Appendix N – Survey Findings

Summary of Business Survey

1.1 A business survey was sent out to all existing businesses within the 10 defined centres in West Cumbria in order to understand how each centre is used and identify those aspects of the centre that may benefit from improvement and change.

1.2 The survey sought to establish the views of local businesses as part of the wider health check of the centres. The aim of the survey was to help inform the Councils future strategy and how it considered future development proposals for retail, town centre and leisure uses. The survey was live from 25th February 2020 until 16th March 2020.

1.3 In total, there were 72 initial responses split as follows:

Table 1.1: Responses

Council	Centre	Responses	Total
Allerdale	Workington	9	41
	Cockermouth	2	
	Aspatria	7	
	Maryport	9	
	Silloth	6	
	Wigton	8	
Copeland	Whitehaven	14	31
	Cleator Moor	4	
	Egremont	2	
	Millom	11	

Source: Question 3 of the 2020 Business Survey.

1.4 However, 42 respondents completed the survey in full, meaning 30 respondents dropped out before completing the survey in full. This resulted in a 36% completion rate. Zero respondents from Egremont completed the survey past question 4 and as such, there is no analysis relating to Egremont. Additionally, we received a low number of responses from Silloth, Aspatria and Cleator Moor Consequently, there is less analysis of these centres within the summary.

1.5 We set out an overview of the key findings of the survey below. The purpose of this document is to provide a summary of the findings of the surveys, and set out the key messages. These will then be used to inform the preparation of the Town Centre, Retail and Leisure Study.

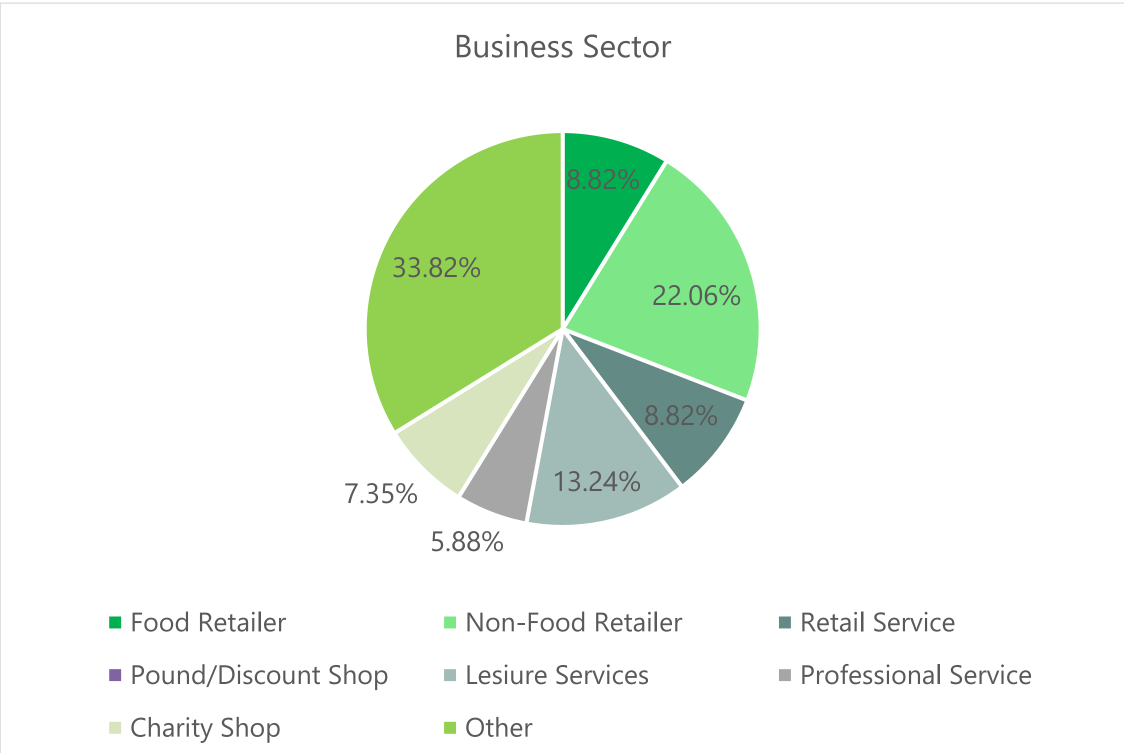
Findings

Question 3: Please confirm which Town Centre your business is located in.

2.1 In total, there were 72 initial responses however, just 42 respondents completed the survey in full, meaning 30 respondents dropped out before completing the survey in full. This resulted in a 36% completion rate. Zero respondents from Egremont completed the survey past question 4 and as such, there is no analysis relating to Egremont. Additionally, we received a low number of responses from Silloth, Aspatria and Cleator Moor. Consequently, there is less analysis of these centres within the summary.

2.2 Approximately one fifth (19.4%) of responses were from business owners in Whitehaven, this is where the highest number of responses to the business survey originated from. 56.9% of responses came from business owners located within one of the 6 centres within Allerdale Borough Council, whilst 43.1% of responses came from business owners within one of the four centres located within Copeland Borough Council.

Question 4: How would you best describe your business?



2.3 With regard to the types of businesses respondents operate, 22.1% of respondents were non-food retailers; 13.2% of respondents ran leisure orientated services; 33.8% stated their business fell under 'other' which included charities, tuition businesses, community groups tourist attractions and nursery care.

Questions 5: Is your business...?

2.4 81.0% of respondents stated that their business is independent, whilst 16.7% stated that their business is part of a national chain. Of the 81.0% who run independent businesses, 20.6% are located in Whitehaven, 17.7% are located in Wigton and 14.7% are located in Millom and Maryport.

2.5 Of those who stated that their business is part of a national or regional chain, 42.9% of respondents are located in Whitehaven, whilst 28.6% run businesses in Workington.

Question 6: What are your hours of opening? (Both during the week and at weekends)

2.6 With regard to opening hours during the week, most respondents describe their weekly opening hours as 9-5, with some variations of half an hour either side. Others cite later opening hours due to the nature of their business, open by appointment, or closure in the mid-afternoon.

Question 7: Are there seasonal changes to your opening hours?

2.7 80.9% of respondents stated that there was no seasonal change to their businesses opening hours, whilst 19.1% stated there was a seasonal change to their opening hours. Of those respondents who cited seasonal changes to their opening hours, 25% are business operators in Cockermouth.

Question 8: If you answered yes to the previous question, please detail the seasonal changes to your hours of opening

2.8 Of the 19% who cited a seasonal change to their opening hours, respondents listed the following changes:

- Closure during school holidays;
- Reduced winter opening hours; and
- Event dependent opening with busier periods in autumn, winter and spring.

Question 9: Are the business premises leased or owner occupied?

2.9 With regard to leases and long term presence, 35.7% of business premises are leased on a long term lease, whilst 61.9% are owner occupied. With regard to the 61.9% of businesses who operate from owner occupied premises, 23.1% are located in Whitehaven whilst 19.3% are located in Millom. 19.3% of these respondents are also located in Wigton.

Question10: If you lease the premises, when is there a break clause in the lease or when does it expire?

2.10 37.5% of respondents state that there is a break in their lease/the lease expires in between 3-5 years. 18.75% state that there is a break in their lease/the lease expires in 1-2 years, whilst 37.5% state that there is a break in their lease/their lease expires in 6 or more years.

2.11 Of the 37.5% respondents who state that there is a break in their lease or that their lease expires in 3-5 years, 66% are located in either Whitehaven or Workington, with the remaining 33% located in Cockermouth or Wigton.

Question 11: How long, approximately, has the business traded in the town centre?

2.12 Overall, 60% of respondents stated that their business had traded in West Cumbria for 20+ years.

Workington

2.13 40% of respondents stated they had traded in Workington for 20+ years, whilst 20% stated they had traded in Workington for between 11 and 20 years. 20% stated they had traded for between 7 and 12 months.

Key Service Centres in Allerdale

- 40% of respondents have traded in Maryport for 11-20 years, whilst 40% have traded in the centre for less than 6 years.
- 75% of respondents have traded in Cockermouth for more than 11 years.
- 57.1% of respondents have traded in Wigton for more than 20 years, and 28.6% have traded in the centre for more than 11 years.
- 100% of respondents have traded in Silloth for more than 20 years.
- 100% of respondents have traded in Aspatria for more than 20 years.

Whitehaven

2.14 72.7% of respondents have been trading in Whitehaven for 20 or more years. 9% of respondents had traded in Whitehaven for between 1 and 2 years, whilst 18% have traded in the centre for more than 6 years but less than 20 years.

Key Service Centres in Copeland

- 100% of respondents have traded in Cleator Moor for more than 20 years.
- 66.7% of respondents have traded in Millom for more than 20 years.

Question 12: Why did you choose the town centre as a business location?

2.15 When asked why respondents chose the town centre as a business location some cited general responses such as:

- The business was established long ago by family;
- They saw an opportunity at the time;
- Wanted to expand;
- The respondent lives in the town;
- Cheaper business rates; and
- Availability of space.

2.16 Respondents with businesses in Maryport and Whitehaven stated that they chose their respective towns due to the existence of appropriate markets for their business. One respondent chose Workington due to its locality to public transport. One respondent chose Cockermouth due to the reduced rates in comparison to Workington and increased level of footfall from day visitors/tourists that they wouldn't get in Workington.

Question 13: Has the business always operated from the town centre?

2.17 Overall, 90.5% of respondents state that their business has always operated from each of the respective town centres. Of those who stated that they had not always operated from the town centre, 25% were located in Whitehaven, 25% were located in Wigton and 50% were located in Workington.

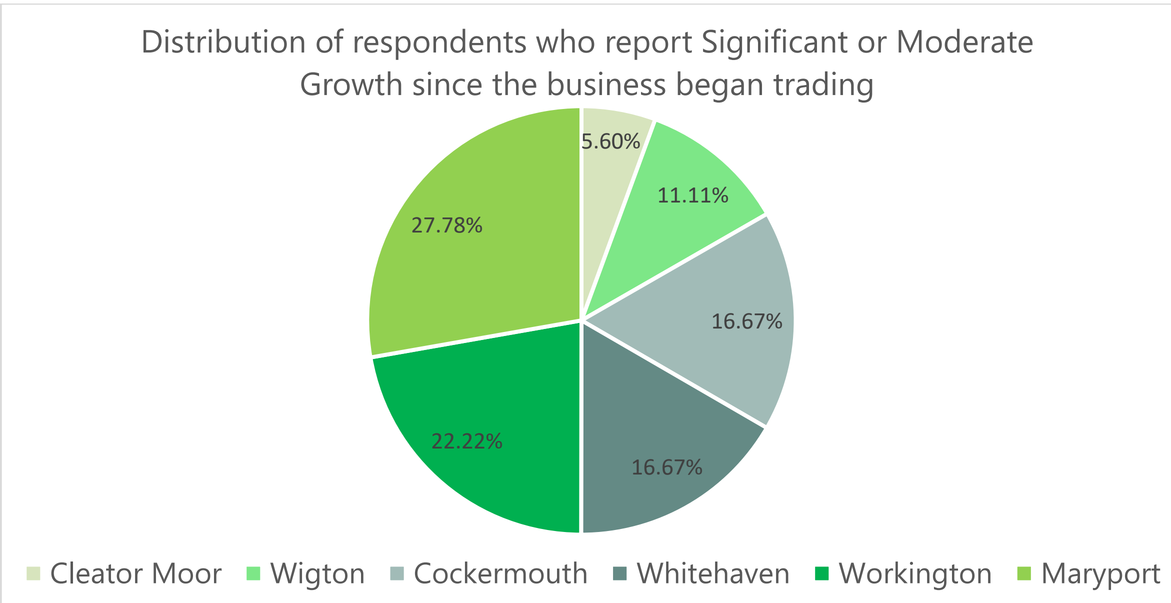
2.18 Respondents who had not always operated from the town centre have relocated from edge of centre business parks, other towns or originally operated as a mobile business.

Question 14: How many staff does the business employ?

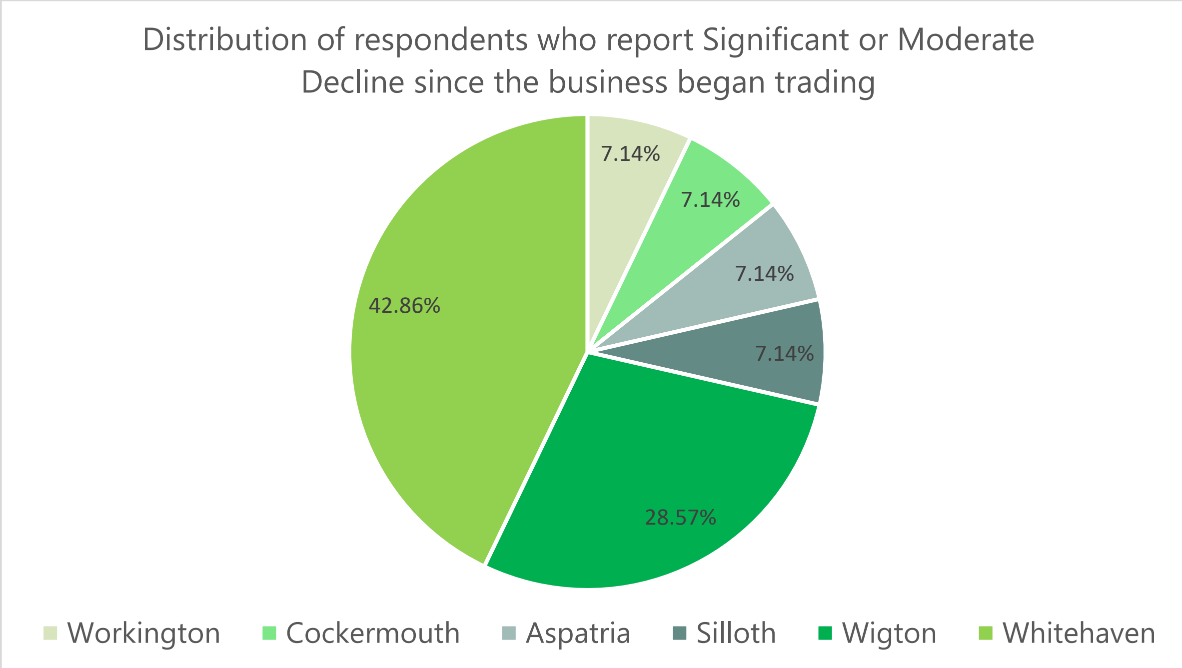
2.19 95.2% of respondents state that they employ full time employees, whilst 35.7% state that they employ either full-time or part-time volunteers. The maximum number of full time employees was stated to be 30 employees.

Question 15: During the time you have been trading in the town centre, has the business....?

2.20 With regard to the current business environment, 28.6% stated that since they began trading, their business had grown significantly, however 19.1% stated that the business had declined significantly. Of those that consider their business to have grown significantly or moderately since they began trading, 27.8% are located within Maryport whilst 22.2% have businesses in Workington.

