Market Town Benchmarking

Measuring the performance of town centres

Ross on Wye
2012 Report

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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.

Because at the date of the initial analysis by AMT Ross-on-Wye was the only 'large' town in the West Midlands to have been surveyed the comparator figures are of no value – it has been possible to use South West comparator figures in a small number of instances – where they were available. The "West Midlands 'large' town" column is retained in the tables for consistency with AMT presentation – but the content has been struck out.

Definitions of terms used in this summary can be found in the body of this 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 as 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 as 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 as 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 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).

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 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

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INTRODUCTION

The Approach

AMT Town Benchmarking 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.

AMT 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 amt-i, the research division of national membership organization and registered charity Action for Market towns 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 commercial units
- Small Towns; consisting of those localities with less than 250 commercial units

Towns, depending on their size, contribute to either the Large or Small Town analysis.

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 2012.
- The Typology analysis refers to the data for the individual town against all of the other towns who have been classified in the same typology by the Rural Evidence Research Centre at Birkbeck College.

Information on towns contributing to Benchmarking in 2012, whether they are part of the Large or Small Town cohort, Region and Typology can be found within the Appendix.

The Reports

The Annual AMT 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	DATA COLLECTION METHODOLOGY
KPI 1: Total number of commercial units	Visual Survey
KPI 2: Retail by Comparison/Convenience	Visual Survey
KPI 3:Key attractors / multiple trader representation	Visual Survey
KPI 4: Number of vacant units	Visual Survey
KPI 5: Number of markets / traders	Visual Survey
KPI 6 and 7: Zone A Retail Rents and Prime Retail Property Yields	Commercial Letting Agents
KPI 8: Footfall	Footfall Survey on Busy and Quiet Days
KPI 9: Car Parking Availability and Usage	Footfall Survey on Busy and Quiet Days
KPI 10: Business Confidence Survey	Postal Survey/ Hand Delivered/ Face to Face/ On Line
KPI 11: Town Centre Users Survey	Face to Face Survey/ Face to Face
KPI 12: Shoppers Origin Survey	Shoppers Origin and Town Centre User Surveys

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: Total Number of Commercial Units

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.

Table of 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 Cafés	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
SG	Sui Generis ("unique" establishments)	Theatres, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/ or displaying motor vehicles. Retail warehouse clubs, nightclubs, laundrettes, taxi business, amusement centres, casinos, haulage yards, transport depots, veterinary clinics, dog parlours, tanning and beauty salons and tattoo studios.
B1	Business	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	Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste)
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.

Class	Type of Use	Class Includes:
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 268 occupied units recorded.

	Ross on Wye %	West Midlands Large Towns %	~~West Midlands Small Towns %~~	National Large Towns %	National Small Towns %	Typology 2 %
A1	51	51	~~53~~	52	54	54
A2	12	12	~~12~~	14	14	13
A3	7	7	~~8~~	9	7	8
A4	3	3	~~6~~	4	4	4
A5	3	3	~~3~~	3	5	3
B1	1	1	~~2~~	3	2	3
B2	2	2	~~1~~	1	1	1
B8	2	2	~~0~~	0	0	0
C1	2	2	~~2~~	1	1	1
C2	1	1	~~1~~	0	0	0
C2A	0	0	~~0~~	0	0	0
D1	6	6	~~6~~	5	5	5
D2	1	1	~~1~~	1	0	1
SG	6	6	~~6~~	6	5	6
Not Recorded	0	0	~~1~~	0	1	0

KPI 2: Retail by Comparison / 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.

	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typology 2 %
Comparison	90	82	~~90~~	78	77	80
Convenience	10	18	~~10~~	22	23	20

KPI 3: Key attractors / multiple trader representation

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.

	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns%	National Large Towns %	Typology 2 %
Key Attractor	7	5	~~7~~	6	7	7
Multiple	15	11	~~15~~	20	24	18
Regional	2	4	~~2~~	7	7	6
Independent	76	80	~~76~~	67	62	68

KPI 4: Number of vacant units

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.

	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typology 2 %
Vacant Units	11	8	~~11~~	8	9	8

KPI 5: Number of markets / traders

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.

	Ross on Wye	West Midlands Small Towns	~~West Midlands Large Towns~~	National Small Towns	National Large Towns	Typology 2
Average number of market days during week	1	n/a	~~1~~	n/a	n/a	n/a
Average number of traders at a market	12	14	~~12~~	19	35	18

KPI 6 and 7: Zone 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.

	Ross on Wye	West Midlands Small Towns	~~West Midlands Large Towns~~	National Small Towns	National Large Towns	Typology 2 %
Zone A	25	24	~~25~~	27	47	32
% Net Yield	7	8	~~7~~	9	9	8

KPI 8: Footfall Counts

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 town.

