



informed solutions

2021 BID Renewal Survey Report



Prepared for Cheryl Curr - Sidcup Partners Ltd BID Manager

June 2021



Contents

- Objectives
- Methodology and Response Rate
- Map of Survey Area
- Results and Findings
- Summary

Objectives

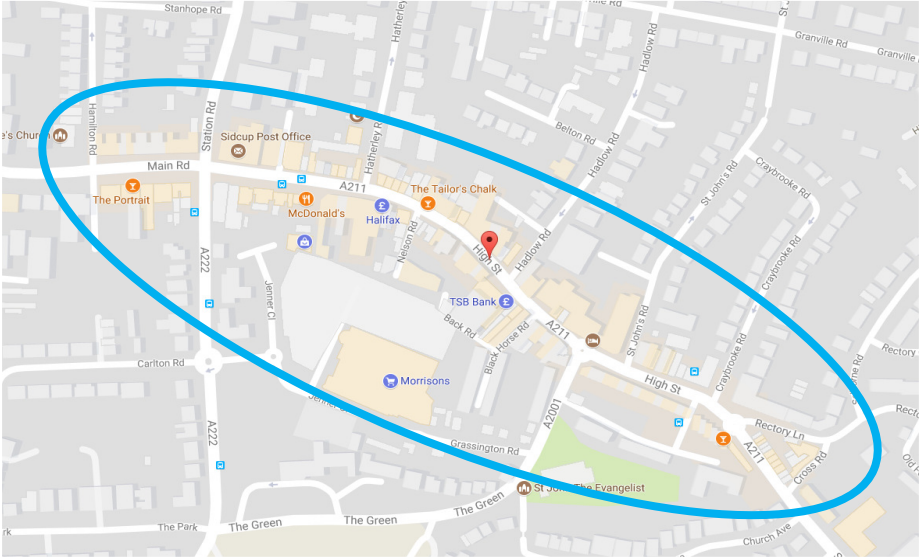
The key objectives of the study were:

- To provide input and direction for the Sidcup BID renewal business plan and continued consultation
- To conduct an independent survey of businesses located in the Sidcup BID area
- The aim of the study is to understand how the town is performing, to ascertain awareness of and satisfaction with Sidcup BID, to identify how the Sidcup BID is benefitting BID levy payers and to provide input for ongoing consultation and the future BID business plan
- The survey included questions on the Covid lockdown and subsequent re-opening period
- To provide comparison and ongoing monitoring to previous business surveys, wherever possible a comparison to previous surveys is included in the comments
- For the 2021 survey a number of questions have changed or been altered slightly. Wherever possible we have shown comparison to previous waves of business surveys

Methodology and Response Rate

- A bespoke questionnaire was developed for the Sidcup BID renewal survey, based on the previous annual survey questionnaires and amended to obtain feedback on historic performance and future requirements.
- Questions are included to explore a number of Covid related aspects
- Surveys were made available online with an excellent questionnaire format developed by Sirman & Lee
- Face to face, direct distribution method adopted when restrictions on trading lifted; surveys handed out directly to managers / owners and collected later the same day to 'open door' customer facing businesses
- Survey distribution completed over two days, 11 and 12 May 2021, across the BID area
- Individual confidentiality pledged; responses analysed collectively
- **The surveys achieved an excellent response rate with 90 completed surveys, a new record for participation**
- It is a particularly strong response given ongoing business closures and restricted opening hours
- In many instances respondents could provide more than one answer, therefore tables and graphs will not always total to 100; additionally respondents may not have answered every question

Map of Survey Area



High Street Area

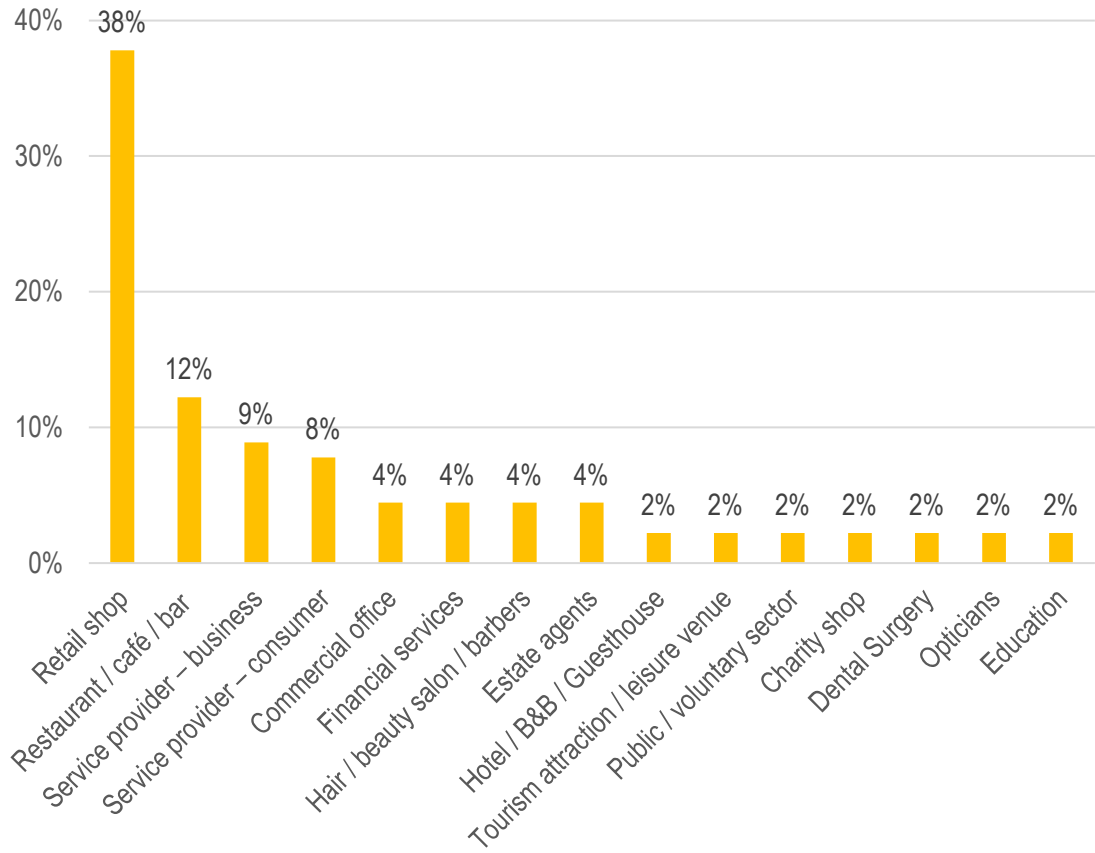


Station Area

Results and Findings

Survey Respondents

What type of business do you operate?



Businesses who responded to the survey predominantly describe themselves as retail shops

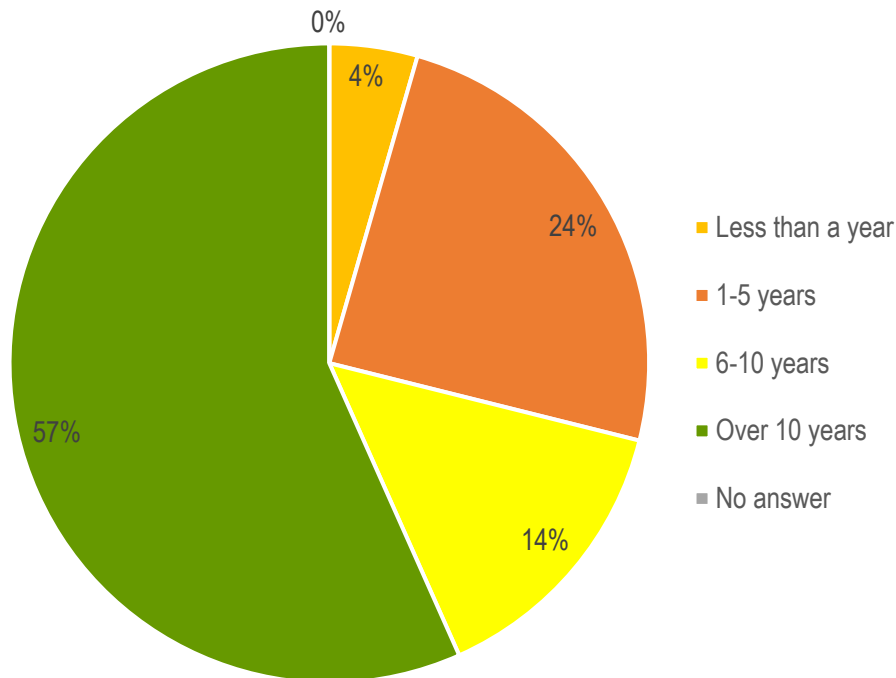
As with previous years the survey has participation from a wide variety of business types, reflecting the variety of offer in Sidcup

Hospitality respondents are slightly down in number (Covid related)

This demonstrates that Sidcup offers a broad cross section of businesses to its customer base

Length of Trading

How long has your business been trading in this location?