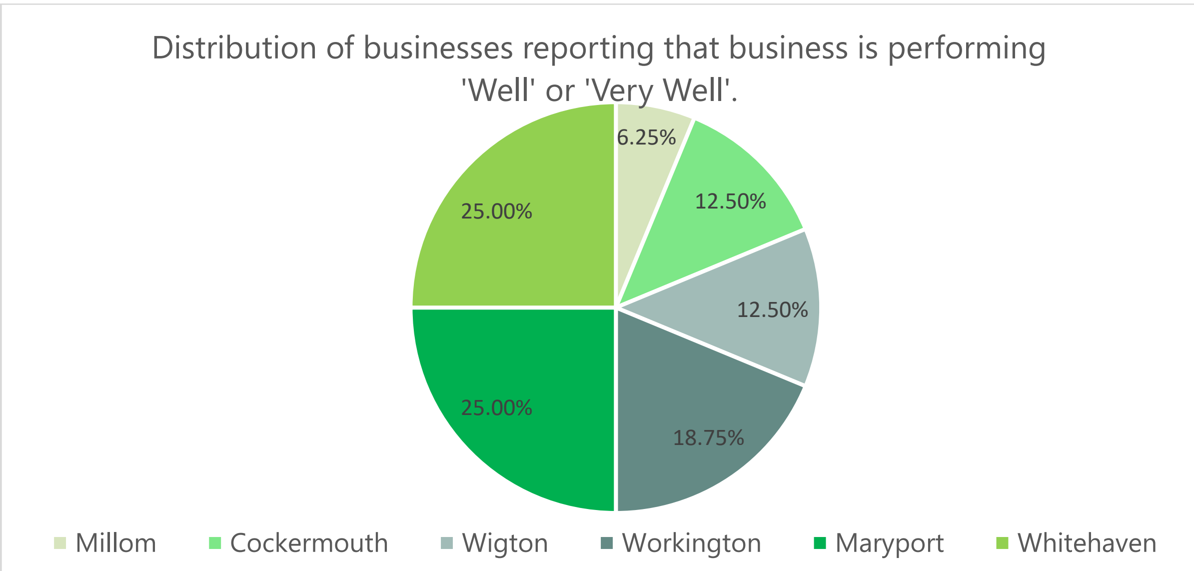


2.21 Of those who report that their business has declined moderately or significantly since they began trading, 42.9% are located within Whitehaven, whilst 28.6% are located in Wigton.

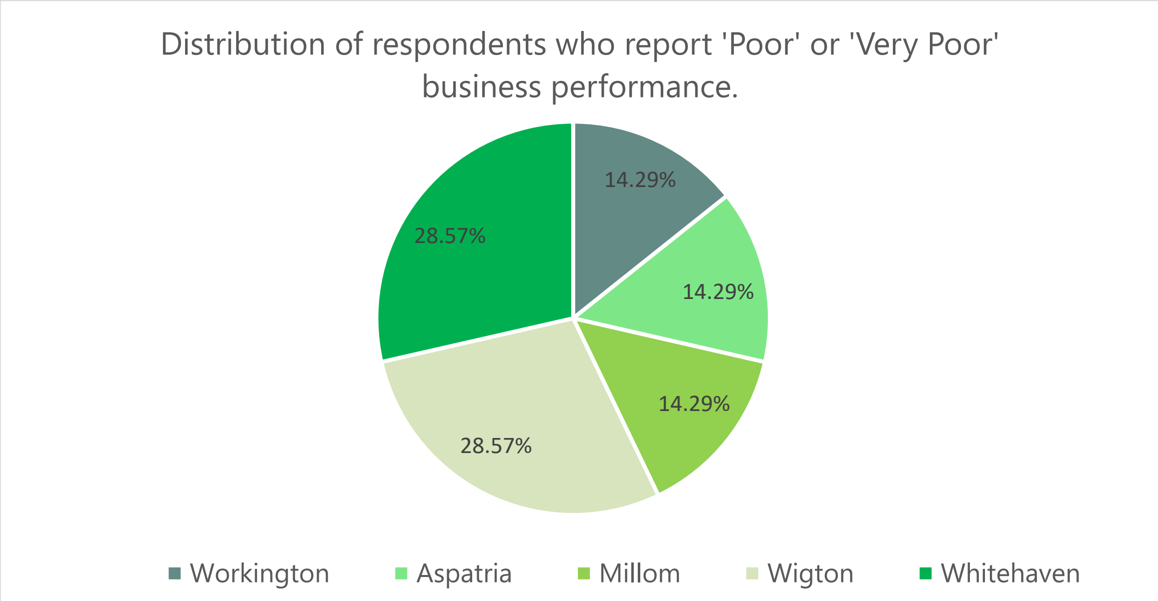


Question 16: How would you say that your business is currently performing?

2.22 47.6% of respondent's state that their business is performing moderately, whilst 38.09% state that their business is performing Well or Very Well. Of those reporting that business is performing Well or Very Well, 25% are located within Maryport, whilst 25% are located within Whitehaven.



2.23 16.7% state that their business is performing Poorly or Very Poorly. Of those who stated that at present, their business is performing Poorly or Very Poorly, 28.6% are located in Whitehaven whilst 28.6% are located in Wigton. None of the respondents in Cockermouth, Maryport, Silloth, Cleator Moor, or Egremont stated that their businesses were performing Poorly or Very Poorly.



Question 17: What type of customer does your business primarily rely on?

2.24 73.8% of respondents stated that their business primarily relies upon residents in or around the town centre in which they are based.

Question 18: How do you rate the following aspects of the town centre? (Transport)

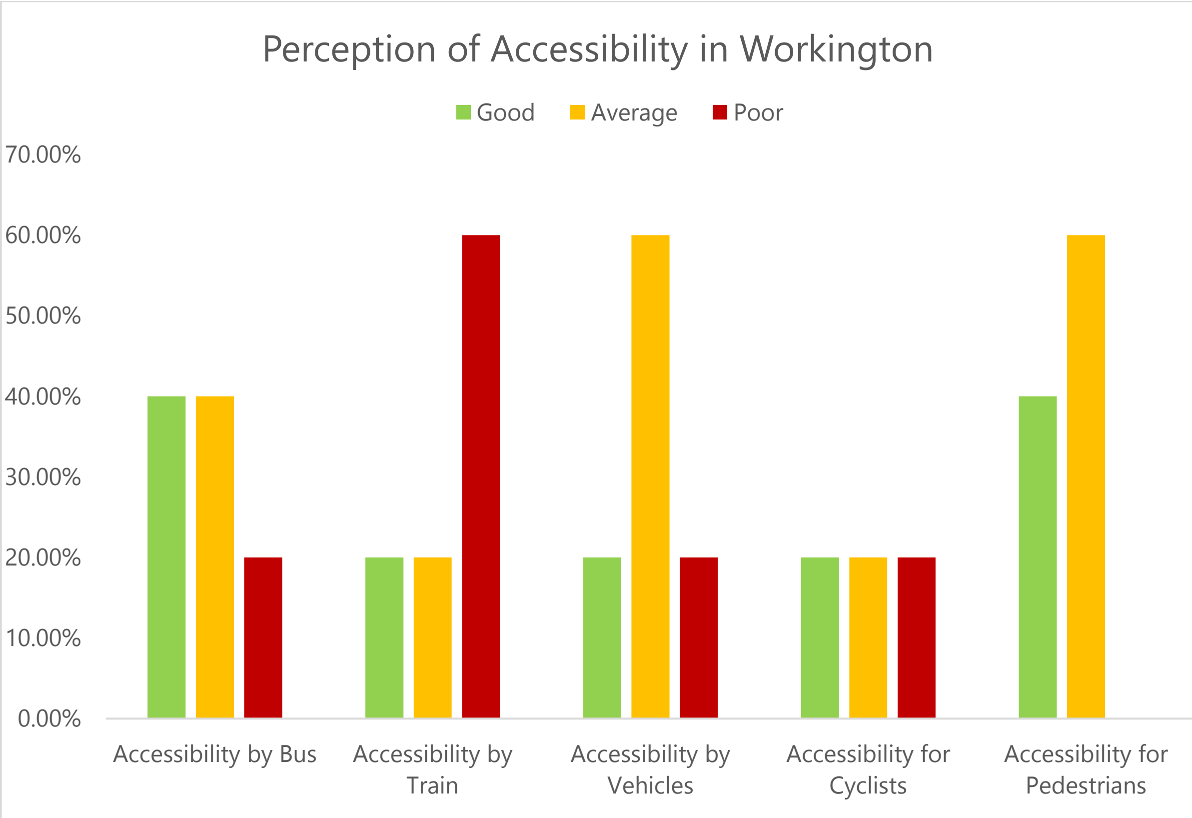
Allerdale's Principal Town Centre: Workington

2.25 80% of respondents believe accessibility to Workington by bus is Average or Good, however 60% rate accessibility by Train as Poor. 80% consider the number of bus stops to be Average in Workington. However, 40% consider the number of buses and routes to be Poor.

2.26 With regard to vehicular transport, 80% rate accessibility as Average or Good and 100% rate the amount of car parking as Average or Good. However, 80% consider the approach to parking enforcement to be Poor.

2.27 Location of car parking is considered to be Average or Good by 80% of respondents. The price of parking is considered to be Poor by 60% of respondents. 40% consider the quality of signage for vehicles to be Poor.

2.28 Accessibility for pedestrians in Workington is rated as Average or Good by 100% of respondents.



Allerdale's Key Service Centres.

2.29 A summary of responses from the business survey regarding transport provision in Allerdale's Key Service Centres can be seen in table 2.1 below.

Table 2.1 Summary of Findings – Question 18

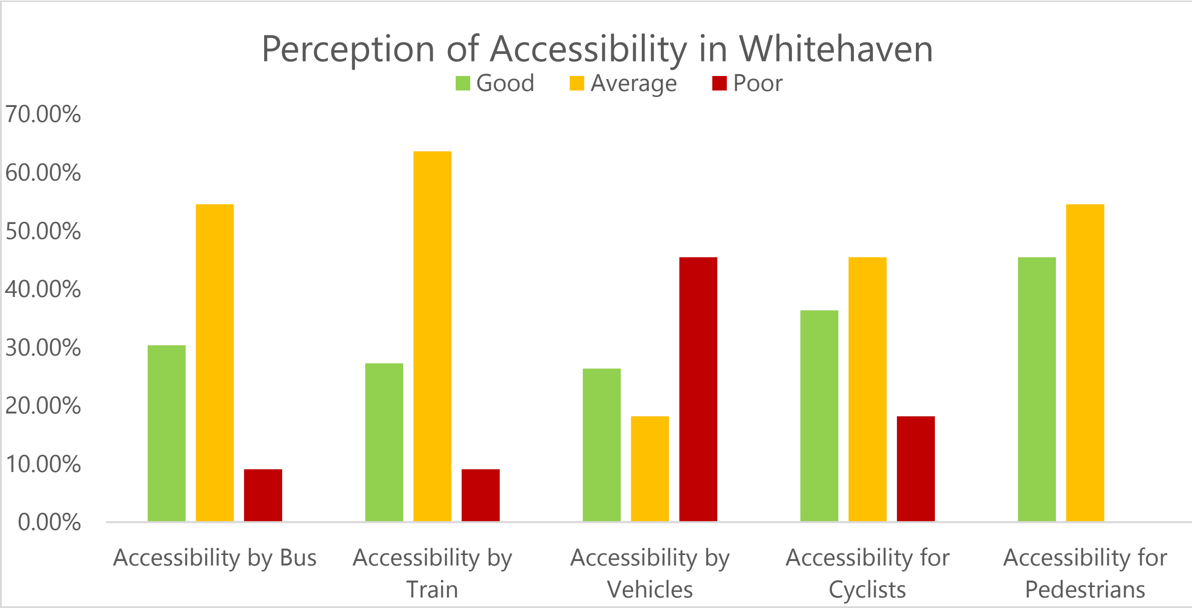
Key Service Centre	Question 18: How do you rate the following aspects of the town centre? (Transport)
Allerdale	
Maryport	100% of respondents believe that accessibility for both cyclists and pedestrians in Maryport is Good. 80% of respondents state that accessibility by train is Good in Maryport, and a further 60% of respondents in Maryport state that the amount of car parking is Poor. However, 60% state that the

Key Service Centre	Question 18: How do you rate the following aspects of the town centre? (Transport)
Allerdale	
	pricing of car parking is Good. 60% of respondents consider the quality of signage for vehicles to be Poor.
Cockermouth	50% of respondents consider accessibility by bus in the town to be Good. 100% of respondents consider accessibility by train to the town as Poor. 50% consider accessibility by vehicle to Cockermouth town centre to be Average, whilst 75% of respondents consider accessibility for pedestrians and those with disabilities to be Good. With regard to parking 75% of respondents consider the amount of car parking, approach to car parking enforcement, and location of car parking in Cockermouth to be Poor. 100% consider the price of car parking to be poor.
Wigton	85.72% consider both accessibility by bus and train to be either Average or Good. 57.14% of respondents consider accessibility by vehicles and Pedestrians in Wigton to be Good, whilst 71.4% consider accessibility for cyclists to Wigton to be good. However, 42.9% consider accessibility for those with disabilities to be poor. With regard to car parking, 57% consider there to be an average amount of car parking, with 66.7% of respondents stating that the location of car parking is average. 71.4% of respondents consider both the location/number of bus stops, and the number of bus services/routes to be Average or Good.
Silloth	In Silloth, accessibility is generally considered to be Poor.
Aspatria	In Aspatria, respondents consider accessibility to be Good. However, quality of signage and disabled parking is considered Poor.

Copeland's Principal Town Centre: Whitehaven

2.30 With regard to parking, 72.7% consider the amount of car parking and approach to car parking enforcement to be Poor. 54.5% consider the location of car parking in Whitehaven to be Poor. 63.6% consider the pricing of car parking to be poor however many consider that the provision of disabled car parking is Good (60%).

2.31 With regard to bus services and routes, 45.5% consider the location/number of bus stops to be Average, and 90.9% consider the number of bus services to be Average or Good. The quality of signage for vehicles is considered to be Average by 36.36% of respondents.



Copeland's Key Service Centres

2.32 A summary of responses from the business survey regarding transport provision in Copeland's Key Service Centres can be seen in table 2.2

Table 2.2 Summary of Findings – Question 18

Key Service Centre	Question 18: How do you rate the following aspects of the town centre? (Transport)
Copeland	
Cleator Moor	Respondents considered accessibility for vehicles, pedestrians and those with disabilities to be Good. Accessibility by Train is considered Poor.

Key Service Centre	Question 18: How do you rate the following aspects of the town centre? (Transport)
Copeland	
	With regard to car parking, the approach to car parking enforcement in Cleator Moor is considered to be Poor. Bus servicing, routes and location/number of bus stops is considered to be Average or Good in Cleator Moor.
Millom	66.7% of respondents consider accessibility to Millom by bus to be Poor, whilst 50% consider accessibility by train to be average. 66.7% of respondents state that the location/number of bus stops in Millom is Poor whilst 83.33% consider the number of bus routes/services to be Poor. Vehicular accessibility is considered to be poor by 50% of respondents. Pedestrian accessibility is rated as Average or Good by 83% of respondents. With regard to car parking in Millom, 66.7% consider the location of car parking to be poor, with 33.3% considering the pricing of car parking to be Good. The quality of signage for vehicles is considered to be Poor by 50% of respondents.
Egremont	There were no responses to this question

Question 19: How do you rate the following aspects of the town centre? (Business Offer)

2.33 With regard to the business offer in West Cumbria, table 2.3 provides a summary of the responses with regard to each centre in West Cumbria.

Table 2.3 Summary of Findings – Question 19

Centre	Question 19: How do you rate the following aspects of the town centre? (Business Offer)
Allerdale	
Workington	With regard to convenience and comparison offer, 60% of respondents consider both the number of independent traders in and the number of market stalls in Workington to be Poor. However, 60% consider the number of supermarkets to be Average or Good. In general, just 20% of respondents consider the number of shops to be Good. Furthermore, 100% of respondents consider the market to be of Poor quality and 40% consider the shops to be of Poor quality.