	Ross on Wye	West Midlands Small Towns	~~West Midlands Large Towns~~	National Small Towns	National Large Towns	Typology 2
Market/ Busy Day	76	104	~~76~~	136	235	139
Non Market/ Quiet Day	69	98	~~69~~	88	178	99

KPI 9: Car Parking Availability and Usage

These days 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;

- Provision of total number of spaces in designated car parks
- Provision of total number of short stay, long stay and disabled spaces in designated car parks
- Percentage of vacant spaces in designated car parks on a Busy/ Market Day and on a Quiet/ Non Market Day.
- Average number of illegally parked cars in designated car parks on a Busy/ Market Day and on a Quiet/ Non Market Day.
- Provision of total number of on street car parking spaces
- Provision of total number of on street short stay, long stay and disabled spaces
- Percentage of vacant on street spaces on a Busy/ Market Day and on a Quiet/ Non Market Day.
- Average number of illegally parked cars on street on a Busy/ Market Day and on a Quiet/ Non Market Day.
- Overall provision of car parking spaces
- Overall provision of total number of short stay, long stay and disabled spaces
- Overall percentage of vacant spaces on a Busy/ Market Day and on a Quiet/ Non Market Day.
- Overall average number of illegally parked cars on a Busy/ Market Day and on a Quiet/ Non Market Day.

Car Park:	Ross on Wye	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typ. 2
Total Spaces:	549	63	82	~~63~~	90	91	88
Short Stay Spaces: <4h	97	18	24	~~18~~	47	35	33
Long Stay Spaces: >4h	437	80	70	~~80~~	46	61	61
Disabled Spaces:	15	3	4	~~3~~	4	3	4
Not Registered	0	0	2	~~0~~	3	0	2
Vacant Spaces on a Busy/ Market Day:	143	26	23	~~26~~	27	26	29
Vacant Spaces on a Quiet/ Non Market Day:	303	55	37	~~55~~	41	37	44
Illegal Spaces on a Busy/ Market Day:	0	n/a	n/a	~~n/a~~	n/a	n/a	n/a
Illegal Spaces on a Quiet/ Non Market Day:	0	n/a	n/a	~~n/a~~	n/a	n/a	n/a

On Street:	Ross on Wye	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typ. 2
Total Spaces:	319	37	18	~~37~~	10	9	12
Short Stay Spaces: <4h	251	79	57	~~79~~	64	88	72
Long Stay Spaces: >4h	48	15	39	~~15~~	26	4	20
Disabled Spaces:	20	6	5	~~6~~	4	8	5
Not Registered	0	0	2	~~0~~	6	0	3
Vacant Spaces on a Busy/ Market Day:	83	26	12	~~26~~	13	14	15
Vacant Spaces on a Quiet/ Non Market Day:	99	31	16	~~31~~	19	21	24
Illegal Spaces on a Busy/ Market Day:	2	n/a	n/a	~~n/a~~	n/a	n/a	n/a
Illegal Spaces on a Quiet/ Market Day:	9	n/a	n/a	~~n/a~~	n/a	n/a	n/a

Overall	Ross on Wye	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typ. 2
Total Spaces:	868	n/a	n/a	~~n/a~~	n/a	n/a	n/a
Short Stay Spaces: (4 hours and under)	348	40	40	~~40~~	48	40	37
Long Stay Spaces: (Over 4 hours)	485	56	56	~~56~~	44	56	56
Disabled Spaces:	35	4	4	~~4~~	4	4	4
Not Registered	0	0	0	~~0~~	3	0	3
Vacant Spaces on a Busy Day/ Market:	226	26	26	~~26~~	25	25	27
Vacant Spaces on a Quiet/ Non Market Day:	402	46	46	~~46~~	39	36	42
Illegal Spaces on a Busy/ Market Day:	2	n/a	n/a	~~n/a~~	n/a	n/a	n/a
Illegal Spaces on a Quiet/ Non Market Day:	9	n/a	n/a	~~n/a~~	n/a	n/a	n/a

KPI 10: Business Confidence Survey

The aim of the Business Confidence Survey is to establish an understanding of the economy of the town. By establishing the trading conditions of the town centre businesses efforts can be focussed on looking at issues which are of concern and how to improve them.

The following tables are based on the 76 responses from the Business Confidence Survey.

