



informed solutions

# Angel Town Centre: Business Survey 2018

Report presentation prepared for

**angel.london**

The Retail Group  
August 2018

OPEN

# Contents

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

# Objectives

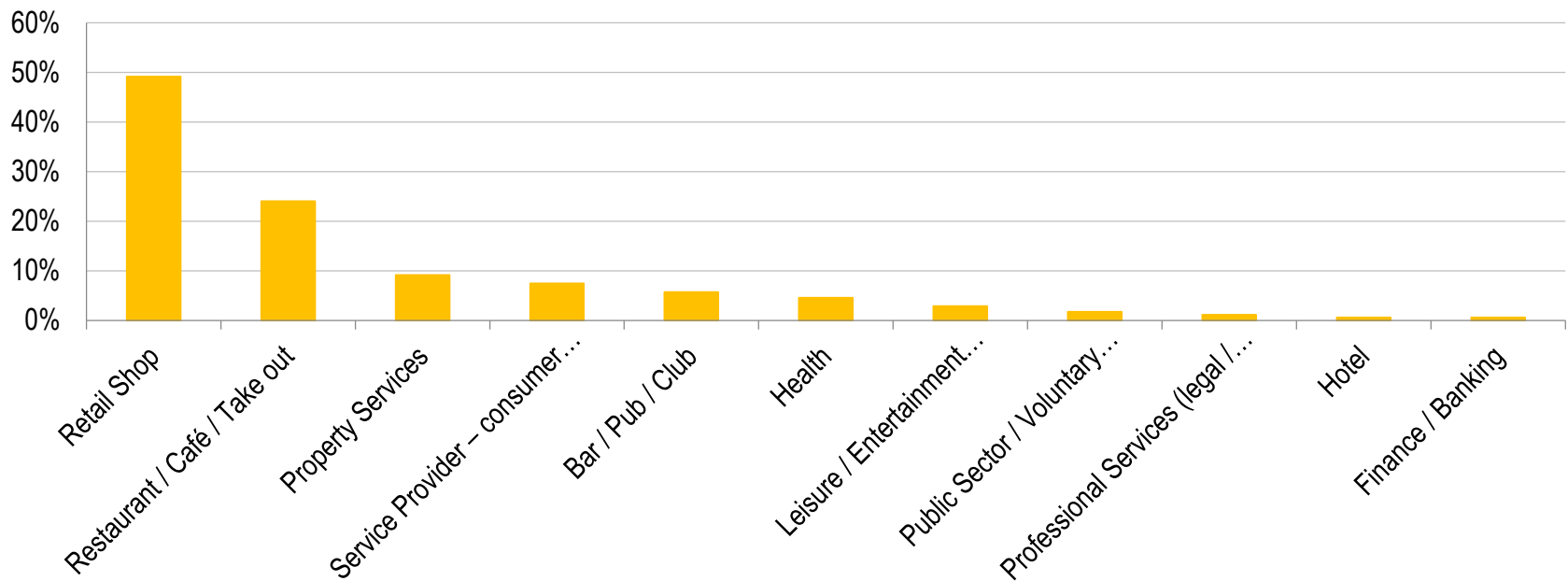
## **The key objectives of the study were:**

- To conduct an independent confidential survey of businesses in the Angel Town Centre area on behalf of angel.london
- To understand how the town centre is performing and to direct improvements for future growth and development of the Angel area, as well as to obtain views on how angel.london is viewed as performing
- To provide input and direction for ongoing angel.london initiatives and actions
- To provide comparison and ongoing monitoring to previous business surveys

# Methodology and Response Rate

- Bespoke questionnaire developed for Angel retail and business operators
- Face to face, direct distribution method adopted; surveys handed out direct to managers / owners and collected later the same day
- Individual confidentiality is pledged and responses are analysed collectively
- Surveys were issued between Monday 30 July and Thursday 2 August 2018
- In addition to the direct distribution, major businesses were emailed directly, as were angel.london BID Board Directors to ensure all had the opportunity to participate in the survey
- The surveys achieved an excellent response rate with 175 completed surveys. (This is an increase over 2017, which is significantly up on the previous survey response of 97)
- A number of questions allow for a multi-response and therefore tables and graphs may not always total 100%
- A previous survey was completed by The Retail Group in 2017 and where relevant we have been able to make comparisons to this research

# Survey Sample



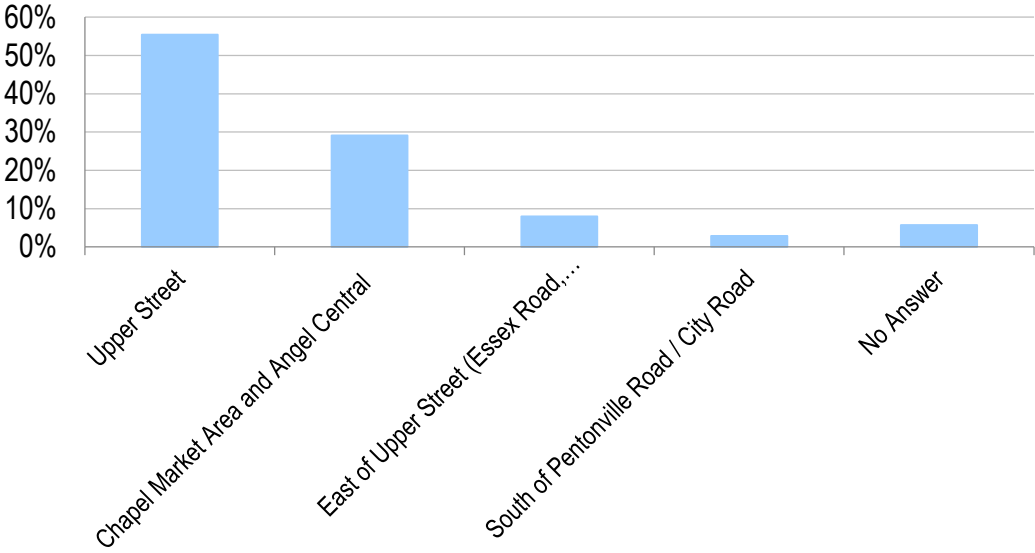
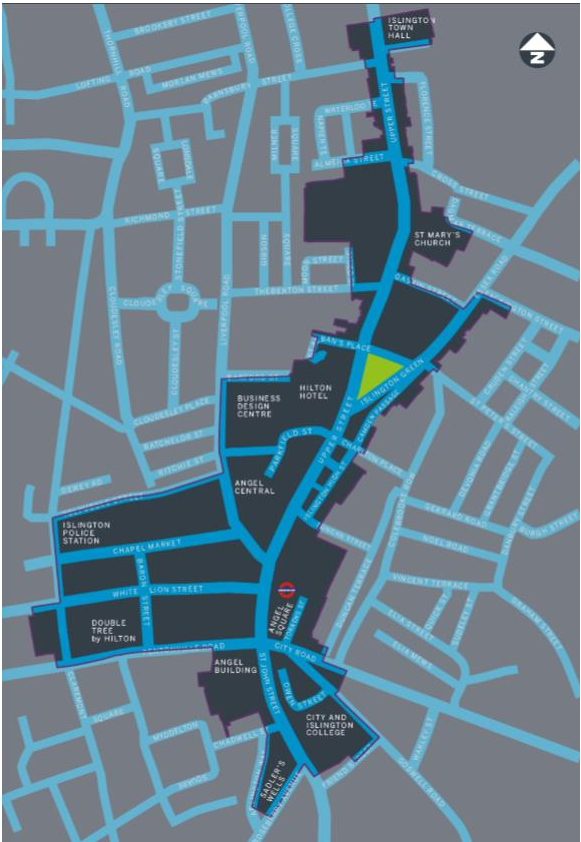
The survey achieved a good spread of responses from a variety of business types

Retail and F&B categories dominate, in line with the mix of customer facing businesses in the area

The response mix is the same as the previous survey, providing a robust comparison set

\* Survey respondents by type of business; a full list of respondents is included as an appendix

# Map of Research Area



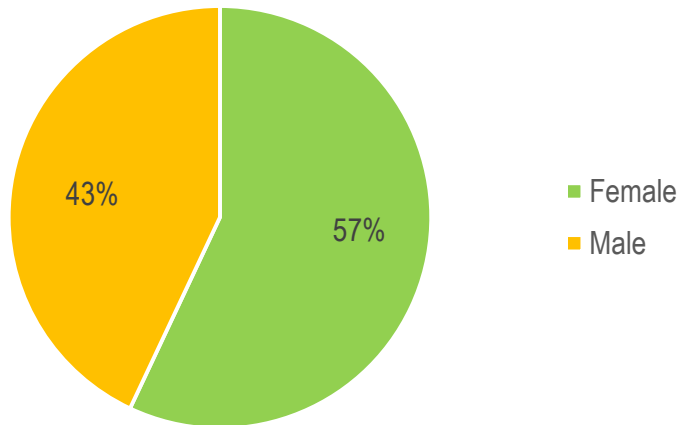
The survey distribution covered the new wider BID area  
 The respondents reflect the distribution of businesses (self located responses)