	With regard to services including leisure, retail and financial services, 80% of respondents believe the number of restaurants in Workington is Poor however, 80% consider the number of licensed premises in Workington to be Good or Average. 60% of respondents consider the number of fast-food restaurants to be Average. In general, 60% of respondents consider the number of services (hair dressers, banks etc.) to be Good. One respondent suggests that, in regard to the business offer they believe there is an over-prevalence of nail salons and hairdressers.
Maryport	100% of respondents consider the number of restaurants in Maryport to be Poor., whilst 80% consider the number of market stalls to be Poor. 80% of respondents believe there is a Good number of fast-good restaurants, however 60% consider the quality of shops to be Poor.
Cockermouth	100% of respondents consider there to be a Good number of independent traders in Cockermouth, however 100% consider the number of Market Stalls to be Poor. 75% consider the number of services in general such as hairdressers and banks to be Good. 66% of respondents believe the quality of shops in Cockermouth is Good.
Wigton	100% of respondents consider the number of fast food restaurants to be Good or Average in Wigton. 57% of respondents believe the number of independent traders in Wigton is Good. However, 71% consider the number of market stalls to be Poor. In total, 42.8% consider the number of services in general to be Good. 66.67% of respondents consider the quality of the Market to be Poor, however consider the quality of the shops to be Good.
Silloth	In general, the number of shops and services in Silloth is considered to be poor, however the number of restaurants is considered average.
Aspatria	In general, retail provision and services are considered Average, however the number of shops in general, the quality of the market and the number of independent traders is considered Poor.
Copeland	
Whitehaven	With regard to convenience and comparison offer, 63.6% of respondents consider the number of independent traders to be Average and 81.8% consider the number of market stalls in Whitehaven to be Poor. The quality of the market is rated Poor by 72.7% of respondents in Whitehaven. 63.6% consider the number of supermarkets in Whitehaven to be Good. However, in general, the number of shops in Whitehaven is considered to be Poor by 81.8% of respondents.

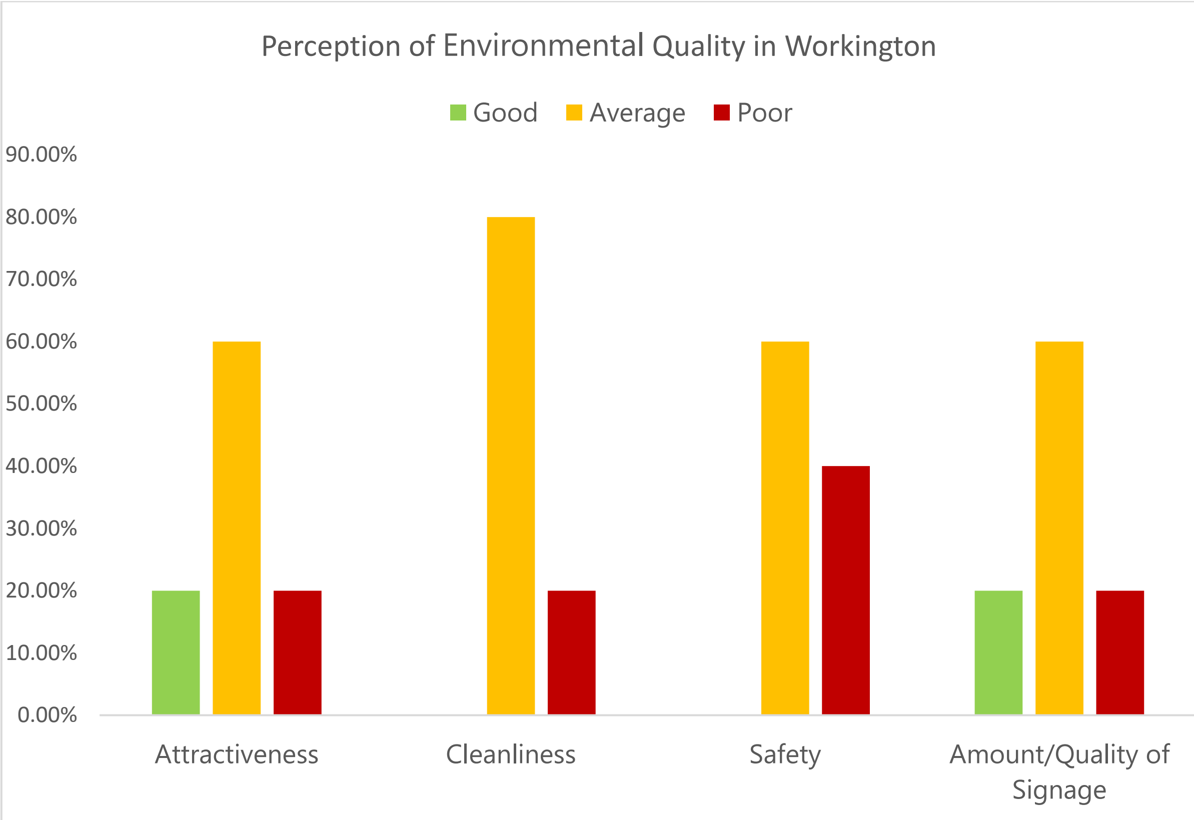
	With regard to services, including leisure, retail and financial services, 63.6% of respondents consider the number of fast-food restaurants to be Good in Whitehaven. 63.64% consider that the number of restaurants in Whitehaven is Average, with 36.36% stating that the number of restaurants is Good. 54.5% of respondents consider the number of licenced premises to be Good. In general, 54.5% consider that the number of services (e.g.banks and hairdressers) is Good. Respondents note that the location of supermarkets is not ideal, whilst others state that market days have a large impact upon footfall.
Cleator Moor	100% of respondents in Cleator Moor consider the number of fast food restaurants to be good, however all respondents also consider the number of independent traders, number of market stalls, number of national multiples, number of restaurants and quality of the market to be Poor.
Millom	In general, the number of shops and quality of the market is considered to be Poor by 66.7% of respondents in Millom. 83.3% of respondents consider the number of services in general, such as banks and hairdressers, the number of restaurants and the number of market stalls to be Poor. 33% of respondents consider both the number of fast food restaurants and the number of independent traders to be Good in Millom.
Egremont	There were no responses to this question

Question 20: How do you rate the following aspects of the town centre? (Public realm / Environment)

Allerdale's Principal Town Centre: Workington

2.34 With regard to attractiveness of the public realm, 60% of respondents consider the public realm's paving and street furniture to be Average. 80% consider the cleanliness of the public realm in Workington to be Average. Additionally, 60% consider the quality, amount and effectiveness of signage for pedestrians in Workington to be Average.

2.35 With regard to events, 40% consider the number of events including street markets, parades and the like to be Poor, whilst 80% consider the range of events to be Poor.



2.36 When considering safety, zero respondents consider safety within Workington's public realm to be Good and 60% consider safety to be average.

Allerdale's Key Service Centres

2.37 With regard to the public realm and environment in Allerdale's Key Service Centres, the below table summarises the key findings.

Table 2.4 Summary of Findings – Question 20

Centre	Question 20: How do you rate the following aspects of the town centre? (Public realm / Environment)
Allerdale	
Maryport	80% of respondents consider the attractiveness of the public realm and the range of events available in Maryport to be Poor. 60% of respondents consider the cleanliness of the public realm, the number of events, and the amount/quality/effectiveness of signage in Maryport to be Poor.
Cockermouth	75% of respondents rate the attractiveness of the public realm (e.g. street furniture and paving) as Good, and the same amount consider the cleanliness of the public realm to be either Average or Good. 75% consider both safety within the public realm and amount/quality of signage for pedestrians to be Good in Cockermouth.
Wigton	42.9% of respondents rate the attractiveness of the public realm in Wigton as Poor however 57% state that the cleanliness of the public realm is Good. Safety within the public realm is rated as Average or Good by 100% of respondents. The amount/quality/effectiveness of the signage for pedestrians in Wigton is considered to be Good by 57.14% of respondents.
Silloth	Silloth is considered to be an attractive and clean town centre, with good levels of safety.
Aspatria	Aspatria is considered to be an attractive and clean town centre with good levels of safety, however the range and number of events is considered Poor.

Copelands Principal Town Centre: Whitehaven

2.38 With regard to attractiveness of the public realm, 54.5% of respondents consider the attractiveness of the public realm in Whitehaven (e.g. paving, street furniture etc.) to be Poor, and 72.7% of respondents perceive the cleanliness of the public realm as Poor. The amount, quality and effectiveness of signage for pedestrians is considered to be Poor by 54.5% of respondents in Whitehaven.

2.39 With regard to safety, 80% perceived safety within Whitehaven's public realm to be Average, whilst 20% consider safety to be Poor.

2.40 With regard to events, 72.73% of respondents consider the number of events such as street markets and parades in Whitehaven to be Poor, and 81.82% consider the range of events to be Poor.

Copeland's Key Service Centres

2.41 The table below summarises key responses regarding the public realm and environment in Copelands Key Service Centres.

Table 2.5 Summary of Findings – Question 20

Key Service Centre	Question 20: How do you rate the following aspects of the town centre? (Public realm / Environment)
Copeland	
Cleator Moor	Generally, the level of safety within the public realm and the cleanliness of the public realm is considered to be average by respondents.
Millom	Generally, the level of safety, attractiveness and cleanliness of the public realm, and provision of events is considered to be Average by half of respondents (50%) and Poor by the other half (50%).

Key Service Centre	Question 20: How do you rate the following aspects of the town centre? (Public realm / Environment)
Copeland	
Egremont	There were no responses to this question

Question 21: How do you rate the following aspects of the town centre? (Centre Safety / Security & Other)

4.1 The key findings with regard to safety and security in the West Cumbrian town centres are summarised in the table below.

Table 2.6 Summary of Findings – Question 21

Centre	Question 21: How do you rate the following aspects of the town centre? (Centre Safety / Security & Other)
Allerdale	
Workington	With regard to safety in Workington, 100% of respondents rate the incidents of anti-social activities to be Poor and 80% of respondents rate the policing presence as Poor. 60% of respondents also considered the amount of/ range of marketing and promotion in Workington to be Poor. Workington's image is considered Poor by 60% of respondents, however, the town centre management is considered to be average by 40% of respondents. With regard to connectivity, 100% of respondents consider the availability and speed of Wi-Fi in Workington town centre to be poor, whilst 60% consider the broadband connectivity / speed to be poor.
Maryport	100% of respondents consider the policing presence in Maryport to be Poor, whilst 60% consider incidents of antisocial behaviour and Maryport's image to be Poor.
Cockermouth	75% of respondents consider the policing presence to be Poor in Cockermouth. 100% of respondents consider both the image of the centre and the town centre management to be either Good or Average.
Wigton	71% of respondents consider the policing presence in Wigton to be Poor. 42.9% consider Wigton's image to be Poor. With regard to other measures, 42.9% consider the range of marketing and promotion of the centre to be poor. 57% of respondents rank the availability and speed of wifi in Wigton as Poor.

Centre	Question 21: How do you rate the following aspects of the town centre? (Centre Safety / Security & Other)
Allerdale	
Silloth	The image of Silloth and the management of the town is considered to be Good.
Aspatria	The image of Aspatria is considered to be Poor, however connectivity with regard to broadband and Wi-fi is considered Good. Respondents cite that town management is needed as there are an increasing number of unkempt buildings and exteriors out of character with the town.
Copeland	
Whitehaven	With regard to safety, 81.82% of respondents rank incidents of antisocial behaviour as Poor, and 25.45% state that the policing presence is Poor. With regard to connectivity, 27.27% of respondents consider both the availability and speed of wifi in Whitehaven town centre to be Good. The same amount of respondents also considers broadband connectivity and speed to be Good. 90.9% of respondents perceive the image of Whitehaven town centre to be Poor, with 72.7% of respondents stating that town centre management is Poor. 70% of respondents state that the range of marketing and promotion of Whitehaven is Poor.
Cleator Moor	Aspects of safety and security including incidents of antisocial behaviour and policing presence are considered Poor in Cleator Moor. It is perceived that Cleator Moors image is Poor and that connectivity with regard to the availability and speed of both wifi and broadband is Poor.
Millom	In Millom, 33% of respondents consider incidents of anti-social behaviour to be Poor, with 66.7% of respondents stating that the policing presence is poor. With regard to connectivity, 66.7% consider the availability and speed of Wi-Fi to be Poor, whilst 50% consider the broadband connectivity and speed in Millom to be Poor. 83% of respondents perceive Millom's image to be Poor, with 66.7% of respondents ranking the town centre management as Poor. As such, 100% of respondents with businesses in Millom rank the range/amount of marketing and promotion of Millom to be Poor.
Egremont	There were no responses to this question

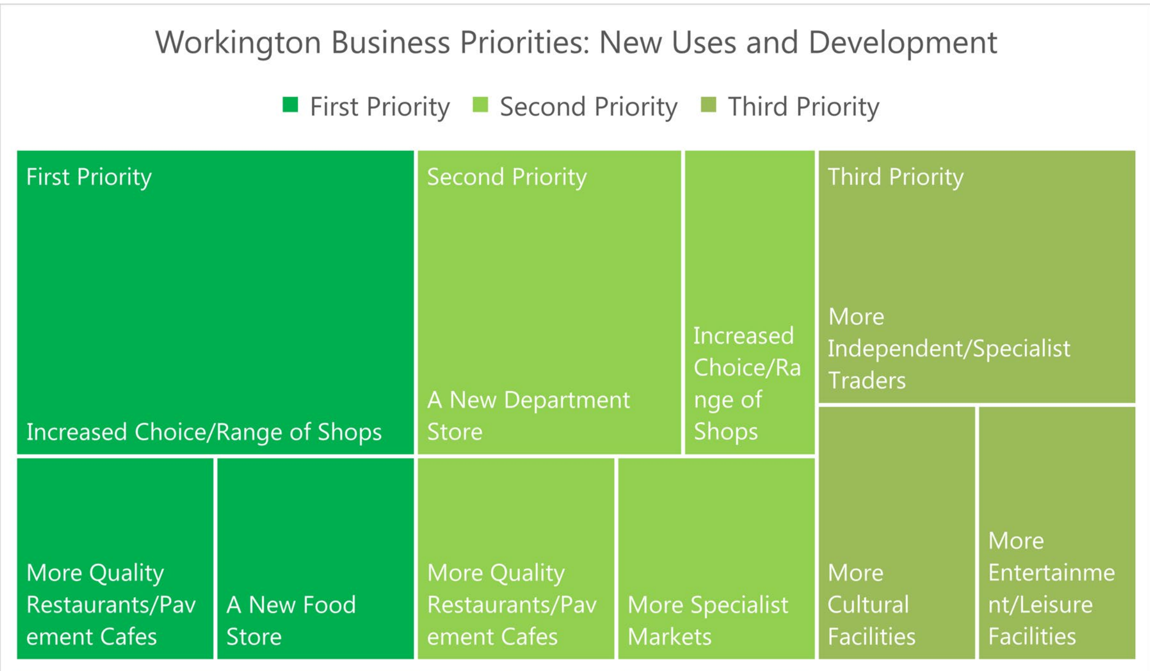
Question 22: Please rank your top 3 priorities in terms of the following improvement measures which you would like to see in the town centre

a. Priorities for New Uses and Development

Workington

2.42 60% of respondents ranked an increased choice/range of shops as their top priority for new uses and development in Workington. Furthermore, the development of more quality restaurants/ pavement cafes was ranked amongst the top three priorities by 60% of respondents. 40% of respondents ranked a new department store in Workington Town Centre as their second priority, whilst 40% of respondents ranked more independent/specialist traders as their third priority for new uses and developments in Workington. Other priorities include:

- A new food store in the town centre;
- More cultural facilities (i.e. museum, theatre etc.);
- More entertainment/leisure facilities; and
- More specialist markets.



