

Jericho Community Association



Registered Charity 1029170



Jericho Business Survey 2013

Report on the Findings

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Executive Summary

1 & 2. Demographics

Twenty seven businesses completed the Jericho business survey. The majority were pubs, restaurants and cafés, reflecting the dominance of these business types in the area. Other businesses represented include: bicycle shops, supermarkets and letting/estate agents, and a cinema, general store, florist, charity shop, General Practice, chiropractor, pharmacy, hairdressers, post office and a publisher. Just over half of these businesses are part of a Business Group, and a minority (2 businesses) stated they were family run.

3. What respondents like about being a business in Jericho

The majority of respondents (96%) are positive about being a business in Jericho; appreciating: "*a great location*"; an "*affluent*", "*busy*" and "*vibrant*" area, its "*diversity*" and "*community spirit*".

4. What respondents dislike about being a business in Jericho

The main concerns for businesses in Jericho are: lack of parking & traffic issues; *social issues*, including concern over issues such as vagrants (homelessness), vandalism, rowdiness and a poor sense of community; low volume of trade (an issue that is seen to be compounded by a lack of parking for potential customers and, a need for improved public transport); high competition from too many similar businesses; and high rents/Council tax.

5. Tenure: The majority (85%) of businesses in Jericho have leaseholds, though more than half of these gave no details of their lease. Only 11% are owner occupied or freehold.

6. Changes businesses would like to see in Jericho

The main things business would like to change in Jericho are parking and traffic; improve the promotion and protection of small businesses; and better security in the area.

7. Changes that would improve business in Jericho

The main changes respondents suggested for improving their business in Jericho were improved parking and public transport; improved hard and soft landscaping and planning & development; and lower rents/costs and improved marketing.

8. The competitive challenges Jericho businesses face

The majority of respondents (89%) stated that there is some element of competitive challenge for their Jericho business. The main competitive challenges for Jericho businesses are competition from other businesses (55%); costs (11%); and parking (7%).

9. How businesses view their/the future in Jericho

The response rate for this question was 96%; 1 business made no comment. In total, 63% of the businesses surveyed are positive about the future of Jericho and/or about their future as businesses in Jericho; only 15% stated that they are not sure of the future.

10. Innovation businesses would least like to see

74.5% of business respondents suggested innovations they would least like to see in Jericho. The main concerns were the threat of more supermarkets (replacing smaller businesses) (18.5%); planning threats to the character of Jericho (11%) (7%); and more estate agents in the area.

11. Number of Employees

Taken together, the 27 businesses represented in this survey employ a total of 2,226. Of these, 2,000 are employed by one business (a publishing house) and 226 are employed by the other businesses.

12. Number of employees living in Jericho?

The publishing house did not know how many of their staff live in Jericho. Of the 226 employees of the remaining 26 businesses, 16.8% live in Jericho.

13. Other input

37% of business respondents gave 'other input'. 7% were positive comments, and the remaining 30% raised further issues and/or suggestions for improvement.

An array of further Issues/suggestions included: proposed business parking permits; a call for the council to freeze rent and rates; a call for support for businesses off Walton Street; a suggested one-way traffic route from The Victoria Arms to the Post Office; local newspaper advertisements to gain local support, and a concern that there is no longer any incentive or encouragement for small businesses.

One business said it was nice to be consulted, and another that they would like to be updated on feedback and analysis/conclusions.

Suggestions Based on the Findings

1. Businesses are concerned about low trade in Jericho. They might form a Jericho Business Community Group (JBCG) to:-
 - address competitive challenges
 - develop marketing strategies
 - address specific physical and social environment issues.
 - maintain, support and develop the perceived positive future and to encourage those business who feel less sure.
 - Run Business Forums to discuss/address more general business issues and to plan implementation of suggestions put forward by different businesses for improvements in Jericho
2. Oxford City Council are advised to support and encourage the diversity of housing and retail that characterises Jericho community and businesses. The JBCG/ JCA could request a review of Oxford City Councils planning policy in relation to the mix/spread of different businesses types in Jericho and request support for smaller independent businesses (including council tax rates for small businesses).
3. The JBCG group could develop marketing strategies to encourage Jericho residents to support local businesses, e.g. a local shops loyalty scheme to encourage residents to shop locally.
4. Further investigation is needed to understand the relationship between parking, public transport and trade in Jericho.
5. The JBCG/ JCA could request a review of the parking and public transport policy in Jericho from the City Council.
6. The JCA could facilitate a local volunteer-based Neighbourhood Watch scheme (to address businesses concerns about anti-social behaviour).
7. The JBCG/JCA could request a review of the police strategy and operations for the area.
8. The JBCG could:-
 - Request a review of the planning policy for external dining and take-away trade in Jericho.
 - Form a working party to raise fund/support for hard and soft landscaping features to improve the look and feel of the area.

- Request a review of the planning policy for new developments in the area; monitor and participate in development plans for Jericho.
- Where possible, campaign for lower rents.
- Form a marketing body for businesses in Jericho (e.g. could include Christmas lights event ; summer market in Walton Street; special promotions in Jericho etc.)

Main Report

1.0 Introduction

This report presents the results of a community led planning survey consulting businesses in Jericho, carried out by the Jericho Community Association (JCA) during 2012 and 2013. Community led planning is a way to bring together local people to better understand their priorities for improvement and to understand which projects which will have the greatest impact. Community led planning aims to improve community cohesion, community trust, community involvement and to increase social capacity, and as a result create a more empowered community.

This survey was carried out by local volunteers with support from officers and community workers in the 'survey area' of Jericho. The survey questionnaire was developed in consultation with various community partner groups. The report is organised by the 13 questions asked in the survey:-

1. What type of business is run here?
2. Is it part of a group?
3. What do you like about being a business in Jericho?
4. What do you dislike about being a business in Jericho?
5. What is the tenure of the premises?
6. What would you like to change in Jericho?
7. What changes do you think would improve your business?
8. What are your competitive challenges?
9. How do you view the/your future in Jericho?
10. What innovation would you least like to see?
11. How many people are employed here?
12. How many of the workers live in Jericho?

