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rTown report

Work Package 1 –
Town Benchmarking and Opinion Survey

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Document summary

The purpose of this Phase 1 study was to refresh our prior understanding of the town from the study undertaken in 2012, to assess the appetite for new ways of working with the town and to build a solid data baseline for Phase 2 work.

This report summarises and attempts conclusions from the main findings which are separately, and publicly, available on the project website.

Requirement

In 2012 the Ross Town Plan Progress Group used the Action for Market Towns (AMT) Benchmarking Toolkit, so for comparison purposes this was reused by the rTown project.

In addition to the standard AMT questions, the project added some of its own to gain a better understanding of town centre user (consumer and business owner) habits relating to parking, incentives and electronically-facilitated service provision. These only have real value in the context of the wider AMT data.

Method

The AMT Benchmarking toolkit was transcribed into SurveyMonkey and supplemented with our own, rTown, questions.

To ensure that results have temporal comparability with the previous AMT study, the survey was undertaken through August 2014.

Regrettably, Action for Market Towns t/a Towns Alive ceased to trade with effect from 23 October 2014. However, the Benchmarking activity continues to be operated through People&Places.

The AMT survey data was submitted to People&Places for analysis and comparison (with national 2013 data) in September 2014, the local data was analysed in parallel. The AMT Benchmarking data will be re-analysed and compared with the newly submitted national data for 2014 in December 2014.

The combined spreadsheet containing all structured, free-text and categorised data is available on the project's private documents website.

Results

AMT Benchmarking

In addressing the key performance indicators (KPIs) in the remainder of this 2014 report the equivalent Ross numbers for 2012 are italicised.

KPIs 1-4: Business Premises

In August 2014 the survey area included 280 (*295*) non-residential premises of which 18 (*13*) were vacant; of the remaining 262, 156 (*179*) were class A1, retail business premises. The percentage of commercial units comprising Class A1 is 55% (*51%*) which is in line with the norms for this type of participating town, as is the percentage distribution of other units.

Of the Class A1 retail businesses 88% (*90%*) are selling comparison goods and 12% (*10%*) convenience goods. This slight shift toward serving shoppers for regular items brings Ross closer to the nationwide pattern of provision than was displayed in 2012.

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Since 2012 Ross had seen a worrying loss of key attractor businesses[1] to 4% (*7%*), seeing a steeper decline than any of the comparators. Independent businesses have declined slightly at 71% (*76%*); while both multiples[2], 20% (*15%*), and regionals, 5% (*2%*), have shown some growth.

In terms of vacant units, Ross has seen a heartening fall from *11%* to 6%; though it is notable that town centre users and businesses despaired of the number of charity shops that have moved in (now 6% of all retail, and of which 70% are multiples). Since 2012 the vacancy rate in participating towns has worsened nationally; only West Midlands towns seem to have gone against that trend.

KPI 5: Markets

Although the markets still operate on Thursdays and Saturdays the average number of traders has declined from *12* in 2012 to 9 in 2014, and is just above half of the average number at markets in participating towns where nationally large towns have seen a larger decline while small towns have seen only a small decline.

KPIs 6 & 7: Zone A Retail Rents and Prime Retail Property Yields

In Ross-on-Wye the Zone A retail rents in Ross have risen from *£25/ft²* in 2012 to £30/ft² in 2014; changing towards the (declining) typology norm for 2013. The comparative figures may be misleading because they are for 2013, but large towns had seen a small decline in rents and small towns had had no rises. Ross would appear to be bucking the national pattern.

The percentage yields in Ross have stayed the same at 7% - a pattern reflected nationally in 2013.

KPI 8: Footfall

Using the average number of people per 10 minutes between 10am and 1pm at the two busiest locations, footfall in Ross on a market day has risen sharply from *76* to 131; it still lags national large town figures (unsurprising given the population comparisons) but has fared better, like West Midlands small towns, than small towns nationally.

On quieter days there is also a rise, though less marked from *69* to 102; somewhat ahead of small towns elsewhere, but at half the large town number.
In both instances Ross footfall still lags the typology expectation which saw 20% rises from 2012 to 2013.

