	-	-	-
Vacant spaces on a busy day:	14%	39%	86	29%
Vacant spaces on a quiet day:	21%	43%	98	34%
Totals				
Total spaces:	n/a	n/a	981	n/a
Short stay spaces:	45%	34%	453	46%
Long stay spaces: (over 4 hours)	45%	66%	502	52%
Disabled spaces:	5%	2%	26	2%
Not registered	5%	-	-	-
Vacant spaces on a busy day:	24%	52%		53%
Vacant spaces on a quiet day:	35%	53%	622	63%

Average vacancy rates of 53-63% are higher than in 2014 and suggest an overall good availability of parking that is neither a limiting factor nor a negative. As further analysis revealed previously, however, public car parks have 210 of these spaces (30% of the total) with higher vacancy rates, whilst private car parks have 131 spaces and are busier. Private parking is free of charge whereas on-street and local authority parking have largely to be paid for. The private parking is thus significantly alleviating any pressure on town centre parking and without this provision there would far fewer vacant spaces spread between on-street and council car parks.

The ‘mixed’ parking offer between public/private and paid/free is confusing to the unfamiliar visitor and this is compounded by inconsistent signage to, within and from car parks. Proposals are in place which can address much of this and add clarity but it is unlikely that this alone will get to the bottom of why parking remains to be perceived as a priority, especially by businesses (see stakeholder surveys). The key issue that needs to be addressed is the balance between using parking tariffs (costs and time restrictions) and managing the availability of on-street parking in particular. Calls to remove on-street parking tariffs completely would likely lead to a ‘free-for-all’ and transfer cars from car parks to occupy on-street spaces valued by businesses and their customers.

Stakeholder Surveys

KPI 10: Business Confidence Survey

Business Confidence Surveys were distributed to all the town centre businesses in Ballinasloe and every business was revisited at least twice. As in 2014, this approach resulted in a very high response rate of return 66% compared to a typical rate of return of 25% in other towns. Normally, high response rates are an indication of businesses engagement in the town centre renewal process. The following percentage figures are based on the returns from 98 businesses.

Profile of Respondents	Nat. Small Towns %	Ballinasloe % (2014)	Ballinasloe %
Business Sector			
Retail	62%	61%	62%
Financial/ professional services	18%	15%	8%
Public sector	1%	1%	2%
Food and drink	11%	13%	19%
Accommodation	7%	10%	9%
Other	0	0	0
Business Type			
Multiple trader	19%	10%	12%



Regional	12%	6%	2%
Independent	69%	84%	86%
How Long Trading			
Less than a year	7%	2%	7%
One to five years	21%	10%	8%
Six to ten years	13%	12%	8%
More than ten years	59%	76%	76%

The evidence indicates that the responses to the survey came from a representative sample of business sectors and types –for example 62% were retailers and 86% were independent businesses compared to 57% and 87% respectively for the town as a whole. Importantly, this data indicates that a high proportion (84%) of respondents were long-established businesses that had been trading in the town for at least six years.

As part of the survey, businesses were asked about recent and future performance. These responses provide key insights in to the health and confidence of town centre businesses and are an indicator of probable future levels of change. The table below shows the responses from the 93 of the respondents.

Changing business performance and confidence	Nat. Small Towns %	Ballinasloe % (2014)	Ballinasloe %
Turnover over last 12 months			
Increased	38%	35%	31%
Stayed the same	32%	36%	48%
Decreased	30%	28%	22%
Profitability over last 12 months			
Increased	34%	34%	23%
Stayed the same	33%	34%	52%
Decreased	33%	32%	25%
Expected turnover over next 12 months			
Increase	47%	42%	37%
Stay the same	32%	42%	54%
Decrease	21%	16%	9%

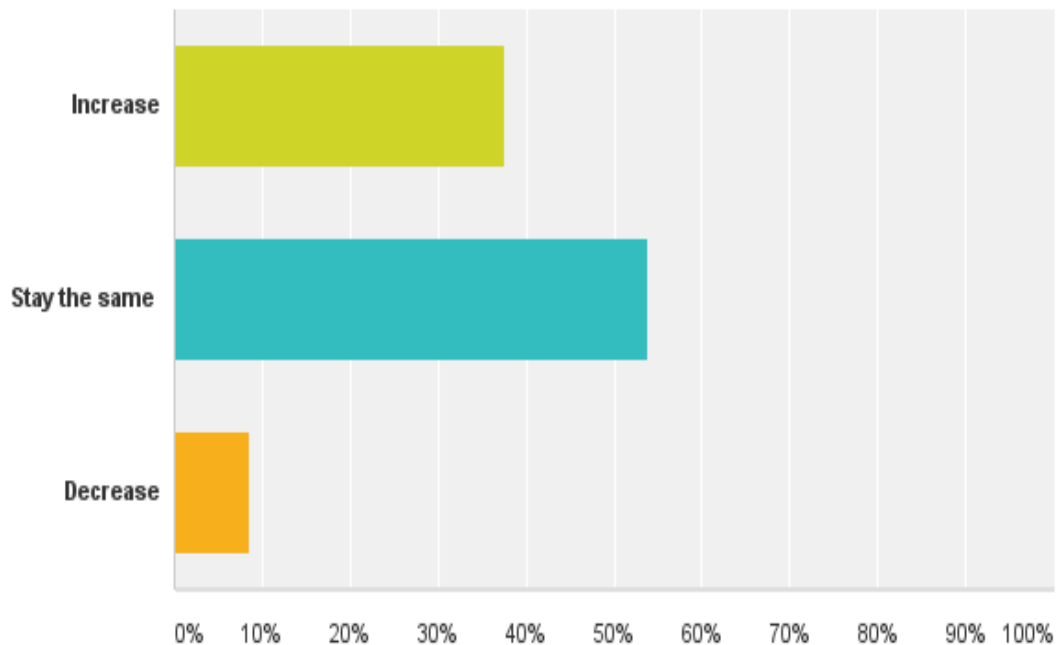
This business confidence and performance data for 2016 shows the following positive trends for Ballinasloe:



- The number of businesses where turnover has stayed the same or increased is up to 79% and this compares favourably with the situation in 2014 (71%) as well as with benchmark averages (70%).
- Profitability has stayed the same or increased in 75% of businesses over the last year and this compares favourably with the situation in 2014 (68%) as well as with benchmark averages (67%).
- There is cause for future optimism by the fact that 91% of businesses in Ballinasloe expect turnover to stay the same or increase over the next 12 months and this compares favourably with 2014 (82%) as well as with benchmark averages (79%). Importantly the proportion of businesses projecting a decline in turnover has reduced from 16% in 2014 to 9% in 2016. This figure equates to the proportion of businesses most at risk as they are likely to be showing year-on-year declines in profitability.

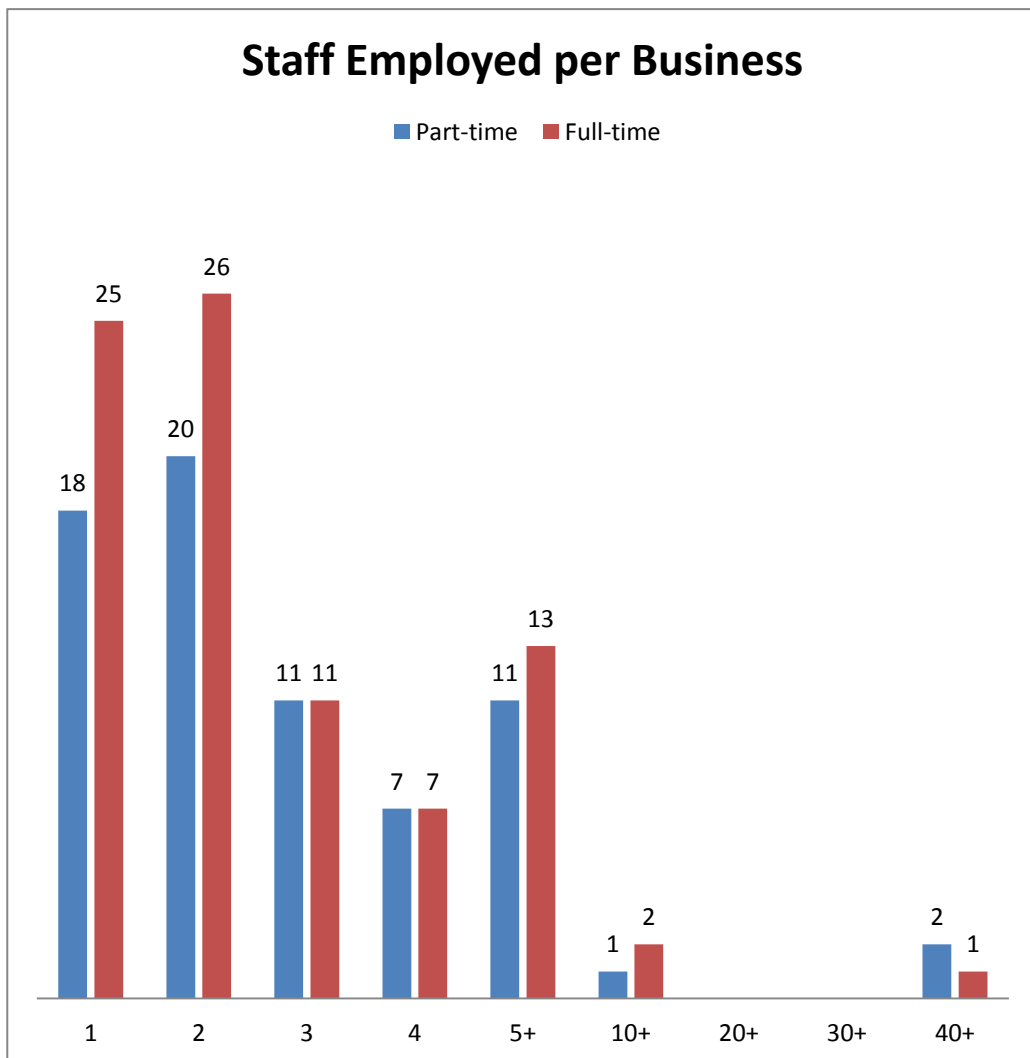
Q7 Over the next 12 months do you think turnover will...