13. Any other input?

2.0 Jericho Business Survey

Of the 42 surveys handed out to businesses in Jericho, 27 were completed and returned, giving a 64% response rate.

2.1 Question One: What Type of Business is Run Here?

The types of businesses represented in the Jericho Community Association Business Survey are shown in Figures 1 (as total number) and Figure 2 (as a percentage).

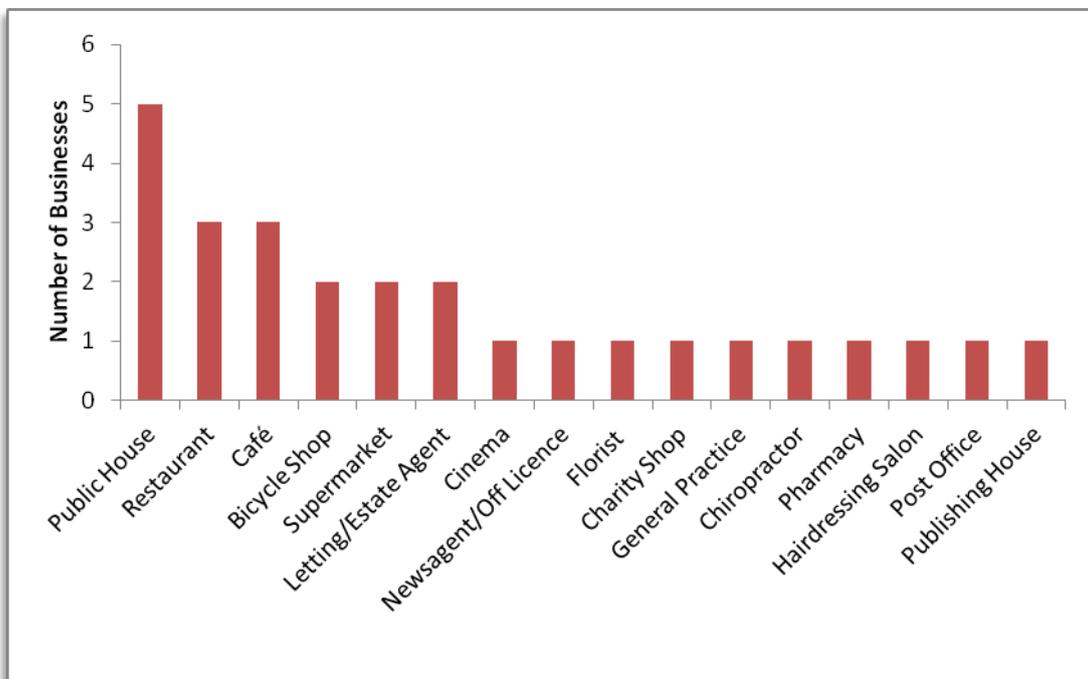


Figure 1: Survey Response by Type of Business

A cluster majority of respondents are Public Houses (19%), followed by Restaurants (11%) and Cafés (11%); Bicycle shops (7%); Supermarkets (7%) and Letting/Estate Agents (7%). The Other (37%) of businesses represented in the survey comprised 1 (3.7%) of each of the remaining business types (as detailed in Figure 1).

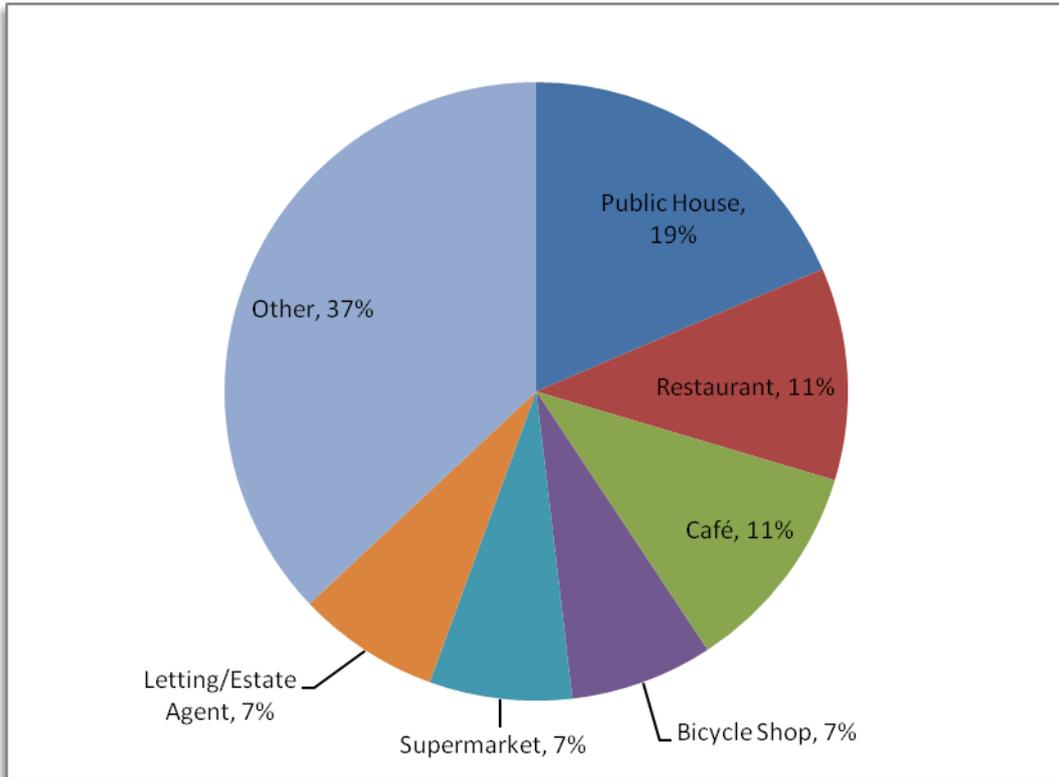


Figure 2: Percentage of Type of Business Represented

2.2 Question Two: Is the Business Part of a Group?

Of the 27 respondents, 14 (51.9%) of the businesses stated that they were part of a Business Group and 13 (48.1%) businesses stated that they were not part of a Business Group (Figure 3)

The 13 business respondents who stated they weren't part of a Group include all of the cafés, a pub, and a restaurant, newsagent, florist, General Practice, chiropractor, hairdresser, bicycle shop, estate agent and post office. Of these, 2 (15%) stated that they were family businesses, the remaining 85% said only that they were not part of a Group.