The largest number of businesses are longstanding businesses, 57% have traded in Sidcup for 10+ years

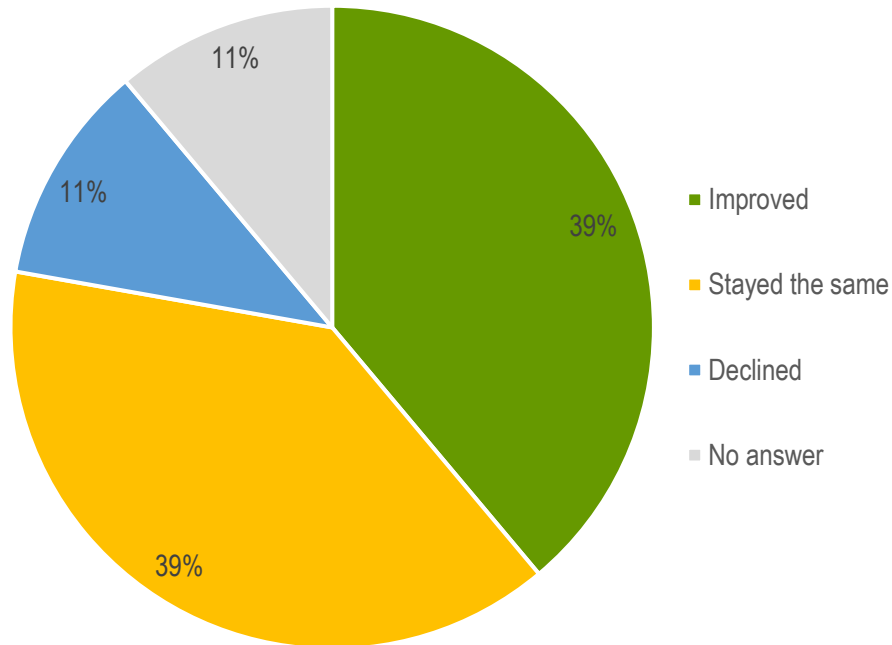
Good number of recent additions to the Sidcup offer with 28% having traded for 1-5 years and an additional 4% of businesses that have opened in the last year

Sidcup benefits from a longstanding base of businesses and a good selection of more recent arrivals

Consistent pattern to 2020. Very positive that businesses continue to choose to open in Sidcup, even during a pandemic

Five Year Improvement Assessment

Broadly how has Sidcup town centre changed as a place to do business OVER THE LAST 5 YEARS?



Clearly Sidcup has improved as a place to do business over the last 5 years

When many places are in decline almost 80% of businesses report that Sidcup has improved or 'stayed the same'

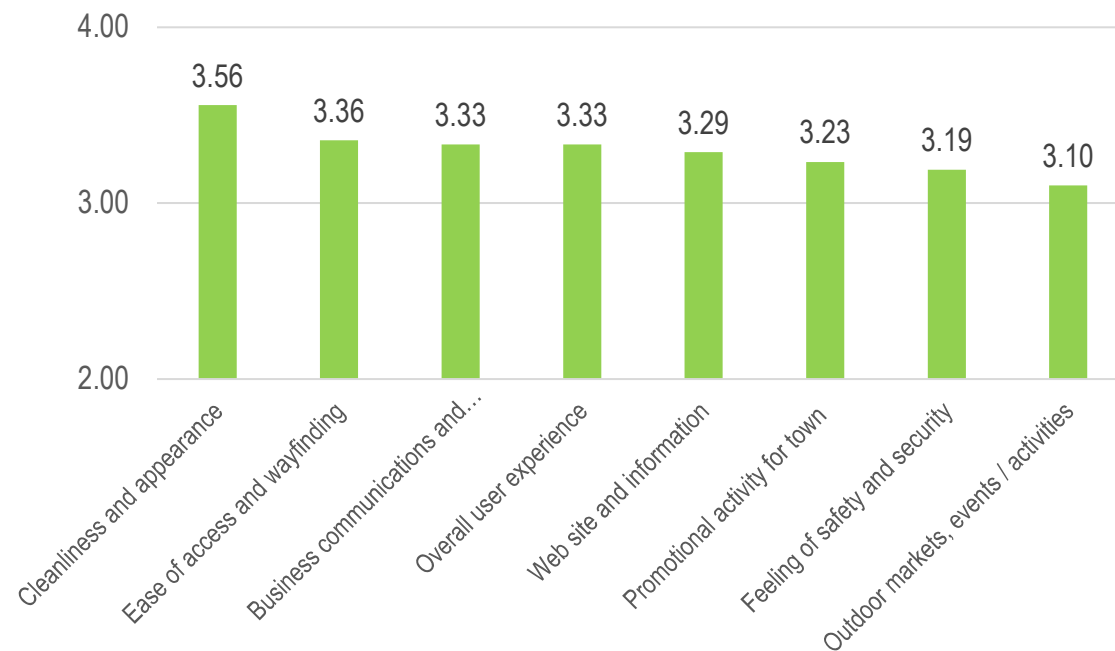
Only 11% believe it has declined

A 7:1 ratio of improve / stability to decline

A 7:2 ratio of improvement to decline

Long Term Change in Sidcup

Compared to 5 years ago, how would you rate the following aspects of Sidcup town centre? 1 = major decline, 2 = slight decline, 3 = no change, 4 = improved, 5 = major improvement



All aspects have scored above 3, meaning that broadly all aspects have shown improvement

Cleanliness and appearance is the most improved aspect

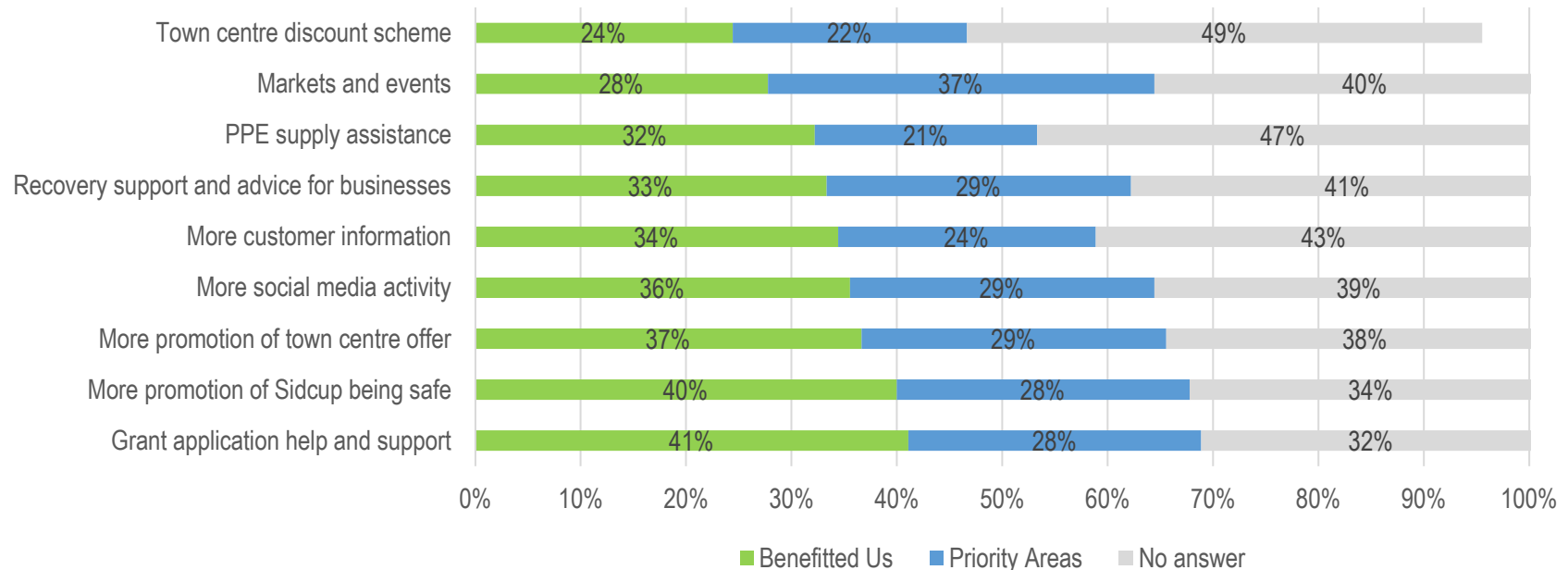
Ease of access, business communications, user experience have all shown good improvement

Feeling of safety, security and outdoor events / markets have improved, at lower levels to other areas

Good performance, more to be done

Covid Recovery Benefit

Which of the BID's Covid recovery activity has benefitted your business and what are the ongoing short term priority areas for further support?