# Results and Findings

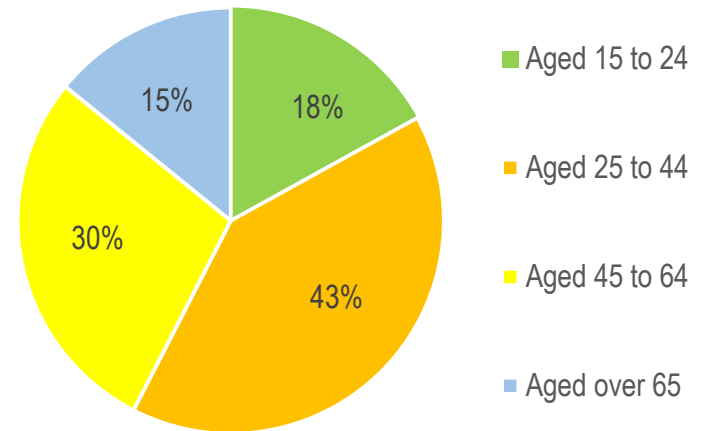
# Typical Customers

*Can you describe your typical customers; approximately what proportion are?*

**Gender**



**Age Profile**



Slight bias towards female shoppers

High proportions of 25-44 year olds

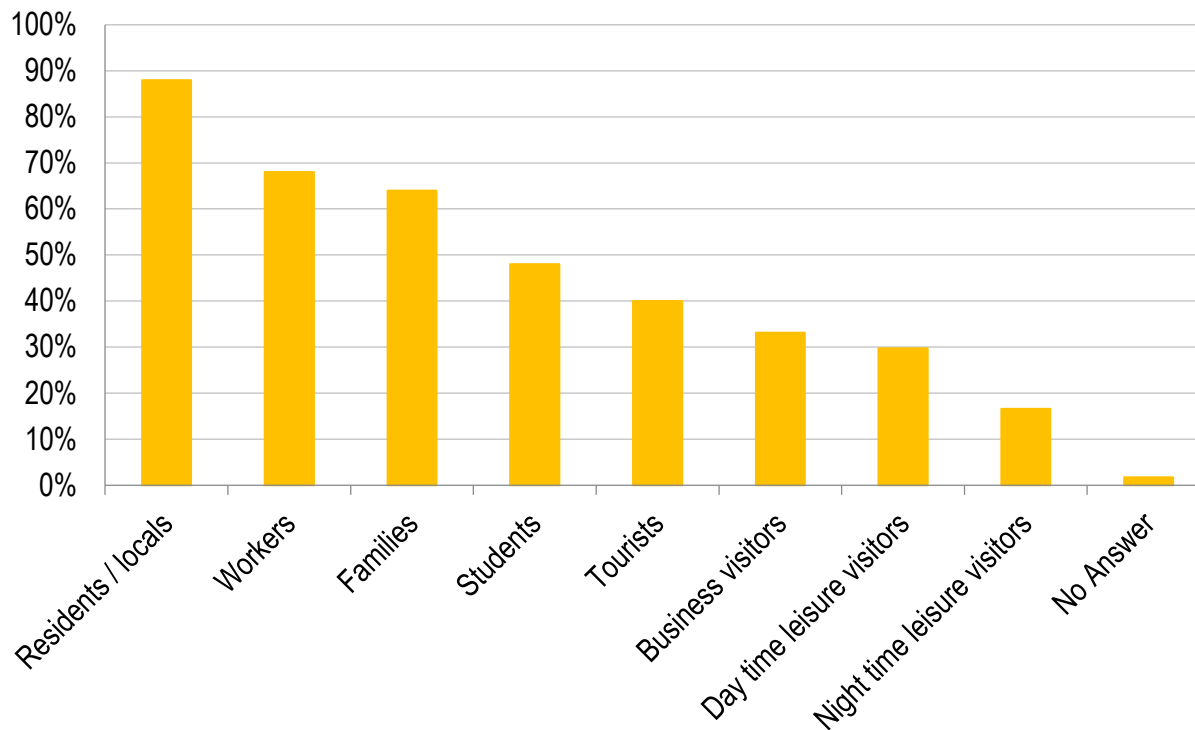
Majority of customers are in key working ages

Mirrors the profile identified in both 2015 and 2018, a very clear and consistent customer understanding



# Typical Customers contd.

Which of the following best describes your customers? (multi-response)



Angel customer groups are dominated by local residents, workers and families

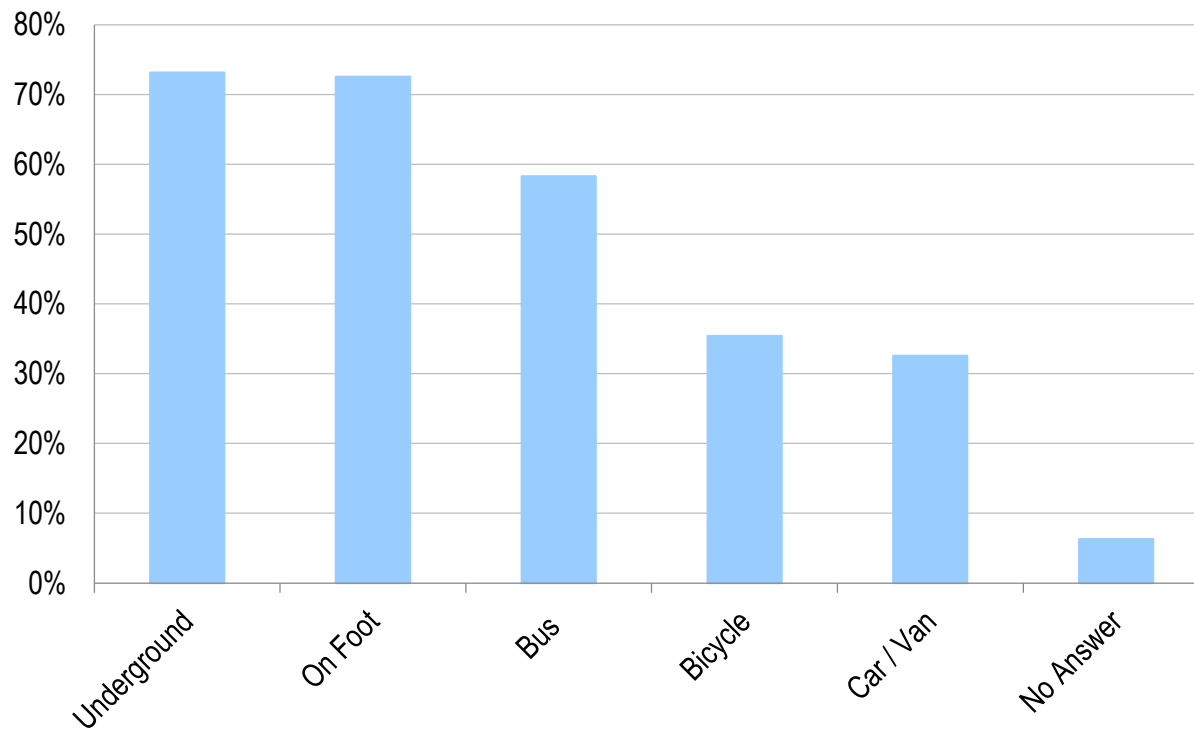
Students and tourists make up a secondary group

The top 5 groups are similar to last year and mostly at similar levels

However both tourists and leisure day visitors achieved higher ratings (49% and 42%) last year

# Mode of Transport

*How do your customers usually travel to Angel? (multi-response)*



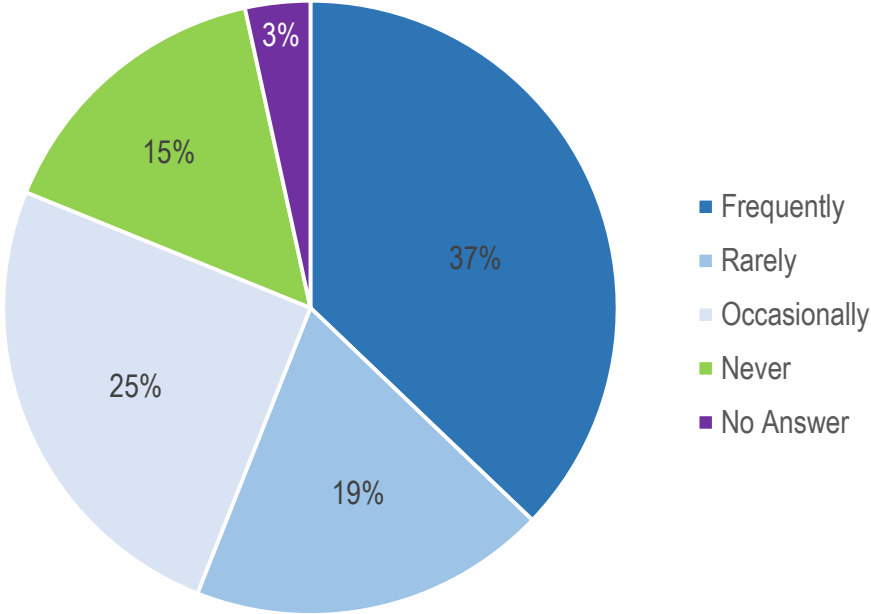
The most cited modes of transport used included; the Underground, on foot and bus

This is the consistent pattern from 2017

Bus usage is a little down, but similar to 2105, as is Underground

# Mode of Transport; Car Parking

*Do customers report problems parking in Angel?*



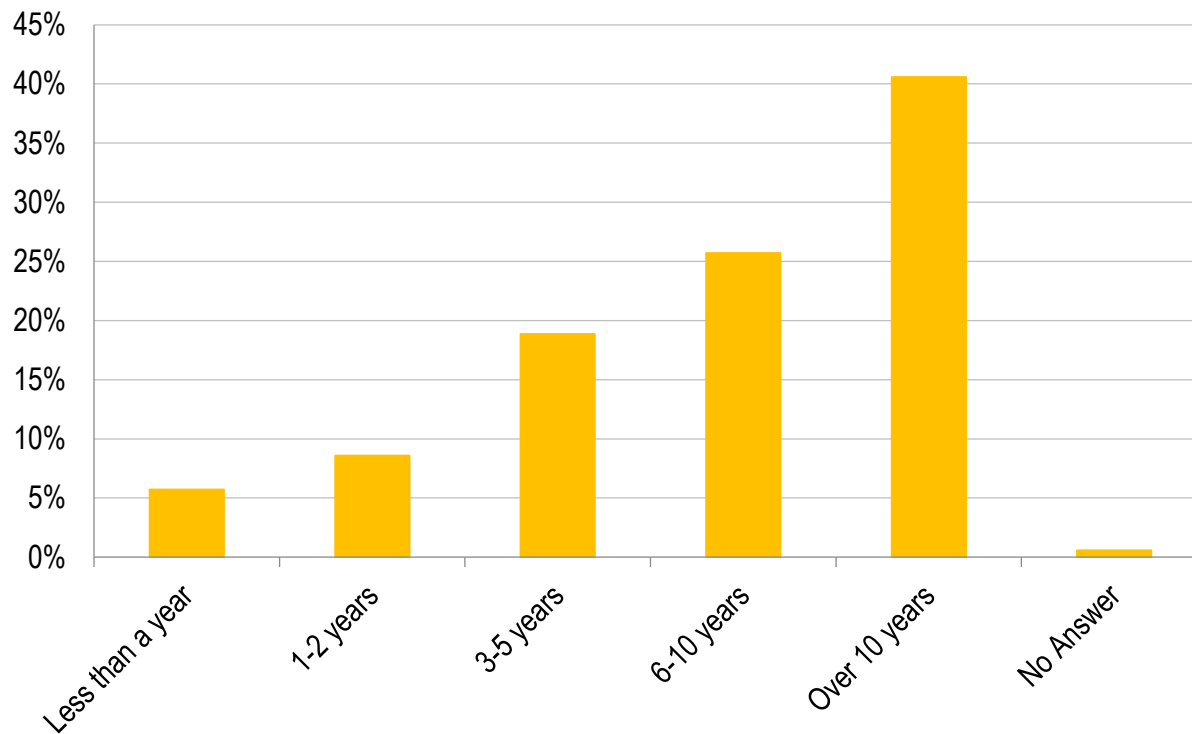
Business are hearing fewer reports of parking problems

