Tavistock

2014 Town Benchmarking Report

May 2015

Executive Summary

The benchmarking surveys were conducted by WDBC Council staff in October and included on street surveys of retail units, footfall, car parking spaces and Town Centre Users. Every business in the town centre was circulated with the business confidence survey and asked to record postcodes data. This was the second year of Benchmarking in Tavistock.

Retail Units

225 ground floor premises were identified of which:-
48% were comparison shops (clothes, gifts, hardware, jewellery etc.)
11% were convenience shops (food, drinks, newspapers etc.)
The remaining 40% were non-retail units
14 were Regional stores (with another outlet in the region)
18 were multiples
87 were independents
There were 6 key attractors (Boots, WH Smiths, Superdrug, New Look, Dorothy Perkins and Car Phone Warehouse)
7% of these units were vacant which is comparable to other small market towns but low compared to elsewhere in the country. They were also spread across the town centre rather than being in any particular location.

Footfall

In a busy market day (Friday) we counted on average 200 pedestrians in a 10 minute period and on a quiet non-market day (Monday) we counted 100 in the same period which is a much greater disparity compared to last year's figures, although weather conditions could have been a factor.

Markets

There were 36 permanent stalls in and around the Pannier Market - an increase since last year. There were a further 48 removable indoor stalls and 14 outdoor stalls on the day they were recorded. This a small increase compared to last year and well above the average for this type of town.

Car Parking

We counted a total of 184 free on street spaces in the town centre and 613 spaces in the car parks around town.
On a busy market day there were 1 in 20 available on street spaces and on a quiet non-market day this rose to 1 in 4.
On a market day there were 194 spaces available in the designated car parks, or 1 in 3 spaces. This increases to 395 or 2/3rds of spaces on a quiet day. These are similar levels to last year.

Business Confidence

Of the 35 businesses who returned the forms, 23 were retailers and of these 22 were independents.
Performance over the past year and prospects for the future and very low compared to other small towns across the country and region.
For 27% turnover had increased in the past year, for 39% it had stayed the same, but for 33% it had got worse.
Profitability increased for only 16% of businesses, whilst for 47% it had stayed the same. 38% had seen a decrease in profitability.
Compared to last year fewer saw an increase in turnover and profitability, but also fewer saw a drop in these indicators (i.e. a greater number just staying at a similar level).
In terms of expectations for the coming 12 months, 36% expected turnover to increase, 48% expected to stay the same and 15% expected it to get worse.
Compared to last year fewer are expecting an improvement, but far fewer are expecting turnover to decrease in the next 12 months.
Hence, things have improved overall compared to last year, with an improvement in levels of turnover and profitability, but still less than 1/3 had seen any actual increase in these indicators of business prosperity. Substantially more were optimistic that turnover would improve or at least stay the same in the forthcoming year, with far fewer expecting turnover to decrease.
Positive factors included the overall mix of uses and the prospects of attracting both local and tourist customers. In terms of negative factors car parking was still regarded as the main problem, together with rental levels and concerns about competition from the internet.
In terms of suggestions, 19 wanted improvements to car parking arrangements with 9 wanting free parking throughout the town centre, 6 wanting cheaper parking charges and 3 advocating pay-on-exit.
8 wanted rents and rates reduced, 5 wanted a halt to any more charity shops and 4 wanted better broadband connectivity among other ideas.

Town Centre Users

Despite efforts to interview a cross section of town centre users the respondents were predominantly women and many of those over 55.

A higher than average proportion were in Tavistock mainly for comparison shopping and a correspondingly low number for convenience shopping.

The proportion of regular customers was down from last year and also low compared to other small towns.

Levels of expenditure per visit were relatively high.

The physical appearance of the town and cleanliness were positive factors as were the range and quality of restaurants. Users also indicated that it was easy to access services and walk around the town centre.

Car parking remains the biggest negative factor and much higher than comparable small towns.

Post Code Data

30% of customers were from the immediate Tavistock area (PL19)
33% from a 30 minute journey
And 37% were from further afield - a significant increase from last year. 5 of these were overseas visitors. This is much higher than in other small towns indicating the importance of tourism to Tavistock.

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. **Tavistock** with **243** 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 **225** occupied units recorded.

	National Small Towns %	South West Small Towns%	Typ. 2 %	Tav. %
A1	51	55	53	61
A2	15	14	13	13
A3	8	7	8	8
A4	4	4	4	3
A5	5	4	4	4
B1	3	2	2	0
B2	1	1	2	0
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	0

Little has changed since last year's survey, with a healthy balance continuing between retail and non-retail uses in the town centre. This balance is similar to other national, regional and Type 2 towns participating in this benchmarking exercise.