Allerdale Key Service Centres

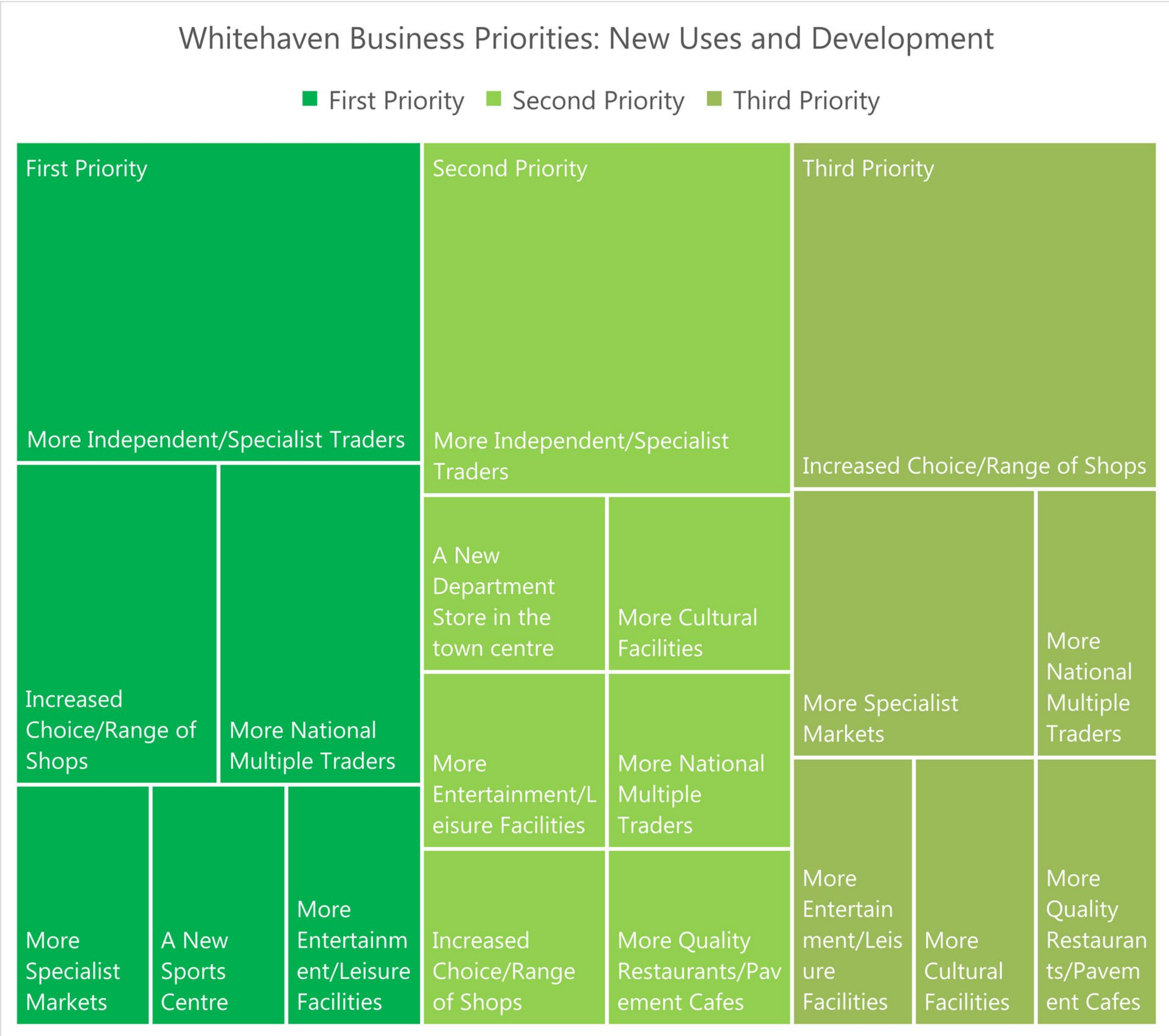
2.43 In Allerdale's key service centres, priorities for new uses and development are summarised in the following table.

Table 2.7 Summary of Findings – Question 22

Key Service Centre	Question 22: Please rank your top 3 priorities in terms of the following improvement measures which you would like to see in the town centre
Allerdale	
Maryport	An increased choice or range of shops in Maryport received the most features across respondents' top 3 priorities with 100% of respondents voting for this measure. With regard to new uses and development in Maryport, other priorities for improvements are split between the following: • More Commercial Offices; • More Cultural Facilities i.e. museums, theatres; • More Entertainment/Leisure Facilities; • More Independent/ Specialist Traders; • More Quality Restaurants/ Pavements Cafes; • More Residential Development/Apartments; and • More Specialist Markets.
Cockermouth	In Cockermouth, half of respondents ranked 'More independent/specialist traders' as their top priority for new uses and development in Cockermouth, whilst half ranked an increased choice/range of shops as their top priority. Other priorities included: • More Entertainment/Leisure Facilities; • More Cultural Facilities (i.e. Museums, theatres); and • A New Cinema.
Wigton	In Wigton 57% of respondents rank more independent/specialist traders as their top priority for new uses and development in the town. Others rank more national multiple traders and more entertainment/leisure facilities as their top priority for the town.
Silloth	Priorities for new uses in Silloth include more specialist markets, a new foodstore in the town centre, and more independent/specialist traders.
Aspatria	Priorities for new uses and development in Aspatria include an increased choice/range of shops, a new sports centre and more commercial offices.

Copeland's Principal Service Centre: Whitehaven

2.44 Priorities for Whitehaven were split, as shown by the figure below, however the desire for more independent or specialist traders was ranked as the most common first and second priority for new uses and development in Whitehaven by 36% of respondents. An increased choice and range of shops was ranked as the third choice of 45% of respondents.



Copeland's Key Service Centres

2.45 In Copeland's key service centres, priorities for new uses and development are summarised in the following table.

Table 2.8 Summary of Findings – Question 22

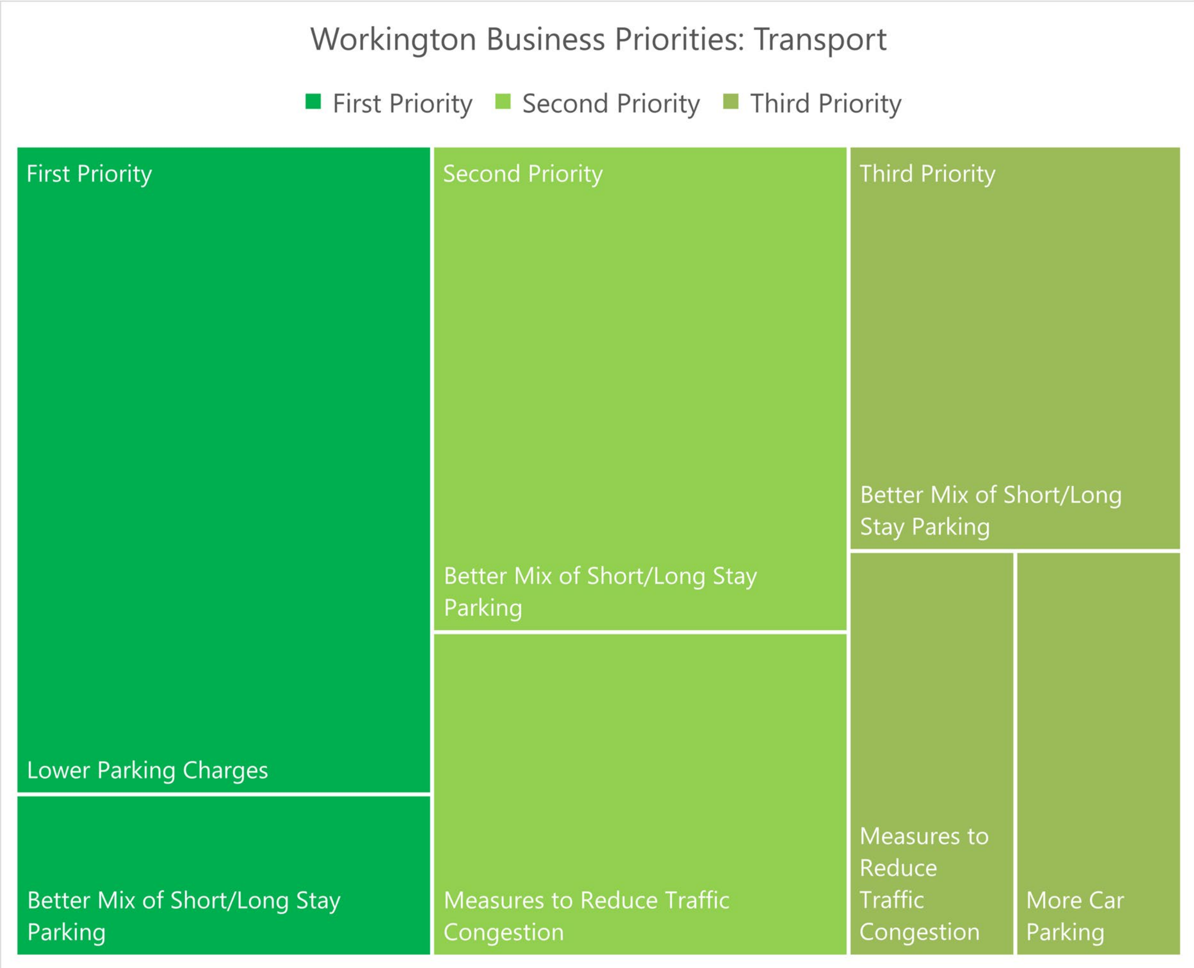
Key Service Centre	Question 22: Please rank your top 3 priorities in terms of the following improvement measures which you would like to see in the town centre (New Uses and Development)
Copeland	
Cleator Moor	Priorities for new uses and development in Cleator Moor include an increased choice and range of shops, a new food store within the town centre, more specialist markets, more national multiple traders, and more commercial offices.
Millom	33% of respondents rank their main priority for new uses and development in Millom as either an increased choice/range of shops, or more entertainment and leisure facilities. Other measures ranked as a first priority include a new sports centre and a new food store in the town centre
Egremont	There were no responses to this question

b. Priorities for Transport Related Improvements

Allerdale's Principal Town Centre: Workington

2.46 80% of respondents ranked lower parking charges as their top priority for transport related improvements in Workington town centre. 60% ranked a better mix of short/long stay parking as their second priority for improvement, whilst votes for the third most important priority were split between more parking (40% of respondents), measures to reduce traffic congestion (20% of respondents) and a better mix of short/long stay parking.

2.47 100% of respondents ranked 'better mix of short/long stay parking' as one of their three top priorities for transport related improvements to Workington town centre.



Allerdale's Key Service Centres

2.48 With regard to transport improvements, the table below sumamrises key priorities for key service centres in Allerdale.

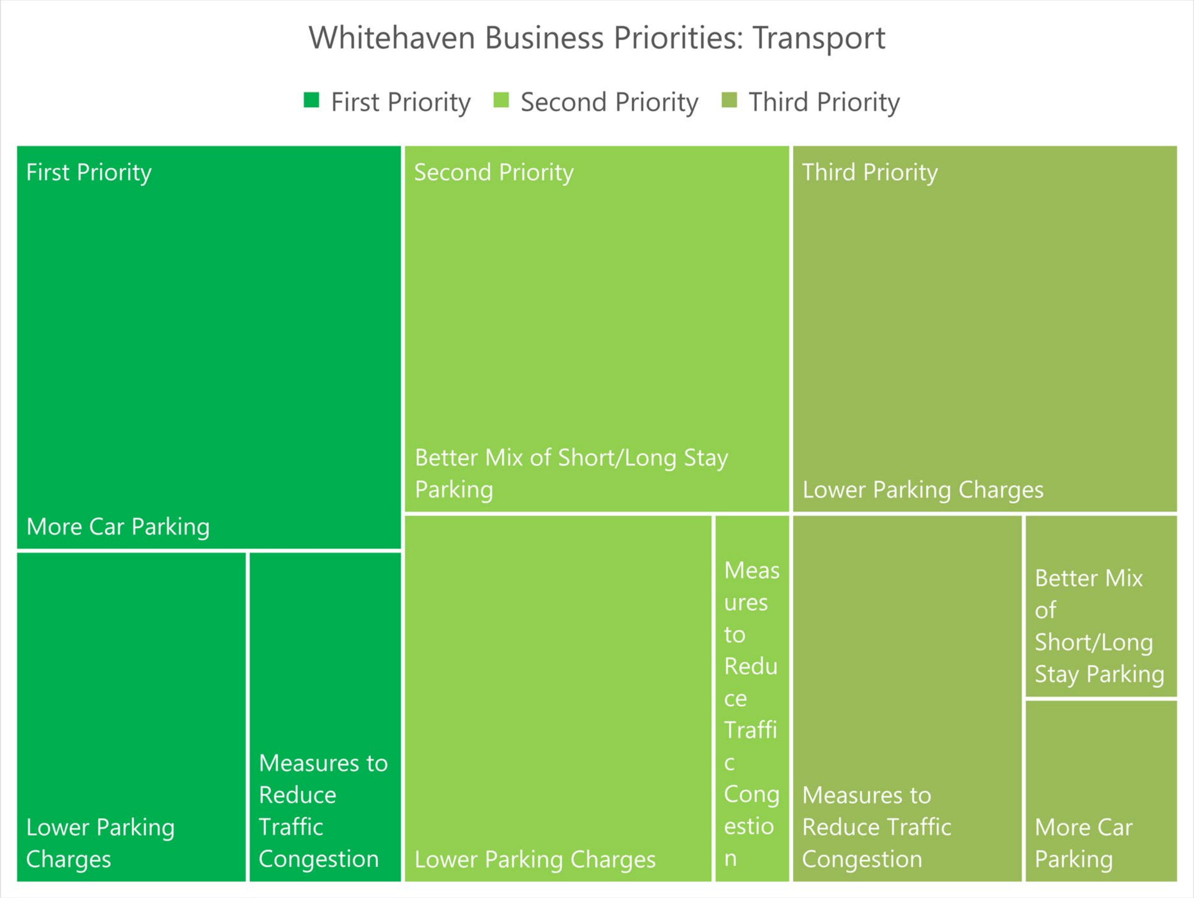
Table 2.9 Summary of Findings – Question 22

Key Service Centre	Question 22: Please rank your top 3 priorities in terms of the following improvement measures which you would like to see in the town centre (Transport Related Improvements)
Allerdale	
Maryport	With regard to transport improvements, 40% of respondents ranked more car parking as their main priority for Maryport, and 80% then went on to rank lower ranking charges as their second priority for improvement. Other priorities for transport improvements include the following: • A better mix of short/long stay parking; • Improved access by foot and cycle; and • Measures to reduce traffic congestion.
Cockermouth	Half of respondents in Cockermouth ranked lower parking charges as their main priority for transport related improvements, whilst the other half ranked more car parking as their main priority. Other priorities included: • Better mix of short/long stay parking; and • Measures to reduce traffic congestion.
Wigton	57% of respondents rank lower parking charges as their main priority for transport related improvements in Wigton. Respondents also rank improved access by foot/cycle, measures to reduce traffic congestion and more car parking as their main priorities.
Silloth	In Silloth, priorities include improved access by foot/cycle and lower parking charges.
Aspatria	Priorities for transport related improvements in Aspatria include a better mix of short/long stay parking.

Copelands Principal Town Centre: Whitehaven

2.49 More car parking is ranked as the top priority for transport related improvements by 54.6% of respondents.

2.50 27.3% of respondents ranked lower parking charges as their top priority, whilst 18.2% ranked measures to reduce traffic congestion as their main priority for transport related measures. Other measures such as a better mix of short/long stay parking was also a popular choice for prioritisation.



Copeland's Key Service Centres

2.51 Priorities for transport related improvements in Copeland's Key Service Centres are summarised in the following table.