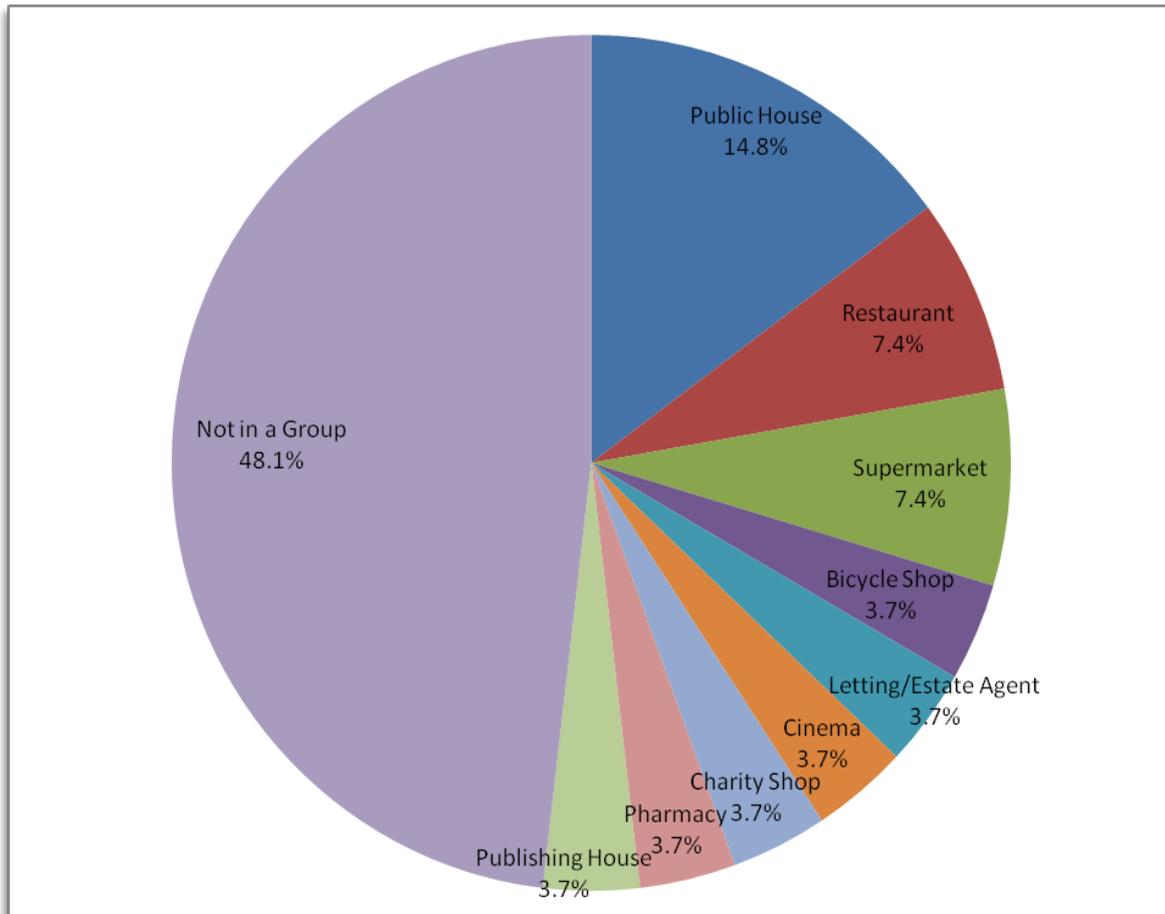


Figure 3: Percentage of Businesses that are Part of a Group

If being part of a Group relates to some extent to business size (bigger businesses are in Groups), then Jericho appears to have around 50% or more independent businesses. In relation to the parallel Jericho Community Survey, both businesses and residents seem to appreciate the independent shops in the area. The New Economics Foundation's *Clone Town Britain* reports (1995; 2010)¹ is useful for understanding the impact of "big business" Vs independent businesses in threatening the character of the UK towns and cities, where the 2010 reports states that "high street diversity is still on the endangered list":-

'Only 36 per cent of the high streets surveyed retain their distinctive character with more than two thirds of their shops being independents'

¹ <http://www.neweconomics.org/publications/entry/clone-town-britain;>
<http://www.neweconomics.org/press/entry/clone-town-britain-2010-high-street-diversity-still-on-endangered-list>

2.3 Question 3: What Do You Like About Being a Business in Jericho?

The majority of respondents (96%) are positive about being a business in Jericho; only one business stated that there is "not much now" that they like. Businesses appreciate Jericho as "a great location"; an "affluent", "busy" and "vibrant" area, citing positive qualities such as its "diversity" and "community spirit". Figure 4 below captures the positive spirit of what businesses had to say:-