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 %	Tav. %
Comparison	81	84	82	81
Convenience	19	16	18	19

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 %	Tav. %
Key Attractor	4	4	5	5
Multiple	20	17	21	15
Regional	7	10	8	11
Independent	69	69	66	69

In Tavistock the proportion of multiples, which aren't key attractors is low compared to elsewhere, although it has increased from last year.

The proportion of independents has decreased but continues to be in line with other small market town.

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 %	Tav. %
Vacancy %	7	7	7	7

Overall vacancy rates are low as they are in other small towns compared to larger centres across the country.

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	Tav.
Average Number of Traders	*21*	*28*	*31*	*98*

The Pannier market is one of Tavistock's Unique Selling Points. This combined with occasional stalls on Bedford Square and the regular farmer's and arts markets ensure levels are much higher than in comparable small market towns.

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	Tav.
Zone A	27	33	29	55
Yield	7	8	8	7

Zone A rental levels appear high compared to other small towns but they remain the same as last year whereas they seem to have significantly diminished elsewhere.

Yields continue to be in line with elsewhere and at similar levels to last year.

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 %	Tav.
Market Day	134	134	191	205
Non Market Day	98	84	123	92

Footfall on a market day has increased, although this may be because the survey was conducted on a sunny day a month earlier than last year. Levels continue to be high compared to similar market towns.

Levels on non-market day are down, again perhaps due to weather conditions, but these are in line with similar towns.

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 %	Tav. %
Car Park:				
Total Spaces:	89	86	87	77
Short Stay Spaces: (4 hours and under)	48	38	49	30
Long Stay Spaces: (Over 4 hours)	46	56	45	66
Disabled Spaces:	4	5	4	5
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	66
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	23
Short Stay Spaces: (4 hours and under)	67	56	70	94
Long Stay Spaces: (Over 4 hours)	12	14	8	0
Disabled Spaces:	5	5	6	6
Not Registered	16	24	16	0
Vacant Spaces on a Market Day:	14	12	14	5
Vacant Spaces on a Non Market Day:	20	21	20	19
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	45
Long Stay Spaces: (Over 4 hours)	42	50	40	50
Disabled Spaces:	5	5	4	5
Not Registered	3	5	4	0
Vacant Spaces on a Market Day:	26	26	27	26
Vacant Spaces on a Non Market Day:	37	37	36	55
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

There are nearly 800 spaces available in Tavistock of which 1 in 4 are free on-street spaces. Whereas the proportion of on-street spaces is low compared to elsewhere there a still many spaces available at all times.

The proportion of vacant spaces on a market day has decreased but remains higher than in similar towns. Most of these are in paying car parks.

There are high levels of vacancies on non-market days and much higher than in similar towns, but again mainly in paying car parks.

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 **35** returned Business Confidence Surveys.

	National Small Towns %	South West Small Towns %	Typ. 2%	Tav. %
Nature of Business				
Retail	61	59	59	69
Financial/ Professional Services	15	19	20	17
Public Sector	2	2	1	3

Food and Drink	12	10	11	3
Other	10	11	10	9
Type of Business				
Multiple Trader	13	9	11	3
Regional	6	6	8	6
Independent	81	85	82	91
How long has your business been in the town				
Less than a year	6	4	4	3
One to Five Years	22	19	24	26
Six to Ten Years	13	17	14	20
More than Ten Years	60	60	58	51
Compared to last year has your turnover				
Increased	39	37	43	27
Stayed the Same	34	34	32	39
Decreased	27	30	25	33

Compared to last year has your profitability				
Increased	35	29	37	16
Stayed the Same	36	40	35	47
Decreased	30	30	28	38
Over the next 12 months do you think your turnover will				
Increase	45	34	45	36
Stay the Same	40	48	42	48
Decreased	15	18	13	15
What are the positive aspects of the Town Centre?				
Physical appearance	44	20	39	-
Prosperity of the town	41	27	41	45
Labour Pool	-	-	-	10
Environment	23	19	22	23
Geographical location	51	47	51	39
Mix of Retail Offer	39	26	34	55
Potential tourist customers	43	35	42	45
Potential local customers	75	77	75	77
Affordable Housing	13	14	12	0
Transport Links	27	28	26	19
Car Parking	43	36	38	19
Rental Values/ Property Costs	20	15	17	0
Market (s)	24	15	27	29
Events/ Activities	30	12	26	-
Marketing/ Promotions	14	6	15	-
Local Partnerships/ Organisations	17	9	16	-
Other	3	6	9	6