Answered: 93 Skipped: 5



As part of the survey this year, businesses were asked how many part-time and full-time staff they employ. The overall totals are summarised in the table below and indicate that the town centre is a significant employer with 618 staff working in the 93 businesses who responded. The range in the number of employees for different businesses is represented in the chart below.

Ballinasloe Town Centre Staff	Part-time	Full-time	Total
Totals (sample of 93 businesses)	293	325	618



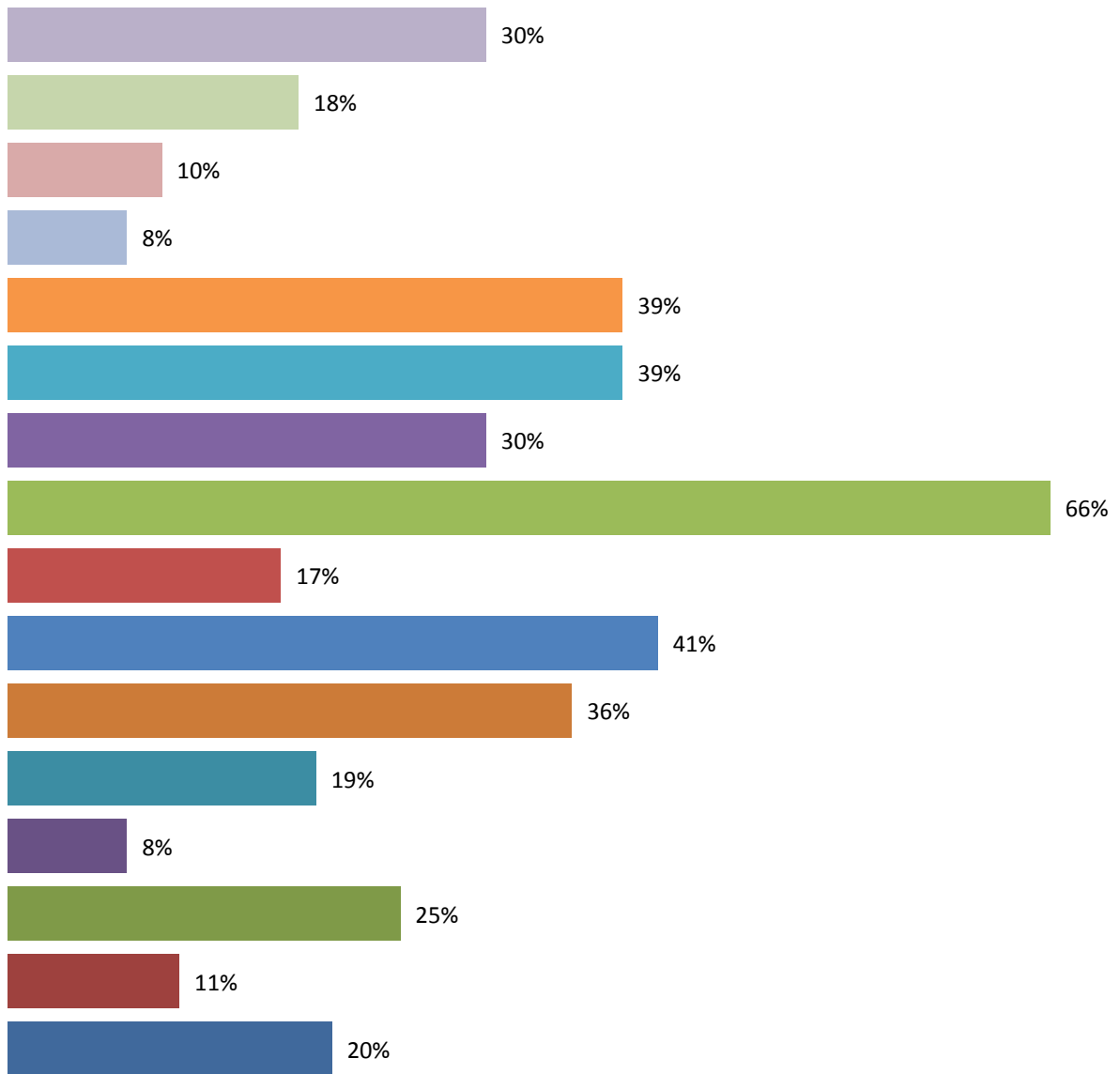
Positive aspects of being located in town centre.	National Small Towns %	Ballinasloe % (2014)	Ballinasloe %
Physical appearance	37%	23%	30%
Prosperity of the town	36%	23%	18%
Environment	18%	1%	10%
Labour pool	-	13%	8%
Geographical location	45%	50%	39%
Mix of retail offer	30%	39%	39%
Potential tourist customers	26%	31%	30%
Potential local customers	75%	66%	66%
Affordable housing	13%	19%	17%
Transport links	29%	36%	41%
Car parking	38%	35%	36%
Rental values/ property costs	23%	25%	19%
Market (s)	18%	15%	8%
Events/ activities	16%	23%	25%
Marketing/ promotions	11%	15%	11%
Local partnerships/ organisations	14%	11%	20%
Other	2%	1%	4%

Positives: The potential for local customers (66%) is consistently considered the strongest positive aspect of being located in Ballinasloe town centre. Transport links (41%), geographical location (39%), retail mix (39%) and car parking (36%) are all characteristics valued by more than a third of businesses.



Positive Perceptions - Businesses

- Physical Appearance
- Environment
- Geographical location
- Potential tourist customers
- Affordable housing
- Car parking
- Market(s)
- Marketing/promotions
- Prosperity of the town
- Labour pool
- Mix of retail Offer
- Potential local customers
- Transport Links
- Rental values/property costs
- Events/activities
- Local partnerships/organidations