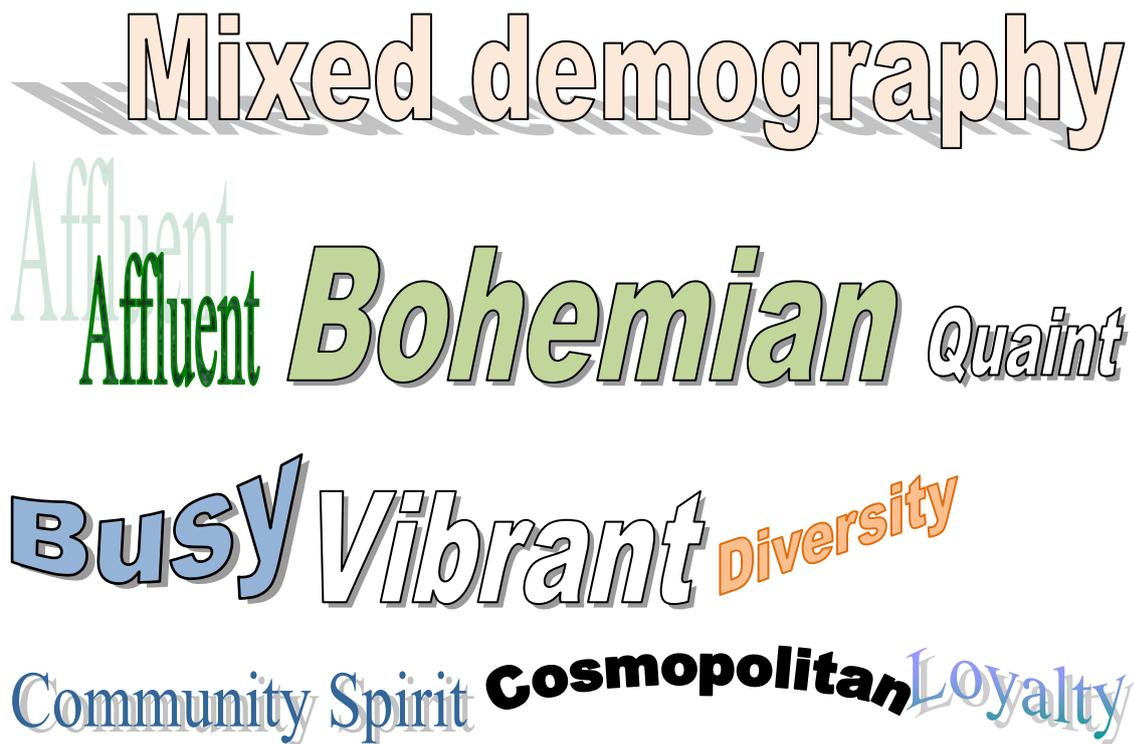


Figure 4: Positive Comments About Being a Business in Jericho

Specific statements businesses made include:-

"Lovely Area, mixed demographic of people to form a customer base"

"The Bohemian atmosphere and eclectic mix of age groups and social groups"

"It's a quaint, lovely community!"

"Diversity - no corporate competition"

"Lots of friendly people and lots of good food"

"The long term relationships with customers; community feel"

2.4 Question 4: What Do You Dislike About Being a Business in Jericho?

Of the 27 business respondents, 19 (70%) stated a number of things they dislike about being a business in Jericho (Figure 4 below). Five (18.5%) stated that there was nothing they dislike about being a business in Jericho; 1 (a General Practice) stated that it was not applicable to them; and 2 (7.4%) did not answer the question.

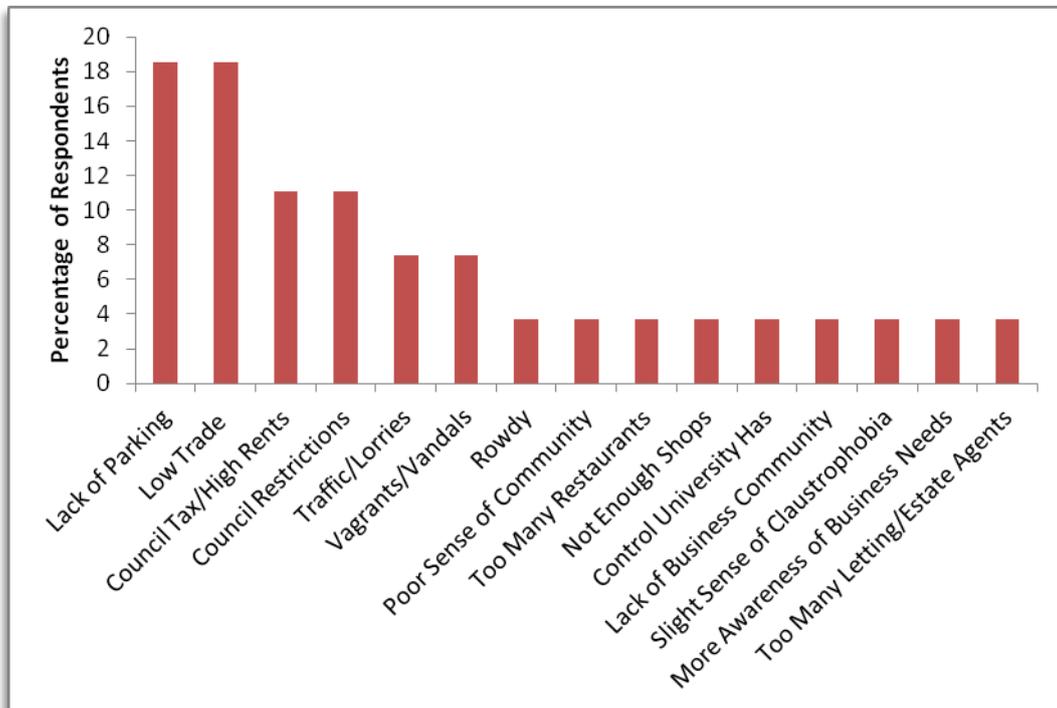


Figure 5: Things Respondents Dislike About Being a Business in Jericho

These responses are consolidated in Figure 6 below. The main concerns for businesses in Jericho are the lack of parking and traffic issues such as congestion, traffic routes and lorries.

Taken together, *social issues* are of concern to 20% of Jericho businesses, including concern over issues such as vagrants (homelessness), vandalism, rowdiness and a poor sense of community.