What are the negative aspects of the Town Centre?				
Physical appearance	17	21	14	-
Prosperity of the town	22	30	19	7
Environment	-	-	-	3
Labour Pool	10	11	10	14
Geographical location	6	8	7	10
Mix of Retail Offer	18	22	18	14
Potential tourist customers	6	4	4	0
Potential local customers	3	0	3	0
Affordable Housing	8	4	8	0
Transport Links	21	12	24	24
Car Parking	50	69	62	83
Rental Values/ Property Costs	27	29	33	52
Market (s)	8	8	8	0
Local business competition	16	8	18	10
Competition from other localities	21	22	22	24
Competition from out of town shopping	33	19	27	-
Competition from the internet	34	33	38	38
Events/ Activities	6	5	5	-
Marketing/ Promotions	6	2	4	-
Local Partnerships/ Organisations	3	1	2	-
Other	3	12	14	17
Has your business suffered from any crime over the last 12 months				
Yes	24	26	25	27
No	76	74	75	73
Type of Crime				
Theft	69	60	69	89
Abuse	12	10	12	0
Criminal Damage	38	48	36	22
Other	4	3	4	0

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

- "Don't build a gateway building in old police station- waste of money"
- "Re open the tourist information centre. Pedestrianise Brook St and Duke St"
- "Free parking all over. Cheaper rates."
- "Broadband- FTTP. Reduce rents, too many vacant properties, looks bad)"
- "More to shop for"
- "More free car parks. Too late now but should not have let so many supermarkets in. Make them put up parking meters."
- "Free car parking"
- "More parking"
- "Car parks! Payment on exit, now park and ride. Lower business rates so we can pay staff more."
- "More independent shops. Cheaper car parks."
- "Install fibre optic cable. Continue small business rate relief"
- "Close the charity shops. Force Plume of Feathers owners to return to good operating premises."
- "Reduce business rates. Offer more free parking."
- "Reinstate TIC. Support BID campaign to continue after 5 year term expires in 2016"
- "Unity- BID concentrates on a few areas not the whole town. Better parking. Long free parking up to 90 mins. Chevron parking on the main road. Cheaper fees for parking in council car park. Better maintenance of council car park."
- "Reduce business rates. Free parking."
- "Offer 1/2 days free parking all day on the quietest day of the year, this could be taken from a survey. I know this has worked in other areas and brought prosperity back. Signs for multi story car park."
- "Farmers Market still setting up at 9 and finishes....should be earlier and longer. More publicity for forthcoming events, usually don't know until they are over."
- "Better comms. Broadband mobile. Better transport links."
- "Reduce/ abolish car parking charges. Limit the number of charity shops."
- "Cheaper/ free parking. More car parking"
- "Stop more supermarkets coming in. Financial incentives for new business start ups."
- "Get better broadband/ mobile phone. More/ cheaper parking]"

- "Too many farmers markets. Too many supermarkets, Tesco was never needed."
- "Pay on exit car parking in Main Street. Fewer charity shops. A better quality supermarket in town centre."
- "Free parking. Rates/ rent reduced"
- "First 2 hours free parking."
- "Change parking to pay as you leave."
- "No more charity shops, this would give retailers trying to sell new goods a fighting chance. Less enthusiastic traffic wardens."
- "Reduce rents and car parking costs"

9 out of 10 who replied to the survey were Independent Traders, a higher proportion than elsewhere.

Over half had been trading for more than 10 years

Only 27% had seen an increase in turnover during the last year – well down from the 38% last year and significantly lower than in similar small towns. 1 in 3 had seen a decrease in turnover, but this was in line with elsewhere.

In terms of profitability the returns were very low compared to elsewhere with only 16% saying their profits had increased and this was well down compared to last year and elsewhere. 38% saw a decrease and although this is well above the average it is at least an improvement on the 47% last year.

Prospects for the next 12 months are an improvement on last year with 85% expecting at least to stay the same or improve.

Positive factors for traders included the overall mix of retail units and the prospects of attracting both local custom and tourists.

The main negative factor was car parking, although it should be pointed out that this survey pre-dates the new flat rate £2 parking charge in the Bedford Car Park. Other negatives include high levels of rents and rates and competition from the internet.

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 **80** completed Town Centre User Surveys.

