Market Town Benchmarking

Measuring the performance of town centres

Executive Summary:

Ross on Wye, 2012

Mike King
Senior Research Consultant
07818 068 982
mike.king@towns.org.uk

the social enterprise focusing on the needs of towns across Britain

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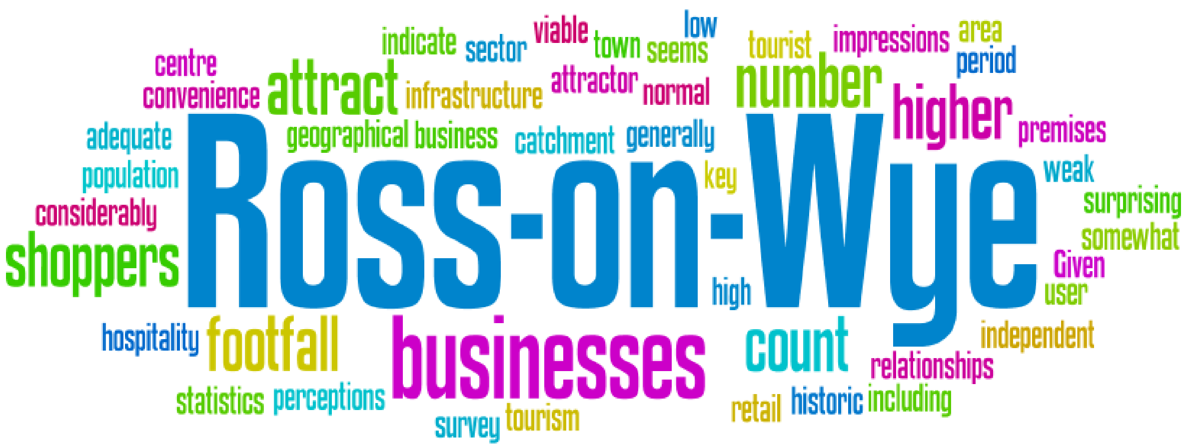

EXECUTIVE SUMMARY

General

This report examines the results of the survey undertaken in August 2012. With the benefit of hindsight, we probably drew the 'town centre' a bit too widely. It might have been better to adopt a criterion of roads in which commercial premises comprised >50% of premises. By casting the area widely Ross was initially assessed as a large market town – whereas the population would put it on a par with towns in the small town category. This scoping has necessitated considerable reworking in order to achieve meaningful comparators.

Definitions of terms used can be found in the main report.

Business Premises Numbers

- In August 2012 there were 295 business premises.
    - Of these 154 were (class A1, retail) business premises – which is just below the national and regional average proportion for small and medium sized towns.
        - Of these 124 are 'comparison' businesses
        - And 18 are 'convenience' businesses
        - There were 13 (class A1) vacant business premises.
        - There were 100 (class A1) independent businesses.
            - Of these 89 are 'comparison' businesses
            - And 11 are 'convenience' businesses
        - There were 28 (class A1) multiple businesses.
            - Of these 22 are 'comparison' businesses
            - And 6 are 'convenience' businesses
        - There were 5 (class A1) regional businesses.
            - Of these all are 'comparison' businesses
        - There were just 8 (class A1) 'key attractor' businesses.
            - Of these just 1 (Sainsburys) is a 'convenience' business
            - And 7 are 'comparison' businesses
    - Of the 295 business premises 33 were (class A2, services) premises – about the national and regional average proportion for small and medium sized towns.
    - Of the 295 business premises 36 were (class A3-A5, hospitality) premises – which is just below the national and regional average proportion for small and medium sized towns.

Retail Property

The retail rents and prime retail property yields were just below the national average (though about the West Midlands regional average). This situation has not been reassessed since 2012.

Car parking

Car parking in Ross-on-Wye, in the measured central area, is split approximately 2:1 between car parks and on-street. Regionally this split is 3:1, and nationally it is 4:1. However the number of vacant spaces is consistently higher than regional or national averages – except in car parks on market days.