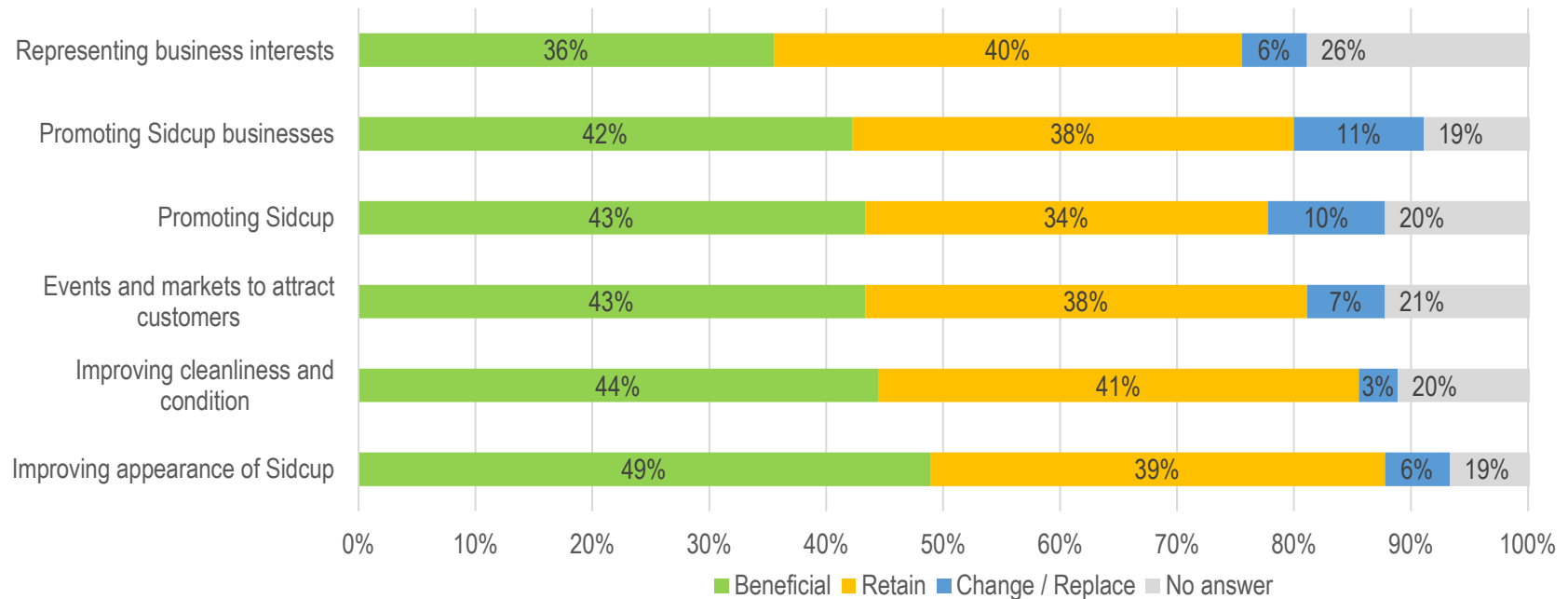


Three ways to consider this graph

1. Over a third of businesses have benefitted from 6 of the 9 initiatives
2. Only one aspect is a clear priority for over a third of businesses, markets and events
3. The high number of 'no answers' imply that some initiatives (PPE, Discount scheme, customer information) are not important. The town centre discount scheme is only aspect to have overall higher 'no answer'

Historic Sidcup BID Priorities

Which of the following Sidcup Partners BID priorities have benefitted your business? Which should be retained or changed / replaced



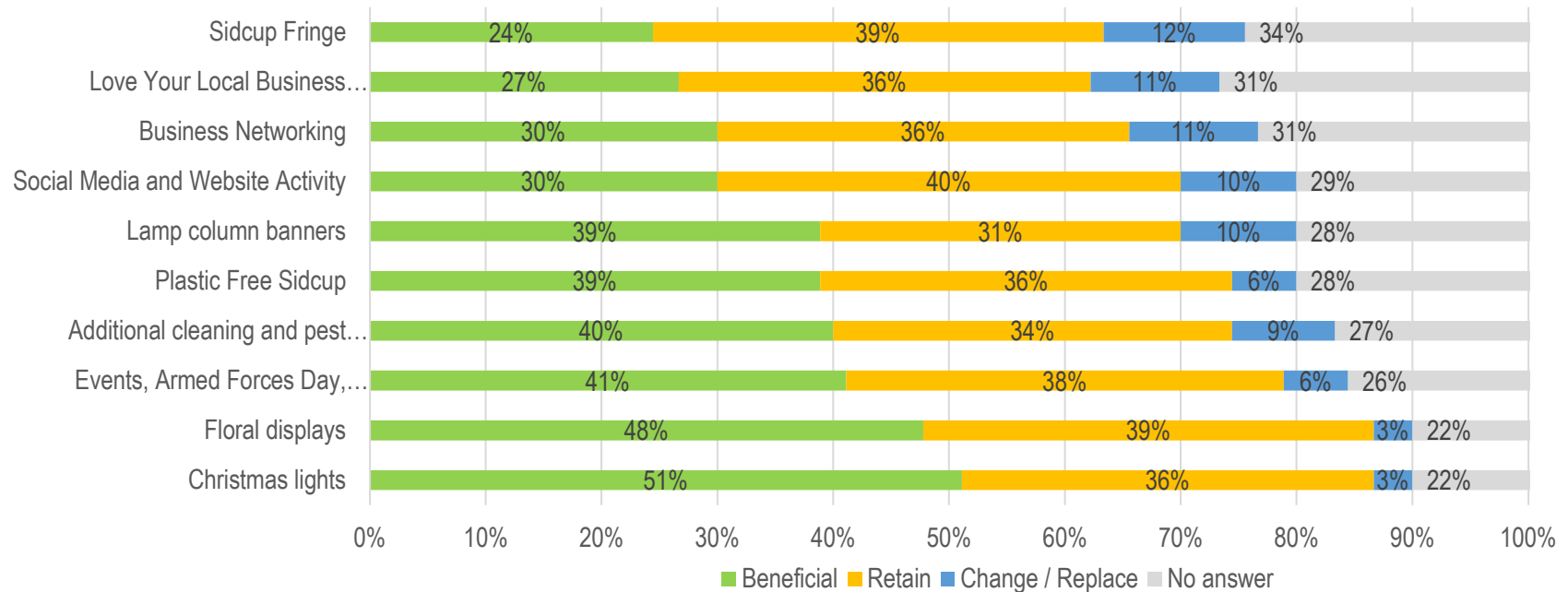
All the existing BID priorities are viewed as beneficial and should be retained, achieving 80% and above benefit / retain

Promoting Sidcup and its Businesses needs further adaptation

Improving the appearance of Sidcup achieves almost 90% benefit / retention

Sidcup BID Services and Their Benefit for Town Centre

Which of the following Sidcup Partners BID core services have benefitted Sidcup Town Centre? Which should be retained or changed / replaced?

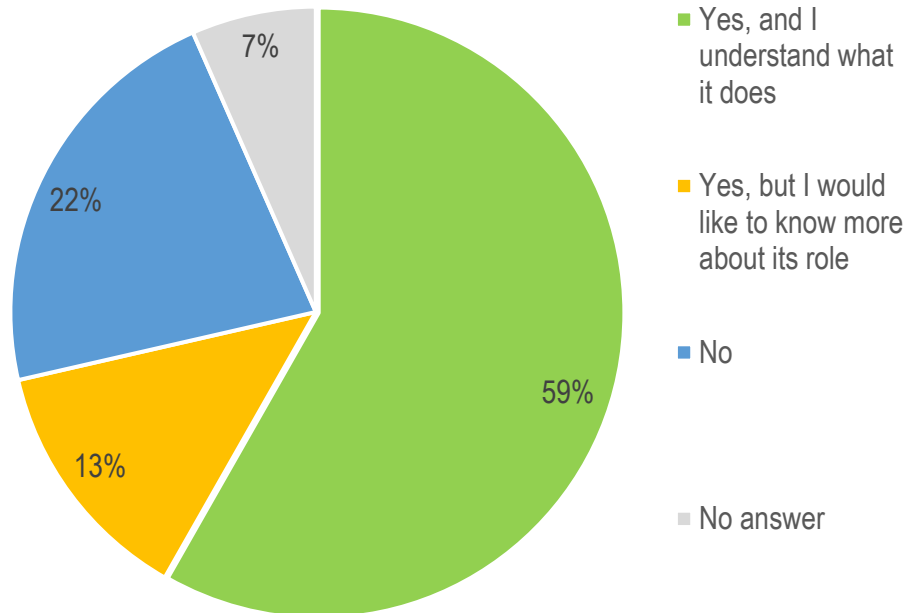


Seven initiatives achieve 70% and above for benefit / retain; Christmas lights, floral displays, Events, Cleaning, Plastic Free Sidcup, lamp column and social media

Sidcup Fringe, Love your Local Business and business networking are aspects that seem to provide least benefit and need adapting / changing

Sidcup Partners BID Awareness

Are you aware of Sidcup Partners BID as an organisation?