What is the nature of your business?	Ross on Wye %	West Midlands Small Towns %	South West Large Towns %	National Small Towns %	National Large Towns %	Typology 2 %
Retail	63	71	62	68	62	63
Commercial/Professional	24	16	27	16	20	20
Public Sector	0	1	0	1	1	1
Hospitality	6	9	6	9	11	10
Other	7	3	5	6	6	6

What type of business are you?	Ross on Wye %	West Midlands Small Towns %	South West Large Towns %	National Small Towns %	National Large Towns %	Typology 2 %
Multiple Trader	8	16	18	15	20	12
Regional	5	5	4	6	4	4
Independent	87	79	79	79	76	84

How long has your business been in the town?	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typology 2 %
Less than one year	7	10	~~7~~	9	7	8
One to five years	15	19	~~15~~	21	20	17
Six to ten years	28	17	~~28~~	16	17	18
More than ten years	51	54	~~51~~	54	56	58

Compared to last year has your turnover…….?,	Ross on Wye %	West Mids Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typology 2 %
Increased	26	33	~~26~~	30	28	30
Stayed the same	33	35	~~33~~	31	33	33
Decreased	41	32	~~41~~	39	39	37

Compared to last year has your profitability…….?	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typology 2 %
Increased	17	31	~~17~~	26	25	24
stayed the same	37	33	~~37~~	31	32	33
Decreased	46	36	~~46~~	43	43	43

Over the next 12 months do you think your turnover will…….?	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typology 2 %
Increase	31	40	~~35~~	37	35	37
stay the same	51	44	~~42~~	41	43	43
Decrease	18	16	~~23~~	23	22	20

What are the positive aspects of having a business located in the town? (Multiselect)	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typology 2 %
Prosperity of the town	n/a	43	~~n/a~~	41	45	42
Labour pool	n/a	12	~~n/a~~	12	15	16
Environment	n/a	32	~~n/a~~	27	33	32
Geographical location	n/a	48	~~n/a~~	46	53	50
Mix of retail offer	n/a	40	~~n/a~~	38	34	38
Potential tourist customers	n/a	49	~~n/a~~	39	46	49
Potential local customers	n/a	83	~~n/a~~	79	79	83
Affordable housing	n/a	13	~~n/a~~	9	7	8
Transport links	n/a	21	~~n/a~~	26	28	19
Car parking	n/a	41	~~n/a~~	35	19	28
Rental values/property costs	n/a	22	~~n/a~~	16	13	17
Market(s)	n/a	16	~~n/a~~	17	24	15
Other	n/a	3	~~n/a~~	5	5	5

What are the negative aspects of having a business located in the town? (Multiselect)	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typology 2 %
Prosperity of the town	39	29	~~39~~	22	21	23
Labour pool	7	5	~~7~~	7	9	7
Environment	3	5	~~3~~	7	7	5
Geographical location	3	6	~~3~~	7	5	6
Mix of retail offer	19	18	~~19~~	23	21	21
Potential tourist customers	10	6	~~10~~	9	11	8
Potential local customers	11	3	~~11~~	4	6	6
Affordable housing	7	8	~~7~~	10	11	7
Transport links	11	33	~~11~~	19	16	23
Car parking	69	47	~~69~~	55	76	63
Rental values/property costs	40	29	~~40~~	37	43	35
Market(s)	6	12	~~6~~	14	6	10
Local business competition	10	19	~~10~~	21	17	17
Competition from other places	25	40	~~25~~	37	26	30
Competition from the Internet	33	40	~~33~~	39	34	39
Other	6	7	~~6~~	7	7	5

Has your business suffered from any crime over the last 12 months?	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns	National Large Towns %	Typology 2 %
Yes	28	29	~~28~~	30	33	30
No	72	71	~~72~~	70	67	70

What type of crime has your business suffered over the last 12 months (Multiselect)	Ross on Wye %	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns	National Large Towns %	Typology 2 %
Theft	67	77	~~67~~	74	73	69
Abuse	10	11	~~10~~	15	11	10
Criminal damage	43	34	~~43~~	40	34	35
Other	10	0	~~10~~	2	7	6

What TWO suggestions would you make to improve the economic performance of the Town Centre?

