Okehampton

2014 Town Benchmarking Report

May 2015

Executive Summary

The benchmarking surveys were conducted by WDBC officers in early October 2014 and included on the street surveys of retail units, car parking spaces and Town Centre Users. Every business in the town centre was circulated with the Business Confidence Survey with a request to collect postcode data.

Retail Units

145 Ground Floor units were identified of which:-
48% were Comparison shops (clothes, gifts, hardware, jewellery etc)
10% were Convenience shops (food, drinks, newspapers etc.)
The remaining 42% being non-retail units
6 were Regional Stores (with another outlet in the region)
11 were Multiples
64 were Independents
There were two key attractors – Waitrose and Boots
6 units were vacant (4%) which is very low, although 4 are on the main street (Fore Street)

Footfall

On a busy day (Friday) we counted 110 pedestrians in 10 minutes and on a relatively quiet day (Monday) about 100 in the same period. This was repeated 3 times with similar outcomes.

Markets

There are no permanent or temporary market stalls in Okehampton

Car Parking
We counted 506 spaces in the various car parks around town and 156 free on street spaces
On a busy day 25% free on street spaces are available rising to 28% on a quiet day
On a busy day nearly 33% on street spaces were vacant rising to 38% on a quieter day

Business Confidence

Of the 22 businesses who returned their forms
15 were retailers and 14 were Independents
Compared to other small towns turnover and profitability over the last year has been poor and there is less optimism about the forthcoming 12 months.
For 27% turnover had increased in the past year, for 36% it had stayed the same and for a further 36% it had declined

Only15% saw profitability increase in the last 12 months. For half it had stayed the same and for 35% it had decreased
Meanwhile, only 28% expect things to improve over the next 12 months, 48% to stay the same and 24% to get worse.
Positive factors included the town geographical location, its overall retail offer and its ability to attract tourist customers
The main negative factor was car parking in the town. Other concerns included the overall prosperity in the town, rental levels and high rates as well as concerns about competition from the internet.
In terms of suggested improvements 8 wanted all car parking to be either free or cheaper, 5 wanted lower rents and rates.

Town Centre Users

There was a higher than average proportion of women answering the town centre users survey compared to elsewhere.

Fewer than average levels of town centre users were in the town centre for convenience shopping with correspondingly more there for work and comparison shopping purposes.

Dependency on car transport is lower than the average small town.
Otherwise the patterns were similar to elsewhere.

Positive factors included, the physical appearance of the town, its retail offer, ease of access to services, walking round town and overall safety.

Negative factors included the lack of markets and transport links which were considered the main areas for improvement

Post Code data

69% of customers were local to Okehampton and the Hamlets
17% were from within 30 minutes journey and
15% from further afield including 3 overseas visitors

Introduction

The Approach

The People and Places Town Benchmarking System has been developed to address the real issues of how to understand measure, evaluate and ultimately improve town centres. The approach offers a simple way of capturing data on 12 Key Performance Indicators selected by those involved in town centre management. By having the tools to measure performance, strategic decision making is both encouraged and improved. By considering performance, forward strategies and action planning can be more focused and effective.

People and Places Town Benchmarking licenses allow users to collect data on the 12 Key Performance Indicators from 1st January to 31st December in a systematic manner. All license holders are provided with a Town Benchmarking Handbook and associated data collection sheets to ensure standardization. Once the data has been collected it is sent to People and Places for analysis and report production.

The System

The Benchmarking system is divided into two sections:

- Large Towns; consisting of those localities with more than 250 units
- Small Towns; consisting of those localities with less than 250 units

Towns, depending on their size, contribute to either the Large or Small Town analysis. **Okehampton** with **151** units is classed as a **Small** Town. The analysis provides data on each KPI for the Benchmarked town individually and in a Regional, National and where possible Typology context. Regional figures are an amalgamation of the data for all the towns in a specific region. The National figure is the average for all the towns which participated in Benchmarking during 2014.

Information on towns contributing to Benchmarking in 2014, whether they are part of the Large or Small Town cohort, Region and Typology can be found within the Appendix

The Reports

The People and Places Town Benchmarking report provides statistical analysis of each of the KPI's. Individual towns are encouraged to add their own commentary to the analysis, noting specific patterns or trends and using local knowledge to provide specific explanations. The reports are used by a variety of key stakeholders such as local authorities, town and parish councils, local partnerships and universities to;

- benchmark clusters of towns to ascertain high performers / under achievers
- understand their locality in a Regional, National and Typology context
- measure town centre performance year on year
- identify strengths, weaknesses, and opportunities for improvement
- measure the impact of initiatives and developments within the town centre
- act as an evidence base for funding applications
- create an action plan for town centre improvements

Methodology

Each KPI is collected in a standardized manner as highlighted in the Table below.

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

Before any KPI data is collected the core commercial area of the town centre is defined. The town centre area thus includes the core shopping streets and car parks attached or adjacent to these streets.