Frequently is 9% points lower, rarely 7% points lower

Occasionally and never are both 10% points higher

# Length of Trading

*How long has your business been trading here?*



Angel benefits from a mix of well established businesses and relatively new businesses

Circa 15% have been trading for less than 2 years, this indicates a healthy churn and that Angel remains an attractive business destination

Two thirds of businesses have traded here for over 6 years

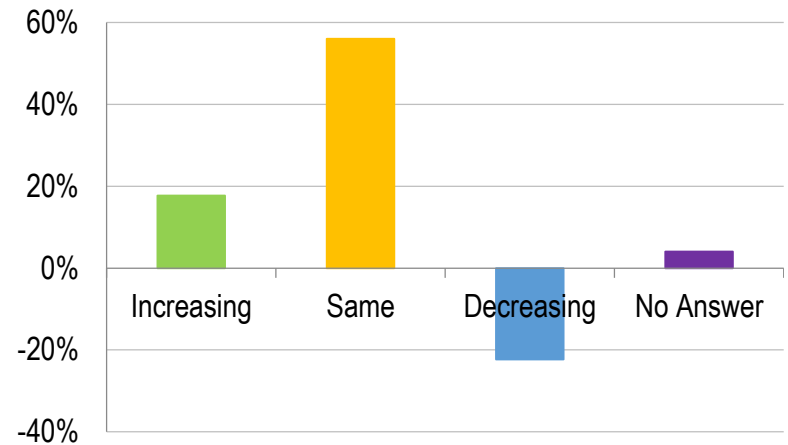
The pattern is consistent

# Number of Employees

## *How many staff do you employ?*

- The average number of staff employed by Angel businesses is 8 FT and 6 PT
- The total employed by those who provided figures is 1,311 FT and 756 PT. The highest at any one employer was 150 FT and another had 80 PT
- The proportion of staff that are Islington residents is 17% on average. However a few business had over 40%; one had 100%

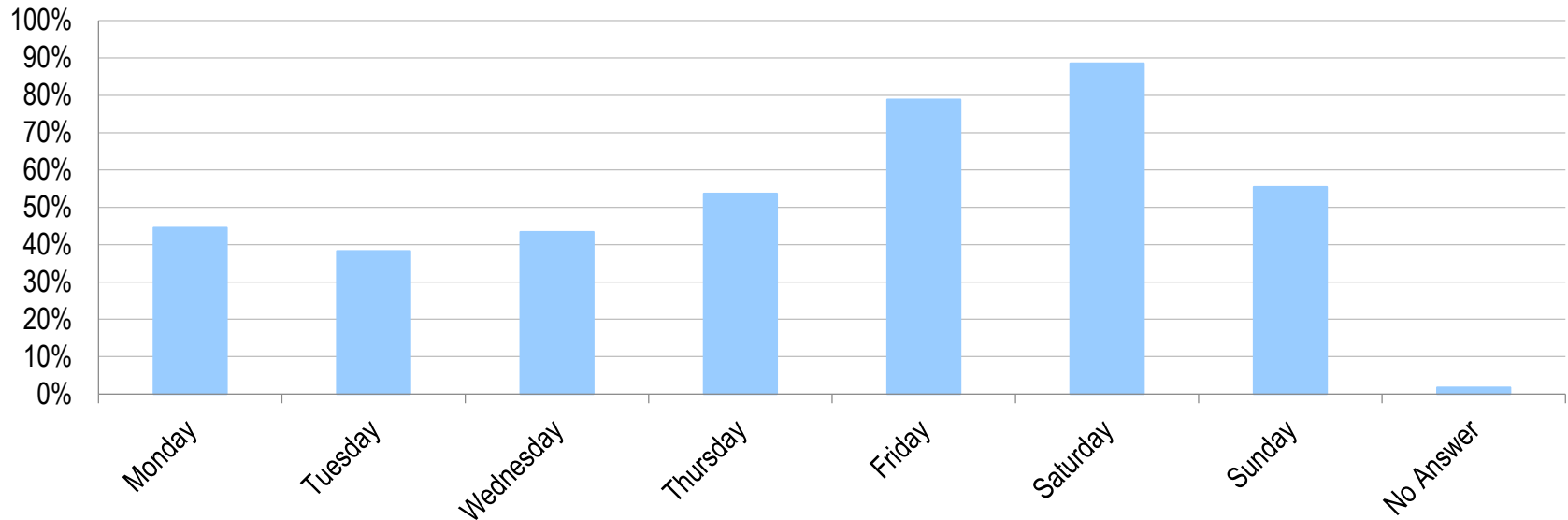
## *How are employee numbers changing?*



- Employee numbers are fairly even
- Almost 60% are on par with last year
- Similar numbers, circa 20% are increasing or decreasing staff numbers

# Trading Days

## What are your busiest trading days?



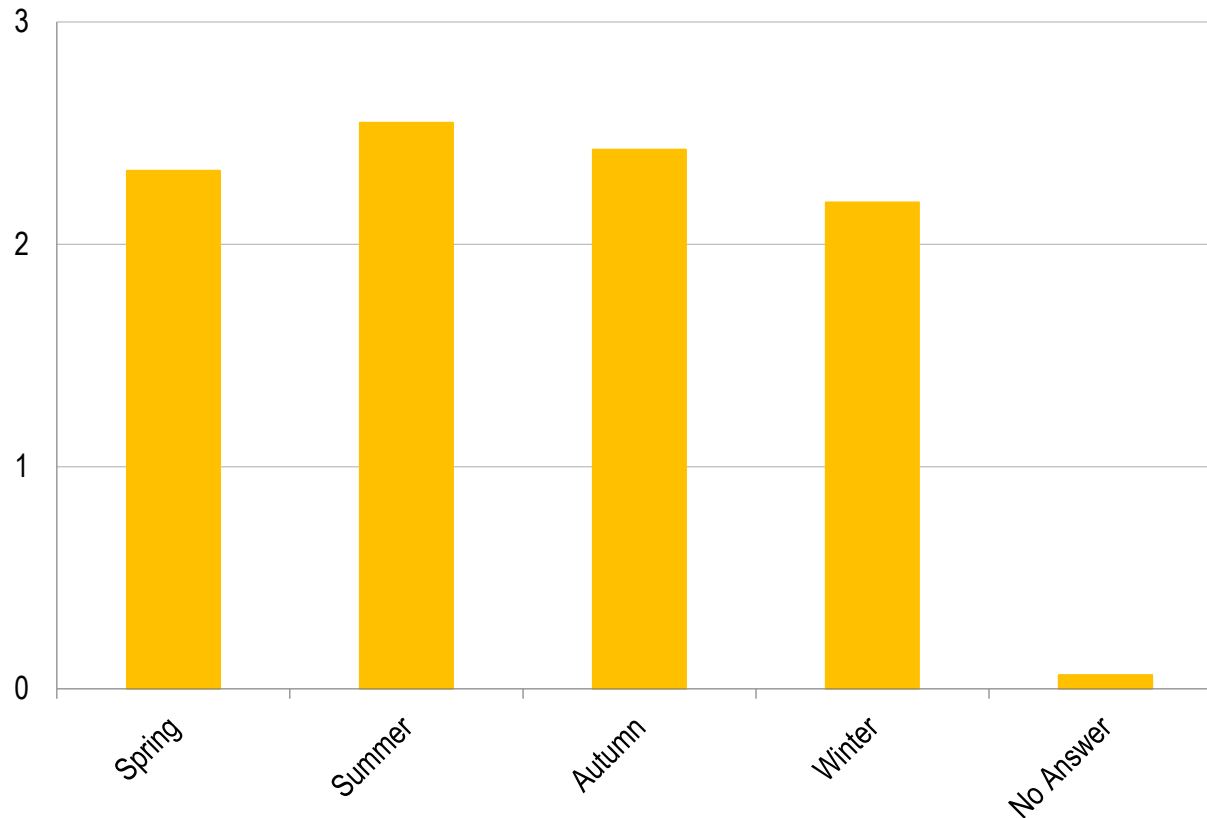
Friday and Saturday are comprehensively identified as the busiest trading days of the week

Sunday and Thursday are on a par as the third busiest days

A trading pattern that reflects the varied customer groups with a strong resident base, as per 2017