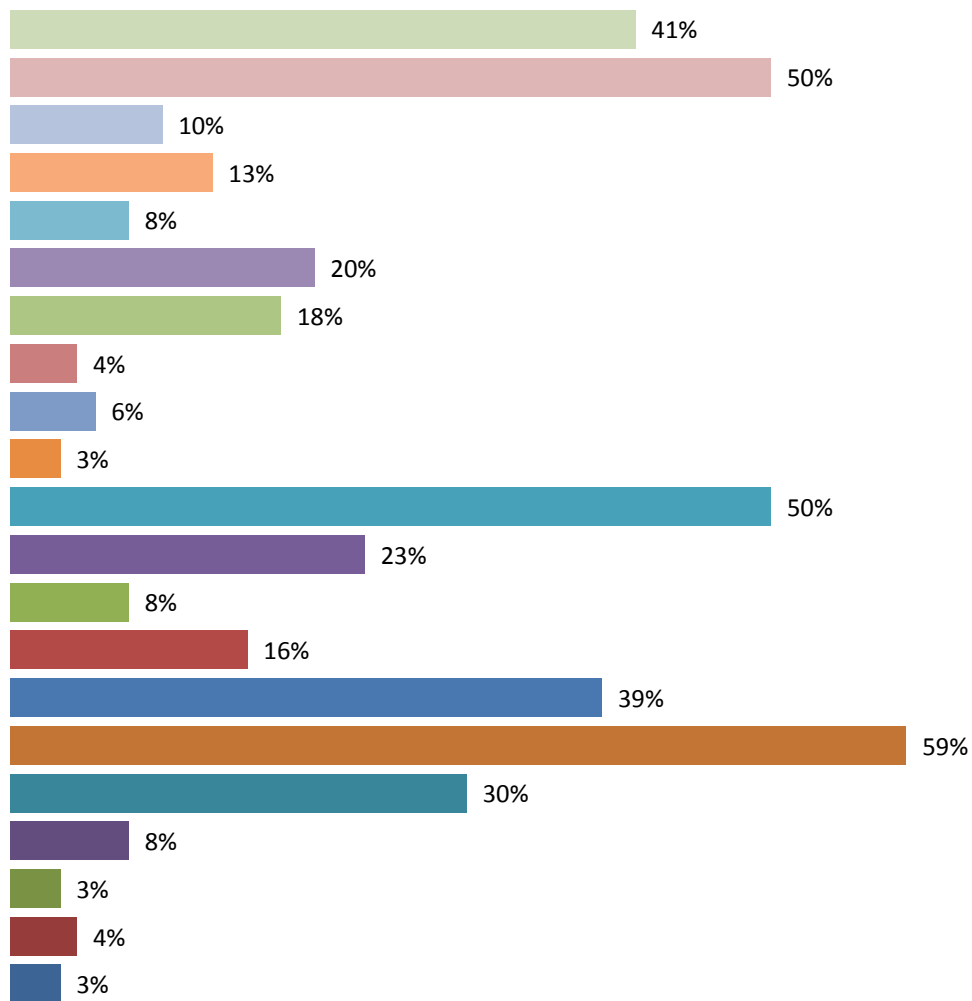
Negative aspects of being located in town centre	National Small Towns %	Ballinasloe % (2014)	Ballinasloe %
Physical appearance	26%	37%	41%
Prosperity of the town	28%	45%	50%
Labour Pool	9%	21%	10%
Environment	-	1%	13%
Geographical location	6%	2%	8%
Mix of retail offer	29%	20%	20%
Potential tourist customers	13%	14%	18%
Potential local customers	5%	4%	4%
Affordable housing	9%	5%	6%
Transport links	18%	5%	3%
Car parking	54%	57%	50%
Rental values/ property costs	28%	14%	23%
Market (s)	10%	6%	8%
Local business competition	20%	11%	16%
Competition from other localities	20%	26%	39%
Competition from out of town	35%	55%	59%
Competition from the internet	33%	25%	30%
Events/ activities	7%	12%	8%
Marketing/ promotions	11%	10%	3%
Local partnerships/ organisations	4%	5%	4%
Other	9%	4%	3%

Negatives: Competition from out-of-town retails is now ranked as the biggest negative aspect of trading in the town centre followed jointly by parking (50%) and the prosperity of the town (50%). The response to parking is slightly less negative than in 2014 and is the only one of this ‘top’ three responses that is comparable to those typical of businesses in small towns. Negative responses to the appearance of the town (41%) and competition from other localities (39%) have increased and are the only other aspects that are rated as problematic by over a third of businesses.



Negative Perceptions -Businesses

- Physical Appearance
- Environment
- Geographical location
- Potential tourist customers
- Affordable housing
- Car parking
- Market(s)
- Competition from other localities
- Competition from internet
- Marketing/promotions
- Other (please specify)
- Prosperity of the town
- Labour pool
- Mix of retail offer
- Potential local customers
- Transport links
- Rental values/property costs
- Local business competition
- Competition from out-of-town shopping
- Events/activities
- Local partnerships/organisations



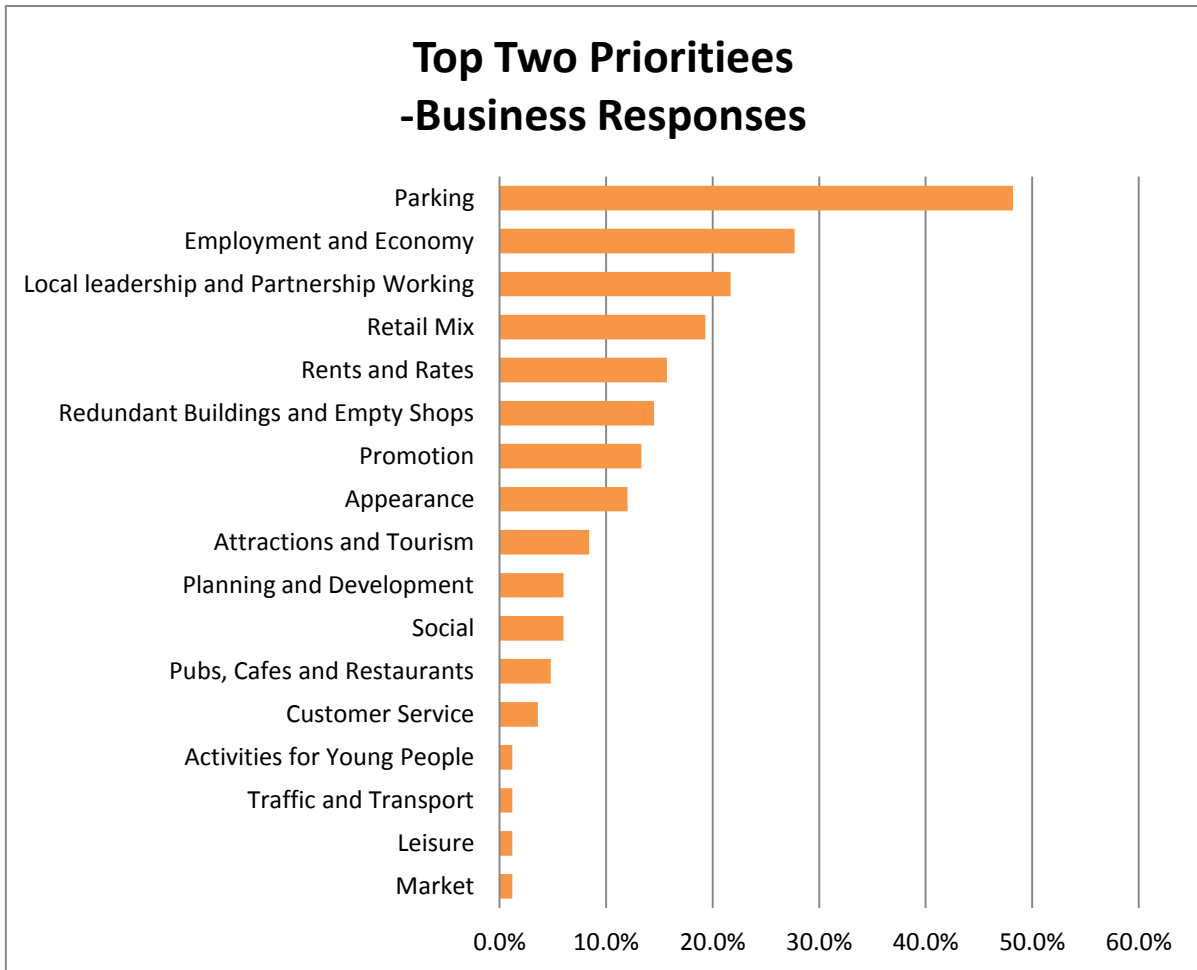
	National Small Towns %	Ballinasloe % (2014)	Ballinasloe %
Has your business suffered from any crime over the last 12 months			
Yes	26%	28%	25%
No	74%	72%	75%
Type of Crime			
Theft	69%	79%	67%
Abuse	18%	21%	21%
Criminal damage	38%	42%	13%
Other	6%	4%	0

A significant but entirely ‘typical’ number of businesses, compared to similar towns, had been affected by crime over the last year. Of those affected, theft was the biggest type of crime suffered.

Questions Specific to Ballinasloe

When asked to respond to the statement that Ballinasloe has a bright future, only 20% agreed and a further 50% were undecided. This perhaps highlights the critical importance of local partners and businesses working together to ensure the most can be done to boost the optimism of those with uncertainties or pessimistic sentiments.

Do you agree with the following statement? “Ballinasloe is a town with a bright future for the decade ahead?”		
	Ballinasloe % (2014)	Ballinasloe %
Strongly agree	9%	10%
Agree	16%	10%
Uncertain	41%	50%
Disagree	22%	16%
Strongly disagree	13%	15%



Two Suggestions to Improve the Town Centre

When businesses in Ballinasloe were asked which two would improve the town centre, the high level of responses again provided valuable insights to their perspectives. These can be compared and contrasted with town centre users' opinions and other findings.

Car Parking

Parking is very often the main priority expressed by businesses in town centre benchmarking surveys and again Ballinasloe was no exception with a very strong emphasis from participating businesses on removing, reducing or 'flexing' on-street parking charges.