Key Findings

KPI 1: COMMERCIAL UNITS; USE CLASS

It is important to understand the scale and variety of the "commercial offer" throughout the town. A variety of shops and a wide range of services in a town are important to its ability to remain competitive and continue to attract customers. Sustaining a balance between the different aspects of buying and selling goods and services ensures that the local population (and visitors from outside) can spend time and money there, keeping the generated wealth of the town within the local economy. Importantly, it forms the employment base for a substantial proportion of the community too, helping to retain the population rather than lose it to nearby towns and cities.

The following table provides a detailed breakdown of each of the Use Classes

Class	Type of Use	Class Includes
A1	Shops	Shops, retail warehouses, hairdressers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes
A2	Financial and Professional Services	Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices
A3	Restaurants and Cafes	Food and drink for consumption on the premises- restaurants, snack bars and cafes
A4	Drinking Establishments	Public houses, wine bars or other drinking establishments (but not nightclubs)
A5	Hot Food Takeaways	Sale of hot food for consumption off the premises
B1	Businesses	Offices (other than those that fall within A2) research and development of products and processes, light industry appropriate in a residential area
B2	General Industrial	General Industrial
B8	Storage and Distribution	Warehouses, includes open air storage
C1	Hotels	Hotels, boarding and guest houses where

		no significant element of care is provided (excludes hostels)
C2	Residential Institutions	Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.
C2A	Secure Residential Institution	Use for a provision of secure residential accommodation, including use as a prison, young offenders institution, detention centre, secure training centre, custody centre, short term holding centre, secure hospital, secure local authority accommodation or use as a military barracks.
D1	Non Residential Institutions	Clinics, health centres, crèches, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, church halls, law court. Non residential education and training centres.
D2	Assembly and Leisure	Cinemas, music and concert halls, bingo and dance halls (but not nightclubs), swimming baths, skating rinks, gymnasiums or area for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used).

The following table provides a detailed analysis of the commercial offering in the town centre by Use Class. The figures are presented as a percentage of the **145** occupied units recorded.

	National Small Towns %	South West Small Towns%	Typ. 2 %	Oke. %
A1	51	55	53	57
A2	15	14	13	20
A3	8	7	8	6
A4	4	4	4	5
A5	5	4	4	3
B1	3	2	2	0
B2	1	1	2	1
B8	0	0	0	0
C1	1	1	1	0
C2	0	0	0	0
C2A	0	0	0	0
D1	6	6	6	6
D2	1	1	1	1
SG	5	4	5	2
Not Recorded	0	0	0	1

There is a healthy mix of retail to non-retail units in Okehampton which is similar to comparable small towns across the country, region and the Type 2 group.

The ratio of comparison to convenience retail units in ground floor premises is in line with other small towns (See KP2 below)

KPI 2: COMMERCIAL UNITS; COMPARISON VERSUS CONVENIENCE

A1 Retail units selling goods can be split into two different types Comparison and Convenience.

Convenience goods – low-cost, everyday items that consumers are unlikely to travel far to purchase. Defined as;

- food and non-alcoholic drinks
- tobacco
- alcohol
- newspapers and magazines
- non-durable household goods.

2. **Comparison goods** – all other retail goods.

- Books
- Clothing and Footwear
- Furniture, floor coverings and household textiles
- Audio-visual equipment and other durable goods
- Hardware and DIY supplies
- Chemists goods
- Jewellery, watches and clocks
- Bicycles
- Recreational and Miscellaneous goods
- Hairdressing

The presence of a variety of shops in a town centre is important to its ability to remain competitive and continue to attract customers. A balance of both comparison and convenience retail units is therefore ideal in terms of encouraging visitors / potential customers.

The following table provides a percentage of the A1 Shops which sell mainly Comparison Goods/ Convenience Goods.

	National Small Towns %	South West Small Towns %	Typ. 2 %	Oke. %
Comparison	81	84	82	83
Convenience	19	16	18	17

KPI3: COMMERCIAL UNITS; TRADER TYPES

The vitality of a town centre depends highly on the quality and variety of retailers represented. National retail businesses are considered key attractors and are particularly important in terms of attracting visitors and shoppers to a town. However, the character and profile of a town often also depends on the variety and mix of independent shops that can give a town a "unique selling point" and help distinguish it from other competing centres. A sustainable balance of key attractors and multiple names alongside local independent shops is therefore likely to have the greatest positive impact on the vitality and viability of a town.

The following shops are considered Key attractors by Experian Goad.

Department Stores	**Clothing**
BHS	Burton
Debenhams	Dorothy Perkins
House of Fraser	H & M
John Lewis	New Look
Marks and Spencer	Primark
	River Island
Mixed Goods Retailers	Topman
Argos	Topshop
Boots	
TK Maxx	**Other Retailers**
WH Smith	Carphone Warehouse
Wilkinson	Clarks
	Clintons
Supermarkets	HMV
Sainsbury's	O2
Tesco	Superdrug
Waitrose	Phones 4 U
	Vodafone
	Waterstones

Multiple traders have a countrywide presence and are well known household names. Regional shops are identified as those with stores / units in several towns throughout one geographical region only and Independent shops are identified as those that are specific to a particular town.