Awareness of the BID is high, and continues to be so

Circa three quarters (72%) are aware of it and well over half understand what it does

There is also the opportunity for further clarification and promotion; 22% are not aware of it (down from 29% in 2019 and 24% in 2020)

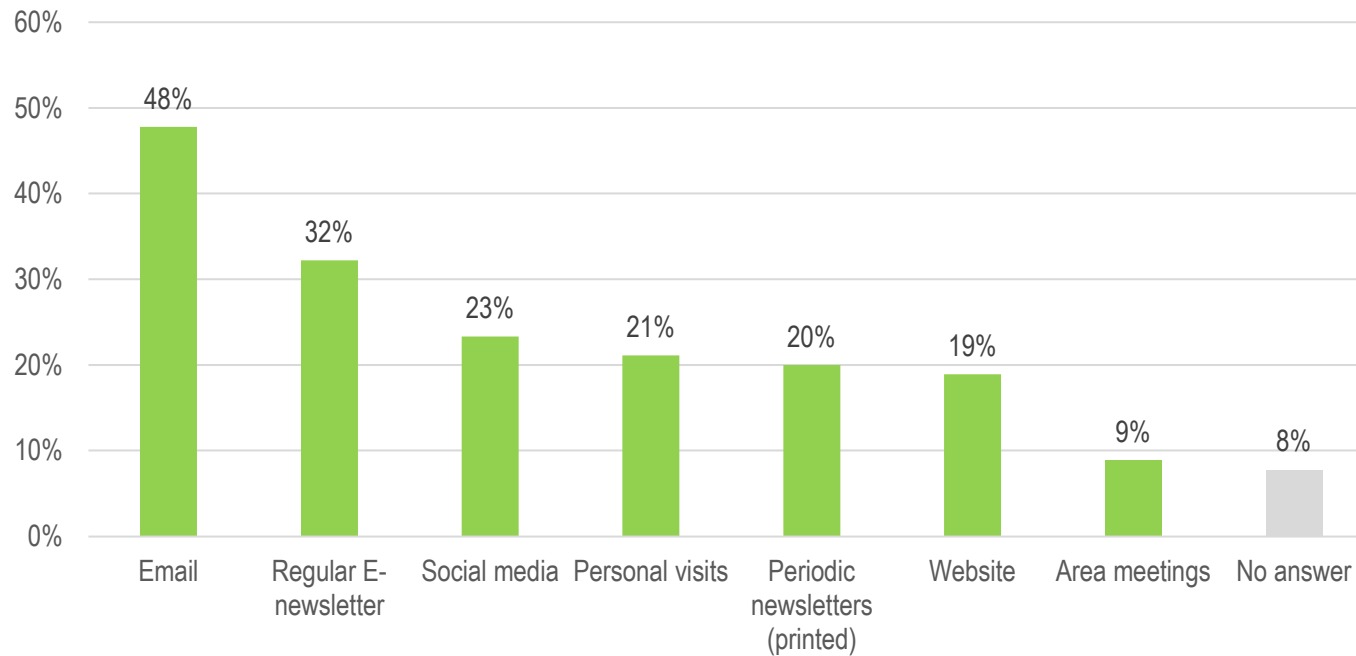
13% of businesses indicated that they would like to know more about its role

Similar to 2020, 2019 and 2018, with ongoing improvement.

A positive result, in the right direction

Sidcup Partners BID contd.

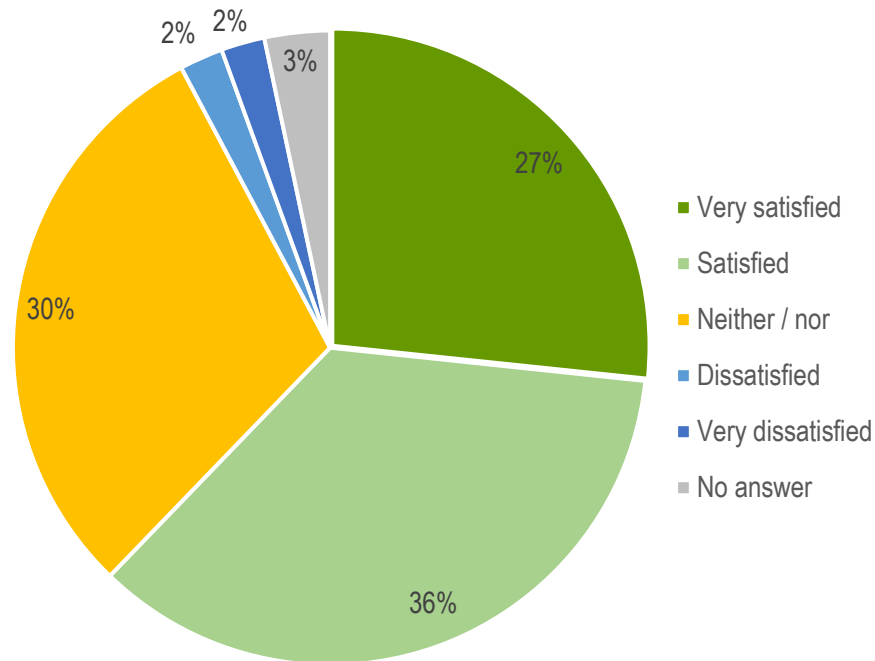
How would you like to hear from the Sidcup Partners BID team?



**Email, regular e-bulletins and social media are the most preferred communication medium
Personal visits and hard copy newsletters have dropped from a previous preferred method, this may be Covid influenced**

BID Satisfaction

How satisfied are you with the overall performance of the Sidcup Partners BID?



Satisfaction with BID performance, is significantly up on 2020, and 2019, which was also significantly up on 2018

63% are satisfied (2020 was 52%, 2019 was 43%, 2018 was 28%)

Only 4% businesses dissatisfied (lower than 2020 & 2019)

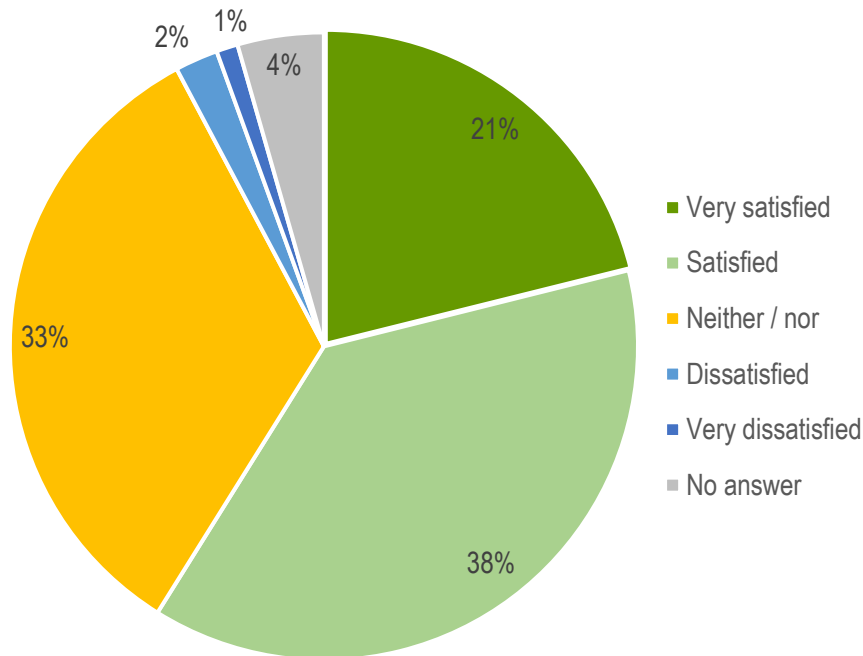
A circa 15:1 positive ratio, up on 2020, 2019 & 2018

Circa 30% have no view either way which is lower than 2020

A very strong satisfaction rating for the BID, with a long term positive trend

Satisfaction with BID Recovery Support

How satisfied are you with Sidcup BID Covid recovery support?