If the surveyed area had been more restricted then some of the car parking spaces counted would have been excluded. In other words, some of the "town centre" parking is more than 200m from what most users would consider to be the town centre.

Business Confidence

Retail confidence in Ross-on-Wye was at or slightly below regional and national averages; commercial confidence was somewhat higher than regional and national averages, and confidence in the hospitality sector was at only 60% of the regional and national averages.

In Ross-on-Wye multiple traders were about half as confident as comparable regional and national averages; regional traders about as confident, and independent traders were somewhat more confident than regional and national averages.

Most traders in Ross-on-Wye had seen a greater decrease in both turnover and profitability since the previous year than regional and national averages, and had lower expectations of improvement.

Town Centre Users

In the survey, females outnumbered males at a ratio of 2:1. More were visiting town for convenience shopping and to access services than is regionally or nationally typical. The transport, spending and satisfaction rating profiles are broadly typical of regional & national patterns.

Positive

Positive aspects of the Ross-on-Wye Town Centre were seen as the Physical appearance, Shops, Access to Services, Ease of walking around the town centre, Convenience, Safety, Car Parking & Markets at higher levels than regional and national averages. However, Leisure & Cultural Facilities in Ross-on-Wye were rated worse – and the only negative aspects reported at notably higher levels than the regional and national averages.

There were a good number of independent businesses in Ross-on-Wye.

Users generally rated the town infrastructure of Ross-on-Wye average or good.

Negative

Accepted retail wisdom[1] is apparently that "A sustainable balance of key attractors and multiple names alongside local independent shops is … likely to have the greatest positive impact on the vitality and viability of a town." On this basis:

- There were too few 'key attractor' businesses in Ross-on-Wye (a situation that has deteriorated since 2012).

[1] AMT Handbook.

Similarly, it seems that the balance of the 9:1 ratio of “comparison” to “convenience” retail in Ross-on-Wye is considerably skewed from the national and regional ratio – which is 4:1.

- There were too few convenience businesses in Ross-on-Wye (a situation that has changed little since 2012).

The proportion of units lying vacant in Ross-on-Wye was above the national average (though about the regional average). This situation has improved somewhat since 2012.

The number of market traders in Ross-on-Wye was well below the national average (though about the regional average). This situation has changed little since 2012.

The footfall count in Ross-on-Wye on a market day was only about 75% of the regional average, and just below 50% of the national average. The situation was somewhat worse on a non-market day. Using an adjusted retail measure[2] indicates figures of about 50% and 65% on respective days. This situation has not been reassessed since 2012, but the impression is of slight worsening.

Conclusions

The statistics and user impressions indicate that Ross-on-Wye has generally adequate infrastructure.

On the basis of national comparators for the town centre:

- There were a high number of independent businesses in Ross-on-Wye.
- The number of business premises in Ross-on-Wye, including retail, is higher than normal for the population of the catchment area;
- The footfall count in Ross-on-Wye was probably insufficient to sustain viability;
- There were, as a proportion, insufficient convenience businesses in Ross-on-Wye to attract shoppers
- There were, as a proportion, insufficient ‘key attractor’ businesses in Ross-on-Wye to attract shoppers.

Given the historic and geographical relationships of Ross-on-Wye to tourism, perceptions in, and of, the hospitality sector seemed to be somewhat weak; surprising when the tourist footfall count was considerably higher during the survey period.

A repeat of this survey in 2014 would useful to gain an indication of changes – particularly in the context of governance and neighbourhood planning initiatives.

Data Sources

The data from which this report was compiled is available from me at Melvin@Ashcote.com, and it is posted at http://www.rosstownplan.org.uk/. This final version is the result of presentation at the RowToP progress Group meeting on February 6th 2014, but any errors in collation and interpretation are probably mine – for which apologies in advance.

Melvin Reynolds, 2014-02-07.

[2] Comparison against all of the other towns who have been classified in the same typology by the Rural Evidence Research Centre at Birkbeck College.