The following table provides a percentage of the A1 Shops which are Key Attractors, Multiples, Regional and Independent to the locality

	Nat. Small Towns %	South West Small Towns%	Typ. 2 %	Oke. %
Key Attractor	4	4	5	2
Multiple	20	17	21	13
Regional	7	10	8	7
Independent	69	69	66	77

Okehampton only has 2 key attractors and a low level of multiples compared to other small towns, but the level of Independent traders is high.

KPI4; COMMERCIAL UNITS VACANCY RATES

Vacant units are an important indicator of the vitality and viability of a town centre. The presence of vacant units over a period of time can identify potential weaknesses in a town centre, whether due to locational criteria, high rent levels or strong competition from other centres.

The following table provides the percentage figure of vacant units from the total number of commercial units.

	Nat. Small Towns %	South West Small Towns%	Typ. 2 %	Oke. %
Vacancy %	7	7	7	4

Vacancy levels are very low even compared to other small towns, which tend to have lower levels compared to larger centres.

KPI5; MARKETS

Good quality markets provide competition and choice for consumers. A busy and well-used street market can therefore be a good indicator of the vitality of a town centre. Conversely, if a market is in decline (e.g. empty pitches reducing numbers), it can be an indication of potential weaknesses in the town centre e.g. a lack of footfall customers due to an inappropriate retail mix or increased competitor activity. Street markets can also generate substantial benefits for the local economy. Markets can also provide a local mechanism for a diverse range of local enterprises to start, flourish and grow, adding to the sustainable mix of shops services on offer throughout the town.

The following table provides the average number of market traders at the main regular (at least once a fortnight) weekday market within the locality.

	National Small Towns	South West Small Towns	Typ. 2	Oke.
Average Number of Traders	*21*	*28*	*31*	*n/a*

Okehampton has no permanent or temporary market stalls, although a farmers market does operate once a month in the town centre, but not on the days when the benchmarking surveys were conducted.

KPI 6 AND 7: ZONE A RETAIL RENTS AND PRIME RETAIL PROPERTY YIELDS

The values for prime retail property yield and Zone A rentals are the "industry" benchmarks for the relative appeal of a location with its users and with the owners or investors in property. All real estate has a value and this value is based on the return on investment that can be levered out of the site. As these indicators rise and fall, they provide a barometer of success or failure and, because the same property dimensions are assessed to determine them, they can be used as an indicator of improving or declining fortunes for towns. In particular retail rents can provide a useful indication of a town's performance and highlight how attractive it is to businesses. Conversely, where rents are falling it can be an indicator of decline.
Zone A rents are expressed as £ per sq. ft. and the Prime Retail Property Yield is a Net Percentage figure.

	National Small Towns	South West Small Towns	Typ. 2	Oke.
Zone A	27	33	29	40
Yield	7	8	8	7

Zone A rentals are relatively high, whereas Yields are in line with other small towns.

KPI 8: FOOTFALL

The arrival and movement of people, whether as residents, workers, visitors or a shopper is vital to the success of the majority of businesses within the town centre. The more people that are attracted to the town, the better it trades and the more prosperous the businesses in it become, provided there is ample available disposable income in that population. Measuring passing people in a consistent manner in the same place, at the same time builds up a picture of the town, its traders and their relative success over the weeks and months.

The following table provides the average number of people per 10 minutes between 10am and 1pm from the busiest footfall location in the locality.

	Nat. Small Towns	South West Small Towns	Typ. 2 %	Oke.
Market Day	134	134	191	112
Non Market Day	98	84	123	98

Footfall in Okehampton is relatively low compared to other small towns even on a busy day. Notwithstanding that Okehampton does not have a “market day” as such.

KPI 9: CAR PARKING

A large proportion of spending customers in a town centre come by car. In the rural setting, the car tends to be an essential tool, used by both those who come to spend and those who come to work. The provision of adequate and convenient car parking facilities is therefore a key element of town centre vitality. An acceptable number of available spaces with a regular, quick turn-over for shoppers are the ideal while adequate longer stay, less convenient spaces for local owners/ workers and visitors must be considered too.

The following tables provide a summary of the Car Parking offering broken down into the;

- Percentage number of spaces in designated car parks
- Percentage number of short stay, long stay and disabled spaces in designated car parks
- Percentage of vacant spaces in designated car parks on a Market/ Busy Day and on a Non Market/ Quiet Day
- Percentage number of on street car parking spaces
- Percentage number of on street short stay, long stay and disabled spaces
- Percentage of vacant on street spaces on a Market/ Busy Day and on a Non Market/ Quiet Day
- Overall percentage of short stay, long stay and disabled spaces
- Overall percentage of vacant spaces on a Market/ Busy Day and on a Non Market/ Quiet Day.