# Seasonality

*What are your busiest trading seasons?*



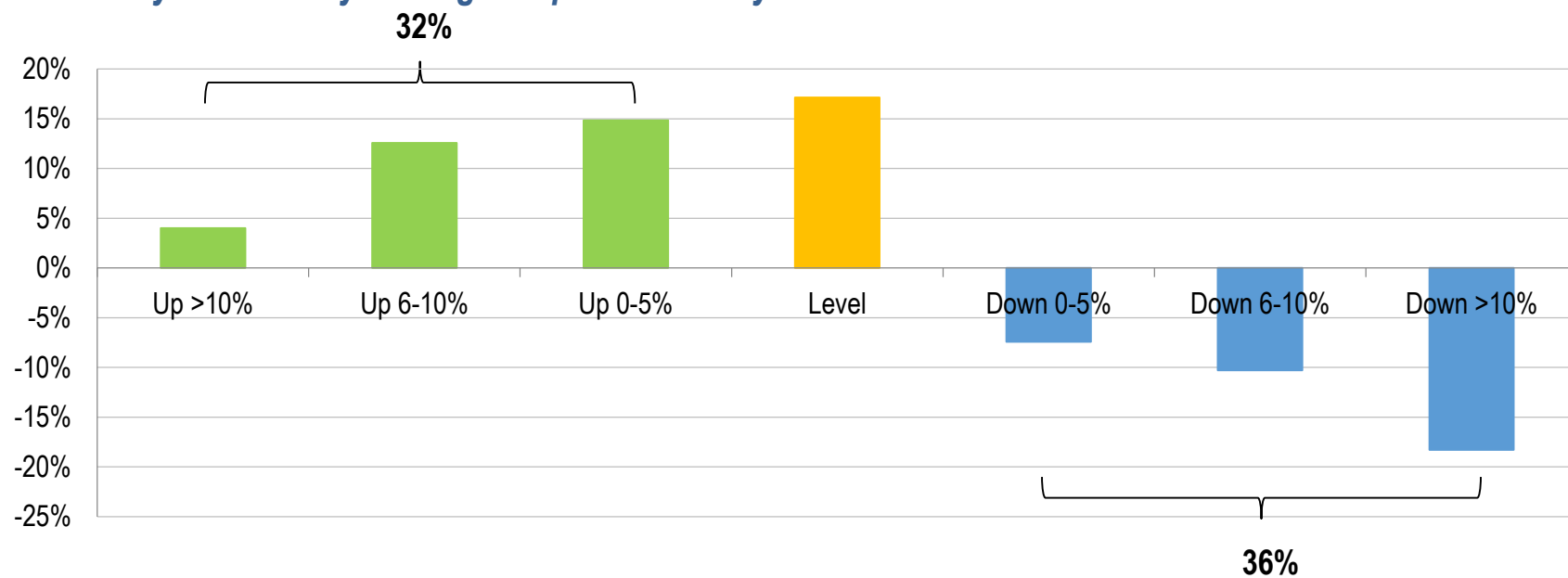
Businesses were asked to rank the 4 seasons

In the round they are all important

Summer is marginally busier than the other 3 seasons

# Trading Performance

*How are you currently trading compared to last year?*



Circa half of respondents are trading up or level compared to last year

Slightly fewer businesses are trading up than in 2017, although more than in 2015

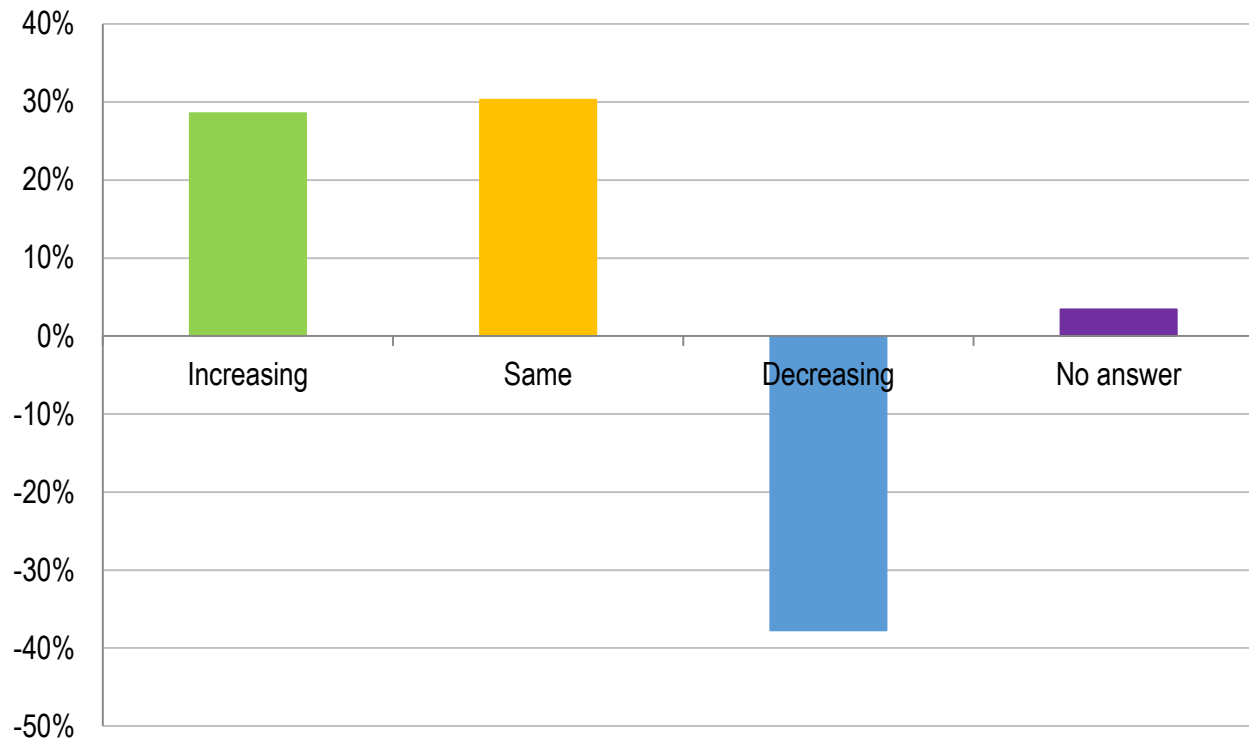
More businesses are level than in 2017

A robust trading performance from many Angel businesses, given the national outlook



# Visit Patterns

*In the last year would you say that your customer numbers have increased, decreased or stayed the same?*



Circa 60% of businesses are seeing similar or increasing customer numbers

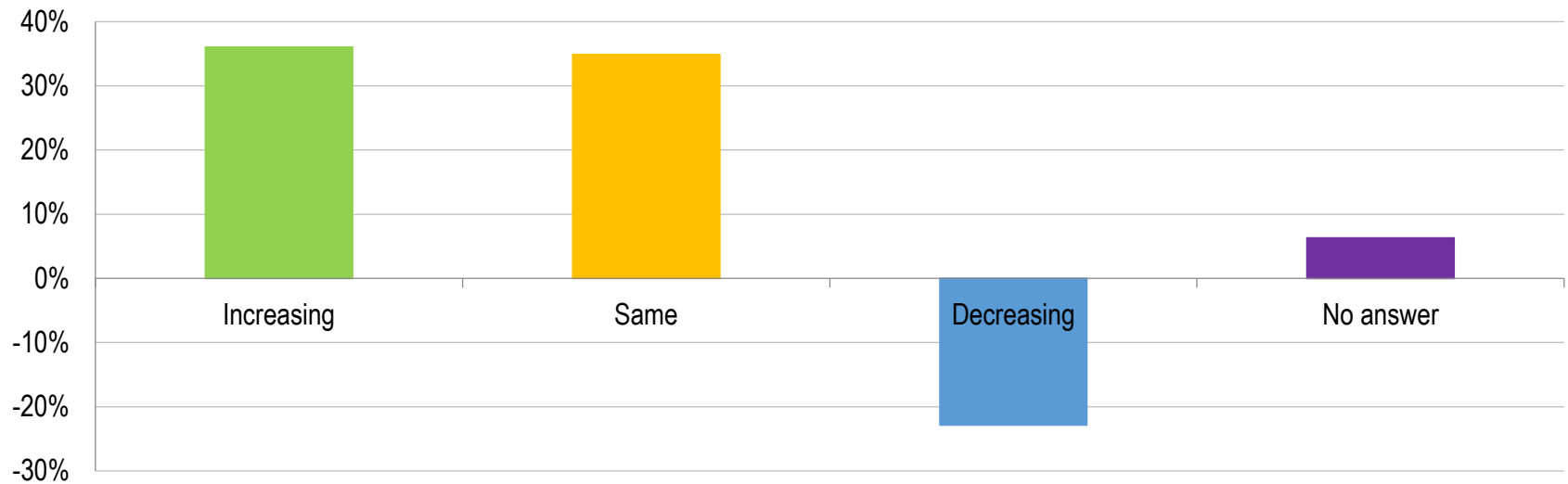
37% are seeing decreasing customers

This is the same as 2017 which was an improved picture over 2015

The long term trend is improving

# Transaction Value Performance

*Are your ATV's increasing or decreasing?*

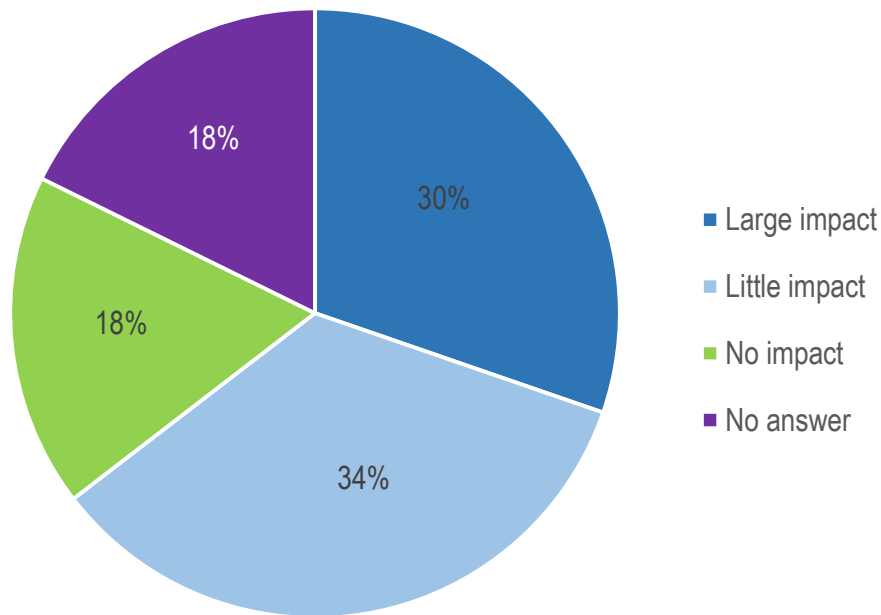


Over 35% of businesses have increasing ATV's, and a similar number are static compared to last year  
Circa 23% are reporting decreasing ATV's

This is a new question, whilst customer numbers are down for many, average spend is holding its own or improving

# Business Rates

*What impact have the revised business rates had on your business?*



Circa two thirds of businesses have been impacted by the revised business rates.