For 17% of businesses, the low volume of trade presented a problem; an issue that is seen to be compounded by a lack of parking for potential customers and, a need for improved public transport (both contributing to low footfall), and high competition from too many similar businesses (7% mentioned the need for better planning of the spread of types of businesses in Jericho).

Finally here, Council tax and high rents are a concern for 10% of businesses, and a further 10% do not like "restrictions" set by Oxford City Council.

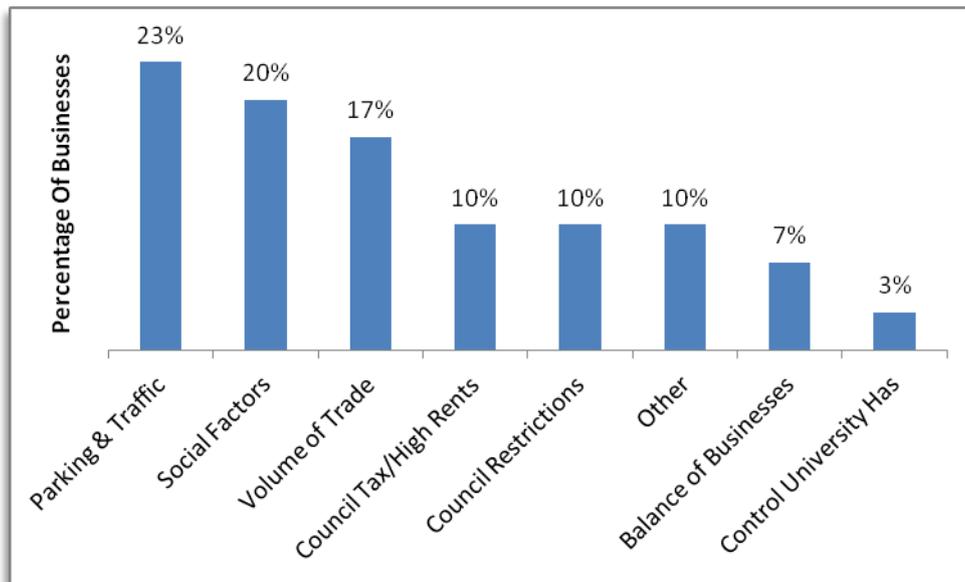


Figure 6: Consolidation of Things Respondents Dislike About Being a Business in Jericho

Parking

Jericho businesses would like to see more parking in Jericho to encourage customers/facilitate footfall. However the recent report *Why Place Matters* (2013) by the UK charity *Living Streets*² suggests that the relationship between parking/car-use and retail trade may be more complex, and that the notion that “*parking is the answer to local high streets’ regeneration*” is a myth:-

'People arriving on foot visit more shops and spend more money than people travelling by other modes. For instance, a study in Bristol found that retailers on a local high street overestimated the proportion of shoppers arriving by car by almost double at 41%, compared with the actual proportion of 22%. In fact, over half of the shoppers had arrived there by foot, and more had arrived by bus and cycle than estimated by retailers. Pedestrians tended to visit more shops than those arriving by car'

(Living Streets, *Why Places Matter*, 2013, pp. 27)

Thus further investigation is needed to understand the relationship between parking, public transport and trade in Jericho.

² <http://www.livingstreets.org.uk/councils-must-acknowledge-community-voice-says-living-streets>

2.5 Question 5: What is the Tenure of the Premises?

Figure 7 below shows the spread of the type of tenure the business respondents hold. The majority of businesses (85%) stated that they had a leasehold tenure, 11% stated they were either freehold or owned, and one business (4%) did not state their tenure position. Of those with leasehold tenures, 52% gave no details of the length of the lease; (18%) stated that they have a long term leasehold; 7% stated that they had a 3 years tenure; 4% that they had a 5 years tenure, and 4% that they had an indefinite tenure.