	Nat. Small Towns %	South West Small Towns%	Typ. 2 %	Oke. %
Car Park:				
Total Spaces:	89	86	87	76
Short Stay Spaces: (4 hours and under)	48	38	49	74
Long Stay Spaces: (Over 4 hours)	46	56	45	22
Disabled Spaces:	4	5	4	4
Not Registered	2	2	2	0
Vacant Spaces on a Market Day:	28	28	29	32
Vacant Spaces on a Non Market Day:	39	40	39	38
Illegal Spaces on a Market Day:	n/a	n/a	n/a	n/a
Illegal Spaces on a Non Market Day:	n/a	n/a	n/a	n/a
On Street:				
Total Spaces:	11	14	13	24
Short Stay Spaces: (4 hours and under)	67	56	70	3
Long Stay Spaces: (Over 4 hours)	12	14	8	0
Disabled Spaces:	5	5	6	5
Not Registered	16	24	16	92
Vacant Spaces on a Market Day:	14	12	14	13
Vacant Spaces on a Non Market Day:	20	21	20	28
Illegal Spaces on a Market Day:	n/a	n/a	n/a	n/a
Illegal Spaces on a Non Market Day:	n/a	n/a	n/a	n/a

Overall				
Total Spaces:	n/a	n/a	n/a	n/a
Short Stay Spaces: (4 hours and under)	50	40	52	57
Long Stay Spaces: (Over 4 hours)	42	50	40	17
Disabled Spaces:	5	5	4	4
Not Registered	3	5	4	22
Vacant Spaces on a Market Day:	26	26	27	27
Vacant Spaces on a Non Market Day:	37	37	36	35
Illegal Spaces on a Market Day:	n/a	n/a	n/a	n/a
Illegal Spaces on a Non Market Day:	n/a	n/a	n/a	n/a

The proportion of car parking spaces against on street spaces is low.

The proportion of vacant spaces in designated car parks is in line with other similar towns, whilst slightly higher levels of spaces are available compared to other towns on a non-market day.

KPI 10: BUSINESS CONFIDENCE SURVEY

In regards to the 'business confidence' by establishing the trading conditions of town centre businesses, stakeholders can focus their regeneration efforts on building on existing strengths and addressing any specific issues. The following percentage figures are based on the **22** returned Business Confidence Surveys.

	National Small Towns %	South West Small Towns %	Typ. 2%	Oke. %
Nature of Business				
Retail	61	59	59	68
Financial/ Professional Services	15	19	20	9
Public Sector	2	2	1	0
Food and Drink	12	10	11	14
Other	10	11	10	9
Type of Business				
Multiple Trader	13	9	11	10

Regional	6	6	8	0
Independent	81	85	82	90
How long has your business been in the town				
Less than a year	6	4	4	10
One to Five Years	22	19	24	15
Six to Ten Years	13	17	14	15
More than Ten Years	60	60	58	60
Compared to last year has your turnover				
Increased	39	37	43	30
Stayed the Same	34	34	32	30
Decreased	27	30	25	40

Compared to last year has your profitability				
Increased	35	29	37	11
Stayed the Same	36	40	35	50
Decreased	30	30	28	39
Over the next 12 months do you think your turnover will				
Increase	45	34	45	23
Stay the Same	40	48	42	50
Decreased	15	18	13	27
What are the positive aspects of the Town Centre?				
Physical appearance	44	20	39	-
Prosperity of the town	41	27	41	24
Environment	23	19	22	29
Geographical location	51	47	51	57
Mix of Retail Offer	39	26	34	38
Potential tourist customers	43	35	42	52
Potential local customers	75	77	75	76
Affordable Housing	13	14	12	5
Transport Links	27	28	26	10
Car Parking	43	36	38	19

Rental Values/ Property Costs	20	15	17	10
Market (s)	24	15	27	0
Events/ Activities	30	12	26	-
Marketing/ Promotions	14	6	15	-
Local Partnerships/ Organisations	17	9	16	-
Other	3	6	9	14

What are the negative aspects of the Town Centre?				
Physical appearance	17	21	14	-
Prosperity of the town	22	30	19	37
Labour Pool	10	11	10	11
Geographical location	6	8	7	16
Mix of Retail Offer	18	22	18	16
Potential tourist customers	6	4	4	5
Potential local customers	3	0	3	0
Affordable Housing	8	4	8	11
Transport Links	21	12	24	26
Car Parking	50	69	62	74
Rental Values/ Property Costs	27	29	33	32
Market (s)	8	8	8	0
Local business competition	16	8	18	16
Competition from other localities	21	22	22	26
Competition from out of town shopping	33	19	27	-
Competition from the internet	34	33	38	32
Events/ Activities	6	5	5	-
Marketing/ Promotions	6	2	4	-
Local Partnerships/ Organisations	3	1	2	-
Other	3	12	14	11
Has your business suffered from any crime over the last 12 months				
Yes	24	26	25	23

No	76	74	75	77
Type of Crime				
Theft	69	60	69	80
Abuse	12	10	12	0
Criminal Damage	38	48	36	20
Other	4	3	4	0

What two suggestions would you make to improve the town's economic performance?