- "As mainly independents we should all be encouraged to take a real look at our shops and businesses and improve not only the stock or services, but the overall look of the shop as there are some tired looking shops in Ross. It always helps to have a revamp. Ross has a bad reputation for parking, so maybe as an incentive offer 1 hours free parking and slightly raise the price thereafter as Ross is cheap enough anyway."
- "Restore 1 hour parking in town. Force landlords to keep empty shops clean and tidy and actively available for let and sale. We have been next to the old Power House shop that has been empty for many years. Despite complaints to council and owners the shop is an eyesore and a Health and Safety issue. As it is a giant pigeon loft and not for sale or let."
- "Better parking. Longer time for parking in town. Street markets i.e. French, German, May Fayre, great but hold on a Sunday."
- "The addition of some popular brands/ retailers would draw people in (customers often refer to Monmouth and state that they have a good selection of shops/ restaurants that dsraw people in). Reduce car parking charges."
- "Better parking. Affordable rates for new shops to get them started."
- "The most common complaint from customer is that a large amount of shops close early. We close at 5.30pm. Some shops are seen to close soon after 4pm. The town should have controlled car parking, but much more user, customer friendly attitude towards motorists."
- "Lower rates for business. Lower rates of parking. More parking."
- "Stop allowing same businesses to pen within certain location of other similar business. Stop allowing Morrison's monopoly of town. Bring in competition."
- "Make the shops cheaper to rent. Get rid of the town's one way system."
- "Reduce business rates. Improve mix of retail especially reduction in number of charity shops."
- "Less charity shops. Lower rents/ rates."
- "Reduce rates and bring in small businesses as well as large retailers."
- "Reduction of parking charges. Initiatives to fill empty shops e.g. social help for new business/ enterprise."
- "Signage."
- "Introduce some concession on uniform business rate. Better car park signage for tourists and improve traffic flood."
- "Too late, Morrison's are hitting retailers hard. Better parking in the town. Don't limit everywhere to just 2 hours. Free bus service."
- "Cheaper and more car parking. Encourage more businesses to open in Ross, especially well known ones to attract people in town. Cheaper rates/ rent/"
- "Lower car parking for customers. Tidy up empty shops in town."
- "Reduce rates so less empty commercial properties."
- "Widening and unifying the Main Road. (Gloucester Road) Sorting traffic flow and bottle necks- but not with anymore 1 way roads."
- "Longer on street parking. Reduced parking fees in car parks."
- "Parking-time increase. Parking, cost reduction."

- "More affordable parking. More help for smaller businesses."
- "Family type restaurant i.e. Pizza Express, Pizza Hut, Bella Vista. Cinema. More industry, less charity Shops."
- "More people. Large customer base. Less rates."
- "Have more events in town. Advertising and encouraging customers/ local people to shop in Ross. Try and increase the shopping varieties- i.e. more clothes shops. Filling empty units."
- "Reverse the traffic flow in High Street and bring traffic from Wilton straight to town centre. Leave all other roads as they are. Do not allow any more charity shops to take prime locations."
- "Better policing all times day and night to alleviate beggars and also better parking facility restrictions outside shops as some waiting times are ridiculous."
- "Low rates. Free parking."
- "Make car parking free or cheaper. Lower rates. More help for small businesses."
- "Longer parking in street. More free parking."
- "Stop the council from promoting French/ Italian markets. Giving trade to others. Due to poor road layout and routes, Ross will never do very well. Visitors are not catered for at all in this town. Car Parks are expensive, with cars parked everywhere to avoid paying. Toilets are closed at 5 every day. Where do you go after then?"
- "Reduce car parking rates or introduce free parking. Half hour parking is not long enough. 1 hour free parking should be introduced."
- "Keep car parking charges down if possible and clearly favoured for shoppers and tourists."
- "Free car parking."
- "Even more individual shops. Better parking- longer time on street, cheaper in town's car parks. New sites needed, e.g. field in Old Glos. Road."
- "This is a waste of space until people get 1 hour parking. Get rid of traffic wardens. Level playing field with Morrison's."
- "Free parking."
- "Car parking, town map or similar should be given a strong profile and sow what the tariffs are including the free area near the sports centre. Pavement improvements........slabs are filled in usually with asphalt, added to which cracks appear on slabs due to vehicles (*heavy) mounting the pavement- not a life threatening issue- just aesthetic. Some town council housekeeping needed."
- "Lower rent charges to attract more independent shops. Transport links between the River and the Town Centre."
- "Better bunting. Tidy empty shop windows."
- "Lower car parking charges. Repairing road services on entrances town."
- "Fill the empty shop units. Hold more town events such as the main fayre to enable visitor and locals to use the town for pleasure!"
- "Enhance town centre parking. Better promotion of the town."
- "Car parking. Street parking. Broad Street eyesore!"
- "Look out for ourselves and continue to support each other. Everyone must recommend each other and perhaps site visits to others to find exactly what we can offer to do this recommendation."
- "Small shops close because of undue competition- don't allow Supermarkets like Morrison's, Tesco and Asda. Free or less expensive parking."