KPI 9: Car Parking

This vexed topic is dealt with in much more detail in the companion WP3 Parking Report but the total figures in 2014 cannot be compared directly with those in 2012. This is because it was found that parking for the town centre covered more areas (121 on-street, and 309 off-street spaces) than were surveyed in 2012, so the area was extended in 2014 to provide a more accurate picture.

KPI 10: Business Confidence

In total there were 61 responses to the business survey, of which two were excluded from 'town centre' analysis because they are located outside the survey area; nevertheless, that number approximates to a 24% response rate from town centre businesses.
The percentage of retail and 'hospitality' responses was the same as in 2012 at 63% and 7% *(6%)*, whereas the commercial/professional rate had dropped while the 'other' rate had risen. Regionals & Multiples showed a heartening inclination to engage with the survey.

[1] Worsened with the subsequent loss of Phones 4 U.
[2] Altered further just after this study by the opening of Aldi.

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New (<5 years) businesses total 37% (*25%*) of responses, with a number of businesses reporting increased turnover, 49% (*26%*), and profitability 44% (*17%*) – with the number expecting decreased turnover in the next year down to 8% (*18%*). This is a substantially better picture than that in participating towns nationally (in 2013).
The subjective indicators are generally approximately in line with other participating towns but the retail mix was seen as more negative than the national picture, whereas rental values are seen more positively. The proportion of businesses reporting crime in the previous 12 months was down (20% v *28%*) – just below the West Midlands rate and well below the nationally reported rate.

KPI 11: Town Centre Users

In total there were 245 responses to the town centre user survey; 212 responses to the web version, and a further 33 face-to-face responses. Ignoring the effect of visitors, this approximates to an adult response rate[3] from the town of 2.9%, or 5.1% of households. The age distribution of those participating was more even than in 2012, with the exception of a decline that of the 16 – 25 band. Male participation was slightly worse than last time. The number of people visiting the town centre more than once a week had risen (41% v *35%*), and many fewer are using a bus to do so (3% v *8%)* with car use having filled the gap.

The spend distribution of those participating was greater than in 2012 – with a rise in "spend nothing" and in "spend more than £50". There has been an increase (36% v *21%*) in the number of people spending less than an hour in the town, and a big decrease (5% v *12%*) in those spending all day.
The subjective indicators are generally approximately in line with other participating towns. The retail mix was seen as more negative than the national picture, and noticeably more negatively than in 2012 (positive rating 29% v *57%* and negative, 43% v *37%*), whereas the cafes & restaurants fared much better (positive rating 70% v *50%* and negative, 11% v *26%*).

KPI 12: Shoppers Origin

This is notable for the decline in visitors being more than balanced by an increase in tourists, with some loss of local footfall.

Responses to rTown-specific questions

These questions concentrated on opinions about the pros and cons of the town, attitudes to incentives and to electronically-enabled service provision (trader, community and local government) within the town.

Some standard AMT benchmarking questions were subdivided to give us greater detail on particular topics already covered.

Ross-on-Wye Town Centre Trader Survey - 2014

The following graphs are produced from the categorised free text responses exported and sorted from the business confidence survey. The main data source is a merge of the transposed Survey Monkey data from two contiguous files which includes the free text but not the categorised data derived from that free text. That merged data is held in file <<BusData_AllAnon_Transposed_20141007.xlsx>>. In total there were 61 responses to the business survey, of which two should be excluded from 'high street' analyses because they are located outside the survey area; nevertheless, that number approximates to a 24% response rate from town centre businesses.