- "opening up of railway line"
- "Change the people running the town encourage new and different businesses to town centre. Financial incentives."
- "Better traffic management, especially market st. 3g availability in area"
- "Revisit the business improvement partnership scheme; collective marketing is powerful"
- "Sorting out the traffic, people do not want to come into town and there are more and more empty shops, this does not look good for anyone (rents/ rates)"
- "Remove the cafe from Waitrose; it stops people from using all other retail outlets. Free parking for local residents"
- "Businesses on end of town heading to Tavistock suffer during event held in town as wither road is blocked off or a procession starts in middle of town. Maybe good to consider us and extend processions during events"
- "Improved roads/ access"
- "More retailers in town and better advertising to draw people in. People willing to open sun/ full week 9-5 or late opening to support town growth. No weekday or weekend closing"
- "Town relief road. Free car parking, outside of hours when workers park up,"
- "Change car parking to either pay on exit which means customers won't have to worry about over running their time or free for up to 3 hours, I prefer the first. Try to have a regular weekly late night"
- "Drop business rates in the High Street to increase empty shops to be filled and free parking."
- "Greater retail mix. More jobs available for skilled workers"
- "Maintain and increase on street and car parking"

- "Lower rent and rates. improved car parking"
- "Rateable value in line with today's lower rents. Better signage for what's on offer in the town centre. Driving customer out of Waitrose car park and in the town"
- "Better on street parking. Coach parking in the town"
- "Traffic wardens not quite so overzealous! Possibly some free parking time on Wednesday which is proving to be a very slow day. This town needs some positive publicity, there is a good range of independent shops here, but compared to Tavistock the people of Okehampton have always considered the town to be the poor relation."
- "Rateable value in line with today's lower rents. Better signage for what's on offer in the town centre, driving customer out of Waitrose car park and into town"
- "Free parking, or town centre car park. Employ town centre manager to coordinate added value to one visit."

The number of surveys returned was low with only 22 replies being received. 2/3rds of these were from the retail sector. Nearly all the respondents were Independent Traders.

Over 75% had been trading for 6 years or more.

Compared to last year a much higher than average proportion of businesses had seen a decrease in turnover with a correspondingly low proportion who experienced an increase in turnover.

A similar, but worse, picture applies to profitability compared to last year with nearly 90% not improving their profitability last year.

In terms of prospects for next year a similarly gloomy picture emerges. Only 23% of businesses expect things to improve and this is well below businesses in other small towns.

Nonetheless, there are some positive features, which include its location, its retail offer and draw for tourism business

On the negative side car Parking is perceived to be a problem, as is transport access and overall prosperity of the town.

KPI 11: TOWN CENTRE USERS SURVEY

The aim of the Town Centre Users Survey is to establish how your town is seen by those people who use it. By asking visitors, of all types, a more detailed picture can be obtained as what matters to regular visitors can be very different to someone who has never been to the place before.

The following percentage figures are based upon the **77** completed Town Centre User Surveys.

	Nat. Small Towns %	South West Small Towns%	Typ. 2 %	Oke. %
Gender				
Male	38	37	37	30
Female	62	63	63	70
Age				
16-25	5	4	5	6
26-35	12	13	12	14
36-45	17	16	17	12
46-55	18	16	18	17
56-65	22	23	22	22
Over 65	27	28	26	29
What do you generally visit the Town Centre for?				
Work	15	18	16	18
Convenience Shopping	43	43	39	35
Comparison Shopping	5	6	7	10
Access Services	17	12	16	15
Leisure	12	14	14	10
Other	9	8	10	13

How often do you visit the Town Centre				
Daily	29	32	28	31
More than once a week	40	40	39	35
Weekly	15	15	16	18
Fortnightly	5	5	4	4
More than once a Month	4	2	4	8
Once a Month or Less	7	6	7	3
First Visit	1	1	2	1
How do you normally travel into the Town Centre?				
On Foot	34	34	33	32
Bicycle	2	3	3	2
Motorbike	0	1	0	1
Car	56	55	56	50
Bus	5	6	6	2
Train	1	1	1	7
Other	1	1	1	5
On average, on your normal visit to the Town Centre how much do you normally spend?				
Nothing	4	4	4	1
£0.01-£5.00	15	13	14	9
£5.01-£10.00	25	24	24	17
£10.01-£20.00	30	31	33	36
£20.01-£50.00	21	22	20	26
More than £50.00	6	7	6	11