	Nat. Small Towns %	South West Small Towns%	Typ. 2 %	Tavistock %
Gender				
Male	38	37	37	35
Female	62	63	63	65
Age				
16-25	5	4	5	3
26-35	12	13	12	14
36-45	17	16	17	15
46-55	18	16	18	25
56-65	22	23	22	20
Over 65	27	28	26	24
What do you generally visit the Town Centre for?				
Work	15	18	16	23
Convenience Shopping	43	43	39	13
Comparison Shopping	5	6	7	18
Access Services	17	12	16	13
Leisure	12	14	14	25
Other	9	8	10	8

How often do you visit the Town Centre				
Daily	29	32	28	29
More than once a week	40	40	39	30
Weekly	15	15	16	24
Fortnightly	5	5	4	8
More than once a Month	4	2	4	1
Once a Month or Less	7	6	7	8
First Visit	1	1	2	1
How do you normally travel into the Town Centre?				
On Foot	34	34	33	34
Bicycle	2	3	3	0
Motorbike	0	1	0	1
Car	56	55	56	60
Bus	5	6	6	5
Train	1	1	1	0
Other	1	1	1	0
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	14
£5.01-£10.00	25	24	24	25
£10.01-£20.00	30	31	33	35
£20.01-£50.00	21	22	20	20
More than £50.00	6	7	6	5

What are the positive aspects of the Town Centre?				
Physical appearance	56	58	67	96
Cleanliness	52	53	59	-
Retail Offer (Shopping)	35	41	43	75
Customer Service	44	43	53	-
Cafes/ Restaurants	51	52	66	83
Access to Services	69	70	73	93
Leisure Facilities	22	18	24	60
Cultural Activities/Events	28	27	37	54
Pubs/ Bars/ Nightclubs	35	41	35	28
Transport Links	34	34	36	66
Ease of walking around the town centre	71	75	76	95
Convenience e.g. near where you live	71	71	72	86
Safety	44	47	53	94
Car Parking	46	39	48	51
Markets	37	33	49	94
Other	4	4	3	4
What are the negative aspects of the Town Centre?				
Physical appearance	26	19	19	7
Cleanliness	24	19	23	-
Retail Offer (Shopping)	41	24	37	32
Customer Service	8	5	10	-
Cafes/ Restaurants	16	10	9	7
Access to Services	11	8	9	5
Leisure Facilities	32	37	34	37
Cultural Activities/Events	26	20	23	30
Pubs/ Bars/ Nightclubs	22	15	20	27
Transport Links	25	24	25	30
Ease of walking around the town centre	7	4	8	2
Convenience e.g. near where you live	7	5	7	10
Safety	12	8	11	0
Car Parking	37	47	37	50
Markets	22	13	17	3
Other	9	5	7	3

How long do you stay in the Town Centre?				
Less than an hour	33	29	28	28
1-2 Hours	42	43	43	40
2-4 Hours	14	16	17	19
4-6 Hours	3	3	3	5
All Day	7	7	7	9
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	44
Good	52
Poor	4
Very Poor	0

How do you rate the cleanliness of the Town Centre?	
Very Good	40
Good	55
Poor	5
Very Poor	0

How do you rate the variety of shops in the Town Centre?	
Very Good	17
Good	62
Poor	20
Very Poor	1

How do you rate the leisure and cultural activities in the Town Centre?	
Very Good	14
Good	63
Poor	23
Very Poor	0

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

- "Encourage more local traders in- business rate relief. More links from the town centre to what cultural activity the town has, present but coming up, events etc"
- "Bigger choice at the cinema. Better access to the river e.g. cafe/ restaurant, overlooking the river edge"
- "More green areas i.e. trees in the centre if possible. The area in front of the Town Hall has a very high frontage"
- "Cheaper car park charges to encourage people to park off street. Fewer charity shops and empty shops and reinstate Old Folks Rest Rooms in the heart of the town"
- "Get rid of signs on pavements as make it tricky for many. Too many charity shops"
- "Re use of old folks building or redevelopment, it is a key location in the town. Clarify the crossings at bottom of Kilworthy Hill and opposite Bedford Square, are they pedestrian/ vehicle priority. Either remove raised crossing or add black and white road markings"
- "Some more child friendly activities, cafes, shops. Better programme at Wharf"
- "No Tesco. We have enough supermarkets and a lovely market. Train to Exeter and London"
- "Parking- not enough in the centre. More independent shops- no Tesco"
- "Parking improved
- "Greater diversity of shops. Lower rents. Swimming pool is dirty"
- "Decent shops e.g. M and S. Fewer estate agents"
- "Clothes shops e.g. for school uniform. More car parking"
- "Would benefit from more car parking areas"