- "Change the one way system from Gloucester Road (very confusing for tourists). Discounts on new businesses (Rates/ Rents) in first two years."
- "An indoor attraction to keep visitors in town. More policing at weekends to curb anti social behaviour and vandalism."
- "More building. Reduce business rates."
- "More incentive by landlords to make independent start ups easier, less coffee chains/ bakery chains to compete with good quality independents."
- "Less charity shops. A wider mix of shops, national and independent."
- "Charity shops have prime location at discount rate. Good shops are off the main streets?? More tourists. Promote the town as a tourist destination."
- "Free parking. Reduction/ rates/ rents."
- "Cheaper rents to shops."
- "Lower rents. Lure Waitrose in as an attraction."
- "Free car parking. Lower rates."
- "Less empty shops. More variety of shops."
- "Better parking structure. Free parking for workers. Advise people to buy from their local shops."
- "Continue to promote Ross as a pretty traditional market town with great road links from Birmingham, Bristol, South Wales, Swindon etc. Promote as a great day out with a wealth of interesting shops. Many more of these should open on a Sunday, if the town is serious about attracting tourists."
- "Extend parking time in Main Street. Make it easier to get into town. Hold more town events."
- "Improved parking."
- "Replace town councillors. Try and get Marks and Spencer's in town. Stop so many charity shops being here, Town rates are driving all businesses away."
- "Clear car parking signage as people don't come to Ross because of the parking issues. Some of the rents are too high which means empty shops. The landlords need to be a bit more realistic, empty shops make the town look sad."
- "Make rent and rates more affordable. Take a leaf out of Monmouth's book- encourages the small shops to open in Ross- Monmouth is thriving and cheerful whilst Ross is dying."
- "Increase parking. Decrease charity shops

KPI 11: Town Centre Users Survey

The aim of the Visitor Satisfaction 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 (i.e. locals who pop in every day or work in town) can be very different to someone who has never been to the place before. For the first group signage is not an issue, for example, and the second may not worry about fear of night time crime.

The following table is based on the 120 responses from the Town Centre Users Survey.

	Ross on Wye %	**West Midlands Small Town%**	**~~West Midlands Large Town%~~**	**National Small Town%**	**National Large Town%**	**Typology 2%**
Gender						
Male	29	38	~~29~~	39	35	38
Female	71	62	~~71~~	61	65	62
Age						
16-25	4	9	~~4~~	9	10	8
26-35	9	8	~~9~~	10	8	8
36-45	24	13	~~24~~	15	16	14
46-55	15	15	~~15~~	20	18	17
56-65	28	21	~~28~~	20	20	21
Over 65	20	34	~~20~~	27	28	31

	Ross on Wye %	West Midlands Small Town%	~~West Midlands Large Town%~~	National Small Town%	National Large Town%	Typology 2%
What do you generally visit the Town Centre for?						
Work	16	17	~~16~~	16	19	18
Convenience Shopping	36	50	~~36~~	42	29	38
Comparison Shopping	4	2	~~4~~	5	11	7
Access Services	18	11	~~18~~	16	13	12
Leisure	19	11	~~19~~	11	18	15
Other	6	10	~~6~~	9	9	10
How often do you visit the Town Centre						
Daily	23	37	~~23~~	25	24	31
More than once a week	35	32	~~35~~	35	39	37
Weekly	24	15	~~24~~	14	17	14
Fortnightly	2	5	~~2~~	4	5	5
More than once a Month	2	2	~~2~~	3	3	3
Once a Month or Less	8	7	~~8~~	7	9	8
First Visit	7	2	~~7~~	11	2	3
How do you normally travel into the Town Centre?						
On Foot	33	35	~~33~~	36	31	37
Bicycle	2	2	~~2~~	3	2	2
Motorbike	0	0	~~0~~	1	0	1
Car	56	57	~~56~~	52	52	52
Bus	8	4	~~8~~	7	12	6
Train	0	0	~~0~~	1	1	1
Other	2	0	~~2~~	1	1	2

	Ross on Wye %	West Midlands Small Town%	~~West Midlands Large Town%~~	National Small Town%	National Large Town%	Typology 2%
On average, on your normal visit to the Town Centre how much do you normally spend?						
Nothing	4	4	~~4~~	3	4	3
£0.01-£5.00	8	19	~~8~~	15	11	13
£5.01-£10.00	28	25	~~28~~	25	22	24
£10.01-£20.00	35	29	~~35~~	31	33	31
£20.01-£50.00	19	18	~~19~~	20	25	22
More than £50.00	7	6	~~7~~	5	7	6
How do you rate the physical appearance of the town centre?						
Very Good	18	18	~~18~~	17	16	18
Good	69	60	~~69~~	58	63	60
Poor	12	20	~~12~~	21	19	18
Very Poor	2	4	~~2~~	4	2	4
How do you rate the cleanliness of the town centre?						
Very Good	14	21	~~14~~	17	13	17
Good	73	61	~~73~~	64	68	63
Poor	11	16	~~11~~	16	18	18
Very Poor	3	1	~~3~~	3	2	2
How do you rate the variety of shops in the town centre?						
Very Good	13	10	~~13~~	11	9	10
Good	53	48	~~53~~	45	47	49
Poor	28	37	~~28~~	36	35	34
Very Poor	8	6	~~8~~	9	9	7