Table 2.10 Summary of Findings – Question 22

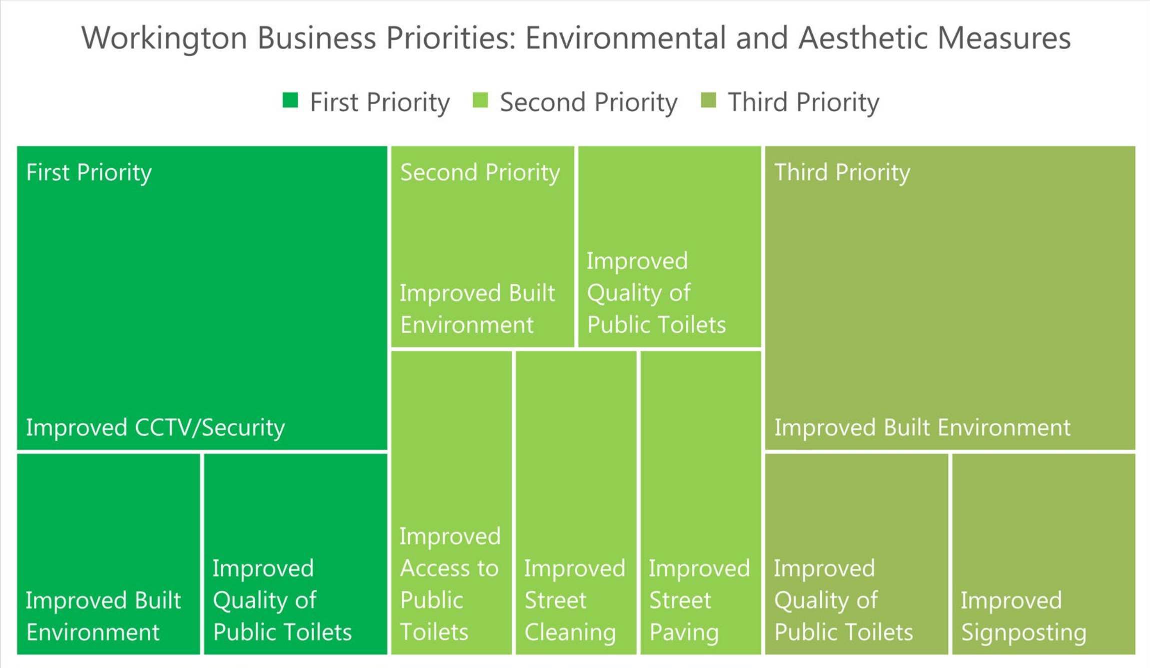
Key Service Centre	Question 22: Please rank your top 3 priorities in terms of the following improvement measures which you would like to see in the town centre (Transport Related Improvements)
Copeland	
Cleator Moor	Priorities for transport related improvements in Cleator Moor include more car parking, a better mix of long/short stay parking and measures to reduce traffic congestion.
Millom	83% of respondents rank more car parking as their main priority for transport related improvements in Millom, whilst 17% place improved access by foot and cycle as their top priority.
Egremont	There were no responses to this question

c. Priorities for Environmental/Aesthetic Improvements

Allerdale's Principal Town Centre: Workington

2.52 With regard to environmental and aesthetic improvements of Workington town centre, 60% of respondents ranked improved CCTV/security as their top priority. The respondents second and third priorities for Workington were split between a number of answers including:

- Improved quality of public toilets;
- Improved access to public toilets;
- Improved signposting;
- Improved street paving; and
- Improved street cleaning.



2.53 100% of respondents ranked 'improved built environment (i.e. crossings, external facades of buildings, lighting) as one of their three top priorities.

Allerdale's Key Service Centres

2.54 With regard to environmental improvements, the following table summarises the key priorities for Allerdales key service centres.

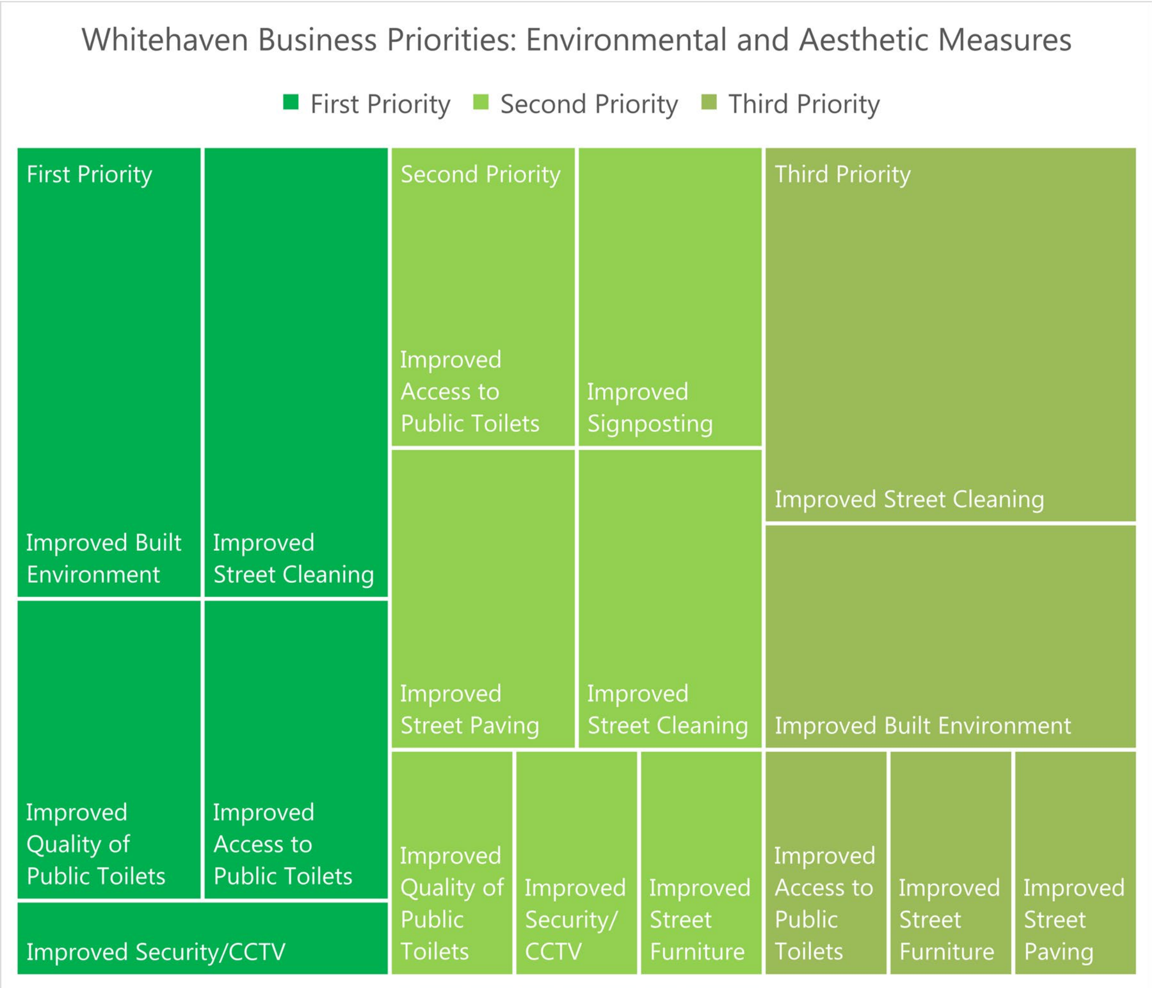
Table 2.11 Summary of Findings – Question 22

Key Service Centre	Question 22: Please rank your top 3 priorities in terms of the following improvement measures which you would like to see in the town centre (Environmental or Aesthetic Related Improvements)
Allerdale	
Maryport	With regard to environmental improvements, 40% of repsondents ranked an improved built environment as their main priority for Maryport, Other priorities with regard to environmental/aesthetic improvements included: • Improved quality of public toilets; • Improved access to public toilets; • Improved CCTV/security; • Improved street furniture;

Key Service Centre	Question 22: Please rank your top 3 priorities in terms of the following improvement measures which you would like to see in the town centre (Environmental or Aesthetic Related Improvements)
Allerdale	
	• Improved street paving; and • Improved street cleaning.
Cockermouth	50% of respondents rank improved security/CCTV as their top priority for environmental related improvements to Cockermouth. Others ranked their main priority as improving the built environment and improving the quality of public toilets. Other secondary priorities included: • Improved signposting; • Improved access to public toilets; and • Improved street cleaning.
Wigton	42% of respondents rank an improved built environment as their main priority related to the environment/aesthetic improvement of Wigton, whilst 42% rank improved security/CCTV as their main priority. Others rank improved street paving as their top priority.
Silloth	Respondents prioritise improved security/CCTV, improved access to public toilets and improved street paving with regard to aesthetic/environmental improvement measures for Silloth.
Aspatria	In Aspatria, priorities for environmental/aesthetic related improvement measures include an improved built environment (i.e. crossings, external facades of buildings and lighting) and improved signposting.

Copeland's Principal Town Centre: Whitehaven

2.55 Priorities for Environmental and Aesthetic Improvement measures in Whitehaven are split, as demonstrated by the figure below. 27% of respondents rank an improved built environment as their main priority, whilst 27% rank improved street cleaning as their main priority. Improved street cleaning also features as 18% of respondents second choice priority and 45% of respondents third choice priority.



Copeland's Key Service Centres

2.56 Priorities for environmental/aesthetic related improvements in Copeland's key service centres are summarised below.

Table 2.12 Summary of Findings – Question 22

Key Service Centre	Question 22: Please rank your top 3 priorities in terms of the following improvement measures which you would like to see in the town centre (Transport Related Improvements)
Copeland	
Cleator Moor	Priorities for environmental/aesthetic related improvements in Cleator Moor include improved CCTV/security, improved built environment, improved access to public toilets and improved street paving.

Key Service Centre	Question 22: Please rank your top 3 priorities in terms of the following improvement measures which you would like to see in the town centre (Transport Related Improvements)
Copeland	
Millom	33% of respondents ranked improved security/CCTV as their main priority for environment/aesthetic improvements to Millom, whilst others ranked several measures such as improved built environment, improved quality of public toilets, improved access to public toilets and improved street cleaning as their main priority.
Egremont	There were no responses to this question

Question 23 How important do you consider the following marketing and engagement measures?

2.57 70.7% of respondents consider further consultation with retailers and businesses on town centre issues to be Essential, whilst 26.8% consider further consultation to be Important or Very Important.

2.58 71.4% of respondents consider greater promotion and marketing of the town centres to be Essential, with 23% stating that greater promotion and marketing is Important or Very Important.

Question 24: Do you think there is an appropriate mix of non-retail uses (e.g banks, building societies, amusement arcades, cafes, pubs and restaurants, fast food outlets, etc)?

2.59 A summary of the key findings with regard to the mix of non-retail uses in each of the 10 centres assessed is provided below.

Table 2.13 Summary of Findings – Question 24

Key Service Centre	Question 24: Do you think there is an appropriate mix of non-retail uses (e.g banks, building societies, amusement arcades, cafes, pubs and restaurants, fast food outlets, etc)?
Allerdale	
Workington	40% of respondents consider there to be a good balance of non-retail uses, however 60% consider there to be too many non-retail uses.

Key Service Centre	Question 24: Do you think there is an appropriate mix of non-retail uses (e.g banks, building societies, amusement arcades, cafes, pubs and restaurants, fast food outlets, etc)?
Allerdale	
Maryport	60% of respondents stated that they consider there to be too many non-retail uses in Maryport.
Cockermouth	50% of respondents consider there to be a good balance of non-retail uses in Cockermouth.
Wigton	28.8% of respondents state that there are not enough non-retail uses in Wigton. All respondents cite too many bank closures and empty premises in Wigton.
Silloth	Respondents are indifferent regarding the general provision of non-retail uses in Silloth.
Aspatria	Respondents consider that there are not enough non-retail uses in Aspatria.
Copeland	
Whitehaven	63.64% of respondents consider there to be too many non-retail uses in Whitehaven, whilst 18% consider there to be a good balance of non-retail uses. Respondents also note too many empty premises and too many take-away services.
Cleator Moor	Some consider there to be a good balance of non-retail uses in Cleator Moor whilst others state there are not enough.
Millom	50% of respondents believe there are not enough non-retail uses in Millom, with respondents noting that there is no bank, no enough cash machines, no registry office, and no police station.
Egremont	There were no responses to this question

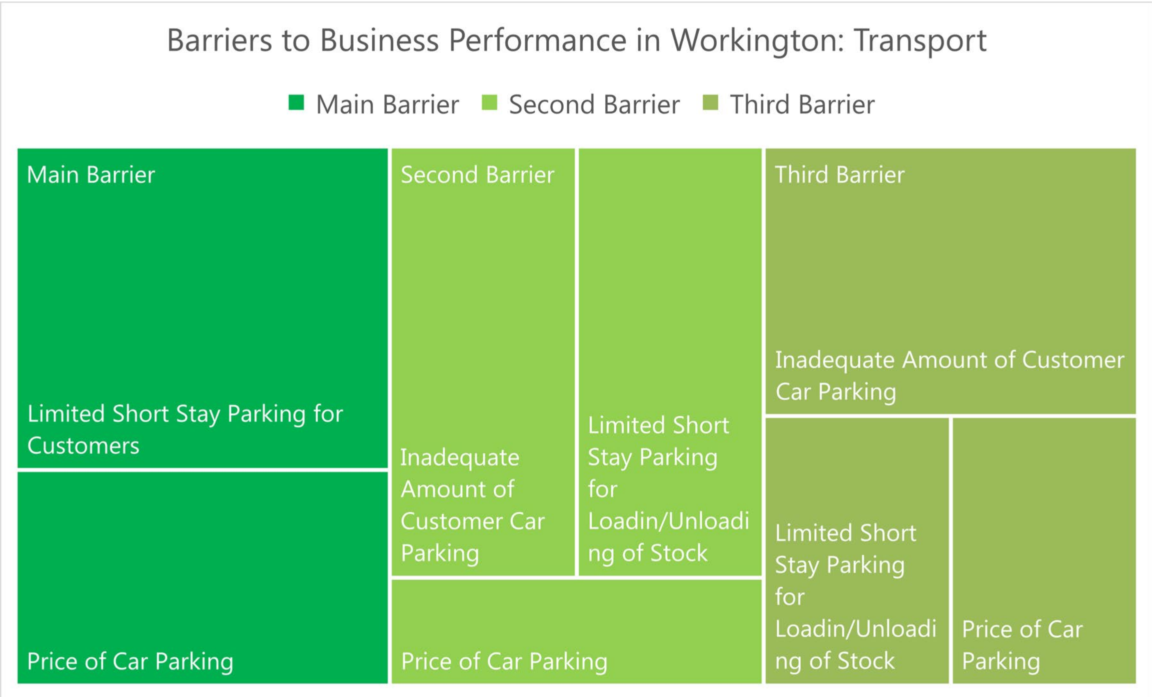
Question 25: Thinking of the performance of your business, please rank what you consider to be the 3 main barriers to your businesses performance in the following areas..

a. Barriers Relating to Transport

Allerdale's Principal Town Centre: Workington

2.60 Relating to transport, 60% of respondents ranked limited short stay parking for customers as the main barrier to their businesses performance, whilst 40% of respondents ranked the price of car parking as the main barrier to their business performance.

2.61 40% of respondents ranked an inadequate amount of customer parking as the second most impactful barrier to their business with regard to transport, whilst 40% ranked the limited amount of short stay parking for loading/unloading of stock as their second barrier. 50% of respondents ranked an inadequate amount of parking as the third most impactful barrier to performance with regard to transport.