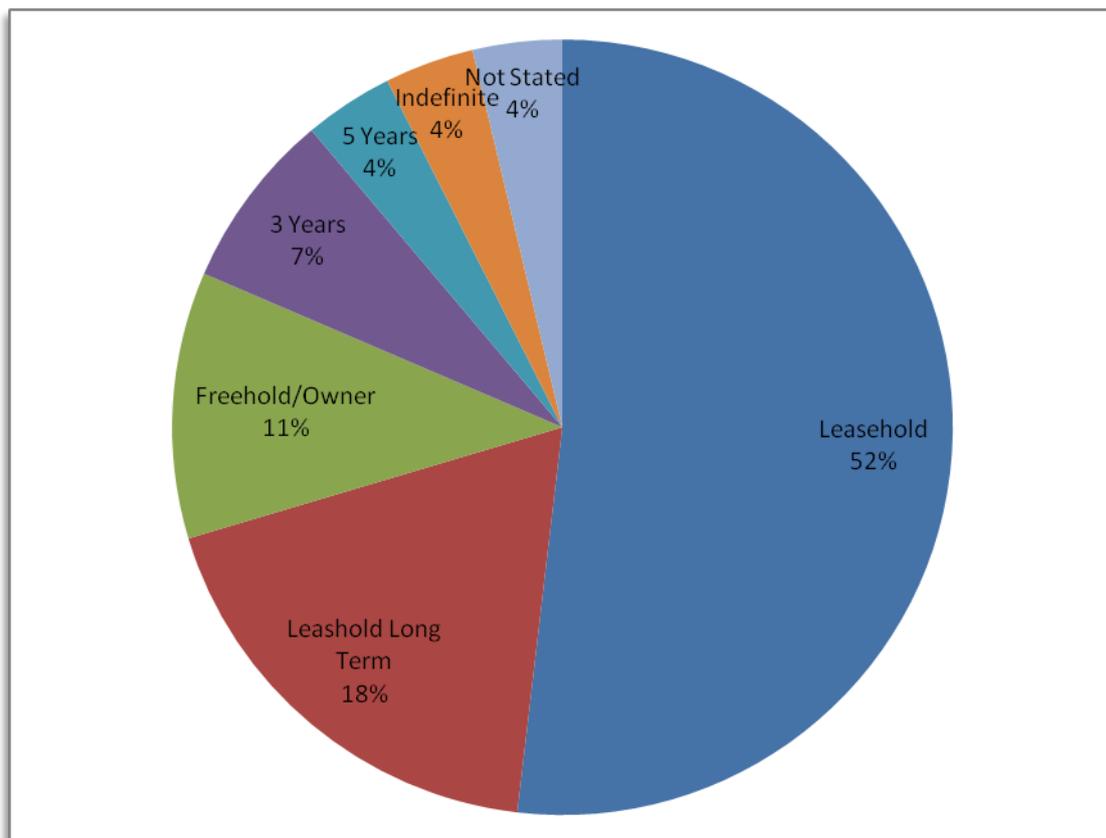


Figure 7: Type of Tenure

2.6 What Would You Like to Change in Jericho?

Of the 27 business respondents, 81.5% made suggestions of what they would like to change in Jericho; 11. % did not state anything and 7.4% said "nothing".

Parking

Reflecting the results from Question 4 (what respondents don't like about being a business in Jericho), the main thing businesses would like to see changed in Jericho is better car parking facilities (stated by 22%). Suggestions include building a car park on some of the disused land, relaxing the parking restrictions in the area, and

even providing free car parking. Again, given the recent reports that indicate a more complex relationship between parking and customers, further evaluation of the parking situation in relation to footfall and retail spending is recommended.

Promoting and Protecting Small Businesses

Businesses are concerned about low trade in Jericho. They might form a business community group, and, together with the JCA: request a review of the parking/public transport policy in the area; and request a review of Oxford City Councils planning policy in relation to the mix/spread of businesses in Jericho and support for smaller independent businesses in Jericho (including council tax rates for small businesses). In addition, a business group could develop marketing strategies to encourage Jericho residents to shop locally, for example a local shops loyalty scheme.

Another main concern of some 15% of the business respondents is the need to promote/protect small businesses and business in general in the area. Suggestions are focused on lowering rents (e.g. on Walton Street; Colleges and Private landlords lowering rents) and on supporting a good spread of "traditional" "useful" "day-time" shops, (e.g. hardware shop, butchers, bakers etc.) as well as the interaction between businesses (presumably to protect trade). One business stated that they did not want Jericho "to become too commercialised", presumably referring to a worry about bigger corporate businesses taking over from the small traders.

Security

In addition, 11% of business respondents would like to see better general security, for example "better behaviour in the evenings", "police presence" and "more security". Two businesses said they would like more focus on road safety, e.g. "to slow down traffic and divert lorries".

Other

Other changes suggested reflect individual businesses views: the following is a list of suggestions each put forward by one business:-

"The 1960s style health centre and the old peoples' home"

"More cash points"

"More community spirit e.g. lights at Christmas"

"More public transport"

"[clean up]Overflowing gutters"

"More commercial promotion"

"Grantham House"³

"Christmas Lights"

More general concerns included having "More family fun events" ; "Protect Schools (keep them for local community"; and "more social housing".

2.7 Question 7: What Changes Do You Think Would Improve Your Business?

A total of 88% of respondents made suggestions about change(s) they thought would improve their business; 7.4% said there was nothing they want to change and 3.7% made no comment.

Parking and Transport

Again improvements to parking in Jericho was the main change suggested - 10 (37%) respondents felt that more parking, more short term parking or free parking would improve their business. Two businesses (7%) suggested that better Public transport in Jericho would improve things for them, and 1 (3.5%) asked for "*more Roads to be one way*".

Hard Landscaping and Planning & Development

Ten (37%) of the respondents made suggestions relating to hard landscaping, planning & development. Specifically, some catering business would like to offer "*external dining*" and be "*able to do take-away hot food*". In terms of the feel of Jericho, respondents suggested that business would be improved with "*street furniture and flower beds*" (to be Bohemian); a "*Parisian feel*" (cafes etc); "*broader pavements*" and "*LED signage*". In terms of development, businesses would like to see "*less NEW buildings and more up keeping of existing buildings*" and "*more flats/residents*". One business would like to have "*more space*", and the cinema would like to have "*a third screen*".

Rents and Other Costs of Running a Business

11% respondents said their businesses would improve if rents were lower, suggesting the need for "*landlord support*" and to "*tackle and negotiate high rents with Somerville College and others*". Other cost-based improvements suggested include "*lower banker costs*", "*lower employment costs*" and "*lower stock costs*".

³ Note that a focus group meeting raised the issue of the drug and related problems at an empty block of flats, 'Grantham House' in Cranham Street. Firstly it was boarded up, easing the problem, and it is now being developed and will be sold off when completed, resolving the problem at that site.

Marketing

11% of businesses said advertising would improve their business, and 1 (3.5%) that "marketing to OUP" would help.

Council

11% of business thought more support from the council would improve their business

Other Suggestions:-

"Better shops in Little Clarendon Street"

"Greater diversity of other businesses"

"Policing evenings 'bad behaviour"

"Change the nature of my business without huge expense"

"More local support for community"

"More opportunities, support"

2.8 Question 8: What Are Your Competitive Challenges?

For 24 (89%) of respondents there is some element of competitive challenge for their Jericho business; 3 (7%) made no comment; and 1 business (4%) said that the question was *"not appropriate to a Jericho survey"*.

Competition from other Businesses

15 (55.5%) of respondents said that competition from other businesses was a competitive challenge. Statements include: *"too much local competition"*; *"corporate competition"*; *"food shops opening in city centre"*; need for *"more food and drink deals"* [than other pubs] and that is was a challenge to *"offer competitive rates while maintaining a high standard"*. One business says that competition had its *"pluses and minuses"*.

Costs

For 11% of the business respondents, costs such as expensive storage, overheads and a "greedy bank" are a competitive challenge.