	Ross on Wye %	West Midlands Small Town%	~~West Midlands Large Town%~~	National Small Town%	National Large Town%	Typology 2%
How do you rate the leisure and cultural offering in the town centre?						
Very Good	10	13	~~10~~	8	13	12
Good	44	54	~~44~~	47	58	52
Poor	35	28	~~35~~	37	25	30
Very Poor	11	4	~~11~~	8	4	6
What are the positive aspects of the Town Centre?						
Physical appearance	76	63	~~76~~	54	56	63
Shops	57	52	~~57~~	53	50	55
Restaurants	50	55	~~50~~	37	59	50
Access to Services	86	79	~~86~~	75	73	78
Leisure Facilities	29	44	~~29~~	25	34	35
Cultural Facilities	30	40	~~30~~	24	33	36
Pubs/ Bars/ Nightclubs	32	53	~~32~~	33	41	40
Transport	39	45	~~39~~	40	44	38
Ease of walking around the town centre	82	78	~~82~~	75	76	77
Convenience e.g. near where you live	79	72	~~79~~	69	61	68
Safety	75	65	~~75~~	48	56	61
Car Parking	48	58	~~48~~	44	38	45
Markets	59	40	~~59~~	39	47	43
		4				

	Ross on Wye %	West Midlands Small Town%	~~West Midlands Large Town%~~	National Small Town%	National Large Town%	Typology 2%
What are the negative aspects of the Town Centre?						
Physical appearance	16	25	~~16~~	24	27	22
Shops	37	37	~~37~~	39	36	34
Restaurants	26	31	~~26~~	18	33	25
Access to Services	4	9	~~4~~	5	8	7
Leisure Facilities	47	33	~~47~~	22	39	31
Cultural Facilities	36	38	~~36~~	25	37	31
Pubs/ Bars/ Nightclubs	33	22	~~33~~	21	29	23
Transport	34	34	~~34~~	24	25	32
Ease of walking around the town centre	11	9	~~11~~	8	10	9
Convenience e.g. near where you live	2	11	~~2~~	11	9	10
Safety	7	13	~~7~~	10	16	12
Car Parking	36	40	~~36~~	43	36	37
Markets	27	38	~~27~~	27	23	33
Other	12	11	~~12~~	9	7	8
		35				
		36				
		15				
		3				
		10				
		0				

	Ross on Wye %	West Midlands Small Town%	South West Large Towns %	National Small Town%	National Large Town%	Typology 2%
How long do you stay in the Town Centre?		%				
Less than an hour	21	27	35	17	36	27
1-2 Hours	43	50	36	41	39	39
2-4 Hours	19	11	15	24	12	18
4-6 Hours	4	3	3	6	3	5
All Day	12	9	10	11	8	10
Other	1	0	0	1	1	1

What TWO suggestions would you make to improve the town centre?

- "Approach in to town is poor - one way system should have been the opposite way. More in town parking."
- "Less empty shops - but don't fill them with charity shops! A smart 'What's On' board - not a scruffy pin board but somewhere that key events such as plays, films, book talks etc can be advertised, that would appeal to visitors as well as locals."
- "More on street parking for 1 - 2 hours. 30 minutes is useless when you have small children who take forever to get around the shops. More focus on 'old market town' feel, so more events like the advent & May Fayre, Pancake races. There needs to be something on at least bi-monthly."
- "The town needs better shops to attract people to the town ie big companies. We need more leisure facilities and a train station."
- "Bigger market. Make it safer to cross the roads, very hard to cross Broad Street."
- "Introduce a Ross-on-Wye pound that can only be spent in the town. Make the shop units affordable to encourage independent retailers. Independent Retailers = More Tourism."
- "Free car parking off street. Less street parking."
- "Better shops eg. M&S food, White Stuff. Pedestrianisation - the May Fayre was lovely with no vehicles in the town centre!"
- "Video game shop eg. GAME Another toy shop."
- "More free parking. Encourage trade."
- "Adopt the ideas as in other towns such as Stroud and ban all Lorries and deliveries in the town between certain hours such as 9am to 4pm. I am sure Lorries and vans could unload into smaller local ones at the under used.....they need to. Encourage more people into the town with better car park charges - perhaps first hour free - freeing up the streets so people can just use the parking there for 30 minutes to deliver and collect goods bought in local shops."
- "Encourage owners of buildings above shops to improve appearance. Attract businesses to derelict buildings in Brookend Street and Copse Cross Street."
- "Less and/or slower traffic. Cleaner."
- "Get rid of some of the charity shops, get more selection of clothes shops and so on. Make Ross-on-Wye a more younger generation town and improve the Saturday and Thursday markets. Used to love market days in Ross-On-Wye."
- "Free car parking. Reduce shop rates to encourage more independent businesses to open up."
- "If you mean the actual centre, not a lot. My main gripe is not having a good leisure centre like Newent/Monmouth. Need a good park also."
- "Tidy up empty shops. Demolish derelict buildings."
- "More variety of shops. Cheaper parking."
- "More restaurants, not just Indians. We need a substantial tourist attraction!"
- "Visible Police presence in the early evening and late night patrols at the weekend."
- "Review the one way system. Think about the width of Gloucester Road, pavement and roadway including parking for deliveries."
- "More facilities for young people e.g. bowling, cinema (one that shows more youthful films). Tidy up shop fronts which are empty."