What are the positive aspects of the Town Centre?				
Physical appearance	56	58	67	75
Cleanliness	52	53	59	-
Retail Offer (Shopping)	35	41	43	69
Customer Service	44	43	53	-
Cafes/ Restaurants	51	52	66	55
Access to Services	69	70	73	87
Leisure Facilities	22	18	24	66
Cultural Activities/Events	28	27	37	40
Pubs/ Bars/ Nightclubs	35	41	35	30
Transport Links	34	34	36	44
Ease of walking around the town centre	71	75	76	94
Convenience e.g. near where you live	71	71	72	84
Safety	44	47	53	90
Car Parking	46	39	48	51
Markets	37	33	49	23
Other	4	4	3	3
What are the negative aspects of the Town Centre?				
Physical appearance	26	19	19	22
Cleanliness	24	19	23	-
Retail Offer (Shopping)	41	24	37	32
Customer Service	8	5	10	-
Cafes/ Restaurants	16	10	9	25
Access to Services	11	8	9	3
Leisure Facilities	32	37	34	18
Cultural Activities/Events	26	20	23	34
Pubs/ Bars/ Nightclubs	22	15	20	30
Transport Links	25	24	25	40
Ease of walking around the town centre	7	4	8	3
Convenience e.g. near where you live	7	5	7	10
Safety	12	8	11	1
Car Parking	37	47	37	32
Markets	22	13	17	69
Other	9	5	7	1

How long do you stay in the Town Centre?				
Less than an hour	33	29	28	34
1-2 Hours	42	43	43	42
2-4 Hours	14	16	17	13
4-6 Hours	3	3	3	6
All Day	7	7	7	5
Other	1	1	1	0
Would you recommend a visit to the Town Centre?				
Yes	80	83	86	-
No	20	17	14	-

Additional questions asked

How do you rate the physical appearance of the Town Centre?	%
Very Good	8
Good	68
Poor	20
Very Poor	4

How do you rate the cleanliness of the Town Centre?	%
Very Good	10
Good	73
Poor	13
Very Poor	4

How do you rate the variety of shops in the Town Centre?	%
Very Good	7
Good	57
Poor	30
Very Poor	7

How do you rate the leisure and cultural activities in the Town Centre?	%
Very Good	10
Good	65
Poor	23
Very Poor	2

What two suggestions would you make to improve the performance of the town centre?

- "Congestion around supermarket"
- "Dogs- control dog mess better"
- "Fewer yellow lines. No more superstores"
- "Less takeaway places. More diverse shopping. e.g. Homeware, Artisan stores."
- "Variety of shops. Fewer estate agents and takeaways. A nice market."
- "Cheaper car parks. Traffic flow not good. Congestion around supermarket."
- "High St Parking could be better. More bins for litter."
- "Plume and Feathers -improve it. The Victoria Arcade- needs updating."
- "Better parking backed up around supermarkets. Expensive to work and pay parking daily. More variety of shops e.g. clothes."
- "Shoe shops needed Young mum's shop- affordable for children's clothes."
- "Looks around supermarket"
- "Rail- Exeter back to London. Fewer charity shops more variety of shops"
- "Needs more independent shops. Market could be better. Open train Exeter to London"
- "More diverse shops i.e. no fashion shops, no book shops, no florists"
- "Traffic management around supermarket. Train to Exeter to London, Look could be better."
- "Traffic management around supermarket. Train to Exeter to London, Look could be better."
- "More shops for 20-30s. Affordable. Clothing shops."
- "Smooth pedestrian areas. Raised pavements an issue."
- "Clear rubbish and dog mess"
- "Plume of Feathers needs selling or changing"
- "No more people. Less violence, more police."

- "More facilities for older people. Better advertising in papers etc, what's available for older people. Auto wifi in the streets, better for shops too"
- "Windy- need enclosed when wet"
- "Concern about expansion of town- need more jobs"
- "Introduce out of school hours exit from Waitrose car park"
- "Asda onto Industrial Estate to east town centre traffic congestion."
- "More shops/ variety aimed at local residents rather than tourists. More supermarkets e.g. Tesco on edge of town."
- "Railworks. Market back. Park n Ride. Road maintenance."
- "Street sweeper needed. Re introduce the market."
- "Street cleaning improved. Shops for young people-sports."
- "Coach parking. Took away WC's"
- "More variety of shops"
- "More restaurants. More independents. Refresh arcade. More events. Railway link"
- "More activities and events, film festival. More buses and rail link. More variety of shops e.g. Games"
- "Buses and Train Station. Traffic congestion especially roundabout at Co Op"
- "Rail link needed"
- "Shoe shops and greater variety. Bring back the railway."
- "Shoe and clothes shops. Re open station."
- "Railway link to Exeter. More variety and shops. Market."
- "Improve safety, more policing"
- "Too many second hand shops. Car parking should be free first hour"
- "Problems crossing road at traffic lights"
- "Improve bus services, breakdowns/ filthy. Lack of variety of shops e.g. books)"
- "Fill up empty shops, rents too high. More multiples e.g. Smiths, bigger Boots, Costa Coffee"
- "Access for mobility scooters"
- "Plume of Feathers needs improving. A central focus area"
- "Improve the traffic flow"
- "Needs painting looks filthy and dirty. Cheaper rents for small businesses"
- "Public transport links, especially train from Exeter to London is needed. More independent shops."
- "More dropped kerbs for mobility scooters"
- "Rail link to Exeter. Plume of Feathers needs a refurb"
- "Better buses. More proper businesses"