- No paid parking
- Scrap paid parking and fines
- Remove parking meters
- Free parking on Saturdays
- Parking should be free at least one day per week
- Reduce parking charges at particular times
- I would stop paid parking; it has a very negative effect on people coming in to the town centre
- Get rid of paid parking

- Get rid of paid parking completely
- Free parking
- Free parking
- Abolish paid parking
- Abolish paid parking -it seems from customers it's more about the inconvenience than the money. Ballinasloe is much busier when parking is free in run-up to Christmas
- Customers complain about street parking charges. Athlone offers 4 hours underground parking for €2.
- Get rid of parking fees
- Scrap parking fines
- Not charging for parking
- Review paid parking
- Introduce free car parking
- No paid parking
- Get rid of paid parking
- Free parking
- Availability of free parking
- No paid parking from 11am; stop shop-workers parking there
- Free parking/free parking for 2 hours
- People would linger if they didn't pay for parking
- 1-2 hours of free parking
- Free parking for at least 2 hours
- More free parking
- Get rid of paid parking on Saturdays as it seems to be the worst day for wardens to be around -losing business to Athlone
- 2 hour free parking minimum
- Remove paid parking
- Free street parking -its the biggest issue all my clients discuss in terms of coming in to town
- Free parking
- No paid parking
- Get rid of paid parking on streets
- First 15 minutes parking free Monday to Friday and free all day on Saturday
- Allow free parking for one hour/30 minutes
- Free parking
- Remove paid parking

Employment and Economy

Consistent with both the 2014 survey and responses from town centre users (see later), 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 industry



- Attract major employers
- Need new industry
- Improve local employment through incentives
- Need more jobs
- Jobs
- New industries
- Jobs
- Submission to IDA with increased pressure to priorities investment in new enterprises for the town which will have numerous positive knock-on effects
- Industry
- More large buildings for industry to come in.
- Factories
- Need a committee that gets new jobs
- Attract more industry, factories
- Employment
- Attract businesses, especially manufacturers
- New factories
- Town urgently requires new jobs to develop. T.D/government help required
- Employment
- Need a factory or employer that can employ a lot of people in town
- Jobs
- Promote more start-up business
- More employment

Local Leadership and Partnership Working

Another consistently distinctive aspect of survey responses from Ballinasloe businesses is the emphasis placed on the importance of effective local leadership and partnership working. In deed there is a greater emphasis on such collective working in this year's survey. It will be important to continue to engage businesses as part of developing local solutions in the way reflected in several calls for 'getting businesses to work together' – always a challenge amongst independently-minded individuals.

- Businesses should work together to benefit and complement each other
- Get GCC to open office in town to issue driving licenses
- Stronger business allowance
- If you want businesses to keep going; help them
- Joined-up thinking; new faces to get behind them
- Lift pride in the town
- Business pulling together more
- Everyone, businesses and customers alike, need to pull together to make this town a good place to live and shop
- Encourage/insist that people take more pride and punish those who throw rubbish on streets
- Support our BACD -they are doing a great job
- Good town committee that make themselves known and seen



- Don't try ideas from other towns that have failed, e.g. local currency
- Inclusion to all local meetings
- Getting businesses to work together
- The council is doing nothing for the town. The Horse Fair is supposed to benefit all businesses but stalls and van block shop fronts
- Political pulling together for the improvement of the town
- Change the negative sentiment
- A local Ballinasloe Council -not Galway

Retail Mix

There was a slightly increased recognition by businesses in this year's survey of the need to diversify the retail mix including calls for a greater range of shops including potentially new multiples to draw people to the town centre.

- We need more shops in town
- It would be good to secure a big supermarket as an anchor tenant to attract crowds in to the town centre
- Encourage business to town centre
- Offer value for money through deals that would attract people
- Encourage other businesses in to the town
- Town centre needs more shopping choice
- Businesses need to stop copying each other
- Encourage at least one late night opening
- Nowhere to buy a paper
- Convenience shop in Dunlo Street
- Greater proportion of quality retail outlets
- New businesses
- Entice more businesses to open in town (not bookies or coffee shops)
- Get big stores like Penny's and Dunnes in to town to stop everyone going to Athlone
- More shops needed, i.e. clothes shop, shoe shop, local butchers
- More 'branded' shops

Business Rates and Property Costs

There were a slightly higher number of calls for business rates reduction including calls for discounts to attract new businesses.

- Keep rates low
- Rate reductions to encourage new businesses
- If the water rates were decreased it would encourage more businesses
- Rates reduction might help create new businesses and choice
- Encourage new businesses in to town, e.g. reduce business rates
- Reduce rates
- Rates have to be reduced
- Reduction in rates to attract more businesses
- Reduction in rates



- Cut the rates for new businesses
- Reduce rates for retail businesses
- Reduce rates for local shop keepers who are more likely to spend money in locality as opposed to Tesco, Lidl who contribute little locally
- Lower rates

Redundant Buildings and Empty Shops

There were significant numbers of comments relating to the appearance of the town centre including a particular focus on the renovation and re-use of empty shops.

- Use empty shop windows for displays
- Tax unused buildings
- Provide incentives for new businesses to locate in to town centres including rates reduction
- Focus on getting businesses in to empty properties through reduced rates and investment
- Tidy empty premises by painting and fixing-up windows & doors
- Encourage take-up of empty buildings
- We need to address derelict buildings -we got a lot of comments from Horse Fair customers about the town's decline
- Need to address run-down premises -a lot of negative comments from Horse Fair customers about town's decline
- Government should introduce grant scheme to develop derelict and vacant premises
- Utilise empty premises
- Clear up derelict fronts
- Improve the look of vacant properties

Promotion

There was again significant recognition and some creative ideas expressed around collective new opportunities for joint marketing of the town by businesses.

- Promote local businesses -everyone should know what is available
- To challenge the attitude of local customers -our towns does have a lot to offer
- Retailers need to work together. We need a stronger presence on-line; more shops should be on-line and should be using social media and mobile apps etc.
- We need footfall from further afield. Take a family focus. Create new playground
- Get people living in Ballinasloe back shopping and rest will follow
- More emphasis on shopping local
- Shops need to open on Sunday for Christmas lights
- Support with advertising
- Build on what we have -the marina, infrastructure, facilities to entice interest from small manufacturing industry
- More needs to be done to get people to shop in the small businesses in town and not in the big shops
- Shop local and buy local



Appearance

Read with earlier summarised points about redundant buildings, there is significant recognition amongst businesses of the need for them to play a part in improving the town's appearance.

- Appearance of shop-fronts -sacrifice 50% of rates to cover costs
- Spend more on appearance
- To paint all empty buildings in three main streets
- General clean-up
- It is vital that the town should be painted. The buildings look dreary and dull.
- Attract footfall for positive reasons -maybe clean, bright
- Improve shop-fronts
- Cut grass on approach roads
- Physical appearance
- Tidy town programme

Attraction and Tourism

Combined with earlier summarised points about redundant buildings, there is significant recognition amongst businesses of the need for them to play a part in making the town more attractive to visitors.

- Evening events that bring about positive attitude or weekly at weekend
- More events to get people together
- Develop the full potential of the Marina -playground, CCTV, lights, plants etc.
- Make use of natural amenities -only festival held is Horse Fair which does not appeal to everyone. More cultural festival should be considered
- More joint marketing of attractions needs to be organised to get people in to town using business 'heroes' -sale days; reduced coffee prices on certain mornings
- Have more community festivals; get more use of town hall and square -music, crafts, arts/drama, themed events
- Need more facilities

Planning and Development

- Encourage a new town centre supermarket to rival Tesco
- Encourage businesses to locate in town centre rather than out-of-town -maybe too late!
- Get the town development plan and enhancement plan ASAP
- What will happen to hospital main building -could they be leased and developed as an amenity area/cycle track?
- Housing to be built

Social

- Very little social activity in town; nothing to encourage young people to stay
- Tackle the anti-social street drinking -this looks awful to visitors and



- regulars and is intimidating
- Stop drinking on street and by Marina
- Make sure the hospital stays
- Better control of anti-social drinking

Pubs, cafes and restaurants

- Restaurant open at night
- Town needs good evening restaurant
- Evening time restaurant Thursday to Saturday

Customer Service

- Encourage/force businesses to open by gam. On Saturdays train are full of people heading elsewhere while town is closed. Also do not close for lunch
- Good customer care
- Personality/optimism for all front-line staff

Activities for Young People

- We need better facilities for children and teenagers, so parents won't bypass the town and head to Athlone

Traffic and Transport

- Too many artic trucks in town; too busy

Leisure

- A cinema for teens

Markets

- Revamp the Saturday market in the square to attract footfall

SUMMARY

Flexibility or the removal of on-street parking charges remain a key priority for Ballinasloe businesses despite in other responses it being considered more widely as a positive of trading in the town. It will be important to discuss practical ways to address these perceptions in ways that also best meet customers' priorities.

Unusually for a survey of this kind, employment and the wider economy were also most prominent amongst businesses' priorities along with recognition of the importance of local leadership and cooperation through initiatives such as joint marketing and promotions. Business rate reductions were amongst possible incentives suggested to help tackle this blight on the town's appearance and help diversify the retail mix to encourage more customers. Businesses in Ballinasloe understand the need to improve the town's appearances especially through renovating and re-letting empty premises.

KPI 11: Town Centre Users

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 from different perspectives -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 153 completed Town Centre User Surveys.