Satisfaction with BID Recovery Support is good with 59% of businesses being satisfied

33% are 'on the fence' in terms of satisfaction. Which given the needs of businesses is acceptable

Only 3% are dissatisfied

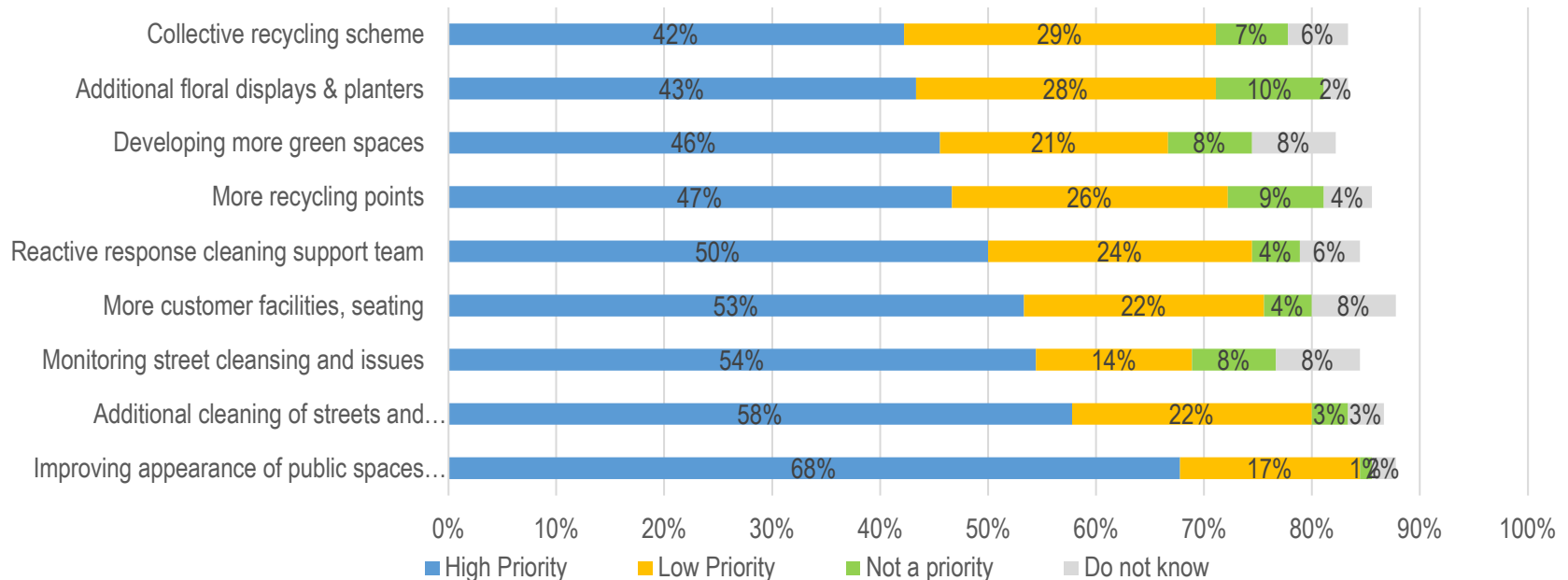
A circa 20:1 positive ratio

This is an improvement on 2020.

Still a third that need different support, may be worth exploring what that is? It wont be simple!

Future BID Projects and Services

CLEANER & GREENER. Thinking of the next five years (and post Covid) what priority should be given to the following proposed Sidcup BID initiatives?

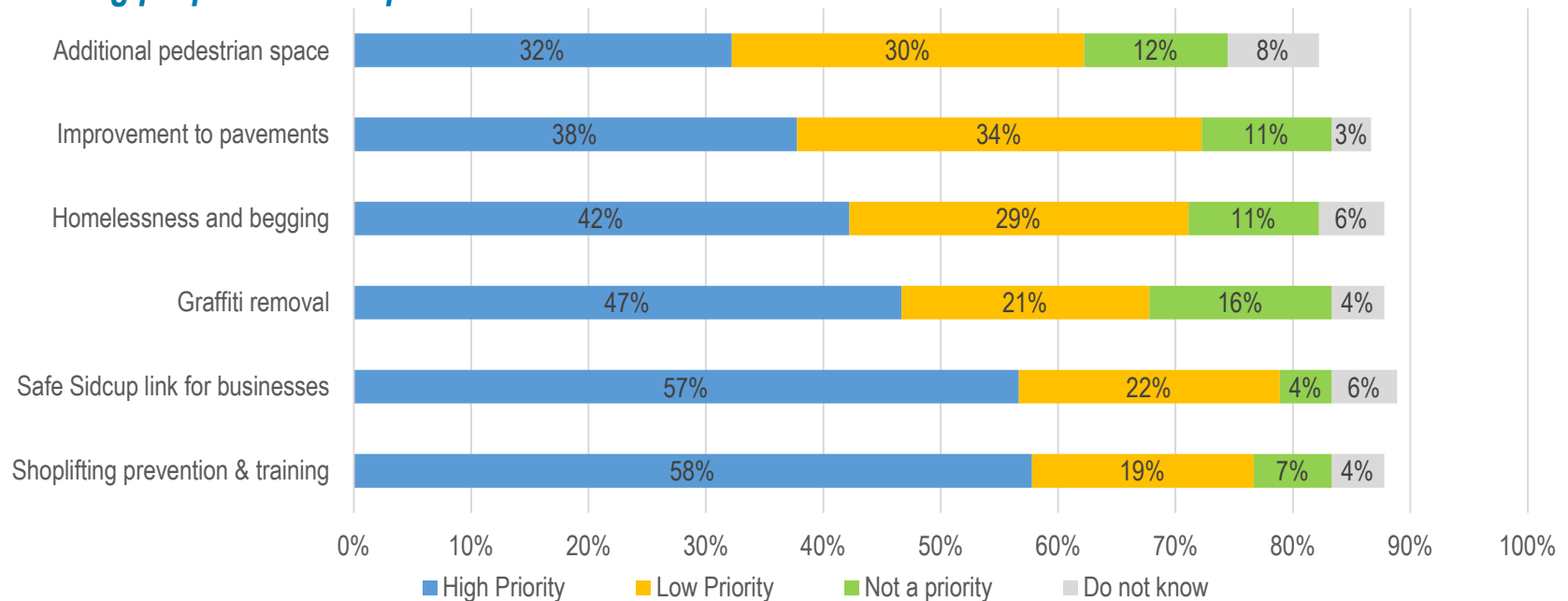


Five initiatives are a high priority for 50% or more businesses; Appearance, Cleaning (three times), Customer facilities

Collective recycling, additional floral displays, greening and recycling are clearly less of a priority for many businesses, however they still remain a combined high / low priority for over 70%

Future BID Projects and Services

SAFE & SECURE. Thinking of the next five years (and post Covid) what priority should be given to the following proposed Sidcup BID initiatives?



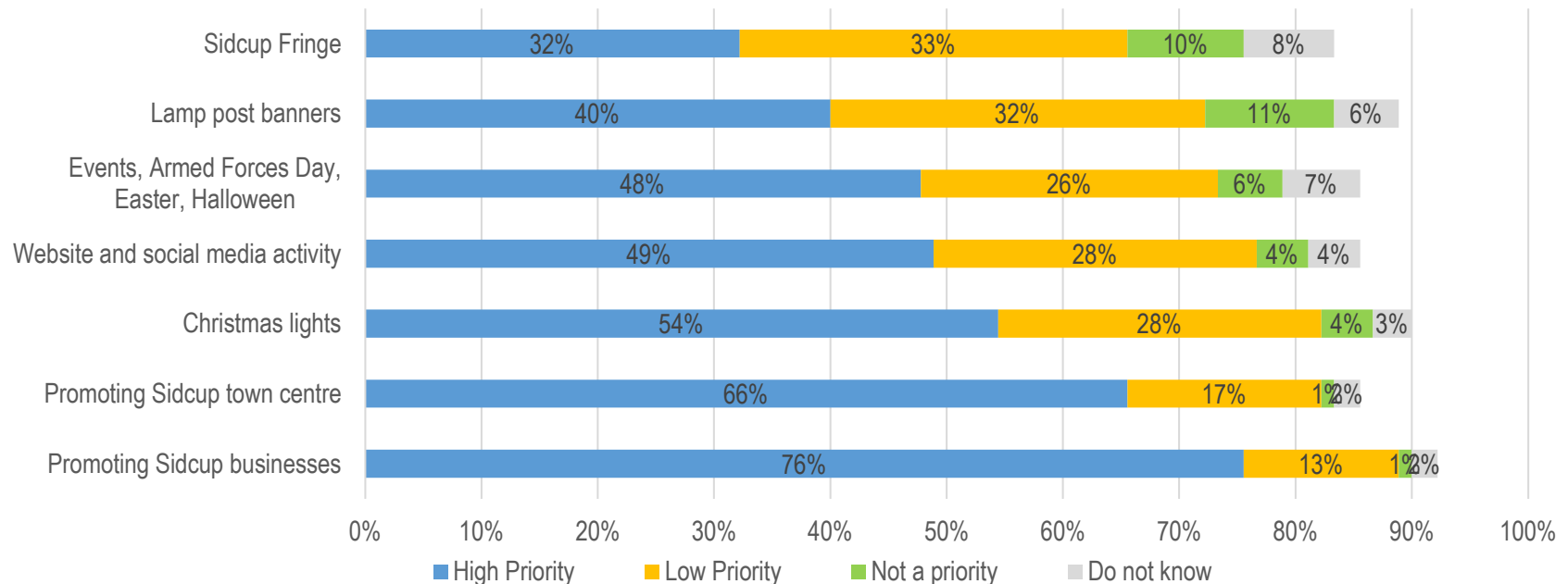
Safe Sidcup and shoplifting prevention are high priorities for almost 60% of businesses (and high / low priority for almost 80%)