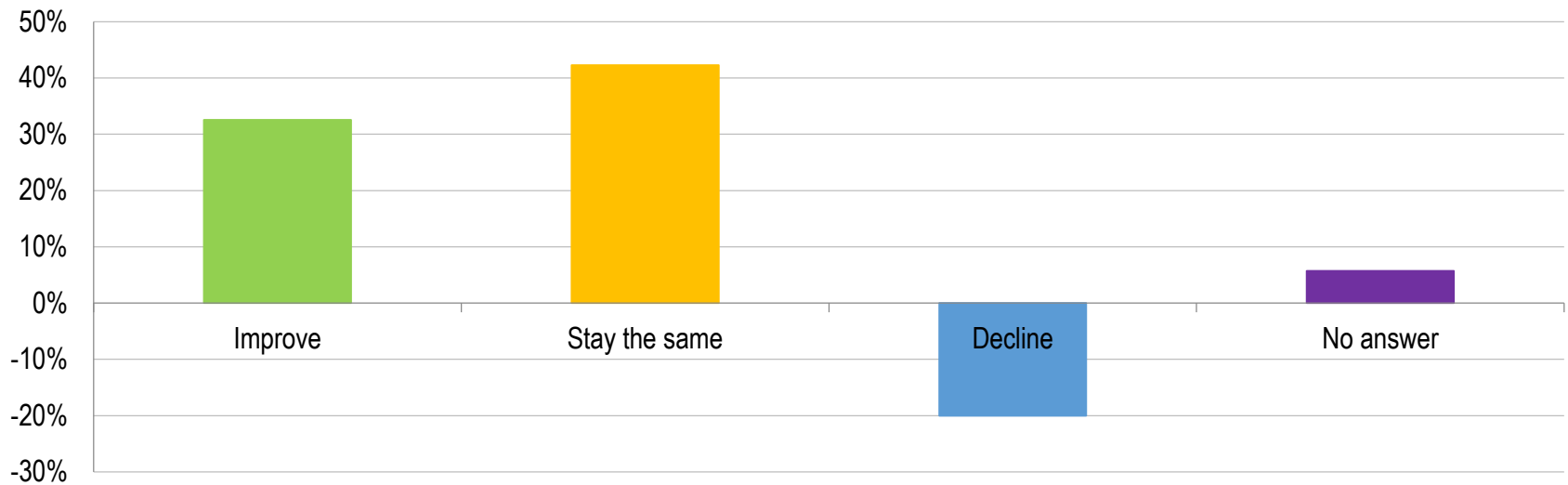
30% having large impact and 34% little impact

These are lower than the anticipated impact reported in 2017, when almost half of businesses expected a large impact

18% have not seen an impact and only 8% expected no impact

# Future Prospects

*Over the next 12 months do you expect business performance to?*

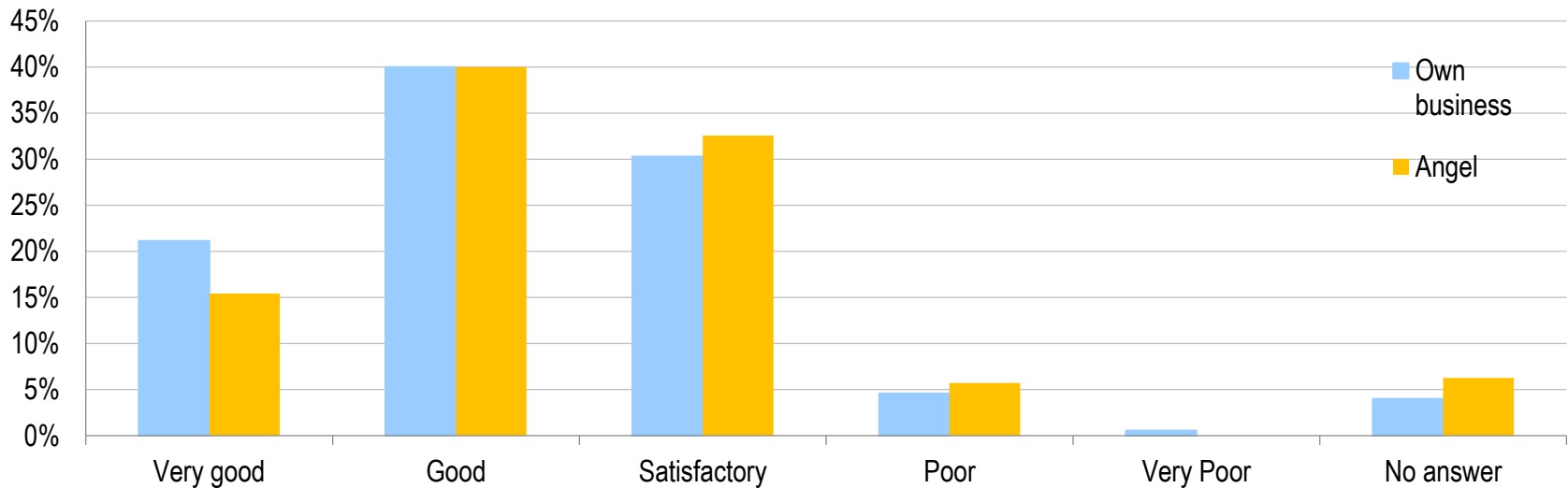


Business outlook is fairly positive with circa 75% of businesses expecting performance to improve or stay the same

Only 20% expect a decline

# Success Rating

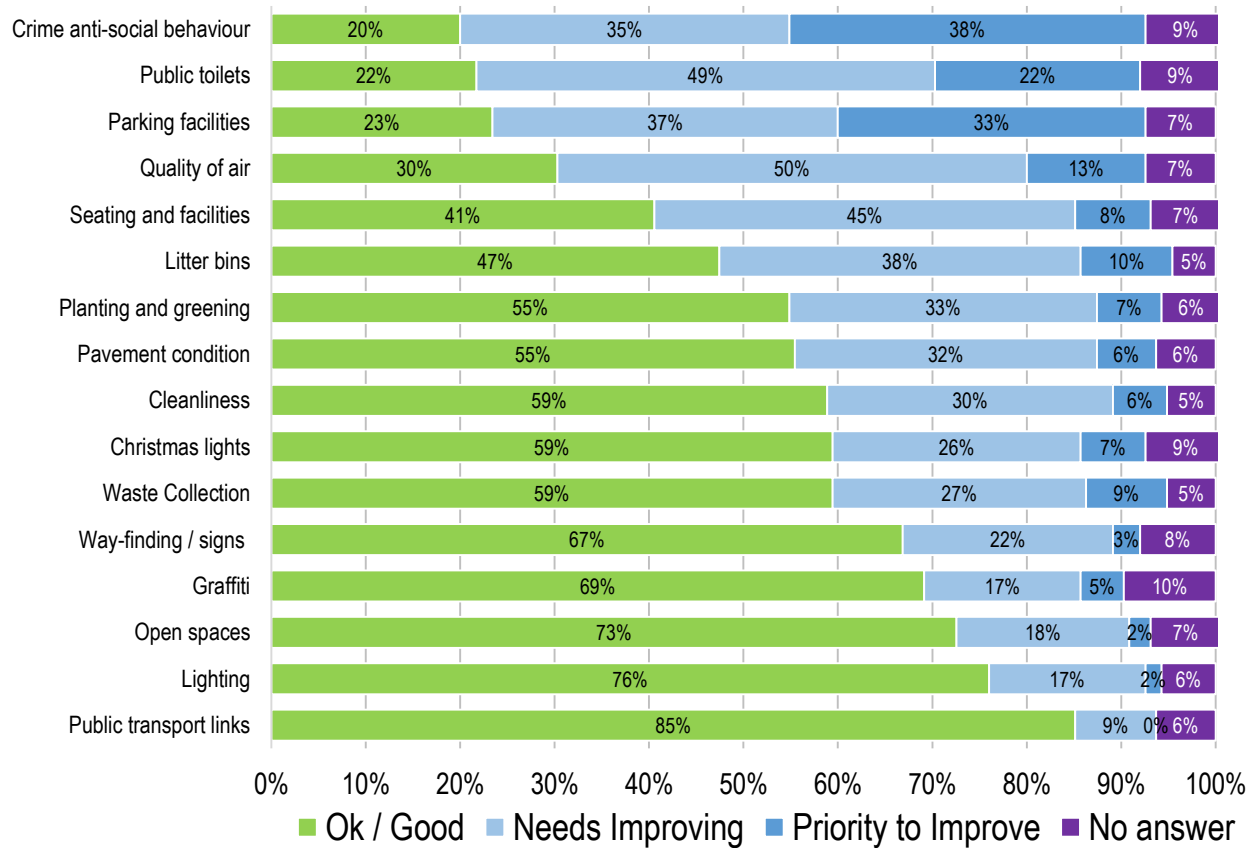
*How would you rate the success of your business and Angel Town Centre as a whole?*



Satisfaction levels for both 'own business' and Angel Town Centre remain very high  
There has been a slight shift from 'Good' to 'Satisfactory' for both, however the key finding is high satisfaction  
At similar levels to 2017 which was up on 2015

# Appearance and Facilities of Angel Town Centre

## How would you rate the appearance and facilities of Angel Town Centre?



The graph clearly highlights the priority aspects and those that are identified as most needing improvement