- "Male clothes shops lacking even a Peacock or similiar store would be usefly for basic clothing. More vibrant nightlife, increasing concentration on food and drinking outlets for a range of tastes."
- "Tavistock full of charity, eateries, estate agents, no real shops as such"
- "Free parking"
- "Free parking for limited time. More variety of shops"
- "Change traffic flow with current routes you are very nearly out of Tavistock before any parking is reached. Visitors do not see any shops etc"
- "Improved transport links. Railway and cycle routes. Family friendly pubs and restaurant"
- "Remove the raised sections across the roads surrounding Bedford Square as people tend to confuse them with Bedford crossings"
- "More transport bus routes to villages. Too many charity shops"
- "Update meadowlands. Shops for boys, electronics/ games"
- "More free parking"
- "Nightclub. Need a KFC"
- "Lack free on street parking"
- "Cut out pedestrian crossing, Space to taxi to be moved. Traffic does not flow"
- "Better bus, rail services in the evening"
- "Deal with illegal parking in Chapel St"
- "Dog bins. Need more parking spaces."
- "More dropped curbs. Co Op end"
- "Improved leisure centre. More parking close to shops especially on a wet day, Improve access to shops with double buggy"
- "lack of cultural activities. Bigger market"
- "Free parking"
- "Crossing need to be better for sight- improved"
- "More variety of shops DIY"
- "Re open Encore and other clothes fashion shops"
- "More events like concerts. More for young people after school"
- "Access for people in wheelchairs. More parking"
- "Could be improved in terms of appearance. Improve range of shops, e.g. electrical, cosmetics"
- "More parking spaces. Ability to park. Longer opening hours for market and info about themes"

- "Repair road surface"
- "Improvements to Meadows"
- "More parking spaces, More multiple shops"
- "Town council to be more selective on choice of shops. Don't be like Swindon"
- "More markets and activities in Bedford Square"
- "More stalls in Bedford Square, Improve the cleanliness of the seating in Bedford Square"
- "Don't change it"
- "Dog fouling- needs addressing. Bells on bicycles and cycle education"
- "Bypass= needed. Open train line Exeter to London"
- "Park and ride scheme"
- "Get rid of pigeons. Get rid of traffic wardens"
- "New car park for visitors e.g. multi storey, Needs a youth club and things for teenagers to do. Children's clothing shops"
- "Waitrose in centre even though good individual shops, Not Tesco. Parking for people with disabilities. Need more spaces."
- "More independent shops"
- "Extend time allowed from 1 hour in Guildhall Car Park. Improve traffic flow."
- "More men's clothes shops. Nightclub for 18-30 year olds"
- "Improvements to Guildhall and reduce car parking. Remove War Memorial. Pay on exit at Bedford Car PArk"
- "Improve area infront of rest room/ repair bench"
- "Cheaper parking in the centre"
- "More flowers and colour. Children clothes shops and shoe shops needed"
- "No Tesco. Rail link to Exeter/ London would be great"
- "Good classical music venue needed. Rail link to Exeter, London, Plymouth"
- "\improve variety of shops. Cheaper cafes would be good but not a chain"
- "More children's clothes shops. Waitrose in Tavistock"
- "More benches and cleaned from pigeons"
- "Crossing at roundabout near HSBC = scary. More seating around needed"
- "Nicer seating in Square-seats outside town hall are scruffy and covered in pigeon droppings. Pigeon mess also a problem on pavements lower end of Drake Road. Longer periods of parking in the centre of the town, 2 hours to all visitors to shop and get something to eat= more money spent in town business."

Despite efforts to interview a cross section of town centre users the respondents were predominantly women and many of those over 55.

A higher than average proportion were visiting the town centre for comparison shopping and a correspondingly lower number were convenience shopping.

The proportion of regular customers was down from last year and also low compared to other small towns.

Levels of expenditure per visit were relatively high.

There were high levels of approval for the physical appearance of the town and cleanliness. Restaurants were well regarded and people indicated that it was easy to access services and walk around the town centre.

Car parking remains the biggest negative factor and much higher than elsewhere.

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 %	Tavi %
Locals	54	52	46	30
Visitors	29	30	34	33
Tourists	16	18	19	37

As with last year, a much higher than average number of town centre users were either visitors or tourists indicating the importance of these groups to the local economy.

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