- "Use riverside more. Promote shops more. Tidy up empty shops."
- "Awful windows being fitted to re-developed church (flats). Like mix of shops. Pedestrianise the streets because parking is close by. Keep small independent shops."
- "Needs more shops, less charity shops and coffee shops."
- "More cultural activities/venues. Clean up Roswyn and Gardner Butcher garage."
- "Free 2 hour car parks. Safer pedestrian circulation."
- "Pavements need to be levelled for wheelchairs/buggy's."
- "Tidy up shabby buildings. Reduce rents and offer rebates to improve occupancy, especially in key areas like The Malting."
- "Restore beautiful old pubs. Get rid of chains like Costa who ruin local businesses built up over a long period. More independent shops, less charity shops."
- "More inexpensive shops. Good for individual gifts but are expensive. Traffic lights needed between High Street and Walford Road."
- "Clean up dog mess. Improve personal safety - unwelcome approaches from drunken men after night out especially Ledbury Road."
- "Change access. Remove charity shops."
- "Keep market house clean and tidy. Have range of activities around market house regularly. Improve swimming pool - too small."
- "Better parking. Entertainment for families like ten pin bowling."
- "Improve empty shops - lower rent/rates to encourage businesses. No more charity shops/cheap shops. Provision for young people in evening other than pub and street to hang out."
- "More clothes shops. More restaurants other than Indian which are good."
- "More shops for young people to retain their spending locally. Regular events at market house."
- "Better selection of shops. Cheaper parking."
- "More trees around market area. Hide wires on face of buildings."
- "Prevent greedy landlords driving up commercial rents making it impossible for retailers to survive. Encourage more stall holders to market to bring more people into town."
- "More seating around market area. Remove Sunday parking fees - too costly."
- "Better car park signage. Brighten up Main Street with banners from lamp posts etc."
- "More outdoor eating under cover. Encourage live music/busking."
- "Change the one way system to bring people into town. Shop fronts/commercial premises to be kept in good condition whether occupied or not. If shop is empty for a period of time, landlords should be made to lower rents."
- "More variety of shops - more high end / boutique retailers, fewer charity shops."
- "Better shops, more tourist things."
- "Make landlords reduce rents to help retailers survive in this economic climate."
- "Shop keepers more welcoming. More restaurants other than Indian."
- "More cultural activities. Tidying up."
- "More unique shops. Only allow old style shop fronts and signs."
- "Improve signage on routes and parking. Provide info of tourist interest."
- "Free car parking. Displays in empty shops by other traders, perhaps including a pop-up local crafters shop."

- "More markets, especially ones selling fresh local produce. Child friendly places - there is rarely anything for families with young children."
- "One way system - something has got to be done about this. Advertising boards on pavements, for the disabled it can be a pain."
- "Some big name shops to bring people to all the shops. A nightclub."
- "There can be litter. Not convinced re the one way system which directs traffic entering Ross-On-Wye away from the town towards grotty areas and is confusing for visitors unfamiliar with the area."
- "Change the Gloucester Road/High Street one way system to the other direction and make the other part of the High Street, Copse Cross Street and Alton Street/Road one way. Extend parking time on streets."
- "Fewer empty shops."
- "Need shops providing good range of children’s clothes."
- "Tidy up shops. Lower rates."
- "More shops open on a Sunday. Nationals need to smarten up appearance."
- "Fewer charity shops."
- "Less empty shops. Ease of parking"
- "Fill empty shops"
- "Reduce car parking charges. Improve bus links."
- "Reduce business rates. Improve car parking."
- "Fill empty shops."
- "Better up keep of buildings"
- "Reduce the number of shop units - fewer empty ones. Reduce parking costs."
- "Empty shops. Bigger shops"
- "Improve parking signage. Reasonable parking prices."
- "Ease congestion. Variety on market."
- "Improve road system. Better signage. Over enthusiastic traffic wardens."
- "Get rid of one way system. Make shop affordable."
- "Street parking."
- "More filled shops"
- "Market variety and size. Shop variety for day to day. Roadside parking."
- "More pedestrian crossings"
- "Pedestrianise"
- "Market"
- "Pedestrian crossing."
- "Empty shops filled"
- "Parking"
- "Shop variety - size. Better disabled access."
- "Advertise market. Better publicity for town."
- "Chain stores."
- "Bus frequency."
- "Bus frequency and keep pool and gym."
- "Variety of shops. Places for youth"
- "Stop any more out of town shopping outlets before they completely ruin any more local businesses."
- "Free parking. More emphasis on cleaning litter."