Parking

7% of respondents said that parking was a competitive challenge

Returning Shoppers (make sure we offer what customers want to make their return visit probable). Entice business from Walton Street

Other Competitive Challenges

"Too small a business to have an impact"; "footfall"; "too far out of town"; identifying Unique Selling Point (USP) and sticking to it" and; "premises too small". For the General Practice:" keeping practice population healthy" is the challenge; and for the publisher the "rend to move from print to digital" s the specific competitive challenge

2.9 Question 9: How do You View the/Your Future in Jericho?

26 (96%) of the respondents gave an opinion on the future of Jericho and/or their business in Jericho; only 1 business made no comment.

Positive

17 of the 27 respondents (63%) are positive the future of Jericho and/or about their future as businesses in Jericho. Comments include:-

"Positive (hopefully a long one - with more student housing customer numbers will rise and local businesses should see a big difference"

"Bright & Successful"

"Going from strength to strength"

"8 out of 10 (and link Road through Radcliffe Infirmary)"

"A very close knit community who will keep supporting their local store (est. 1985, only one remaining)

"Hopeful things will pick up with the university coming to the Radcliffe site"

"Secure and long term"

"Future looking good but struggling"

"We hope to be very successful and would like to move to the area"

"Bright - getting busier, exploiting Jekyll & Hyde of Population - cash rich/spend poor"

"We would like to run our business for as long as we can and to see Jericho growing with a along with a longevity in business running"

Uncertain

4 businesses (15%) stated that they are not sure of the future: that they are *"not sure but hopefully a long one"*; that it is *" too early to tell" and that it " depends on the general economy - good if were through the worst, otherwise very shaky - last two years were very tough"*.

Other comments

"Things will stay the same"

The future is *"challenging (all retail tough at present, seemingly worse in peripheral areas like Jericho and there is a tendency for shops to give way to bars/restaurants but what can be done about that?"*

"Sadly increasingly expensive and streamlined"

"More estate agents" and "more estate agents and restaurants"

2.10 Question 10: What Innovation Would You Least Like to See?

20 (74.5%) business respondents suggested innovations they would least like to see; 5 (18.5%) businesses made no comment and 2 (7%) did not understand the question.

Supermarkets

18.5% of the business respondents would least like to see more supermarkets in Jericho. They do not want to see *"more supermarkets replacing individual businesses"*.

The Character of Jericho

3 (11%) of the respondents would not like to see any innovation that changes the character of Jericho, for example that *"changes the 'Village' feel of Jericho"*; *"a shopping mall with parking"* or *"more high end, tall, modern buildings"*.

Estate Agents and Restaurants

2 (7%) of business respondents said they would least like to more estate agents, and one that they would least like to see more restaurants.

Other Comments

Roads and Traffic: *"Pedestrianisation of Walton Street"*; *"continuation of heavy traffic"* and *"fewer parking wardens"*⁴ One respondent would not like to see the *"closing of small pubs/ businesses - this would bring less people to the area and be bad for business"*. Another said they would not like to see *"more crime"*, and one health care worker that they would not like to see the *"privatisation of the NHS"*.

On a humorous note, one respondent would not like to see *"dogs driving cars!"*

⁴ respondent may have misunderstood the question

2.11 Question 11: How Many People are Employed Here?

The total number of people employed by the Jericho businesses represented in this survey is 2,226. Of these, 2,000 are employed by one publishing business, as seen in Figure 8 below, and 226 are employed by the other businesses.