Graffiti removal has the largest 'not a priority' score of 16%

Improving pavements is a significant 'low priority'. Providing additional pedestrian space is the least priority

Future BID Projects and Services

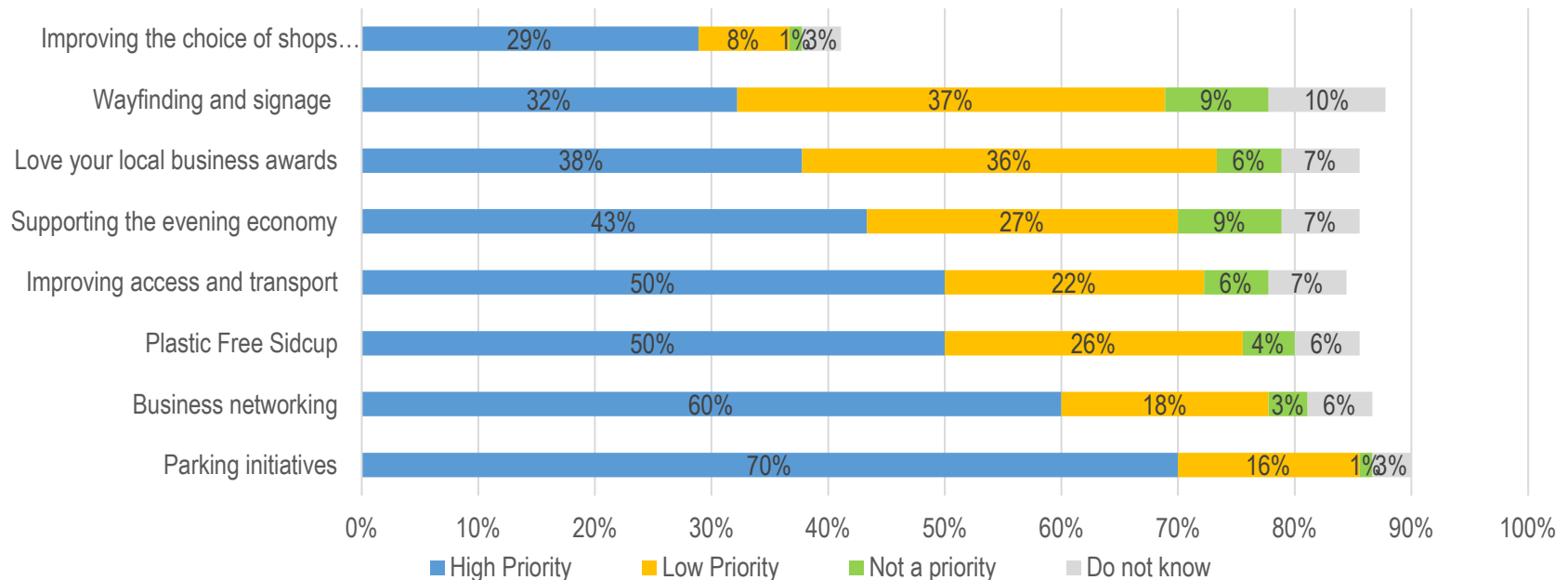
PROMOTIONS & ACTIVITY. Thinking of the next five years (and post Covid) what priority should be given to the following proposed Sidcup BID initiatives?



Promotion of Sidcup businesses and of the town are the clear 'high priorities' for most businesses
Christmas Lights, Web and social media, along with Events are key initiatives to continue
Sidcup Fringe is possibly the lowest priority, with a 35% no response, to not a priority score

Future BID Projects and Services

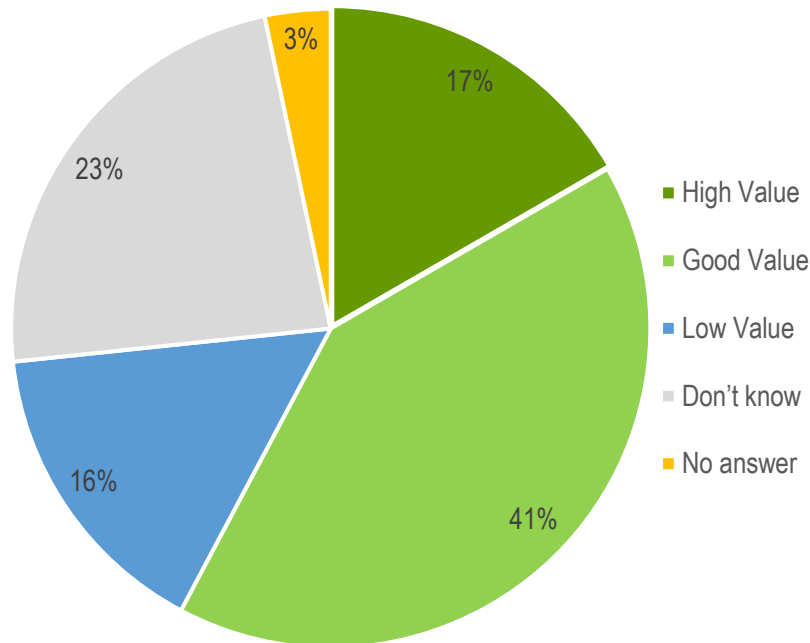
SUPPORTING SIDCUP BUSINESSES. Thinking of the next five years (and post Covid) what priority should be given to the following proposed Sidcup BID initiatives?



Unsurprisingly parking initiatives are the highest priority, with a combined high / low score of over 85%
Business networking, Plastic Free Sidcup and improved access / transport are also high priorities
Wayfinding signage and love your local business are low priorities
Improving choice is not a priority, possibly existing businesses are not keen on adding competition

BID Value

Looking back over the support provided during the last five years what value does Sidcup Partners BID provide you for your BID levy contribution?



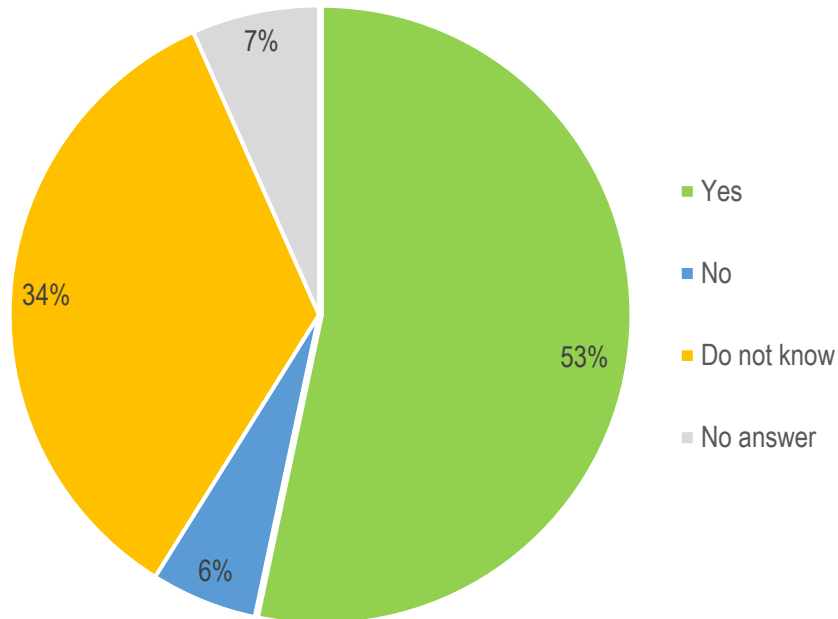
The BID is viewed as providing value by 74% of businesses, which is a very positive response, and circa 18% points up on 2020

Circa a quarter still do not know whether the BID provides any form of value, similar to 2019

This is a significant improvement on 2020 and remains an area to further improve in the build up to a ballot

Current Voting Intention

If you were voting tomorrow to retain Sidcup Partners BID to manage, deliver, implement all the above; and promote the town centre, how would you vote?