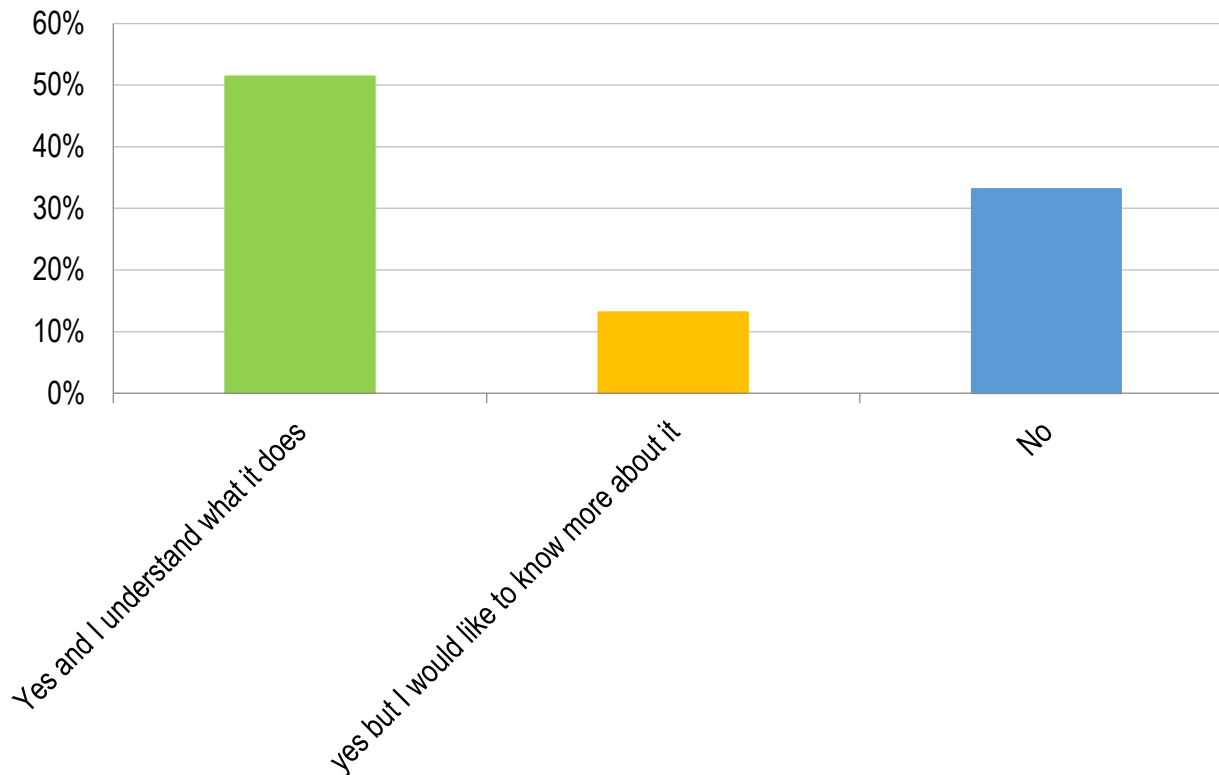
Crime & ASB, toilets, parking, air quality, seating, litter bins are all aspects to improve

There are 10 aspects that need maintaining and or a little further improvement

Crime and ASB has become the top priority since 2017

# Awareness of angel.london

## Have you heard of angel.london?



Two thirds of businesses are aware of angel.london

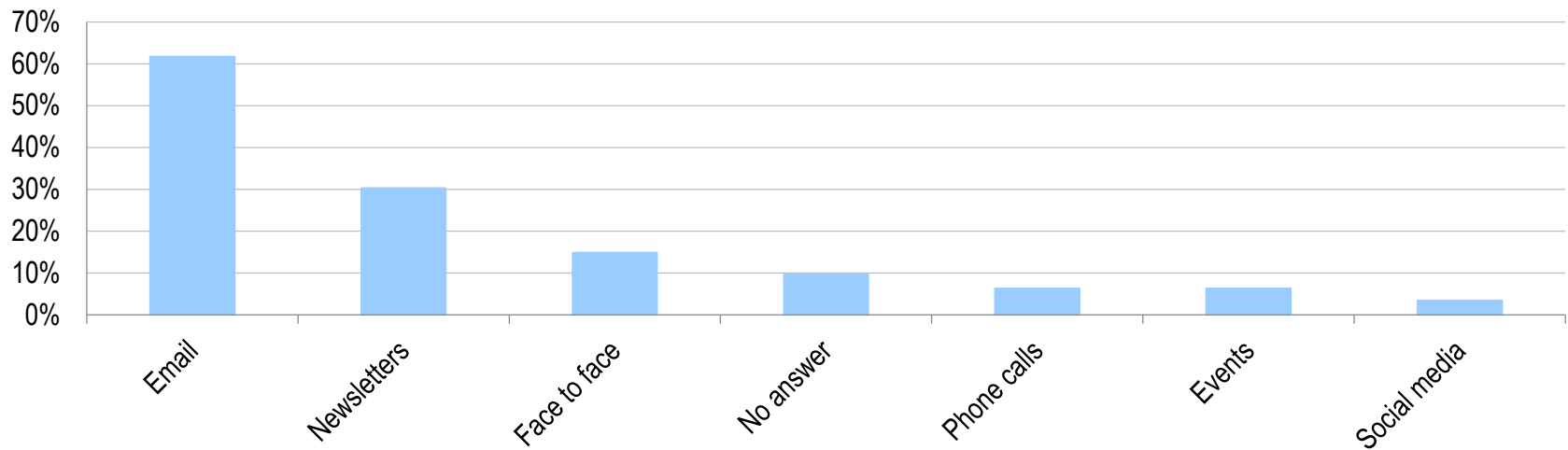
A third are not (this may include non BID members trading in the area)

Circa 13% would like to know more about its role

This is a continued improvement over 2015 and in line with 2017

# Future Contact from angel.london

*How would you like angel.london to contact you?*



The preferred future contact method is email

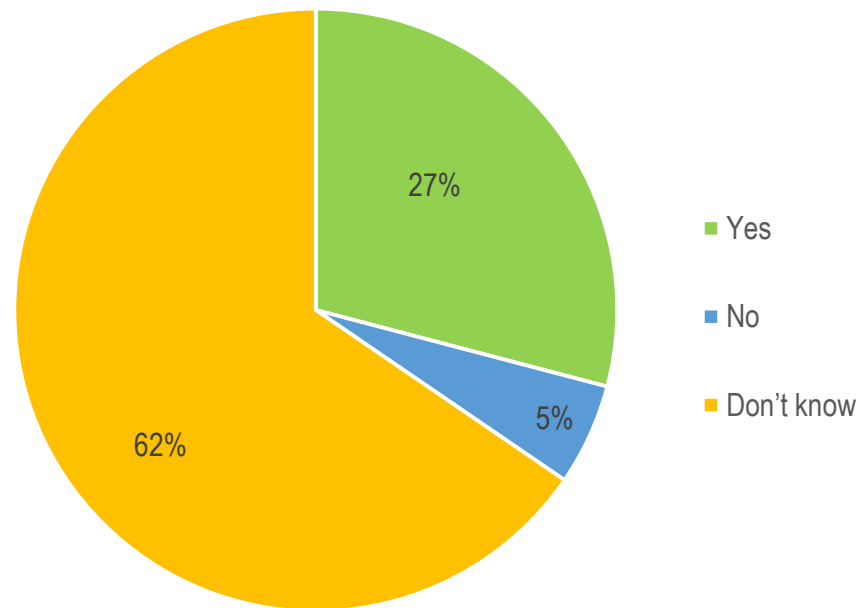
The second contact method is newsletters and possibly face to face

A similar mix to 2017



# Views and Opinions: angel.london

*Do you believe angel.london provides good value for your BID levy contribution?*



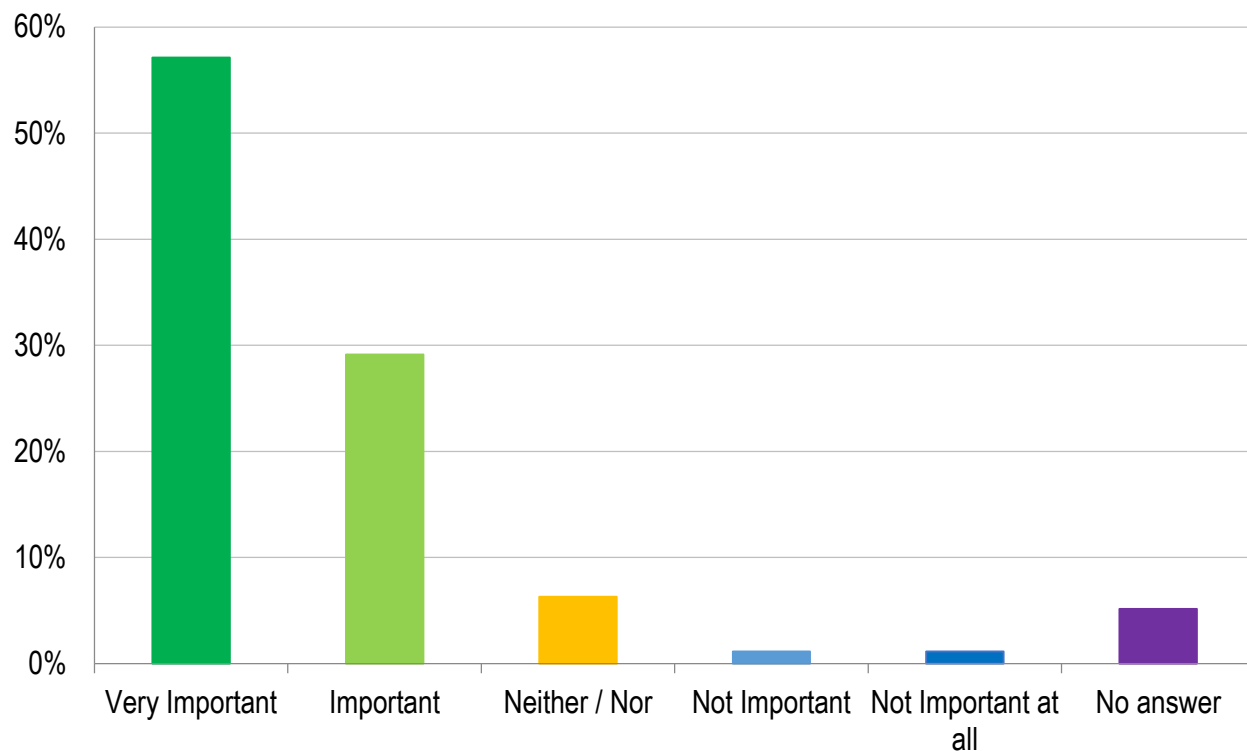
The majority of businesses 'Don't know' whether the BID is providing good value

Of those that have a view there is a positive ratio of 5:1 that think it does provide good value

The 2017 survey had a positive ratio of 3:1, with more businesses saying yes and no

# Views and Opinions: Police Team

*How important is it that angel.london provides the Angel Police Team responsive to businesses in the town centre?*