Allerdale's Key Service Centres

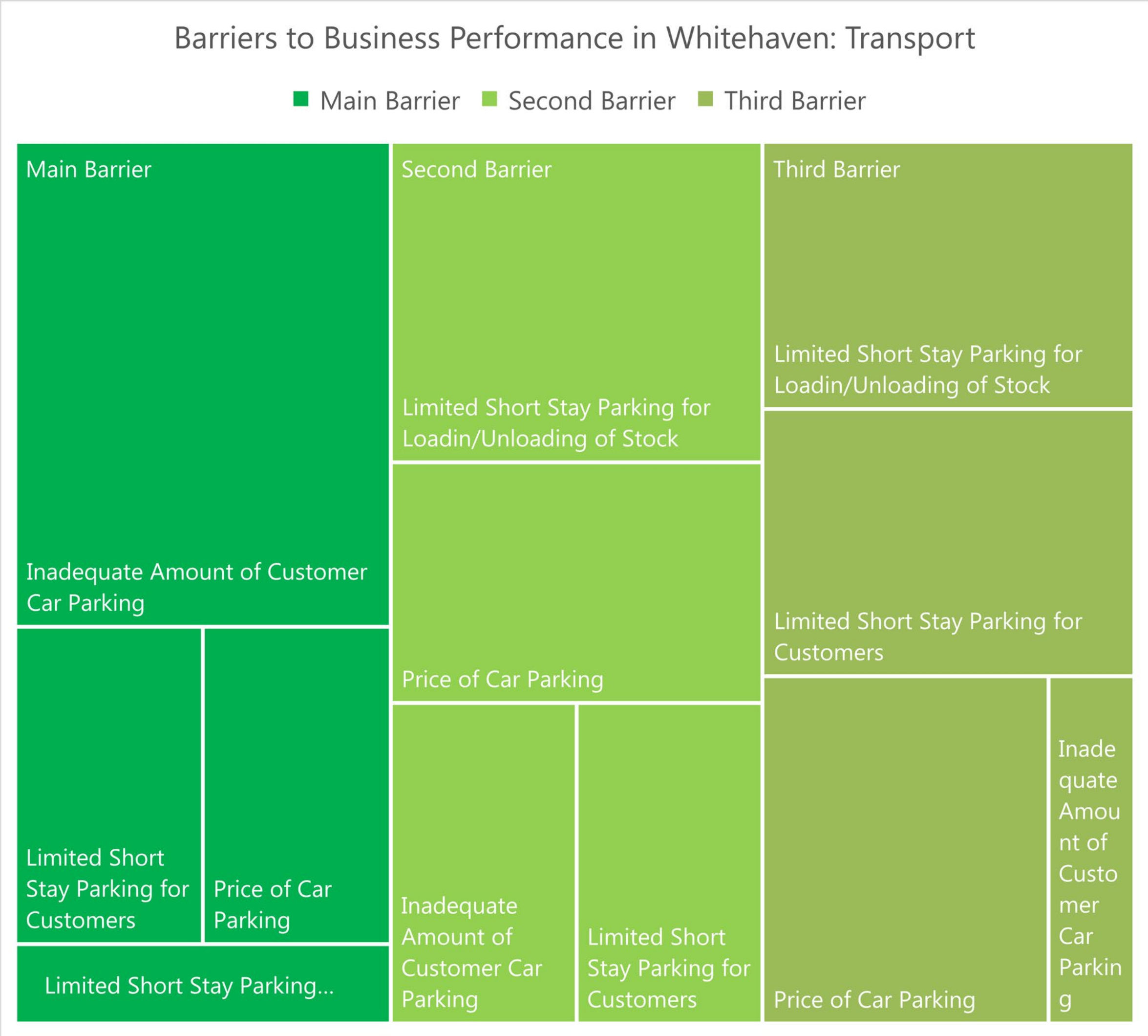
2.62 80% of respondents in Maryport rank an inadequate amount of customer car parking as their main barrier to business performance relating to transport whilst 80% consider limited short stay parking for customers to be the second barrier to business performance relating to transport,

Table 2.14 Summary of Findings – Question 25

Key Service Centre	Question 25: Thinking of the performance of your business, please rank what you consider to be the 3 main barriers to your businesses performance in the following areas. (Barriers Relating to Transport)
Allerdale	
Maryport	80% of respondents in Maryport rank an inadequate amount of customer car parking as their main barrier to business performance relating to transport whilst 80% consider limited short stay parking for customers to be the second barrier to business performance relating to transport,
Cockermouth	50% of respondents consider an inadequate amount of customer car parking to be the main barrier to business performance which relates to transport. Others ranked limited short stay parking for unloading/loading of stock and the price of car parking as the top barriers to the performance of their business. Limited short stay parking for customers was considered to be the third main barrier to performance by 75% of respondents.
Wigton	71% of respondents consider the price of car parking to be the main barrier to their businesses performance relating to transport. Others rank limited short stay parking for loading/unloading of stock as the main barrier.
Silloth	There were no responses to this question
Aspatria	There were no responses to this question

Copeland's Principal Town Centre: Whitehaven

2.63 55% of respondents in Whitehaven ranked an inadequate amount of customer car parking in Whitehaven as the main transport related barrier to the performance of their business. Others cited the main transport related barriers as the limited amount of short stay parking for customers and the price of car parking.



Cleator Moor

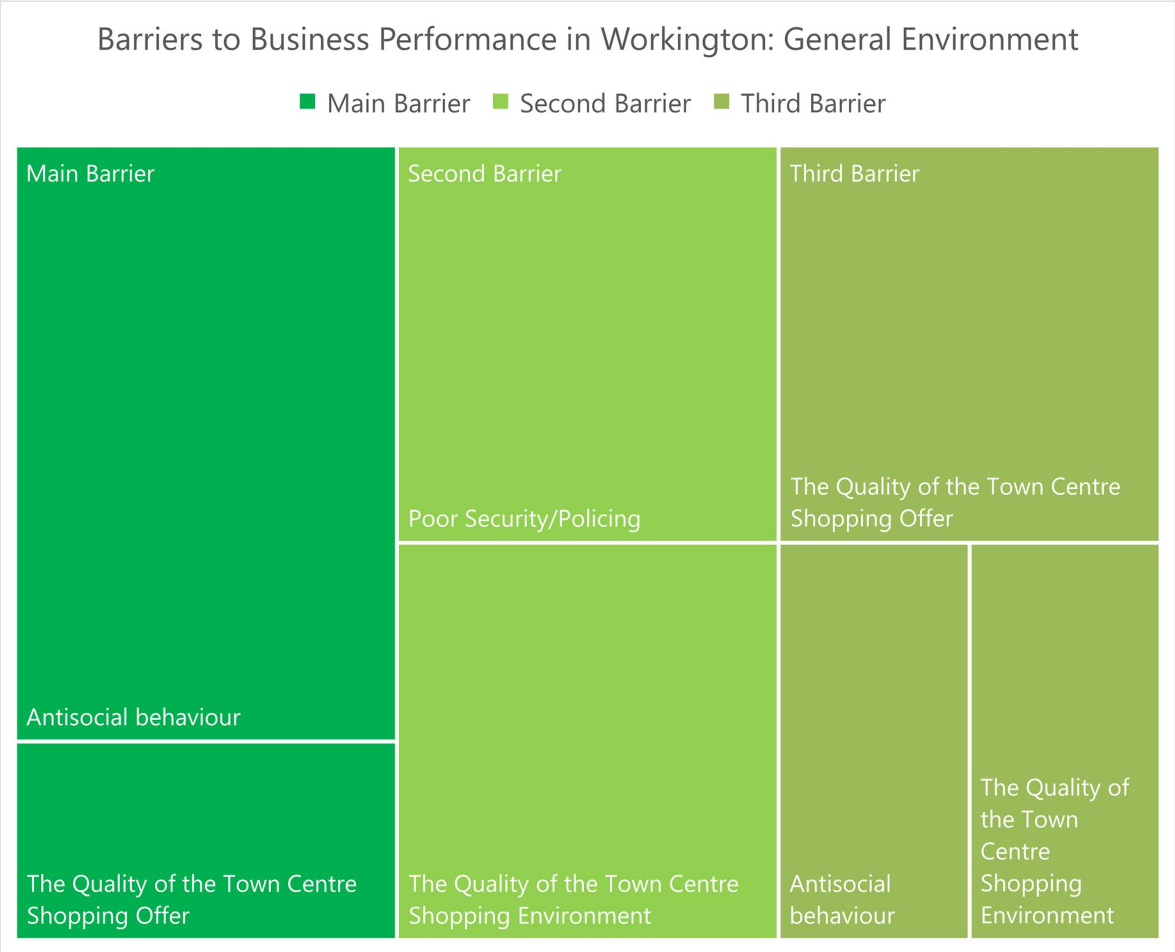
2.64 Relating to transport, respondents consider the main barriers to be an inadequate amount of customer car parking and limited short stay parking for customers.

Millom

2.65 100% of respondents rank an inadequate amount of customer car parking as the main barrier to the performance of their business. Opinions are split regarding the second and third main barriers to business performance, with respondents ranking limited short stay parking for customers, limited short stay parking for unloading/loading of stock & price of parking as key barriers.

b. Barriers Relating to General Environment and Aesthetics.

Allerdale's Principal Town Centre: Workington



2.66 Relating to the general environment and aesthetics, 75% of respondents ranked antisocial behaviour as the main barrier to their businesses performance.

2.67 With regard to the second most impactful barrier to their businesses performance, half of respondents stated that poor security or policing was the second ranking barrier, whilst half stated that the quality of the town centre shopping environment was the second ranking barrier.

2.68 50% of respondents ranked the quality of the town centre shopping offer as the third main environmental related barrier to their businesses performance.

Allerdale's Key Service Centres

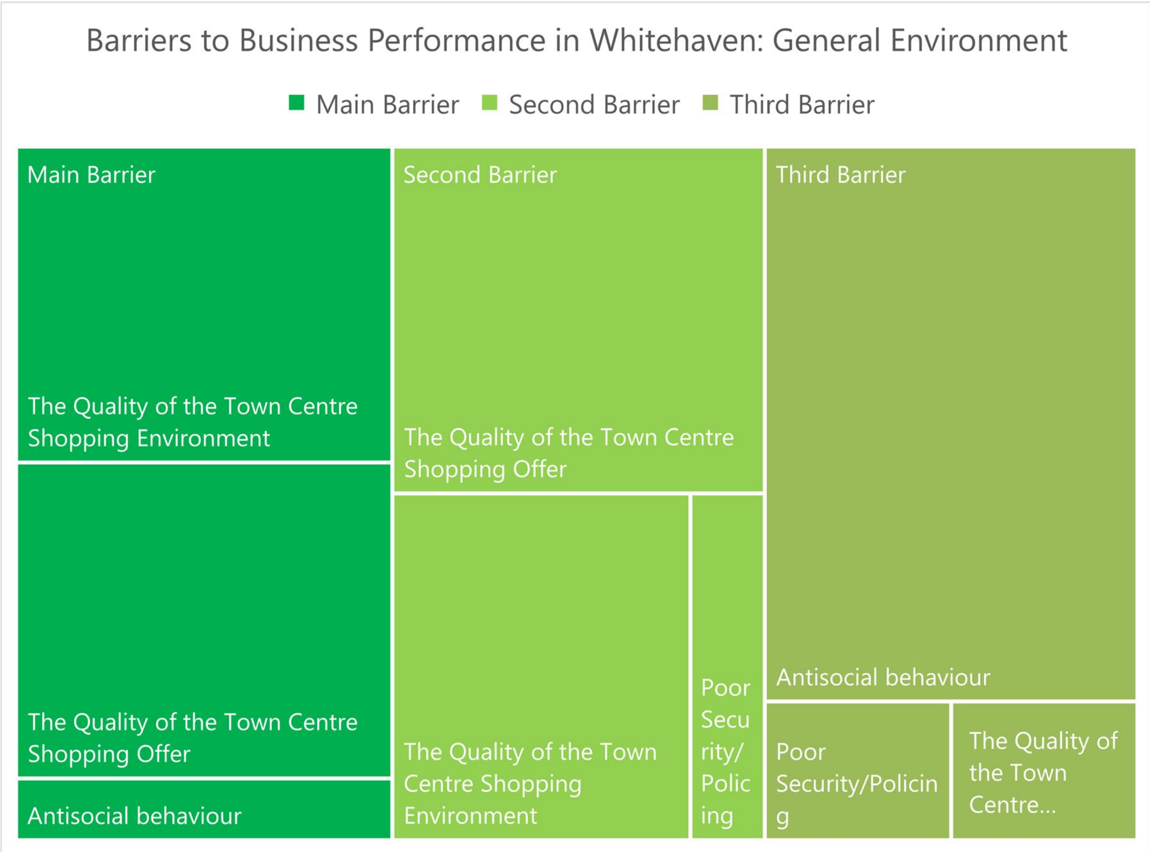
2.69 Relating to the general environment, the table below provides a summary of responses regarding main barriers to business performance in Allerdale's key service centres.

Table 2.15 Summary of Findings – Question 25

Key Service Centre	Question 25: Thinking of the performance of your business, please rank what you consider to be the 3 main barriers to your businesses performance in the following areas. (Barriers Relating to General Environment and Aesthetics)
Allerdale	
Maryport	Relating to the general environment, 60% of respondents believe antisocial behaviour is the main barrier to the performance of their business in Maryport, whilst 60% rank the second most detrimental general environmental barrier as the quality of the town centre shopping environment.
Cockermouth	66.7% of respondents consider the poor location of the premises to be the environmental related barrier to the performance of their business. The quality of the town centre shopping environment is also ranked as a main barrier.
Wigton	85.72% of respondents in Wigton consider either the quality of the town centre shopping environment or the quality of the town centre shopping offer to be the main barrier to their business' performance relating to environment/aesthetics. Antisocial behaviour is also ranked as another main barrier.
Silloth	Respondents consider the main barriers relating to environment/aesthetics to be antisocial behaviour and poor location of the premises (e.g. not prime pitch).
Aspatria	Respondents consider the quality of the town centre environment and the quality of the town centre shopping offer to be the main barriers relating to the general environment in Aspatria.

Copeland's Principal Town Centre: Whitehaven

2.70 91% of respondents rank either the quality of the town centre shopping environment or the quality of the town centre offer as the main barrier to their businesses performance in Whitehaven. These factors also feature as 90% of respondents second choices regarding the main environmental related barriers to their businesses performance. 80% of respondents rank antisocial behaviour in Whitehaven as the third main barrier to their businesses performance.



Cleator Moor

2.71 Respondents consider the main environment related barriers to their businesses performance to be poor security/policing and the quality of Cleator Moor's shopping environment.

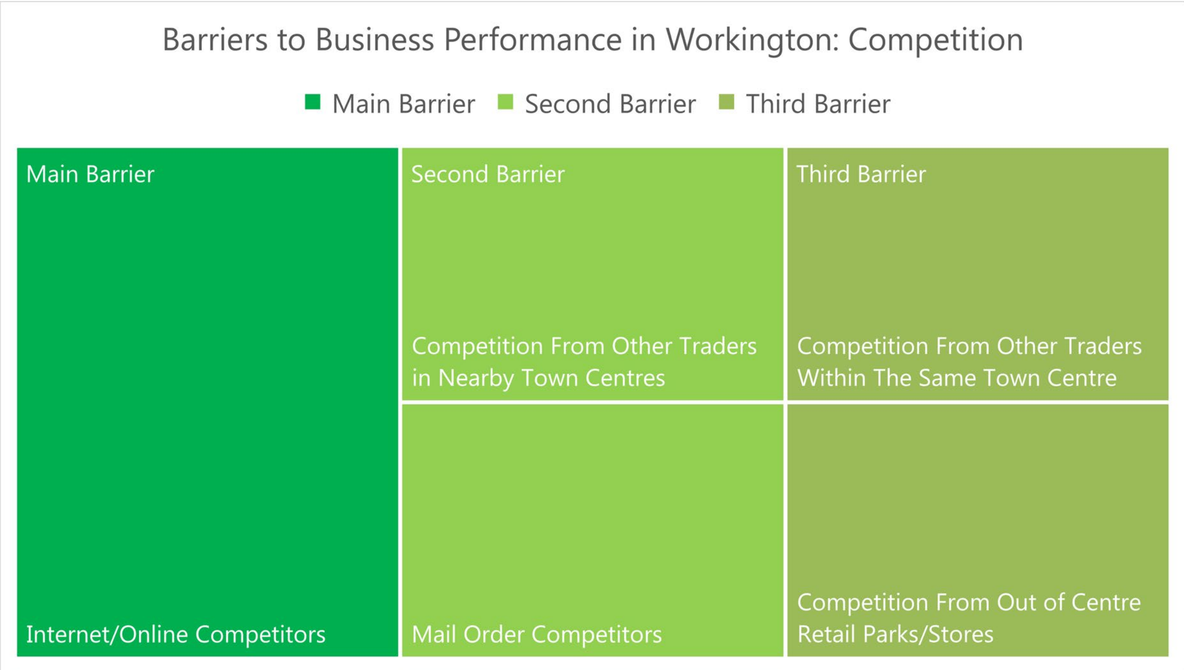
Millom

2.72 Respondents consider the main environmental/aesthetic related barriers to the performance of their business to be the quality of Millom's shopping environment and the quality of Millom's offer.

c. Barriers Relating to Competition

Allerdale's Principal Town Centre: Workington

2.73 Relating to competition, 100% of respondents ranked internet/online competitors as the top barrier to the performance of their business. The second most impactful barrier with regard to competition was split between mail order competitions and competition from other traders in nearby centres. The third most impactful barrier with regard to competition was split between competition from other traders within Workington town centre and competition from out-of-centre retail parks.