	Nat. Small Towns %	Ballinasloe % (2014)	Ballinasloe %
Gender			
Male	37%	57%	52%
Female	63%	44%	48%
Age Range			
16-25	7%	10%	13%
26-35	11%	15%	10%
36-45	20%	19%	18%
46-55	20%	13%	21%
56-65	18%	23%	24%
Over 65	23%	19%	14%
Reason for Visit			
Work	10%	25%	25%
Convenience shopping	40%	24%	23%
Comparison shopping	6%	10%	5%
Access services	22%	20%	17%
Leisure	12%	14%	25%
Other	9%	7%	6%

	Nat. Small Towns %	Ballinasloe % (2014)	Ballinasloe %
Frequency of Visit			
Daily	20%	46%	48%
More than once a week	38%	31%	25%
Weekly	21%	12%	15%
Fortnightly	7%	2%	5%
More than once a month	4%	1%	5%
Once a month or less	10%	6%	4%
First visit	1%	3%	1%
Travel to Town			
On foot	34%	22%	28%
Bicycle	2%	5%	3%
Motorbike	1%	1%	0%
Car	57%	65%	64%
Bus	4%	4%	3%
Train	1%	1%	0%
Other	1%	3%	3%
Spend per Visit			
Nothing	3%	2%	2%
€0.01-€6.00	13%	6%	10%
€6.01-€12.00	25%	16%	19%
€12.01-€25.00	32%	30%	24%
€25.01-€65.00	21%	28%	26%
More than €65.00	6%	17%	20%
How long do you spend in town?			
Less than an hour	42		25%
1-2 hours	38		39%
2-4 hours	12		14%
4-6 hours	2		6%
All day	5		16%



The mix of town centre users includes a higher percentage of males (52%) than amongst comparable UK figures. There was a good spread of ages represented including a slightly 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%); leisure (25%), convenience shopping (24%) and access to services (17%). Combined with the fact that 85% of the town centre users sampled visited the town at least once a week, this suggests a key role as a local service centre. Only 5% of users stated that they were in town for comparison shopping (compared to 10% in 2014), whilst 88% of retailers offer comparison goods.

Nearly two-thirds of town centre users travelled by car (64%) and a significant number walked (28%). Spending in the town centre appears relatively high compared to averages for small towns in the UK with 70% of town centre users saying they spend over €12.01 on a normal. This relatively high spend may in part be accounted for by linked trips to supermarkets.



Positive Perceptions of Town Centre	Nat. Small Towns %	Ballinasloe % (2014)	Ballinasloe %
Physical appearance	45%	44%	50%
Cleanliness	52%	59%	57%
Retail offer	27%	36%	45%
Customer service	43%	71%	83%
Cafes/ restaurants	52%	57%	67%
Access to services	63%	70%	88%
Leisure facilities	20%	51%	53%
Cultural activities/events	23%	38%	47%
Pubs/ bars/ nightclubs	35%	45%	47%
Transport links	28%	62%	75%
Ease of walking around the town centre	67%	79%	90%
Convenience e.g. near where you live	71%	68%	80%
Safety	n/a	73%	69%
Car parking	43%	46%	58%
Markets	39%	40%	30%
Other	-	0%	1%

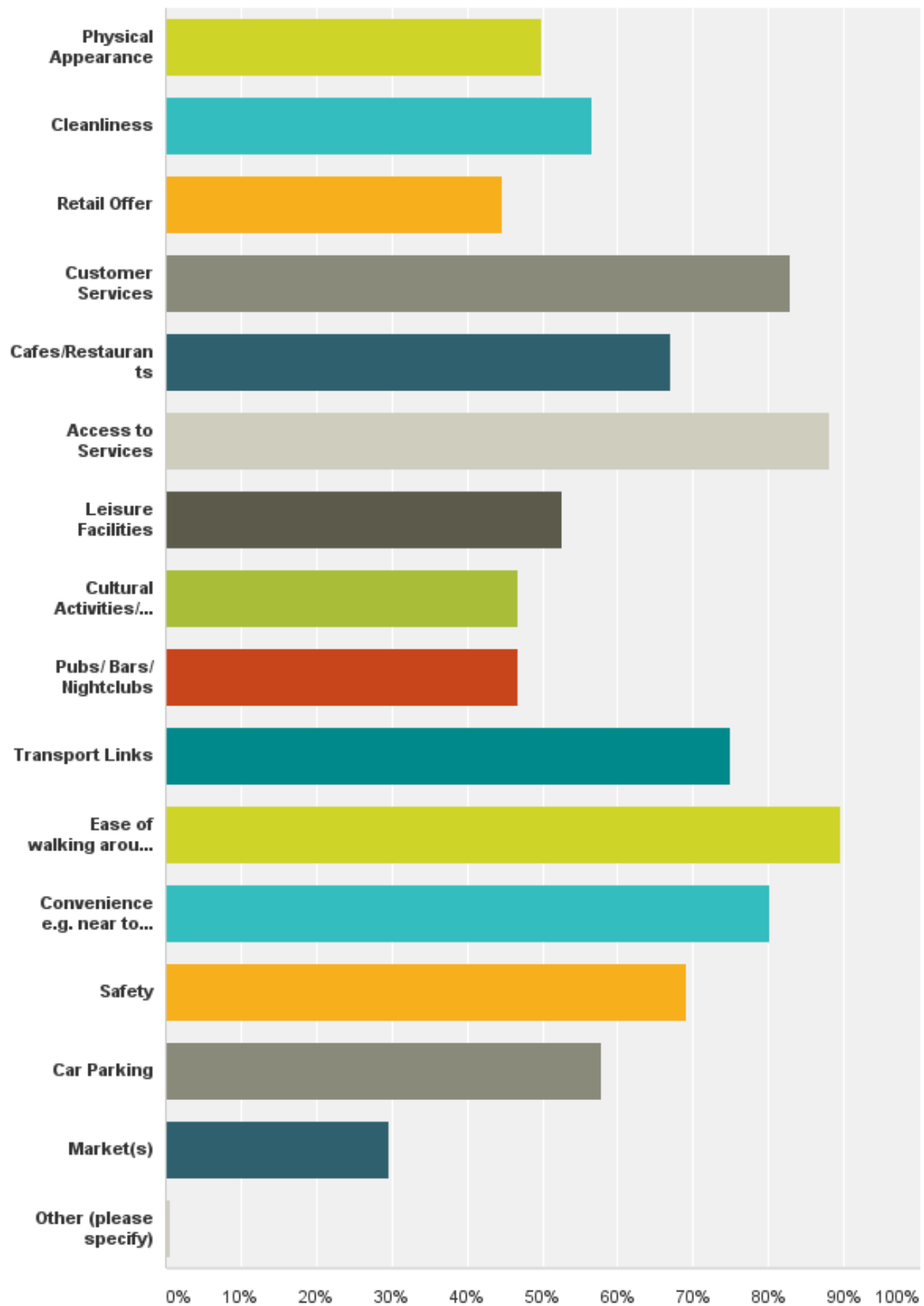
Positives: Respondents were very positive about key aspects of the experience of Ballinasloe as a ‘good local town’ including access to services (88%), customer service (83%), convenience (80%) and ease of walking around town (90%). In deed users’ perceptions of these aspects of the town centre experience appear to have improved over the last two years and all are rated higher than comparable benchmarks for UK towns.

Other notable improvements (>10% increase) in users’ perceptions about the town centre include cafes/restaurants (67%), transport links (75%) and car parking (58%) where a majority now view these as positive aspects of the town centre experience and in a way that compares favourably with UK national benchmarks.