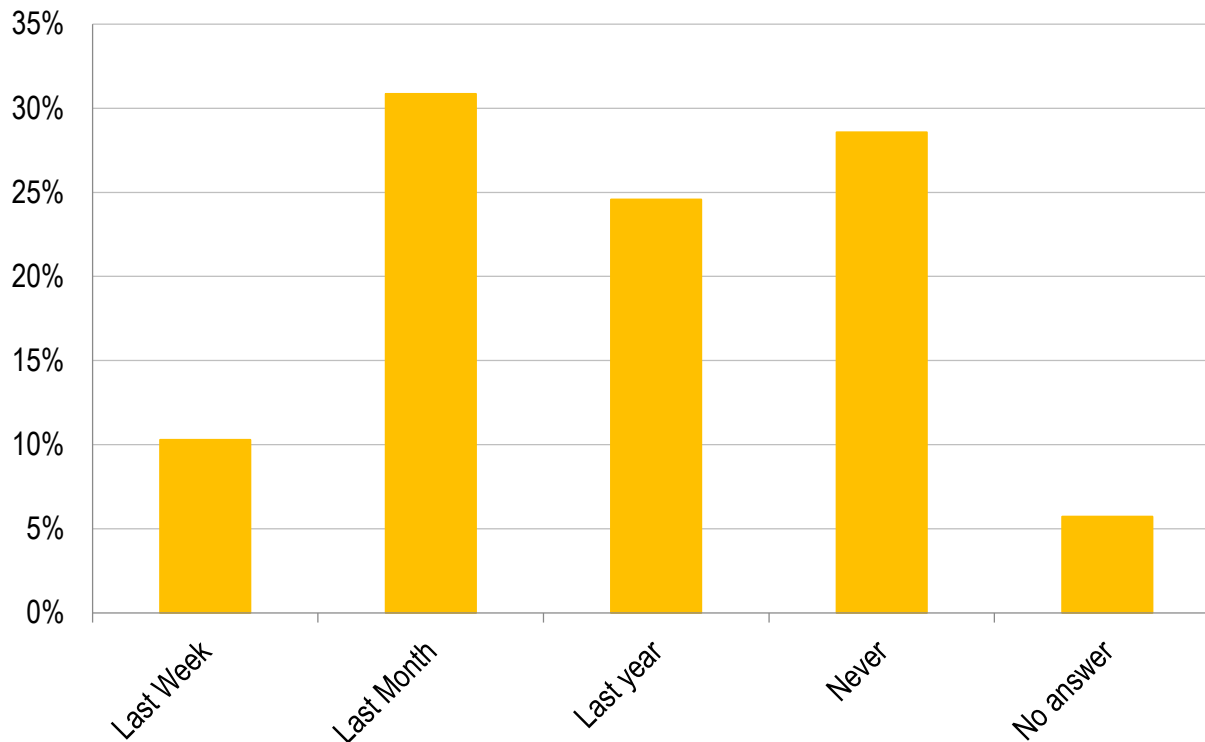
Businesses find the Police Team 'very important'

Over 85% of businesses find it important

This is consistent with 2017

# Views and Opinions: Police Team contd.

## When did you last have contact with the Police Team?



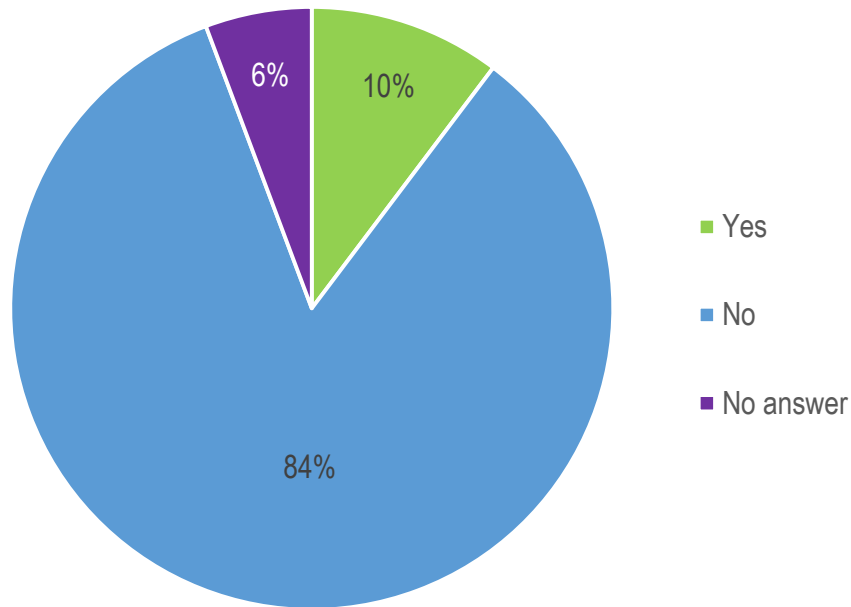
The Police Team continues to be a valuable, much used resource

42% have had contact within the last month

28% of respondents have never had contact with the Police Team

# Attendance at Police Courses

*Have you attended any of the Police training courses?*

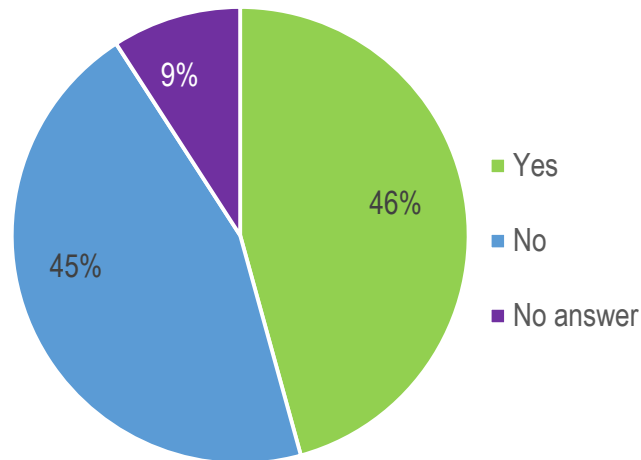


Most businesses, at 84%, have not attended any of the Police training sessions

2017 survey identified 74% had not attended

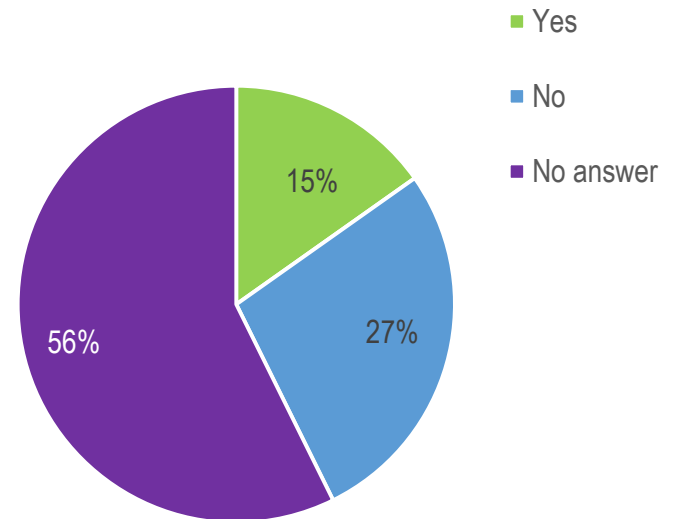
# Views and Opinions: Recycling Services

*Are you using the free recycling services that [angel.london](http://angel.london) offers?*



Almost half of local businesses are using the free recycling scheme, a similar number are not, more were using it in 2017

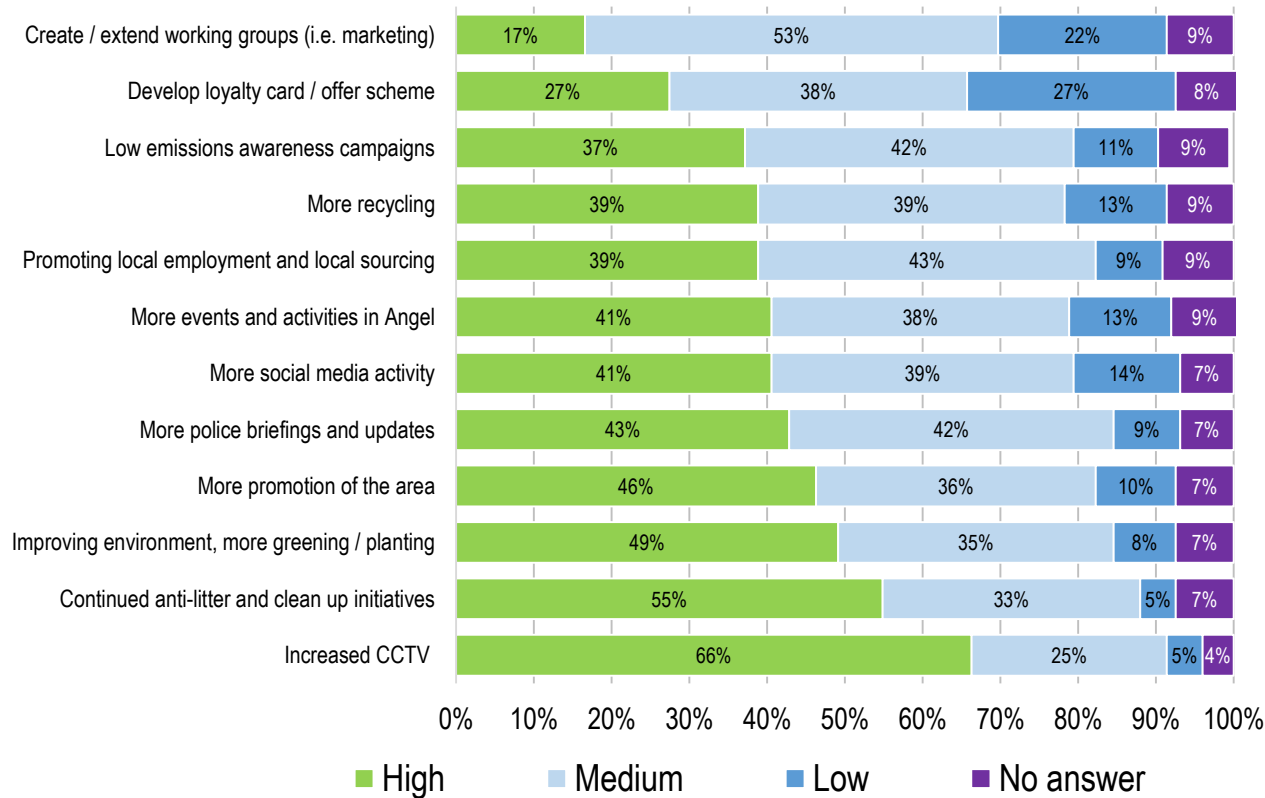
*If not, would you like to join the scheme?*



An additional 15% of businesses would like to join the scheme. Contact details have been provided