- "Traffic flow needs improving. Some buildings look tired, needs refreshing"
- "Plume of Feathers needs improving. Remove burger van outside Oxfam on Friday and Saturday"
- "Enhance empty shops, too many charity shops. Need e.g. toy shops. Phoenix gym needs a revamp"
- "Better variety and quality of independent retailers. Keep supermarkets as they are"
- "Need better variety of shops inc brand names. An hour's free parking would be good"
- "I would like to have seen a local format store for one of the big 4 supermarkets- rather than need a Tesco's on Plymouth Road Industrial Estate. A local currently, like the Totnes Pound should be piloted"
- "Redevelop the area opposite Waitrose- i.e. pet supermarket area. Provide another entrance to the Main Street so that pedestrians can employ a circular route via Red Lion Yard, along Fore Street, going East then back through the small car park adjacent to pet supermarket, Make it less tacky, encourage shop owners to look at the detail of cleanliness, ...repair...., window displays. It just looks a bit tired with exceptions of shops such as Angel and a few others who pay attention to good decoration etc. Chamber of Trade could encourage to advise."
- "Free parking"
- "Free parking"
- "Redevelopment/ re use of the Plume of Feathers Pub. Redevelop the mill site on Mill Road for community, cultural, business users to expand the town centre users"
- "Evening cafe openings (not just pubs). More/ better live entertainment"
- "Improve signage / ....when coming in town e.g. Mill Road, Waitrose Car Park. Encourage pop up shops in empty units- particularly for small businesses and home workers and display goods"
- "More shops needed to encourage people to town. As you can only get limited items easier to go online or to Exeter, Possibly a retail development on North Road to connect town. Revamp the Victorian arcade. Train line"

There was a higher than average proportion of women answering the town centre users survey compared to elsewhere.

Fewer of these were in the town centre to go convenience shopping than average with more visiting for work and comparison shopping purposes.

Dependency on car transport is lower than the average small town.

Otherwise the patterns were similar to elsewhere.

Positive factors included, the physical appearance of the town, its retail offer, ease of access to services, walking round town and overall safety.

Areas for improvement included the provision of markets and transport links

KPI 12: SHOPPERS ORIGIN SURVEY

The Shoppers Origin Survey tracks the general area that your town centre visitors originate from. The data can be used to target local marketing or promotional literature. It can also be used as evidence of the success of such campaigns by gauging the penetration into the population.

The **703** postcodes gathered from businesses are split into 3 categories to be able to compare with other towns. The categories are:

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

	National Small Towns%	South West Small Towns %	Typ 2 %	Oke. %
Locals	54	52	46	68
Visitors	29	30	34	17
Tourists	16	18	19	16

A higher proportion of locals answered the survey compared to other small towns with a correspondingly low level of visitors from over 30 miles journey distance.

Appendix

Participating towns in 2013

The following towns all contributed to the Benchmarking System in 2014.

TOWN NAME	REGION	TYPOLOGY
Cowbridge	South West	n/a
Llantwit Major	South West	n/a
Abergavenny	South West	n/a
Blaenavon	South West	n/a
Corsham	South West	2
Devizes (L)	South West	2
Frome	South West	2
Okehampton	South West	2
Ludgershall	South West	4
Marlborough	South West	2
Melksham	South West	2
Tavistock	South West	2
Trowbridge (L)	South West	2
Warminster	South West	2
Westbury	South West	2
Wilton	South West	2
Basingstoke (Top of Town)	South East	n/a
Bletchley	South East	n/a
Stratford upon Avon (L)	West Midlands	5
Alcester	West Midlands	2
Great Malvern	West Midlands	2
Tenbury Wells	West Midlands	2
Newport	West Midlands	8
Southam	West Midlands	4
Rhayadar	West Midlands	n/a
Upton upon Severn	West Midlands	3
Ross on Wye (L)	West Midlands	2
Loughborough (L)	East Midlands	n/a
Melton (L)	East Midlands	2
Hucknall (L)	East Midlands	n/a

Retford (L)	East Midlands	2
Worksop (L)	East Midlands	6
Westdale Lane	East Midlands	n/a
Bury St Edmunds (L)	East of England	2
Wymondham	East of England	2
Loddon	East of England	2
Huntingdon	East of England	4
St Ives	East of England	4
Harleston	East of England	2
Neston	North West	1
Alston	North West	n/a
Appleby	North West	2
Buckley	North West	n/a
Colwyn Bay (L)	North West	n/a
Connahs Quay	North West	n/a
Flint	North West	n/a
Holywell	North West	n/a
Kirkby Stephen	North West	2
Llangefni	North West	n/a
Holyhead	North West	n/a
Mold	North West	n/a
Penrith (L)	North West	2
Queensferry	North West	n/a
Saltney	North West	n/a
Shotton	North West	n/a
Leyburn	North East	n/a
Hexham (L)	North East	5
Morpeth	North East	1
Ponteland	North East	1