- "Improve market"
- "Tidy bottom end of town"
- "Improve market. More cultural stuff. Bus - labels Large DIY store open Sundays"
- "Takeaway litter. Market."
- "More for children / youth. Festival."
- "Reduce business rates for independent shops. Pedestrianise Broad Street at the weekends."
- "Improve sports facilities in the town"
- "Parent & Child parking. Market - variety. Variety of shops - charity."

KPI12: Shoppers Origin

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 1717 postcodes gathered from businesses have been 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

	Ross on Wye%	West Midlands Small Towns %	~~West Midlands Large Towns %~~	National Small Towns %	National Large Towns %	Typology 2 %
Locals	56	62	~~56~~	58	56	61
Visitors	25	28	~~25~~	29	28	26
Tourists	18	10	~~18~~	13	16	12

APPENDIX

Town Name	Large or Small	Region	Type
Loughborough	L	East Midlands	n/a
Hinckley	L	East Midlands	n/a
Carlton Square	S	East Midlands	n/a
Carlton Hill	S	East Midlands	n/a
Netherfield	S	East Midlands	n/a
Mapperley	S	East Midlands	n/a
Arnold	S	East Midlands	n/a
Bury St Edmunds	L	East of England	2
St Ives	L	East of England	4
St. Neots	S	East of England	4
Ramsey	S	East of England	4
Huntingdon	S	East of England	4
Wetherby	S	North East	1
Ripon	S	North East	2
Bentham	S	North East	2
Settle	S	North East	3
Knaresborough	S	North East	n/a
Penrith	L	North West	2
Nantwich	L	North West	2
Wrexham	L	North West	n/a
Crewe	L	North West	n/a
Wilmslow	L	North West	n/a
Macclesfield	L	North West	n/a
Alsager	S	North West	1
Disley	S	North West	1
Appleby	S	North West	2
Kirkby Stephen	S	North West	2
Middlewich	S	North West	4
Knutsford	S	North West	5
Bollington	S	North West	5
Wigton	S	North West	7
Congleton	S	North West	8
Sandbach	S	North West	8
Holmes Chapel	S	North West	8
Mold	S	North West	n/a
Queensferry	S	North West	n/a
Saltney	S	North West	n/a
Shotton	S	North West	n/a
Buckley	S	North West	n/a
Connahs Quay	S	North West	n/a

Flint	S	North West	n/a
Holywell	S	North West	n/a
Alston	S	North West	n/a
Bangor	S	North West	n/a
Caernarfon	S	North West	n/a
Alderley Edge	S	North West	n/a
Handforth	S	North West	n/a
Poynton	S	North West	n/a
Audlem	S	North West	n/a
Broadstairs	L	South East	n/a
Hertford	L	South East	n/a
Halstead	S	South East	2
Buckingham	S	South East	4
Southwater	S	South East	4
Henley	S	South East	5
Sheerness	S	South East	6
Dover	S	South East	6
Bishops Waltham	S	South East	8
Waltham Cross	S	South East	n/a
Cheshunt Old Pond	S	South East	n/a
Bletchley	S	South East	n/a
Bookham	S	South East	n/a
Wolverton	S	South East	n/a
Devizes	L	South West	2
Trowbridge	L	South West	2
Nailsea	S	South West	1
Pewsey	S	South West	2
Melksham	S	South West	2
Frome	S	South West	2
Westbury	S	South West	2
Warminster	S	South West	2
Corsham	S	South West	2
Wilton	S	South West	2
Chippenham	S	South West	4
Calne	S	South West	4
Malmesbury	S	South West	4
Ludgershall	S	South West	4
Bradford On Avon	S	South West	5
Cricklade	S	South West	8
Royal Wootton Bassett	S	South West	8
Tidworth	S	South West	n/a
Ross on Wye	L	West Midlands	2
Tenbury Wells	S	West Midlands	2
Great Malvern	S	West Midlands	2

Alcester	S	West Midlands	2
Upton Upon Severn	S	West Midlands	3
Southam	S	West Midlands	4
Whitchurch	S	West Midlands	5

TYPOLOGY CLASSIFICATION

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 **agricultura**l 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 East 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 i33s 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

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CAR PARKING DATABASE

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