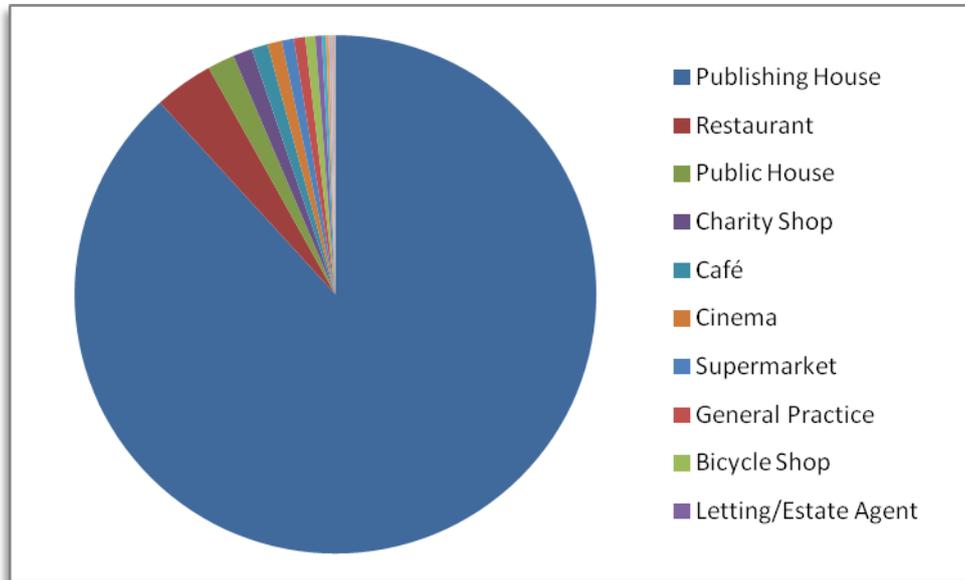


Figure 8: Number of Employees for Each Business Type Represented

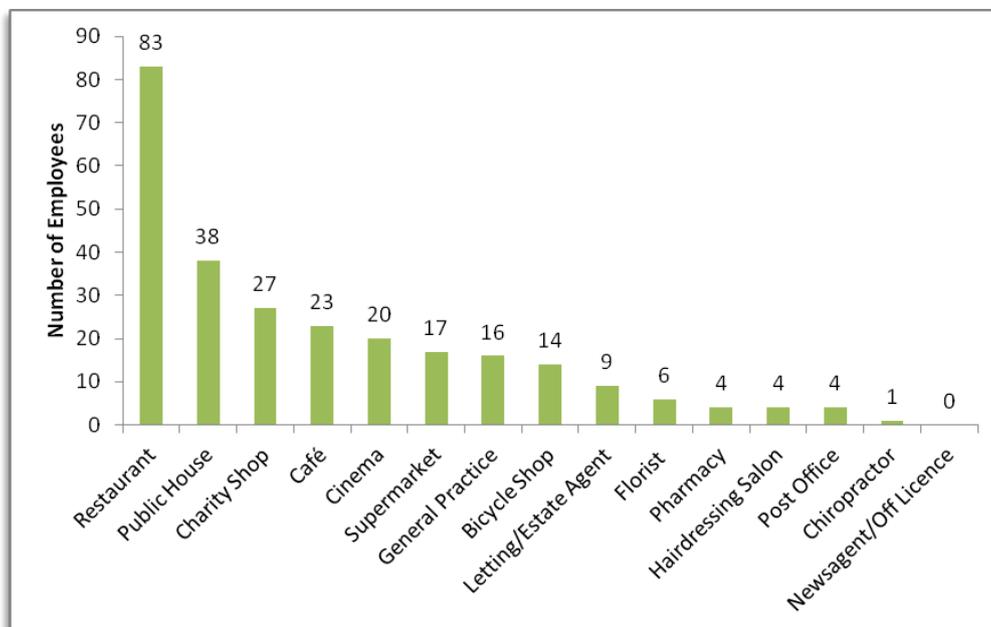


Figure 9: Number of Employees for each Business Type (excluding the publishing house)

Figure 9 shows the number of employees for each business represented in the survey except for the OUP, where the latter has been taken out to show the spread

of employees across the other businesses without being skewed by the OUP outlier. Note that the newsagent and one of the public houses are family run businesses and have no employees. Some of the employees stated are volunteers: of the charity shops 27 employees, 2 are paid and 25 are volunteers; one café- bookshop has one volunteer.

2.12 Question 12: How Many of the Employees Live in Jericho?

The spread of number of employees living in Jericho by business type is shown in Figure 10 below (with the publishing house not represented because they did not know how many of their staff live in Jericho).

Of the 226 employees of the remaining 26 businesses, 38 (16.8%) live in Jericho. The five public houses represented in the survey have more staff living in Jericho (13) than the other businesses.

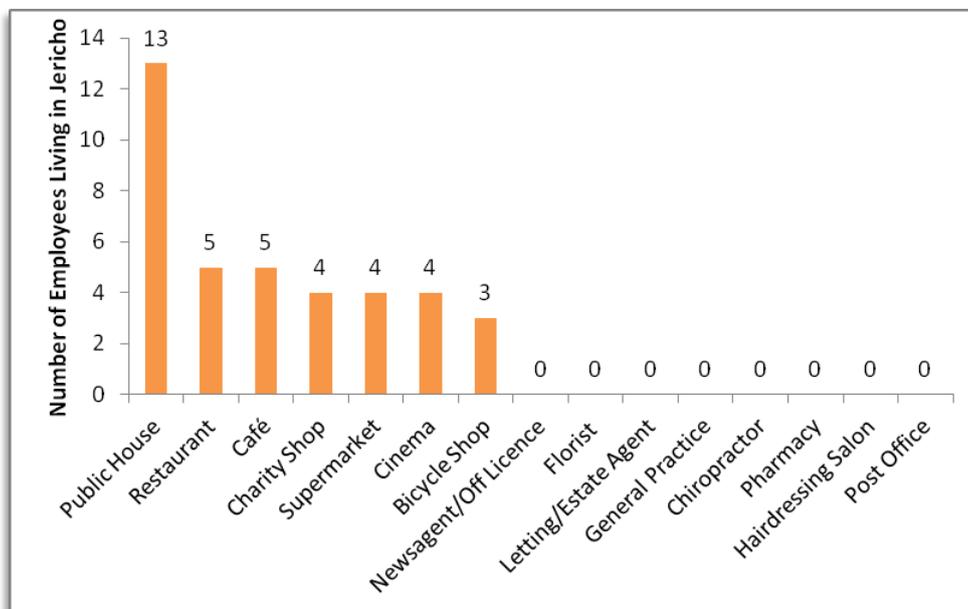


Figure 10: Number of Employees Living in Jericho (excluding the publishing house)

2.13 Question 13: Any Other Input?

Of the 27 business respondents, 9 (33.3%) made no statement for any other input, 2 (7.4%) said it was not applicable and 6 (22.2%) said they had no more input to add. Of the remaining 10 businesses represented (37.1%), 2 made positive comments about Jericho and 8 raised further issues and/or suggestions for improvement (see below). One business said it was nice to be consulted, and another that they would like to be updated on feedback and analysis/conclusions.

Positive Comments

"Love the feeling of Walton Street -Walton Manor of Jericho"

"Jericho works very well as it is and the diversity is very attractive to new comers and businesses; We are looking to sponsor local initiative"

Further Issues/Suggestions for Improvements

Parking

"Business parking permit"

High Costs

"Jericho is expensive with high rents and new businesses tend to be cafes or property agents which are not needed. It would be nice if were more affordable for people in middle bracket."

"We would like council to help - freeze rent and rates"

"We have been here 25 years and weathered events but would not dream of starting a business now because everything is against you: high rents/rates; high bank charges; lack of other indie shops (Oxford is particularly bad); Greedy college (could do far more to promote their community); sclerotic traffic/high parking charges; online competitors etc; staff costs. To conclude: Everything favours large outlets and seems there is no incentive/encouragement for small businesses anymore"

Business Support

"Visitors need to get here to spend. We would like a One-way Street from the Victoria to Post Office and more support for businesses off Walton Street"

"Be advertised in local newspaper to help get the communities support behind us."

Students

"There is a danger it will become populated by even more students, and businesses suffer when students are on holiday"

Other

"Resolving Crime and sorting out rough sleepers."

"More retail available to support the local population"