Q7 What are the positive aspects of the Town Centre? (Please choose all that apply)

Answered: 152 Skipped: 1



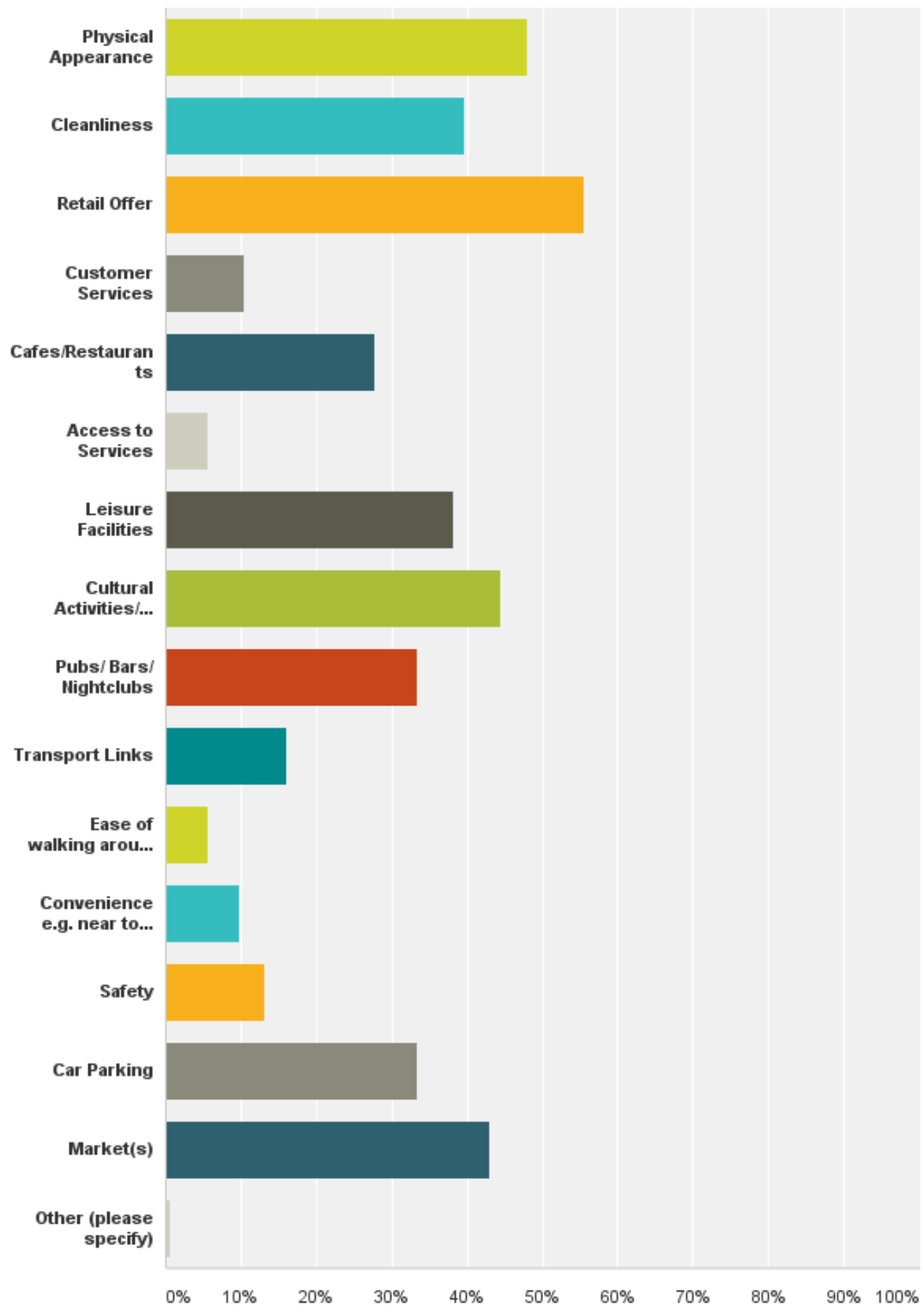
Negative Perceptions of Town Centre	Nat. Small Towns %	Ballinasloe % (2014)	Ballinasloe %
Physical appearance	34%	47%	48%
Cleanliness	19%	31%	40%
Retail offer	54%	50%	56%
Customer service	9%	17%	10%
Cafes/ restaurants	15%	26%	28%
Access to Services	13%	11%	6%
Leisure facilities	30%	25%	38%
Cultural activities/events	28%	36%	44%
Pubs/ bars/ nightclubs	18%	23%	33%
Transport links	23%	18%	16%
Ease of walking around town centre	7%	7%	6%
Convenience e.g. Near where you live	6%	14%	10%
Safety	9%	15%	13%
Car parking	43%	47%	33%
Markets	25%	33%	43%
Other	-	2%	1%

Negatives: Town centre users were most negative about the retail offer (56%) with a slight increase in this sentiment over the last two years. Other aspects that might be considered significantly negative because perceptions have worsened and/or they compare unfavourably with benchmarks are physical appearance (48%), cultural activities/events (44%), cleanliness (40%), leisure facilities (38%), pubs/bars/nightclubs (33%) and markets (43%). Many of these are aspects of the town centre that it is necessary strengthen to improve perceptions of the town centre as a destination for a 'day-out' either for locals or visitors.



Q8 What are the negative aspects of the Town Centre? (Please choose all that apply)

Answered: 144 Skipped: 9



Questions Specific to Ballinasloe

What three of the following words would you use to describe Ballinasloe?	Ballinasloe % (2014)	Ballinasloe %
Local	56%	66%
Good value	14%	23%
Quirky	6%	10%
Convenient	43%	61%
Friendly	57%	54%
Independent	13%	15%
Accessible	34%	41%
Quiet	44%	48%
Charming	7%	14%



Would you recommend a visit to the Town's Centre?	Ballinasloe % (2014)	Ballinasloe %
Yes	63%	63%
No	37%	37%

Do you agree with the following statement? "Ballinasloe is a town with a bright future for the decade ahead?"	Ballinasloe % (2014)	Ballinasloe %
Strongly agree	9%	2%
Agree	23%	29%
Uncertain	24%	32%
Disagree	29%	26%
Strongly disagree	14%	11%

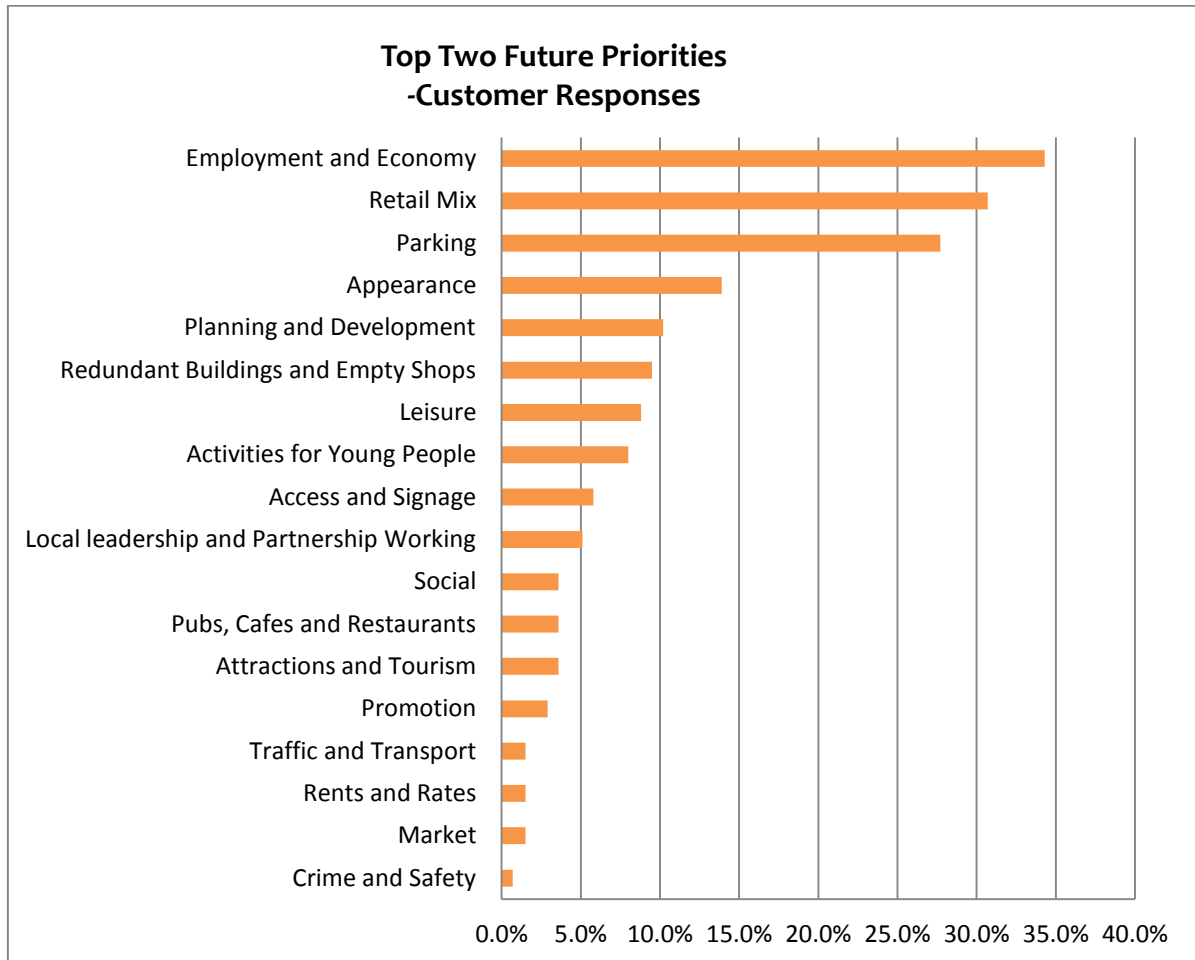
Supplementary questions about Ballinasloe indicate that once again nearly two thirds of users (63%) would currently recommend a visit to the town centre. They are less optimistic looking forward with under one third (31%) agreeing that it has a bright future and only 2% strongly agreeing compared to 9% in 2014. Such apparent pessimism may well reflect wider economic concerns apparent in future priorities expressed later in this survey.