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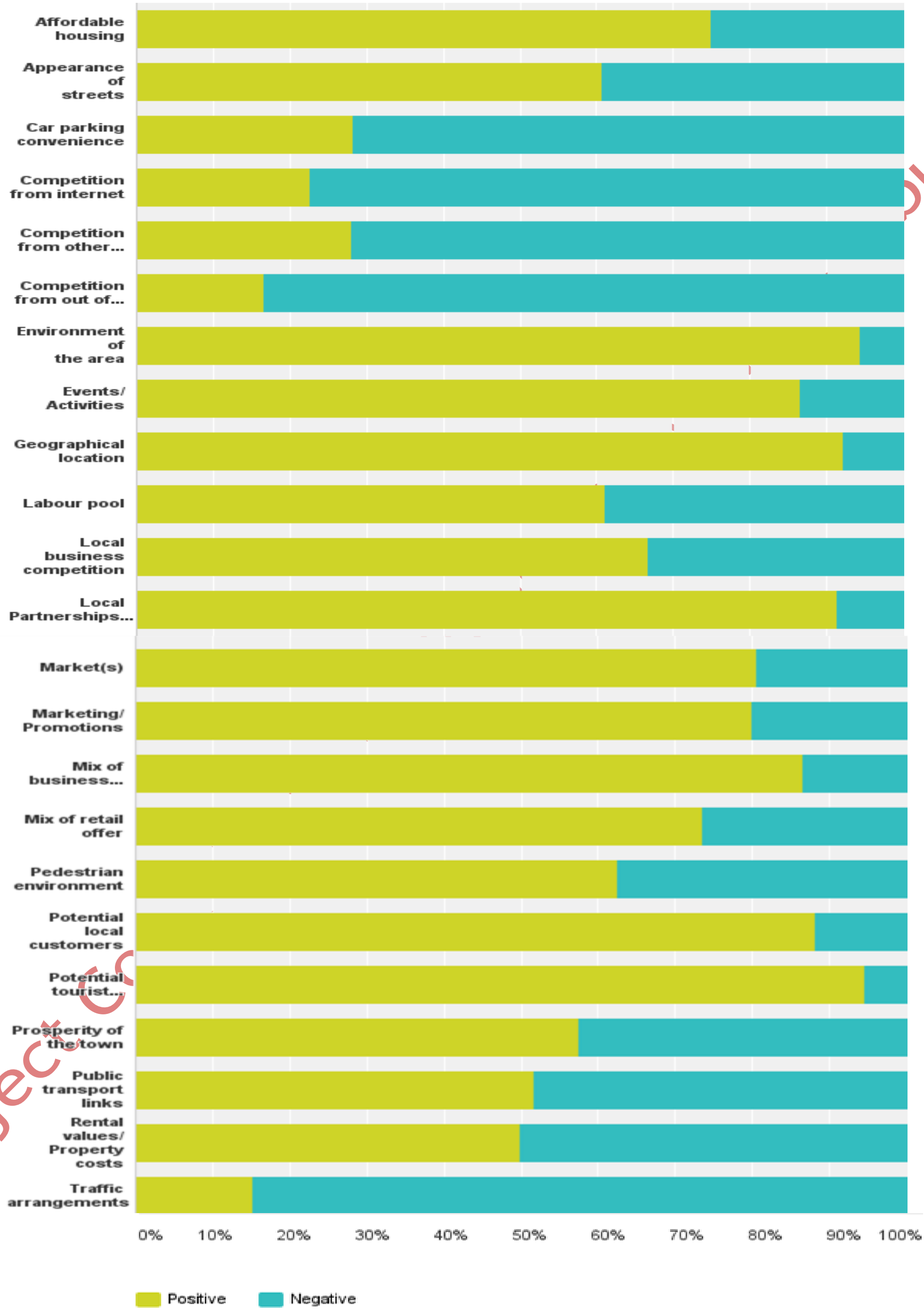
[3] http://factsandfigures.herefordshire.gov.uk/docs/Area_Profiles/Ross-on-Wye_2011_Census_Profile.pdf

In case of each free text question from which the categorised data was produced the source file is noted.

Aspects of business in Ross-on-Wye town centre

Business survey 2014, Question 11 asked "*How do you rate the following aspects of Ross-on-Wye town centre?*" Respondents were asked to rate as positive or negative, with null responses being interpreted as 'fair'.