53% of businesses indicate that they would vote 'YES'

Only 6% would vote 'NO'

34% are undecided

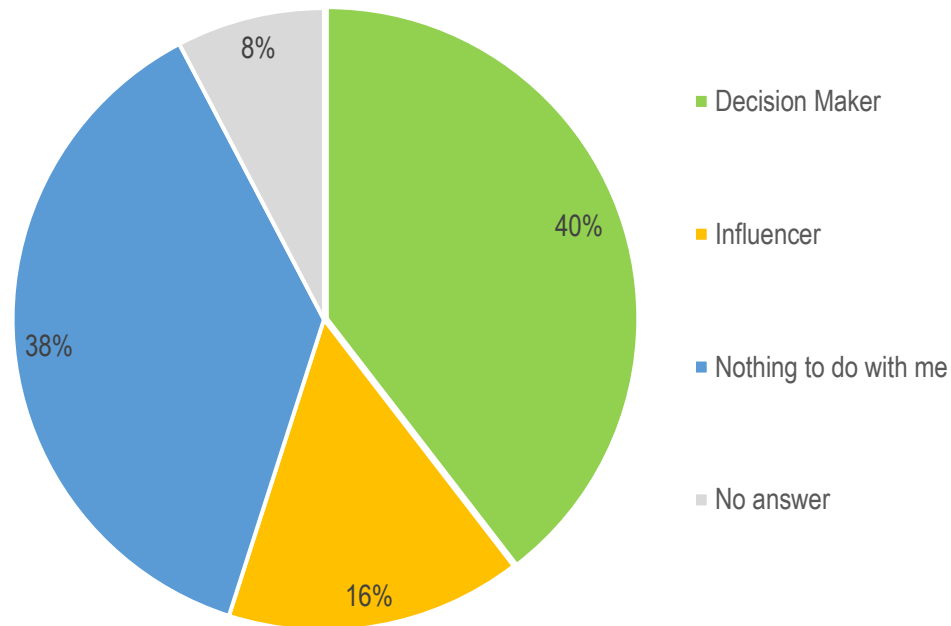
A good place to be at this stage.

Need to help the 34% choose to make a YES vote

And keep the 53% on side.

Are You the Decision Maker?

In voting to retain Sidcup Partners BID are you the decision maker or do you influence the decision, or is it nothing to do with you?



40% of businesses are operated by the decision maker

16% describe themselves as an influencer

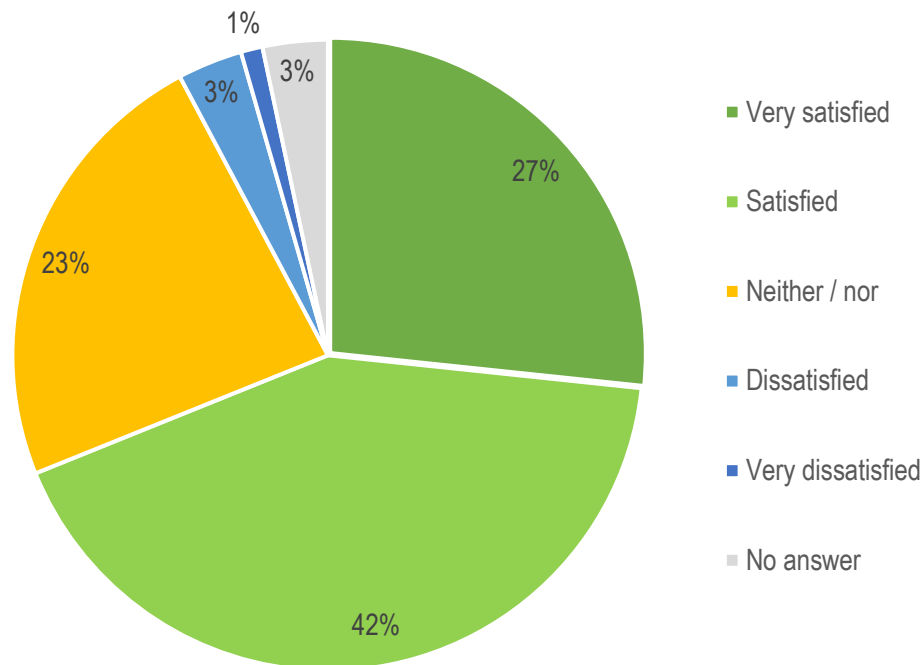
38% clearly have no or a limited say, this will most likely be national multiple businesses

The business details for each category are available

Only 4 businesses provided alternative contact details for voter decision maker

Long Term Satisfaction with Sidcup Town Centre

How satisfied are you about the long-term success of Sidcup town centre as a place to operate in?



69% of businesses are satisfied with the long-term success of Sidcup Town Centre

Only 4% are dissatisfied

A 17:1 satisfaction ratio

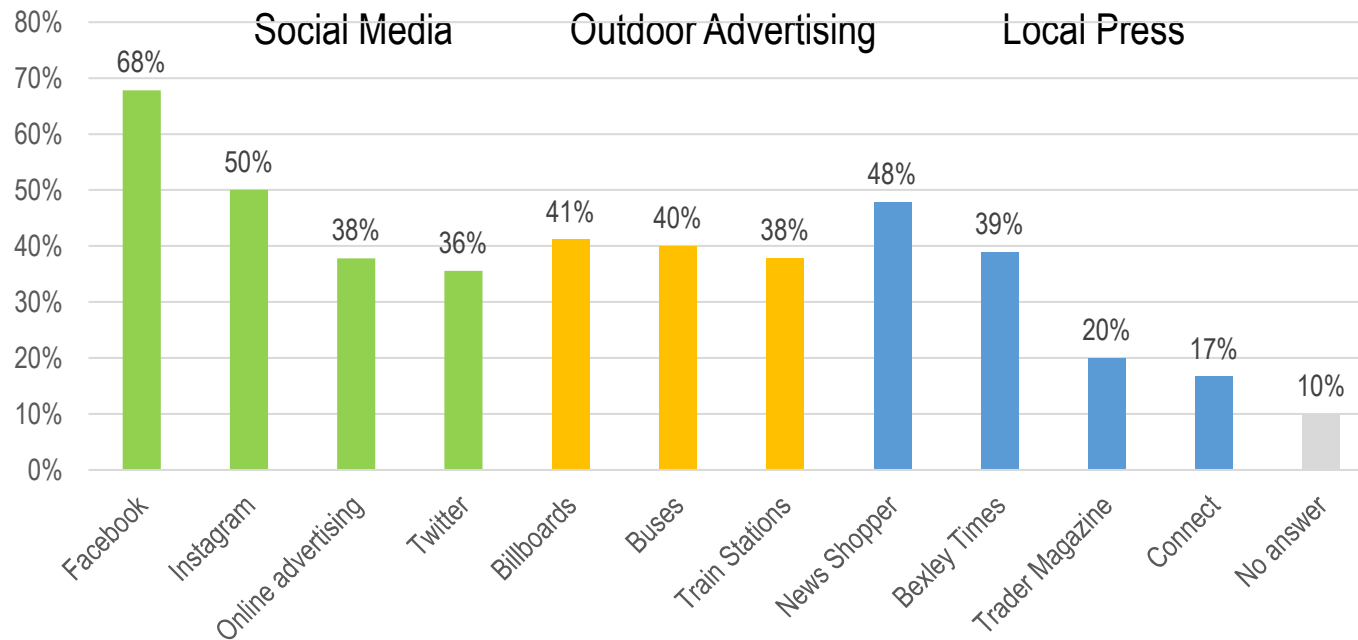
A quarter of businesses are undecided

Sidcup remains a good place to operate in

A key selling point in terms of securing new businesses

Preferred Marketing Channels

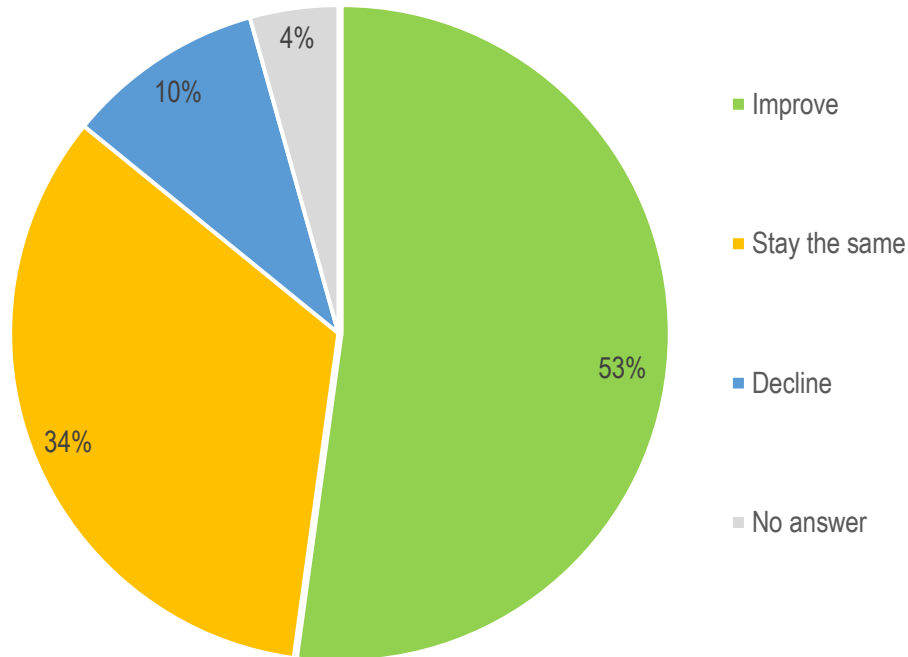
What marketing channels would you like Sidcup Partners BID to use to promote the town centre?