When asked to select three words that best described Ballinasloe, the most popular choices remain local (66%), convenient (61%), friendly (54%) and quiet (48%). These responses give a realistic portrayal of the town by existing users than can help in understanding and promoting the town. Consistent with 2014, 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

Respondents were asked about what two suggestions they think would help to improve the town centre? The responses provide an authoritative and insightful overview about future priorities from the 153 town centre users surveyed.



Employment and Economy

Very unusually in a survey of this nature -though consistent with 2014- there was wide recognition amongst towns centre users of the need to improve the wider economy and employment on offer in the town. Indeed this was the strongest response received in this 2016 with 34% of respondents raising this issue.

- More work for the town
- Employment
- More work for unemployed
- Something to bring employment
- More employment
- Bring employment
- Factory -employment
- Industry in the town for employment

- Retail shops, employment
- Employment (bring back factories and retail outlets)
- Bring back employment
- Job opportunities
- Employment
- Employment
- Employment
- Unemployment
- Improve employment
- Bring employment back; factories, retail stores
- Need industry
- Investment
- Improve jobs
- Create jobs -bring industries
- Employment (more shops)
- More employment
- Allow industry in
- Employment opportunities
- More jobs for younger people
- Keep local businesses going
- Work -improve jobs
- Business
- More industry
- More industry
- Factory (more employment)
- New jobs
- Employment -IDA; investors
- Improve/help smaller businesses
- Investment in local businesses
- Investment in local businesses
- Create employment
- Employment
- Industry in to town
- More employment.
- More work; more industry.
- More industry; more jobs
- Investment in business
- More industries
- Jobs, factory and employer

Retail Mix

As in 2014, 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.



- More shops
- Lack of shops
- More shops; could be a Dunnes store
- Keep shops up-to-date
- Very expensive -would prefer to go to Galway
- More shops
- Shops
- Shopping centre; more shop variety
- New store or shopping centre
- More shops; no variety
- Clothes shops
- More shops
- Not enough shops
- Choice of shops
- More varied stores
- More shops
- Shops (offers)
- Shops
- More clothes shops
- Big store needed (e.g. Dunnes)
- More shops
- More variety of shopping
- More shops
- More shops to open
- Support local shops
- More upmarket shops
- More shops
- Shops
- Shopping centre
- Penney's, Dunnes; only so many things you can buy in the town without travelling.
- Not enough retail outlets
- Penney's would be great
- More shops
- More shops
- More choice of shops
- Bigger shops
- Shopping centre
- Increase retail outlets; small shops (square footage)
- Modernise shops as old fashioned. Not great value especially Lady's fashion
- More retail (clothing)
- More businesses with affordable prices



- Change/open more shops/facilities

Parking

Calls from town centre users for the re-instatement of free on-street parking at least in part, remains important to 27% of respondents but this is slightly reduced compared to 2014. This level and type of response is typical of town centre users that have experienced the relatively recent introduction of car park charges.

- Parking
- Car parking
- Paid parking to go
- Free parking
- Better parking
- Car parking
- More parking
- Car parking charges
- No paid parking
- Get rid of paid parking
- Get rid of paid parking
- Get rid of parking metres
- Layout of parking in the Square
- Accessible parking (15 minute parking allowance)
- Get rid of paid parking
- Get rid of paid parking
- Stop paid parking
- Parking cheaper (free hour)
- Get rid of paid parking
- No parking and paying
- Free parking
- Free car parking
- Free parking for at least an hour
- Free parking
- Get rid of paid parking
- No parking metres
- Free parking
- Get rid of paid parking
- Parking in town centre
- Get rid of paid parking
- Free car parking
- Parking should be free
- Parking too dear
- Free parking
- More car parks
- Get rid of parking metres
- No paid parking. 2 to 2 hours free parking.



- Parking expensive around the town

Appearance

As in 2014, there were a relatively high number of calls for a survey of this nature to improve various aspects of the town centre's appearance.

- Cleaner
- Appearance of town
- Paint shops
- Tidy up the town by painting shops
- Clean-up/paint shops
- Shops need paint/cleaning
- Make shopkeepers maintain the appearance of their shops
- Clear-up business premises -especially Main Street.
- Spruce up buildings and sweep-up pathways
- Painting; knock a few buildings down
- Remove large flower boxes that are in the way of the parking
- Remove flower boxes
- No litter on streets
- Cleaner pavements
- Freshen town up
- Town shocking looking; especially Dunlo Street.
- Cleaner
- Keep cleaner; more bins
- Clean the town

Planning and Development

There was a much greater number of wider planning and development-related issues raised by town centre users in this year's survey. Alongside the responses recorded for economic development, this is very unusual for a survey of this nature and so merits careful consideration. Many of the responses related to calls for new housing.

- Further investment
- Housing
- More housing
- More houses
- Housing
- Improve infrastructure
- Council houses
- Housing for locals
- Too expensive housing
- Houses -people moving out
- Make more attractive for bigger shops
- Possible shopping centre
- More retail facilities.
- Focus businesses in the town centre rather than the outskirts like Tesco/Aldi
- Better location of housing



- More, newer housing

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.

- "Too many closed shops
- Open-up more shops(bring back employment)
- Decorate empty shops
- Incentives for retail start-ups
- Improve derelict buildings
- Get rid of the derelict buildings
- Don't let local businesses close down
- Open premises
- More shops open
- Reopen shops
- Open closed shops
- Re-open businesses
- Too much closed down

Leisure

Alongside calls to diversify the retail mix, there was a more modest response this year for calls for improved leisure facilities in the town centre including far fewer calls for a new cinema than in 2014.

- Better nightclub/nightlife
- Nightclub
- Cinema
- Nightclub
- Bigger cinema
- Nightclub; cinema
- Better nightclub
- More night life
- More hotels
- More culture and amenities
- Activities needed for all ages
- Improve the look of the local park.

Activities for Young People

Unusually again -and consistent with 2014- specific calls for activities from children and young people featured quite prominently amongst the suggestions for wider diversification of the town centre offer.

- Something for youth
- Better facilities for young people
- More family friendly events (outside)
- More activities for younger people



- More activities for younger people
- No places for young people
- Places for young people
- More facilities for younger people
- More areas for children (in Fair Green)
- Great own to live-in and bring-up children -just needs that something extra.
- More for children.

Pubs and Restaurants

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

- Pubs -they would bet on private parties to keep people out that aren't locals
- More restaurants
- More restaurants
- More eating establishments
- Nicer cafes and takeaways

Attractions and Tourism

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

- Not as many activities
- More events
- More events
- More events would be good. Zombie walk was great.
- Utilise the river and develop its economic and recreational potential

Promotion and Marketing

- More advertising; keep businesses running by supporting them
- More important for people to shop local
- Try to get more people to stop.
- Promote more of the positives -area/accessibility

Access and Transport

There was a much smaller number of responses this year relating to different aspects of improving town centre access and transport.

- Bus service around suburbs; bus shelters
- Cycle ways; one way streets.

Local Leadership and Partnership Working

A small 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.



- Work together
- Get ministers to bring changes/improvements to the town
- Shift some of our representatives as the town has potential
- Improve community spirit -club together
- Get politicians involved

Social

Unusually for a survey of this nature, a number of respondents made remarks relating to social provision though there were far fewer about anti-social behaviour than in 2014.

- More facilities
- Racism -great problem in organising events
- Anti-social behaviour
- Look after children and elderly
- More facilities
- Racism -great problem in organising events
- Anti-social behaviour
- Look after children and elderly

Market

- Improve market at weekend
- Better market near the Square

Rents and Rates

Two town centre users suggested that there was a need to reduce business rates.

- Rents are too high
- Reduce rents on businesses

Crime and Safety

One response mentioned issues relating to crime and safety.

- Need law and order; fight crimes

Other

- Better phone network
- Keep things as they are

SUMMARY

Unusually for a survey of this kind, strategic issues such as employment, the economy, planning and development were most prominent amongst respondents' priorities for improving the town centre; showing increases on 2014 response rates and topping the poll.

Calls to improve the retail mix also remained high and included requests for a greater variety that reflects the mixed demographic profile using the town centre. Parking remained a significant issue though with slightly fewer responses than previously and with comments mostly focused on at least reducing on-street parking charges. The



KPI 12: Shoppers Origin Survey

The Shoppers Origin Survey tracks the general area that your town centre visitors 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.

The postcodes gathered from businesses are split into 3 categories to be able to compare with other towns. The categories are:

- Locals; those who live within a Post Code covering the town
- Visitors; those who live within a Post Code less than a 30 minute drive away
- Tourists; those who live within a Post Code further than a 30 minute drive away

	National Small Towns %	Ballinasloe %
Locals	54%	55%
Visitors	29%	32%
Tourists	16%	14%

The figures for shoppers' origin for Ballinasloe from this survey indicate that 87% come from within 30 minutes of the town. Significantly, 14% of town centre users are from over 30 minute drive away at the time of this 'snap-shot' mid-week survey



Appendices



Appendix 1a: Business Use Class Codes and Descriptions

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	General Industrial
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.
D: 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.