Allerdale's Key Service Centres

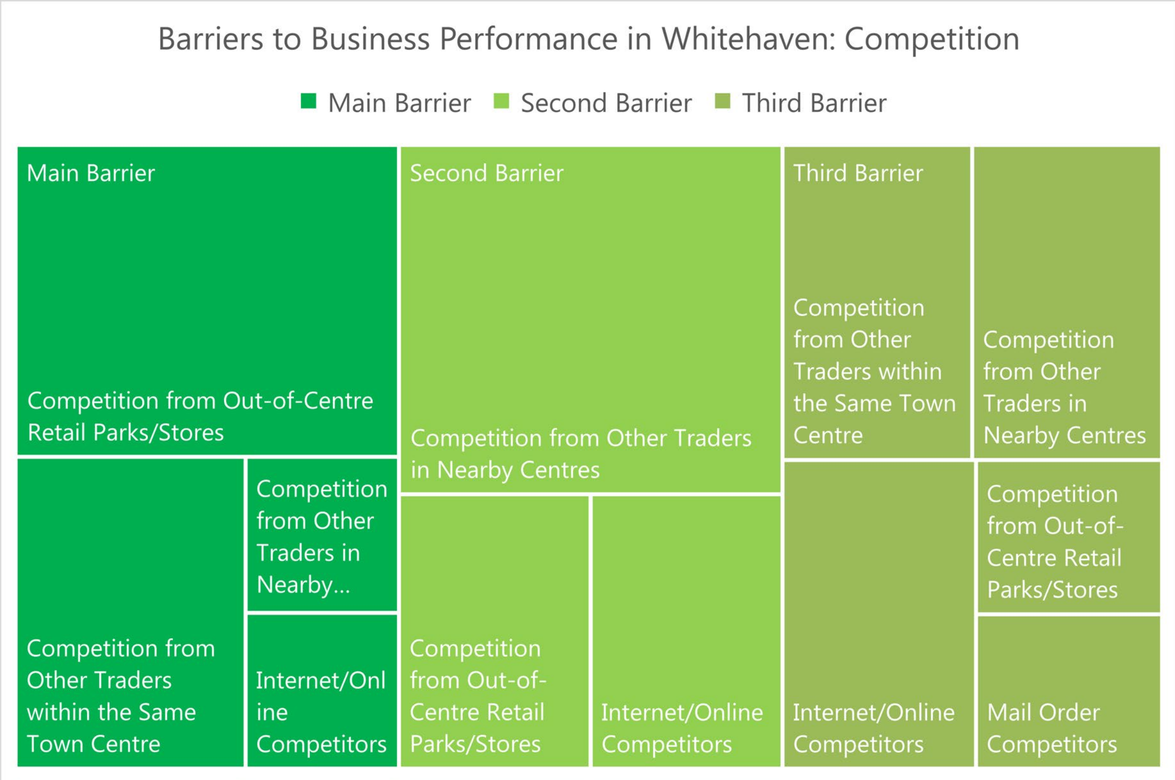
2.74 Relating to competition, the following table summarises the key barriers in Allerdale's key service centres.

Table 2.16 Summary of Findings – Question 25

Key Service Centre	Question 25: Thinking of the performance of your business, please rank what you consider to be the 3 main barriers to your businesses performance in the following areas. (Barriers Relating to Competition)
Allerdale	
Maryport	Respondents consider competition from other traders within the same town centre, competition from traders within nearby town centres, and internet/online competitors to be the main competitive barriers to their businesses performance.
Cockermouth	The two main barriers to business performance relating to competition in Cockermouth are considered to be competition from other traders within the same town centre and competition from out-of-centre retail parks.
Wigton	75% of respondents with businesses in Wigton consider Internet/Online competitors to be the main barrier to the performance of their business. Another main barrier is considered to be competition from out-of-centre retail parks/stores.
Silloth	There were no responses to this question
Aspatria	There were no responses to this question

Whitehaven

2.75 In Whitehaven, 50% of respondents consider competition from out-of-centre retail parks/stores to be the main competitive barrier to their businesses performance. Competition from traders within nearby town centres and within Whitehaven is also considered a common barrier to business performance.



Cleator Moor

2.76 Relating to competition, respondents consider the main barriers to the performance of their business to be competition from other traders in nearby centres and competition from out-of-centre retail parks.

Millom

2.77 Regarding competition, respondents from Millom consider the main barriers to the performance of their business to be internet/online competitors and competition from out-of-centre retail parks/stores.

d. General Commercial Barriers

2.78 Relating to general commercial barriers in West Cumbria, the table below provides a summary of the key findings.

Table 2.17 Summary of Findings – Question 25

Key Service Centre	Question 25: Thinking of the performance of your business, please rank what you consider to be the 3 main barriers to your businesses performance in the following areas. (General Commercial Barriers)
Allerdale	
Workington	Relating to general commercial barriers, 100% of respondents ranked business rates as the main commercial barrier to their businesses performance. With regard to the second main barrier, 100% of respondents ranked a lack of passing trade outside the premises as the second most impactful upon their business performance, whilst the third most impactful barrier was chosen by 100% of respondents to be general overheads.
Maryport	Relating to general commercial barriers, respondents rank business rates, general overheads, a lack of day visitors/ tourists and a lack of passing trade outside the premises as the main general commercial barriers to their businesses performance.
Cockermouth	Business rates are considered to be the main barrier relating to general aspects of commerce in Cockermouth. Other barriers are considered to be a lack of passing trade outside the premises, general overheads, and a lack of day visitors/tourists to Cockermouth.
Wigton	The main barriers relating to the general commercial environment are considered to be business rates, general overheads and a lack of day visitors/tourists to the town.
Silloth	There were no responses to this question
Aspatria	In Aspatria, the main barriers relating to the general commercial environment are considered to be general overheads, business rates and a lack of day visitors/tourists to the town.
Copeland	
Whitehaven	Opinions regarding the main barriers within the general commercial environment are split. 37% of respondents cite the lack of passing trade outside their premises as the main barrier to their businesses performance, whilst 25% rank either high rents/mortgage costs or a lack of day visitors/tourists to Whitehaven as the main barrier to their businesses performance.

Key Service Centre	Question 25: Thinking of the performance of your business, please rank what you consider to be the 3 main barriers to your businesses performance in the following areas. (General Commercial Barriers)
Allerdale	
Cleator Moor	Respondents consider a lack of passing trade outside their premises and general overheads to be the main general commercial barriers to the performance of their business.
Millom	There were no responses to this question
Egremont	There were no responses to this question

Question 26: Have you any plans to alter your business in any way in the next five years?

2.79 45.2% of respondents have no plans to alter their business within the next five years. 21.4% of respondents have plans to refurbish the existing floorspace, whilst 16.7% plan to set up a website or expand the range of products on offer. 7.14% of respondents (3) have plans to close their business. Of those planning to close their business, two are located in Whitehaven, whilst one is located within Wigton.

2.80 7.14% of respondents have plans to relocate elsewhere in the town centre, whilst 4.6% of respondents have plans to relocate to another centre or to an out-of-centre location.

Question 27: If you answered YES to question 26, please elaborate on your plans to alter your business.

2.81 Plan include upgrading and renovation of premises internally, refreshing products and updating website. Some are creating attractions to bring footfall to their shops, with one respondent citing that they are building a model railway to attract visitors.

Question 28: If you are considering relocating the business, where are you considering relocating to and why?

2.82 Reasons for relocation include the requirement for larger premises, higher footfall, and a lack of tourism. Respondents cite that they are considering relocation out of Cockermouth for larger premises, whilst others state that they are considering relocating to Ulverston due to the promotion of the town as a tourist attraction.

Question 29: Please rank the top 3 costs (per annum) to the operation of your business

2.83 Key findings regarding the main costs to the operation of business in each town centre is presented in the table below.

Table 2.18 Summary of Findings – Question 29

Key Service Centre	Question 29: Please rank the top 3 costs (per annum) to the operation of your business
Allerdale	
Workington	When asked to rank the main costs to the operation of their business, 60% rank staffing as the top cost, whilst 40% rank utilities (e.g. water, electricity, gas and telecommunications) as the main cost. 40% of respondents stated that business rates were the second most important cost to the operation of their business.
Maryport	80% of respondents consider staffing to be their main operational cost. Other costs ranked by respondents include business rates, promotion, rent/mortgage, and stock.
Cockermouth	Staffing, Business Rates and Rent/Mortgage are considered to be the main cost to the operation of businesses in Cockermouth.
Wigton	85.71% of respondents in Wigton consider staffing to be their main operational cost. Stock is also considered a top operational cost.
Silloth	Respondents rank utilities as their main operational cost.
Aspatria	In Aspatria, respondents consider business rates, utilities and promotion to be the three main operational costs.
Copeland	
Whitehaven	In Whitehaven, 45% of respondents rank staffing as the main operational cost to their business, whilst 27% rank stock as the main cost. Others rank rent/mortgage and utilities as their main operational cost.
Cleator Moor	Respondents with businesses in Cleator Moor rank staffing, stock and utilities as their main operational costs.
Millom	50% of respondents in Millom consider their main operational cost to be rent/mortgage, whilst 33 % consider utilities to be the main cost. Others rank business rates as their main cost.
Egremont	There were no responses to this question

Question 30: How have these costs changed (if at all) in the last five years?

2.84 More than 50% of respondents cite an increase in various costs over the last five years for reasons such as minimum wage increases and expansion of/movement to larger business premises.

Question 31: Which centres or out of town retail parks do you consider to be the town's biggest competitor? Please specify

2.85 Responses regarding the main competitors for each town centre were as follows:

- 20% of respondents cited Carlisle as Workington's biggest competitor, whilst others mentioned Derwent Retail Park, Dunmail Retail Park and Cockermouth.
- 100% of respondents consider Workington to be Maryport's biggest competitor, along with Carlisle, the out-of-centre Lidl in Maryport, Cockermouth, and Dunmail Retail Park.
- Respondents in Cockermouth consider Workington, Keswick, and the Local Authorities Sports Centre to be the town's biggest competitor.
- 57% of respondents cite Carlisle as Wigton's biggest competitor. Others mention Gretna and online shopping.
- Carlisle is considered to be Aspatria's main competitor.
- 50% of respondents cite out-of-centre supermarkets such as the Morrison's at Bridges Retail Park, Aldi and Tesco as the biggest competitors for Whitehaven. 38% of respondents state that Workington is Whitehaven's biggest competitor.
- Respondents consider Whitehaven to be Cleator Moor's biggest competitor.
- 50% of respondents consider Barrow-in-Furness to be Millom's main competitor.

Question 32: Do you operate any other businesses in any other centres in the West Cumbria region?

2.86 21.4% of respondents operate other businesses in other centres in the West Cumbria region, however 78.6% do not operate any other businesses in other centres.

Question 33: Does your business currently have its own website?

2.87 76.2% of respondent's businesses have their own website. 23.8% of respondents do not have a website for their business.

Question 34: What services does your website provide to customers?

2.88 Of these respondents, 90% stated that the website provides contact information. Just 53% stated that their website provides the ability to browse goods available at the website and 23.3% stated that the website provides the availability to order goods directly from the website.

Question 35: How important is your website to your business?

2.89 65.64% of respondents consider their website to be Important, Very Important, or Essential to their business. 15.63% of respondents consider their website to be of Little Importance to their business.

Question 36; Do customers visit your store as a result of browsing your website?

2.90 More than half (56.25%) of respondents state that customers visit their store as a result of browsing their website, whilst 25% of respondents do not know if customers visit their store as a result of the website.

Question 37: Approximately what proportion of your sales are from the internet?

2.91 33% of respondent's state that zero of their sales are from the internet. Some respondents cite as high as 90%-99% of their sales are from the internet, whilst others state that social media channels such as Facebook are the main source of their internet based sales and are used more than their website.

Question 38: Why do you not have a website?

2.92 Of the 23.8% of respondents who state that their business does not have a website, 30% cited a lack of skills to produce/run a website as the reason why they do not have a website, whilst 30% cited that they are currently in the process of designing a website. 30% stated that designing a website would be too expensive.

Question 39: Is there more that could be done to support local businesses?

4.2 Respondents made a number of suggestions for the West Cumbrian centres, which are summarised in the table below.

Table 2.19 Summary of Findings – Question 39

Key Service Centre	Question 39: Is there more that could be done to support local businesses?
Allerdale	
Workington	Respondents suggest that several measures including parking enforcement, more promotion of local leisure businesses, the creation of a strategic vision for the town, and upgrading of/investment in run down units across the centre would support local businesses. Respondents also note the value of support for small and new businesses.
Maryport	Respondents state that more parking, repair/improvement of derelict shops, an increase in CCTV, public toilets, and a shop front improvement grant could work towards supporting local businesses.
Cockermouth	75% of respondents state that the a reduction of business rates in Cockermouth is a measure that would support local businesses. .
Wigton	Respondents raised several suggestions including reduced waste disposal costs, features in local magazines, reduced business rates, reduced rates for those in their 1st year of business trading, a farmer's market to attract more footfall, free parking, and informal educational/safe spaces for young people.
Silloth	Respondents in Silloth suggested a reduction in rural fuel tax.
Aspatria	Respondents with businesses in Aspatria suggest lower broadband costs or lower business rates for local businesses.
Copeland	
Whitehaven	Respondents recommended the promotion of town centre attractions, improvement of signage to ensure visitors to the harbour are well informed on the town centre is, tidying up of empty retail units, better events to promote local businesses, free parking and reduced rates for new retailers.
Cleator Moor	Respondents recommended measures such as improved security, police presence, and measures to make the town more aesthetically attractive.
Millom	Respondents suggested several measures such as investment in the tourist industry, signed cycle and footpaths, leisure facilities, general improvements to the environmental quality of the public realm, renovation of older buildings, reduced business rates, and free short-term parking.
Egremont	There were no responses to this question

Question 40: Do you think that a number of people who work in the town centre from Monday to Friday (but are not permanent residents) have appreciable benefits for your business (i.e. an increase in the number of customers and amount of spending)?

2.93 Approximately 60.0% of respondents overall think that people who work in the centre from Monday-Friday (but are not permanent residents) have appreciable benefits for their business.

2.94 Of those respondents with businesses in Whitehaven, more than 63% consider people who work in Whitehaven throughout the week but are not permanent residents to have appreciable benefits for their business such as an increase in the number of customers and amount of spending.

2.95 Of those respondents with businesses in Workington town centre, 80% believe people who do not live in the town permanently, but work in the centre between Monday and Friday, to have appreciable benefits for their business such as an increase in the number of customers and amount of spending.

2.96 100% of respondents from Silloth, and Aspatria believe that people who work in the town centre from Monday-Friday (but are not permanent residents) do not have appreciable benefits for their businesses.

Question 41: Would you be interested in joining any of the following groups?

2.97 50.0% of respondents would be interested in joining a Business Group or Forum, 2.4% of respondents stated that they would be interested in joining a Landlords Forum, whilst 47.6% stated that they would not be interested in joining either group

Question 42: If you have any further comments, please feel free to express your views below.