More marketing is the cry from Sidcup businesses
As per 2020 and 2019, very similar pattern to all responses

Future Performance Expectations

Over the next 12 months do you think business performance in the town centre will?



More businesses expect performance to improve than either decline or remain static

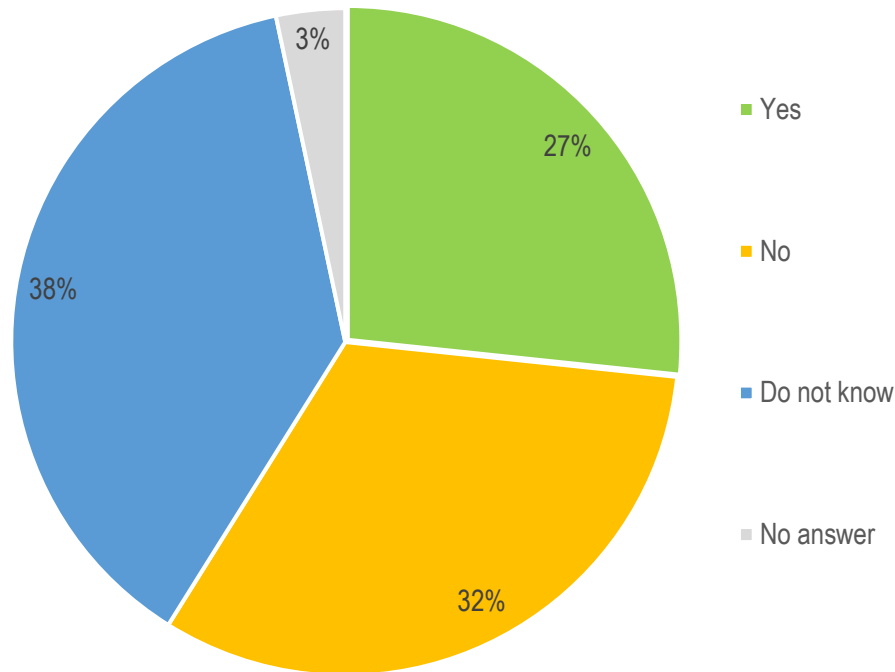
The ratio of improve to decline is over 5:1

This is a further improvement over 2020 and 2019

A reflection of the expectations of businesses emerging from lockdown and Covid restrictions

BID Renewal Workshop Attendance

Would you be interested in attending a Sidcup Partners BID renewal virtual workshop to discuss priorities emerging from the survey?



A quarter of businesses are interested in attending a BID renewal workshop

A third are not

38% are not sure

A BID renewal workshop, or a series of them, focussed on sectors would benefit the engagement and business plan development

Summary

- The survey achieved an excellent response with 90 surveys completed, from the High Street and the Station areas
- Responses provided by a good cross-section of businesses from retail shops and service providers to F&B operators
- A mix of longstanding businesses having traded in the town centre for over 10 years, and over a quarter of businesses being less than five years 'old'
- Equal numbers of businesses consider Sidcup to have improved 39%, 'stayed the same 39% over the last five years. 11% think it has declined
- All facets of the town centre have improved, appearance and cleanliness most improved
- A mixed response on the Covid recovery support areas, benefiting many, ongoing priority for many and many not responding
- The historic BID priorities remain beneficial and important to majority of businesses
- As are the various BID services, although a few are less important
- Good awareness of the BID at 72%; although 22% are not aware of it
- Future contact via emails, e-news and social media preferred, plus personal visits
- Satisfaction with BID performance is good 63%, only 4% not satisfied and 30% are 'on the fence'
- The BID recovery support has good satisfaction ratings, 59% satisfied, only 3% dissatisfied, 33% unsure

Summary contd.

- Future BID Projects
 - Cleaner & Greener; there are five clear priority aspects
 - Safe & Secure; there are two clear priority aspects
 - Promotions & Activity; there are five clear priority aspects
 - Supporting Sidcup Businesses; there are four clear priority aspects
- 74% of businesses believe the BID provides value, 58% either good or high value. A quarter 'don't know'
- Current voting intentions are positive with 53% saying YES, only 6% NO. however 36% are undecided
- 40% of businesses have the decision maker on site, 38% do not and 16% are influencers
- Long term satisfaction with Sidcup is very good, 69% satisfied, only 4% dissatisfied
- Businesses would like more marketing, using both social media and physical marketing channels
- The outlook for Sidcup is positive for 53% of businesses, static for 34% and declining for 10%
- A quarter of businesses are interested in attending a BID renewal workshop, a third are not, 38% are not sure
- In response to an open question for any other actions or initiatives the BID should consider, 73% gave no response, only six aspects achieved more than one mention, these include parking related aspects, more cleaning and promotion. Including for non-core areas

Key Statistics at a Glance: 2021 Vs. 2020, 2019 and 2018

Topics	Measurement	2018	2019	2020	2021	2021 Comment
Completed questionnaires		80	81	74	90	Continued excellent response rate, despite post Covid re-opening
BID Awareness (%)	Yes / No	66% / 30%	73% / 29%	71% / 24%	72% / 22%	Great awareness, 13% would like to know more
BID Satisfaction (%)	Satisfied / DN / Dissatisfied	22% / 58% / 8%	43% / 38% / 9%	52% / 38% / 6%	63% / 30% / 4%	Increased satisfaction, fewer dissatisfied
Satisfaction with Sidcup Town Centre (%)	Satisfied / DN / Dissatisfied	64% / 30% / 6%	64% / 23% / 9%	74% / 11% / 7%	69% / 23% / 4%	Amended question to cover long-term 5 year satisfaction
Sidcup BID Value (%)	Value / Don't know / No Answer	41% / 46% / 13%	48% / 33% / 20%	56% / 35% / 8%	74% / 23% / 3%	Continued increased perception of value provision. Note amended question for long-term 5 year perception
Year on year trading performance	Level / Up / Down	52% / 30%	50% / 25%	50% / 9% / 35%	Not asked	
Customer Numbers	More / Same / Fewer	23% / 41% / 24%	29% / 33% / 26%	N/A	Not asked	
Business performance (next 12 months)	Improve / Stable / Decline	30% / 54% / 14%	34% / 50% / 13%	35% / 28% / 23%	53% / 34% / 10%	Positive outlook, given Covid recovery impact

The Retail Group Informed Solutions

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Appendix: List of Respondents (subject to local spelling check)

Access Garage Doors	Collett Opticians	Indian Rose	Rose Bruford College	Toscana Restaurant
Acorn Estate Agents	Comet Dry Cleaning	Jade Nails	Rose Bruford College of Theatre and Performance	Travel Lodge
Anthony's Barbers	Costa Coffee	Just Therapy	Santander	Tulip Restaurant
Beautiful Nails	Cutting Company	Kallers Estate Agents	Sidcup Auction Rooms	Vape Express UK
Belvoir	Diamond Shutters	McDonalds	Sidcup Dental Spa	Village Estates
Bet Fred	Drewery	Mer Barbers	Sidcup Newsbox	Waitrose
Better Staff Recruitment	Euronics	MET Police	Sirman and Lee	Windows + Door Glazing
BHF - Furniture	Finally Framed	Mind	Specsavers	Wright Eyewear
Birbeck Dentistry	Fish + Chips	Mizen	St Johns Pharmacy	Your Move
Boots Pharmacy	Francis Chapel + Sons	Mold + Russell	STA Group	Zone Hair Advisors
Braundton Recruitment	Future Step Education	Nailspa + Beauty	Stage Door	
British Heart Foundation	Gingers	Nationwide Building Society	STN Vapes	
British Red Cross	Ginny Tailors	Pizza Express	Swaffield Bros LTD	
Café Nuovo	Greggs	Porcelian Tiles	Tesco Express	
Calm Collective	H+T Pawnbrokers	Poundland	The Bed Post	
Card Factory	Hair by Catherine	Premier Inn	The Charity Shop	
Cedrus Lebanese Cuisine	Halifax	Prezzo	The Co-op	
Charlotte Raymond's Cupjoint	Holland + Barrett	Resknon	The Hair Movement	
Cheapsites	Hook and line	RG LAW	The Works	
Coast Bar + Grill	Ilda Femandes	Roadnight Pharmacy	Tile King	