Appendix 1b: Business Audit

Street Name	Number	Business Name	Use Class	Business Type (Comparison/ Convenience)	Business Type (Key Attractor/ Independent)	2014 status	2016 Update
Society Street	FR	Fusion Restaurant	A3				
Society Street	HW	Healthwise	A1	Comparison	Independent		
Society Street	DF	Crafters Corner	A1	Comparison	Independent		Previously Donnelly's Florists.
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	TM2	Top Man (barbers)	A1	Comparison	Independent	VACANT	Yes. Previously vacant.
Society Street	FE	Fletchers (Expert)	A1	Comparison	Regional		Yes.
Society Street	BFO	n/a (formerly Ballinasloe Festival Office)				VACANT	VACANT; Sold. Added as update to 2014 data.
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	VACANT
Society Street	DB	Downey's Bar	A4				
Society Street	C	n/a (formerly Casino)					VACANT
Society Street	36	n/a (formerly Society Fayre)					VACANT
Society Street	NT	Noor Tandoori	A4				
Society Street	ST	Society Travel	A1	Comparison	Independent		
Society Street	STA	n/a (formerly Second Time Around)				VACANT	VACANT
Society Street	GC	George Coyle	A2				
Society Street	ELB	Emerald Lounge & Bar	A4				
Society Street		n/a				VACANT	VACANT. Sale Agreed.
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						VACANT	VACANT
Society Street	GG	Geraroid Geraghty	A2				
Society Street	UH	Utopia Hairdesign	A1	Comparison	Independent		
Society Street	6	Now Front Room (beauty salon)	A1	Comparison	Independent		Previously Avril's Beauty Rooms.



Society Street	7	Karibas	A3				
Society Street	8	The Pillar House/Gibbons bar	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	Bar One Racing	A2				Formerly Johnsons Bookmakers
Society Street	TM	Island of Beauty	A1	Comparison	Independent		Formerly Top Man.
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	CC	Corner Café	A3			VACANT	Added as update to 2014 data.
Society Street (Sarsfield Rd)	SM	Supermacs	A5				Yes.
Society Street (Sarsfield Rd)	GE	Grocon Energies	B1			VACANT	Added as update to 2014 data.



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	Cregg Stone	A1	Comparison	Independent		Yes. Formerly Sopranos Hair.
Society Street (Society Court)	TTP	n/a (formerly Tattoo Parlour)					VACANT -presumed vacant as not open during 3 visits.
Society Street (Society Court)	PS	n/a (formerly Polski Sklep)					VACANT
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)						VACANT	VACANT. Added as update to 2014 data.
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)		Daisy's Cafe	A3				Added as update to 2014 data.
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	VAC	Rosewood Psychological	D1			VACANT	Added as update to



(Cullens Yard)		Services					2014 data.
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		Closed on three visits.
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 (barber)	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		Same owner as Passion Hair
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	Sheridan's Stores	A1	Comparison	Independent		
Dunlo Street	AIB	Allied Irish Bank	A2				
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	VACANT
Dunlo Street	6	Rothwell Staunton	A2				
Dunlo Street	MRO	Mary Rothwell Dental Practice	A1	Comparison	Independent		Same ownership as Rothwell Stauton.



Dunlo Street	ZZ	Apache Pizza	A5				Formerly Zam Zam. Closed for refitting.
Dunlo Street	PS	Parish Shop	A1	Comparison	Independent		Not open on three visits but has new stock on shelves.
Dunlo Street	18	An Nonnch	A4			VACANT	VACANT. Added update to 2014 data.
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 (formerly Dunghams)				VACANT	VACANT
Dunlo Street		n/a				VACANT	VACANT
Dunlo Street		n/a (formerly Saorse)				VACANT	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	VACANT. Added as update to 2014 data



Dunlo Street		n/a				VACANT	VACANT. Added as update to 2014 data
Dunlo Street	PD	n/a (formerly P Dooley)				VACANT	VACANT. Added as update to 2014 data
Dunlo Street	TSN	The Stork's Nest	A1	Comparison	Independent		Yes.
Dunlo Street		Patrick Hogan and Co (solicitors)					Upstairs with street-level entrance. Added as update to 2014 data
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				Re-opening December.
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		Clothing for Cash	SG			VACANT	Closed on both visits.



Dunlo Street	PAN	n/a (formerly Panache)	A1	-	-		VACANT
Dunlo Street	TDI	The Duck Inn	A4				
Dunlo Street		n/a				VACANT	VACANT. Sold sign
Dunlo Street	HH	n/a (formerly Haydens Hotel)	-				VACANT
Dunlo Street	SRP	n/a (formerly Solid Rock Parish)				VACANT	VACANT
Dunlo Street	SRPadj	n/a				VACANT	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	Caroline's Hair Salon	A1	Comparison	Independent		
Main Street	16	Spirit 3				VACANT	Previously vacant
Main Street		n/a				VACANT	VACANT
Main Street	DEB	n/a (Formerly Egan's Bar)					VACANT
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		SG Injury Clinic				VACANT	Previously vacant.
Main Street	6	Cahalan	A1	Comparison	Independent		
Main Street	GP	Greenhams Pub	A4				
Main Street	GOL	Greenhams 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	VACANT
Main Street		n/a				VACANT	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	VACANT
Main Street		Talking Heads (hairdresser)				VACANT	Previously vacant – business has relocated from first floor location.
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	VACANT
Main Street	JD	John Dolan	A2				VACANT
Main Street	VOD	Vodafone	A1	Comparison	Key Attractor		
Main Street	SF	Scannell Financial	A2				
Main Street	MM	Maud Millars	A4				
Main Street						VACANT	VACANT. Added as 'vacant' in update to 2014 data
Main Street	WB	Willie Burke	A1	Comparison	Independent		Yes
Main Street						VACANT	VACANT. Added as 'vacant' in update to 2014 data
Main Street	SAL	Salmon's	A1	Comparison	Independent		
Main Street	BOI	Bank of Ireland	A2				
Croffys Yard		Celtic Healing	D1	Alternative Therapy	Independent	VACANT	New Business 2016
Croffys Yard		Croffy's Laundrette	SG	Comparison	Independent		Existing
Croffys Yard		Aloha Kids Yoga	D2		Independent	VACANT	New Business 2016
Croffys Yard		The Engine Room	D2		Independent		Previously Solid Fitness



Croffys Yard		The Frock Exchange	A1	Convenience	Independent	VACANT	New Business Dec 16
Croffys Yard		Car Valet		Comparison	Independent		Existing
Croffys Yard		Gannet Fish Mongers		Comparison	Independent		Existing



Appendix 2: Car Park Data

CAR PARK SURVEY									
Name:	On street / car park:	Total Spaces				Vacant Spaces			
		Short Stay		Long-stay		Quiet Day		Busy Day	
		Standard	Disabled	Standard	Disabled	Standard	Disabled	Standard	Disabled
CAR PARKS (long-stay)									
Society Street (paid)	Car park	0	0	65	5	65	5	62	5
Fair Green (free)	Car park	0	0	108	2	86	2	76	1
West Car Park (paid)	Car park	0	0	79	5	78	5	75	5
West Car Park (free)	Car park	0	0	54	0	19	0	15	0
Marina Point (free)	Car park	0	0	64	1	44	1	37	0
Gullane's (free)	Car park	170	4	0	0	125	4	88	2
Sub-totals	0	0	0	512	13	376	13	328	11
CAR PARKS (short-stay)									
Lidl (free)	Car park	98	2	0	0	77	2	52	1
Salmon's (free)	Car park	40	0	0	0	32	0	24	0
Bank of Ireland	Car park	32	2	0	0	16	2	12	1
Sub-totals		170	4	0	0	125	4	88	2
TOTALS		170	4	512	13	501	17	416	13



CAR PARK SURVEY									
Name:	On street / car park:	Total Spaces				Vacant Spaces			
		Short Stay		Long-stay		Quiet Day		Busy Day	
		Standard	Disabled	Standard	Disabled	Standard	Disabled	Standard	Disabled
On-street (long-stay)									
-	On-street	0	0	0	0	0	0	0	0
Sub-totals									
On-street (short-stay)									
McNevin Avenue	On-street	28	0	0	0	18	0	12	0
St Michael's Square	On-street	92	4	0	0	31	2	22	2
Main Street	On-street	43	1	0	0	8	0	11	1
Dunlo Street	On-street	72	2	0	0	23	2	25	1
Society Street	On-street	48	2	0	0	18	2	16	1
Sub-totals		283	9	0	0	98	6	86	5
TOTALS		283	9	0	0	98	6	86	5
OVERALL TOTALS		453	13	512	13	599	23	502	18