2.98 When asked if they have any further comments, 28.6% of respondents gave further information. Comments raised the following:

- The new creation of the Maryport Business Group;
- Issues regarding parking, lighting and public toilets;
- Threats from out-of-centre convenience based retail parks offering free parking;
- Potential for tourism;
- Threat of antisocial behaviour to town centre;
- Christmas marketing campaign to support the businesses;

- Enforcement regarding landlords who fail to keep derelict premises in a fit state of repair;
- A strategy for vacant units including measures such as community art work;
- General tidying of centres and green areas;
- Covering of highstreet to make it all weather; and
- A strategy for communication with council and other shops regarding security, vacant units and promotion.

Conclusion

3.1 A business survey was sent out to all existing businesses within the 10 defined centres in West Cumbria in order to understand how each centre is used and identify those aspects of the centre that may benefit from improvement and change.

3.2 The survey sought to establish the views of local businesses as part of the wider health check of the centres. The aim of the survey was to help inform the Councils future strategy and how it considered future development proposals for retail, town centre and leisure uses. The survey was live from 25th February 2020 until 16th March 2020.

3.3 These findings will be used to inform the production of the West Cumbria Retail, Town Centre and Leisure Study.

In-Street Survey Findings

1.1 In-street surveys were undertaken in the centres of Workington and Whitehaven by NEMS in February 2020, in order to understand how each centre is used and identify those aspects of the centre that may benefit from improvement and change. The results of the in-street surveys are invaluable to formulating the future strategies for both Whitehaven and Workington town centres and pull together not only residents' views but also those views of tourists visiting the two centres.

1.2 In total, 100 surveys were undertaken in Workington and 100 surveys in Whitehaven. Within the centres, the surveys were undertaken at various locations to ensure that the results picked up a range of responses and that they were reflective of a broad array of visitors to the centre.

1.3 It is important to note that this Study was undertaken at a time pre-COVID-19 and all of the market research was carried out prior to the country being put on 'lockdown'. As such, high streets across West Cumbria were fully operational and residents were undertaking 'normal' shopping trips.

1.4 The full tabulated in-street survey results are provided at Appendix D. We set out an overview of the key findings of the survey below, focusing on customer satisfaction ratings, customer behaviour and suggestions for improvement.

Findings

Purpose of Visit and Shopping Intentions

2.1 Respondents were asked to identify the principal purpose of their visit to the respective centre. Table 2.1 below demonstrates that the principal reason for visiting both Workington and Whitehaven town centres is to go shopping. followed by work. In Workington 14.0% of respondents were visiting for retail and leisure services including cafes, restaurants, banks, hairdressers and post offices.

2.2 In Whitehaven, the third most popular reason for visiting the centre was to visit a financial or retail service such as a bank or hairdressers, whilst 7.0% of respondents intended to visit medical or health facilities.

Table 2.1: Purpose of Visit to Centre

Centre	1st	2nd	3rd	4th
Workington	Visiting the town centre shops (63.0%)	Work (work here or attending meeting) (14.0%)	Visiting pub / café / restaurant *and* Visiting bank or other services (hairdresser, post office, solicitor) (both 7.0%)	-
Whitehaven	Visiting the town centre shops (51.0%)	Work (work here or attending meeting (14.0%)	Visiting bank or other services (hairdresser, post office, solicitor) (11.0%)	Visiting health or medical facilities (7.0%)

Source: Question 1 of the 2020 In-Street Survey

2.3 When asked what else they would be doing on the day of the survey, nearly half of respondents in both Workington and Whitehaven stated that they would be doing nothing else during their visit to the centres. Table 2.2 illustrates the four top answers in each centre. One quarter of respondents in Workington stated they would also visit town centre shops, whilst one fifth stated they would also visit a café/ bar/ restaurant during their trip. In Whitehaven, just under one quarter of respondents (23.0%) stated they would also visit a pub/café/restaurant.

Table 2.2: Additional Trips

Centre	1st	2nd	3rd	4th
Workington	Nothing else (48.0%)	Visiting the town centre shops (25.0%)	Visiting pub / café / restaurant (20.0%)	Visiting bank or other services (hairdresser, post office, solicitor) (7.0%)
Whitehaven	Nothing else (49.0%)	Visiting pub/café/restaurant (23.0%)	Visiting town centre shops (13.0%)	Visiting bank or other services (hairdresser, post office, solicitor) (6.0%)

Source: Question 2 of the 2020 In-Street Survey

2.4 The Workington In-Street Survey found that of the 64.0% of respondents who were planning to conduct food shopping during the week of the survey, the most popular shop to undertake grocery shopping was cited by respondents as Iceland on Pow Street, Workington.

2.5 Table 2.3 identifies that two of the top four food shopping destinations in Workington that respondents cited are located out of the defined town centre. As such, approximately 30% of respondents in Workington travel to out-of-centre retail parks to conduct their food shopping.

2.6 The In-Street Survey of Whitehaven found that 89.0% of respondents were planning to conduct food shopping during the week of the survey. Of those who were planning to conduct food shopping that week, 36.0% were planning to undertake their shopping at Morrisons, Flatt Walks in Whitehaven. 16.9% of those respondents stated that they would undertake their food shop at Heron Foods on King Street, whilst 15.7% stated that they would visit the Tesco Superstore on Bransty Row for their food needs. Approximately 11.2% stated that they would conduct their food shop out of the centre of Whitehaven, at the Asda in Carlisle.

Table 2.3: Food Shopping Intentions

Centre	1st	2nd	3rd	4th
Workington	Iceland, Pow Street, Workington (20.3%)	Asda, Dunmail Park Shopping Centre, Workington (15.6%)	Aldi, Derwent Drive, Workington (14.1%)	Marks & Spencer, Pow Street, Workington (12.5%)
Whitehaven	Morrisons, Flatt Walks, Whitehaven (36.0%)	Heron Foods, King Street, Whitehaven (16.9%)	Tesco Superstore, Bransty Row, North Shore Road, Whitehaven (15.7%)	Asda , Carlisle (11.2%)

Source: Question 4 of the 2020 In-Street Survey

2.7 Of those surveyed in Workington, 44.0% were planning on doing non-food shopping during the week of the survey. The three most popular shops for undertaking non-food shopping were cited as Debenhams, Next and New Look, all within the Washington Square Shopping Centre. In joint fourth, Workington town centre and Marks and Spencer were both cited by 11.4% of respondents. A further 13.6% of respondents in Workington cited non-food shops at out-of-centre retail parks.

2.8 Of those surveyed in Whitehaven, 46.0% were planning to undertake non-food shopping during the week of the survey. Of those 46 respondents, almost half (47.9%) were planning to undertake a non-food shopping trip to Wilko, Lowther Street in Whitehaven. Following Wilko, the most popular shops for undertaking non-food shopping were cited as Superdrug, Poundland, Boots, B&M and Charity Shops.

2.9 Half of respondents in Workington intended to spend between 1 and 2 hours in Workington on the day of the survey. Only 7% were planning to spend more than 4 hours in the centre. Of the 79.0% of respondents who stated that they intended to spend up to 2 hours in the centre, 46.8% stated that nothing in particular would encourage them to stay in Workington for longer than 2 hours.

2.10 In Whitehaven, 48.0% of respondents planned to stay in the town centre for between two and four hours. 8.0% were planning to spend more than four hours in Whitehaven, and 31.0% stated that they intended to spend between 1 and 2 hours in the centre. In total, 56.0% of respondents stated that they intended to stay in Whitehaven for longer than 2 hours. Of the 44.0% who intended to stay in the centre for up to two hours, 86.4% stated that nothing in particular would encourage them to stay in Whitehaven for longer than two hours. 13.6% of this group cited various changes to car parking as measures that would encourage them to spend longer in the town centre.

Table 2.4: Factors that would encourage visitors to stay in the centres for longer than 2 hours

Centre	1st	2nd	3rd	4th
Workington	Nothing in Particular (46.8%)	Different or better shops or markets (21.5%)	Don't know (12.7%)	Weather (5.1%)
Whitehaven	Nothing in Particular (86.4%)	Good / Cheap Parking (6.8%)	Longer Car Parking (4.6%)	More or better car parking (2.3%)

Source: Question 8 of the 2020 In-Street Survey

Frequency of Visit

2.11 Over half of respondents (53.0%) visit Workington more than once a week, with a total of 75.0% of respondents visiting Workington at least once a week. Of the 25.0% of respondents who visit Workington less than once a week (i.e. every 2-4 weeks, monthly, or less often), 48.0% cited that they didn't know or that nothing in particular would cause them to visit more frequently.

2.12 63.0% of respondents visit Whitehaven more than once a week, and 79.0% of all respondents visit Whitehaven at least once a week. Of the 21.0% who visit Whitehaven less than once a week (i.e. every 2-4 weeks, monthly, or less often), 90.5% stated that nothing in particular would encourage them to visit more frequently. Of the remaining respondents, all others (9.5%) stated that the cleanliness of the town centre would encourage them to visit Whitehaven more frequently.

Table 2.5: Factors that would encourage respondents to visit the centres more frequently.

Centre	1st	2nd	3rd	4th
Workington	Nothing in Particular (32.0%)	Different or better shops or markets (24.0%)	Don't know (16.0%)	Good / cheap car parking (8.0%)
Whitehaven	Nothing in Particular (90.48%)	Cleanliness of the town centre (9.52%)	-	-

Source: Question 10 of the 2020 In-Street Survey

Travel and Car Parking

2.13 More than half (52.0%) of respondents travelled by private vehicle to Workington. 26.0% of respondents walked into Workington, whilst 22.0% took the bus to Workington. None of the respondents travelled into Workington via train or bicycle.

2.14 Of the 52.0% who travelled by car/van to Workington, 34.0% parked in the Parksafe Multi-Storey Car Park and 21.0% parked on-street. Approximately 30.0% of such respondents were dropped off. 48.0% of respondents travelled by private vehicle to Whitehaven. 28.0% took public transport (bus or train) whilst 23.0% walked into the centre. Just 1.0% of respondents cycled into Whitehaven.

2.15 Of those who travelled by car/van into Whitehaven, 18.8% parked in the Morrisons car park, whilst 10.42% of respondents used car parking at the Harbour. 10.4% of these respondents parked on-street.

Likes and Dislikes regarding the Centre

2.16 When asked what they liked about Workington, more than a third of respondents cited that the range of shops and markets was the aspect of Workington Town Centre that they liked most. Notably, none of the respondents stated that they liked that Workington was convenient to their place of work.

2.17 When asked what they liked about Whitehaven, 30.0% stated that they didn't like anything about Whitehaven, however 15.0% cited the range of shops as the main thing they like about the centre. 13.0% of respondents stated that they liked the harbour, whilst 5.0% stated that friendly people was the aspect of Whitehaven they liked the most.

Table 2.6: Top four likes regarding the Town Centres

Centre	1st	2nd	3rd	4th
Workington	Range of Shops or Markets (37.0%)	Compact (13.0%)	Convenient to Home (10.0%)	Nothing (7.0%)
Whitehaven	Nothing (30.0%)	Range of Shops of Markets (15.0%)	The harbour (13.0%	Friendly People (5.0%)

Source: Question 13 of the 2020 In-Street Survey

2.18 When asked what they disliked about the town centre, more than a third of respondents cited that they disliked nothing about Workington town centre. Empty shops and 'undesirable clientele' in Workington were both disliked by 12.0% of respondents.

2.19 When asked what they disliked about Whitehaven, more than one quarter of respondents stated that they disliked the appearance or character of the town centre. Empty Shops were disliked by 16.0% of respondents, whilst the cleanliness of the town centre was disliked by 14.0% of respondents.

Table 2.7: Top four dislikes regarding the Town Centres

Centre	1st	2nd	3rd	4th
Workington	Nothing (35.0%)	Empty Shops *and* Undesirable clientele (both 12.0%)	-	Difficult / expensive parking (7.0%)
Whitehaven	Appearance or character of the town centre (26.0%)	Empty Shops (16%)	Nothing (15%)	Cleanliness of the town centre (14.0%)

Source: Question 14 of the 2020 In-Street Survey

Suggested Improvements to the Centres

2.20 Respondents were asked for their views in terms of how each of the centres could be improved. Table 2.8 identifies that, in Workington, the most popular suggestion is the provision of different or better shops or markets. None of the respondents stated that they would like to see improved visitor accommodation or improved visitor information in Workington.

2.21 In Whitehaven, more than half of respondents (51.0%) stated that they would like different or better shops or markets to improve Whitehaven. Nearly half of respondents (48.0%) stated that improved quality or cleanliness of public space would be their favoured improvement measure.

Table 2.8: Suggested Improvements to Town Centres

Centre	1st	2nd	3rd	4th
Workington	Different or better shops or markets (32.0%)	Don't know (20.0%)	Nothing in Particular (10.0%)	Different or better leisure facilities *and* Different or better places to eat or drink (both 8.0%)
Whitehaven	Different or better shops or markets (51.0%)	Improved quality or cleanliness of public spaces (48.0%)	Different or better places to eat or drink (8.0%) *and* Nothing in Particular (8.0%)	-

Source: Question 15 of the 2020 In-Street Survey

2.22 Of the 32.0% who desire different or better shops or markets in Workington, 62.5% desire more shops selling clothing/footwear, whilst 18.0% suggested more or new independent shops and 15.65% suggested more or new national retailers. Of the 8.0% who suggested different or better places to eat and drink would improve Workington Town Centre, the majority (87.5%) suggested a better range of restaurants or cafes would be the main change they would like to see, as opposed to bars, pubs and nightclubs. Of the 8.0% who suggested different or better leisure facilities, the majority (87.5%) stated that they would like to see more or better entertainment for children and families. In addition:

- 60.0% of those who would like to see changes to service facilities want more/better public services (e.g. health centres and libraries);
- 60.0% of those who would like to see more or better parking suggest longer free parking; and

- 100% of those who would like to see improved quality or cleanliness of public spaces suggest cleaner streets or parks as their priority for improvement

2.23 Of the 51% who desire different or better shops or markets in Whitehaven, 47.1% would like more shops selling clothing / footwear. 31.4% would like more or new independent shops in Whitehaven and 54.9% seek better quality shops or markets.

2.24 Of those who stated that cleanliness of the town centre would improve Whitehaven, 100% of respondents stated that they would like to see cleaner streets or parks, whilst 12.0% stated that they would like to see less traffic or congestion in the centre. There are also a number of takeaway points:

- 100% of those who would like to see changes to the public transport or cycle facilities believe more frequent bus services would improve Whitehaven.
- Of those who would like to see different or better places to eat or drink in Whitehaven, 87.5% cited a better range of restaurants or cafes as their preferred improvement.
- Of those who would like to see changes to car parking, 80% would like cheaper car parking, whilst 20.0% would like more long stay car parking.
- Zero respondents stated that they would like to see improved visitor accommodation or improved visitor information in Whitehaven.

What do the town centres do better than other places?

2.25 Table 2.9 illustrates the top four aspects that respondents consider the town centres to perform best in. 38.0% of respondents considered that Workington's shopping offer is better than other towns, compared to just 6.0% of respondents from Whitehaven who believe the shopping offer is better than other towns.

Table 2.9: What do the town centres perform best in?

Centre	1st	2nd	3rd	4th
Workington	Shopping (38.0%)	Don't know (38.0%)	It's Compact (6.0%)	Events (5.0%)
Whitehaven	Don't know (49.0%)	Nothing (24.0%)	The harbour (9.0%)	Shopping (6.0%)

Source: Question 25 of the 2020 In-Street Survey

Conclusions

3.1 In-street surveys were undertaken in the centres of Workington and Whitehaven by NEMS in February 2020, in order to understand how each centre is used and identify those aspects of the centre that may benefit from improvement and change.

3.2 It is important to note that this Study was undertaken at a time pre-COVID-19 and all of the market research was carried out prior to the country being put on ‘lockdown’. As such, high streets across West Cumbria were fully operational and residents were undertaking ‘normal’ shopping trips.

3.3 The results of the in-street surveys are invaluable to formulating the future strategies for both Whitehaven and Workington town centres and pull together not only residents’ views but also those views of tourists visiting the two centres.

3.4 These findings will be used to inform the production of the West Cumbria Retail, Town Centre and Leisure Study.