(L) denotes Large Town

Typology Information

Group 1 : Middle Aged, Managerial Jobs
236 places (14.7%)
This group is characterized by relatively high values on young/middle age groups (25–44), intermediate and managerial occupations, people working in public administration, education and defence, detached housing, households with adult children and a high proportion of carers. It has low numbers of residents with no qualifications. Geographically the group is found on the outskirts of the big cities and towns outside London and along the south coast from Essex and Kent and into Devon and Cornwall.

Group 2 : Single Persons, Routine Jobs
261 places (16.3%)
Places in this group are particularly characterized by persons living alone (separated/divorced and pensioners), as well as people in routine and lower supervisory and managerial occupations and people living in rented accommodation. Car ownership is low whilst travel to work by public transport is relatively high. Geographically this group is well scattered across the rural areas of the country but particularly in the East of England (Norfolk and Suffolk), in the South West (Wiltshire, Cornwall and Devon). There are few examples of this type of place around the main population centres.

Group 3 : Older Persons, Leisure Jobs
123 places (7.7%)
This group is characterized by older persons, single pensioners, workers in hotels and restaurants, and part time workers, especially among men. It also has high numbers of people working from home and of second homes. This group of places is found overwhelmingly in coastal areas (for example, on the Isle of Wight and in Devon and Norfolk) and in attractive rural areas(e.g. Hampshire, Gloucestershire and North Yorkshire).

Group 4 : Young Families, Administrative Jobs
129 places (8%)
The group is typified by high proportions of people in the 25 – 44 age groups and women looking after the home. Occupations tend to be in the higher managerial and professional groups and in public administration (including defence, teaching and social security).Most places in this group are located in what geographers have called the 'Golden Belt' a stretch of country going from north Wiltshire, through Oxfordshire, Buckinghamshire, Bedfordshire to Cambridgeshire with an 'offshoot' in Berkshire. This area grew rapidly in the period 1981-2001 and continues to do so. There are few places of this type outside this area but where they do exist they are in the rural areas around sizeable towns.

Group 5 : Professionals, Commuting
188 places (11.7%)
This group is characterized by high proportions of professional and higher managerial workers and by people employed in intermediate managerial occupations. There are high proportions of people in financial service occupations and people who commute over 20 kilometers to work. Use of public transport is also proportionately high. There comparatively high proportions of Asian/British Asian households relative to the other groups of settlements. As might be expected from its social and occupational description, this group of rural places is predominantly located within commuting belt around Great London and particularly along the major rail routes into London. There are, however, examples of these types of places around other cities, especially Leeds/Bradford and Greater Manchester.

Group 6 : Disadvantages, Routine Employment
181 places (11.2%)
This group includes high proportions of census measures that have been used to identify social and economic disadvantages of various kinds. These include: routine and low skill occupations, lack of qualifications, unemployment, long term illness, lone parents, lack of a car and the presence of social housing. The geography of most of the members of this group is overwhelmingly that of the former coalfield areas, namely, Notts/Derby, South and West Yorkshire and Northumberland/Durham. Other, smaller, geographical clusters of places in this group are the Cumbrian coast, Teesside and east Lancashire. Places not in such clusters include Hayle (Cornwall), New Addington (Greater London) and Withernsea (East Riding of Yorkshire).

Group 7 : Routine Jobs, Agriculture/Manufacturing
209 places (13%)
This group is similar to Group 6 in that it is characterized by routine and low skill occupations and lack of qualifications. However, this also typified by high percentages of people working in agricultural and manufacturing occupations and in the wholesale trades. Unemployment (in April 2001) was low. As might be expected this group maps onto two main types of area: rural areas and generally those with labour intensive agricultural production of various kinds (e.g. Norfolk, the Fens, mid Somerset and Lincolnshire/North Lincolnshire) and around the major manufacturing centres of the West and West Midlands, West Yorkshire and Humberside.

Group 8 : Age Mix, Professional Jobs

290 places (18%)

This, the largest single group in the typology, is also typified by professional and managerial workers and high levels of educational qualifications but is distinguished from Group 1 by a broader age range (relatively high numbers of young people, but also of middle aged and older people) and from Group 6 by lower levels of longer distance commuting. Also unlike either of these groups there are high proportions of households in detached houses and very low levels of public transport use. The geography of this group is similar to Group 4 in that it is mostly concentrated within the ‘Golden Belt’ of Middle England. However, it is nationally more widespread than Group 4 and includes locations on the outskirts of all the major urban centres outside London with the notable exception of Tyneside where only Castle Morpeth and Coxhoe (both somewhat distant from the conurbation), are of this type.

Business Unit Database

Car Parking Database