# Views and Opinions: Future Priorities

*Please rate what you consider to be the level of priority for each of the following proposed BID activities?*



Most of the proposed BID initiatives are considered important. 10 initiatives are rated at circa 40% and above as high priority

Continued anti litter and increased CCTV are rated at over 55%

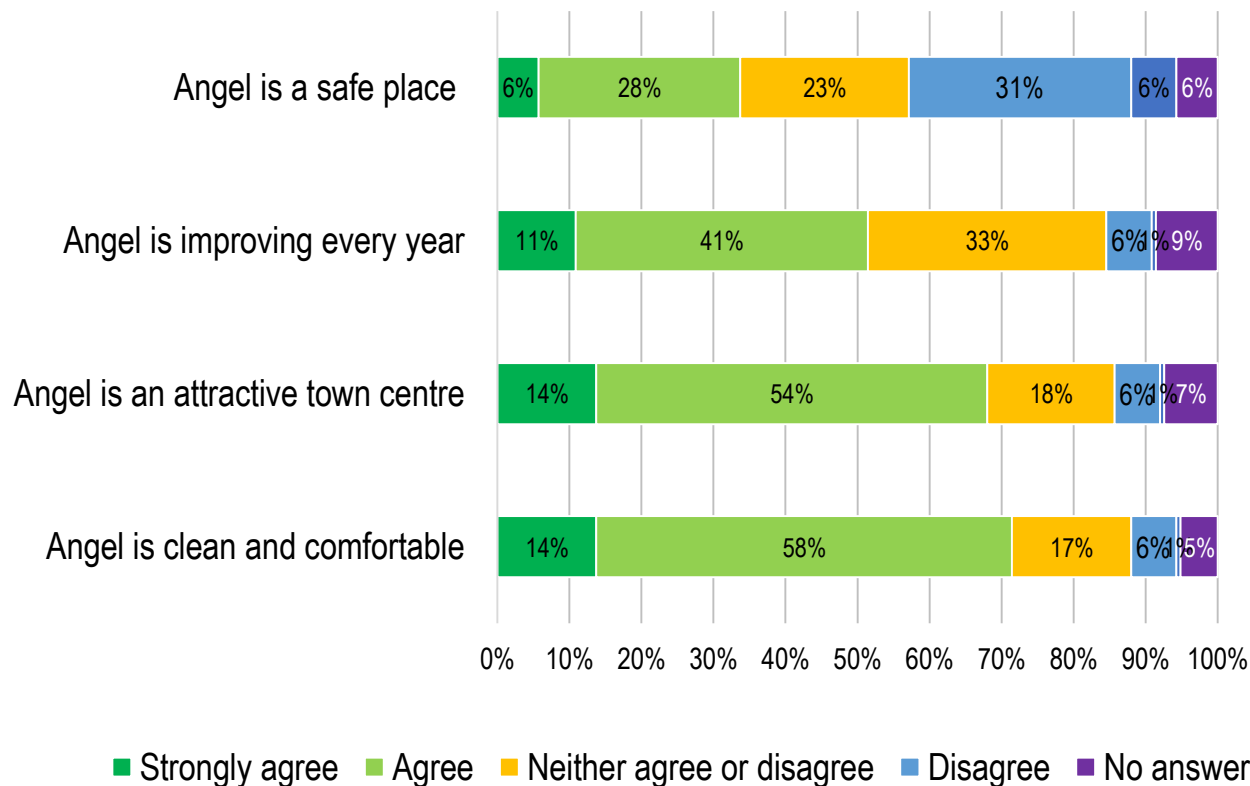
A loyalty card scheme was the highest 'low' priority

Working groups are the lowest 'high' priority

Broadly reflective of 2017

# Views and Opinions: Angel Town Centre

*Please rate how strongly you agree or disagree with the following?*



In line with other results in the survey, safety in Angel is an identified issue, almost 40% disagree that it is safe

A third of businesses are unsure about Angel improving year on year

There is broad consensus that Angel is clean, comfortable and attractive

# Additional Comments

Businesses were asked what other service or areas the BID should invest the levy funds in, and were also able to provide general comments at the end of the questionnaire.

Very few businesses responded, and topics were mentioned by only 1 or 2 businesses

16 services were mentioned, 10 are topics already underway. Others mentioned by one business each included

- More free samples in street
- Vans and trucks block shop front
- Bike lane
- Create a street food market
- Remove Uber bikes from street
- Rated local handyman list

General comments included (made by 1 business each)

- Homeless is a big issue
- More variety of shops
- Not enough support for small businesses
- Road is very bad
- Too many shops closing



# Summary

- Excellent response rate at 175 completed surveys
- Survey respondents were predominantly retail shops and F&B operators reflecting the mix of the area, businesses trade in all parts of Angel; Upper Street, Chapel Market and Angel Central dominate
- Settled customer demographics, more likely to be female and aged 25-44 years
- Residents, workers, families and students dominate customer types
- Tourists and daytime leisure users are down on last year
- Customer visit patterns are stable for most, 37% are seeing declining visits compared to previous year
- Mode of transport is dominated by public transport and walking, reflecting both the local nature of the centre and the good transport links
- Fewer parking issues noted, and fewer businesses identifying this as a priority area; it is worth noting that relatively low proportions of customers appear to drive into the centre
- The mix of businesses in Angel appears to be maintaining a healthy balance with many longstanding businesses but also good proportions of new comers
- Islington residents account for circa 17% of employees in local businesses on average
- Friday and Saturday are clearly identified as the busiest trading days, Summer is a marginally busier time of the year for most businesses, although all 4 seasons are pretty close

## Summary contd.

- Trading performance is reasonably robust, a third of businesses are down, consistent with 2017
- Average transaction values are up or the same for 70% of businesses, only 22% are down
- Business rate changes appear to be less of an impact than was anticipated, two thirds believe it has had some impact, marginally more than half of these report a little impact
- Satisfaction and success rating levels are excellent and continue to be up on 2015 at over 90% for both individual businesses and the town centre overall
- Overall the appearance and facilities of Angel Town Centre are viewed positively, areas for further attention focus on; Crime / ASB, parking, toilets, and promotions
- Awareness of angel.london is very good at circa 66% and in line with 2017
- The ratio of those businesses who believe the BID provides good VFM is 5:1. This is up on 2017, although the percentages are down, the majority of respondents do not know if the BID provides good VFM
- Both the Police Team and the free recycling service are positively regarded and well used. Training course attendance is low
- CCTV and anti litter initiatives are the top priority areas for BID activity, however most proposed BID initiatives are considered to be important for ongoing activity
- Angel needs to feel safer and to improve more each year

# Summary Priorities

## High Priority

- Crime reduction
- ASB issues
- Public toilets
- Parking
- Police Team access and training
- More CCTV
- Anti litter initiatives
- Improve safety perception

## Medium / Lower Priority

- Promotion and social media activity
- Increase visit patterns
- More events
- More tourists and day leisure visitors
- More seating and facilities
- Air quality improvements
- Litter bins
- BID awareness and BID VFM
- Greening and planting
- Business support for low performers

# Appendix: List of Respondents

<p>5 Star Dry Cleaning 7 Day Spa Adventures in Furniture Aflah Communication After Noah Albam Angel City Pharmacy Angel Flowers Angel Inn Angel Smile Dental Anji Orient Anthony Garfield+Co Argos Aria Bella Italia Benefit Bet Fred Bills Bobo London Book Market</p>	<p>Boots Brewhouse+Kitchen Brother Marcus Bubbleology Byron Café Gallipoli Again Café Nero Calzedonia Cancer Research Carlton CEX Chilango Chipotle Chocolate House Clan Pharmacy Cluttons Coexistence Colibri Cote Brasserie Cotswolds</p>	<p>Crepe Affaire Currell Daniel Rose Dansk Flowers David Clulow David Scotcher Dexters Dinny Hall Doubletree by Hilton Dress For Less EE Euphorium Bakery Eye Level Fast Break Workers Café FC UK Felicity J Lord Five Guys Flight Centre Folio Fontaines</p>	<p>Framed Opticians Franca Manca Fredericks Fresh Lifestyle Salon Gap GBK German Doner Kebab Giovanni Hamptons Hamptons 2 he Cast Iron Bath Company Hearts+Daggers Hobbs Holland + Barrett Hot Black Desiato Hugh Grover Assoc Humming Bird Bakery In Residence Insight Islington Properties</p>
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

# Appendix: List of Respondents

Jamie's Italian	Moxons	Reiss	Sweaty Betty
Joy	Muji	Rituals	Tech Exchange
Katsyte 100	Neals Yard Remedies	Rymans	Tesco Express
Kings Head	Next Move	Sadlers Wells	The Blue Legume
Kinleighfolkard + Hayward	Oasis	Sainsbury's Local	The Body Shop
Kipferl	Oliver Bonas	Sally	The Breakfast Club
Kobkun Thai Therapy	One + One	Sano	The Bull
Kojima LTD	Ottolenghi	Savills	The Carphone Warehouse
La Divina Café	Oxfam	Screen on the Green	The Fox on the Green
La Farola	Oxfam	Scribbler	The Islington Town House
Le Creuset	Palace Amusements	Space NK	The Joker Of Penton Street
L'Occitane	Paperchase	Specsavers	The Perfume Shop
London City Smiles	Pera	Sports Direct	The Three Johns
London Grace	Petit Bateau	Starbucks	Thomas Cook
Malin+Goetz	Pinkberry	Starbucks	Three
Marsh+Parsons	Pistachio+ Pickie Dairy	Steam Passage Tavern	Tiger
Masigo	Posh Totty	Storksens	Toast
Men Kind	Post Office	Strip	Tom Howley
Modern Couch	Post Office	Studio 120	Tool Shop
Moss	Prestige	Superdrug	Tortilla

# Appendix: List of Respondents

Twenty Twenty One Vegas Vibe Vision Express Vodafone Vue Wagamama's Wahaca Waterstones Whistle Dry Cleaners Whistles Wild Swans William Hill Zakti Zen Mondo			
--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--

# The Retail Group Informed Solutions

The Retail Group: Dunnings Oak Offices, Dunnings Road, East Grinstead, West Sussex RH19 4AT  
Tel: 0844 209 8480 Web: [www.theretailgroup.co.uk](http://www.theretailgroup.co.uk) Email: [info@theretailgroup.co.uk](mailto:info@theretailgroup.co.uk)