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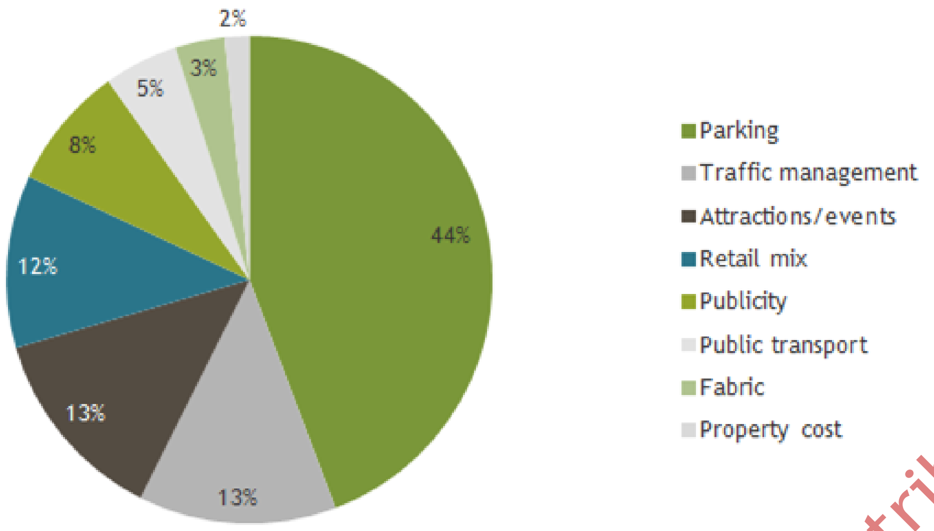
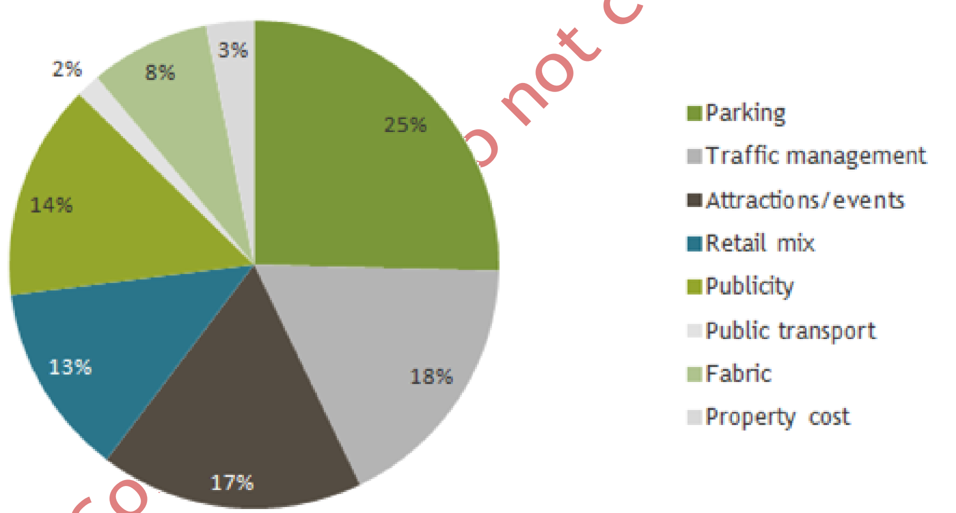
Action categories to attract local trade

Business survey 2014, Question 12: asked "*What one action would in your opinion generally increase regular trade in Ross-on-Wye town centre?*" The categorised responses source data file is <<BusData_Q12Local_20141007.xlsx>>. In total there were 49 free text responses to this question, and 12 respondents skipped the question.



Action categories to attract tourist trade

Business survey 2014, Question 13: asked "*What one action would in your opinion generally increase tourist trade in Ross-on-Wye town centre?*" The categorised responses source data file is <<BusData_Q13Visitor_20141007.xlsx>>. In total there were 47 free text responses to this question, and 14 respondents skipped the question.



Taken together, these responses indicate a concern that businesses perceive that parking is a bigger issue for locals than for visitors, and that traffic management unsurprisingly has the reverse importance.

Attitudes to the town

Ross-on-Wye Town Centre User Survey – 2014

The following graphs are produced from the categorised free text responses exported and sorted from the town centre user survey undertaken in August 2014. There were fewer free-text responses to the face-to-face questionnaires than to the online web versions; because the latter sampled people who were visiting the town it is inevitable that they were therefore less likely to have time to consider reasons for their opinions. In total there were 212 responses to web version of the town centre user survey, and a further 33 face-to-face responses. Ignoring the effect of visitors, this approximates to an adult response rate[i] from the town of 2.9%, or 5.1% of households.

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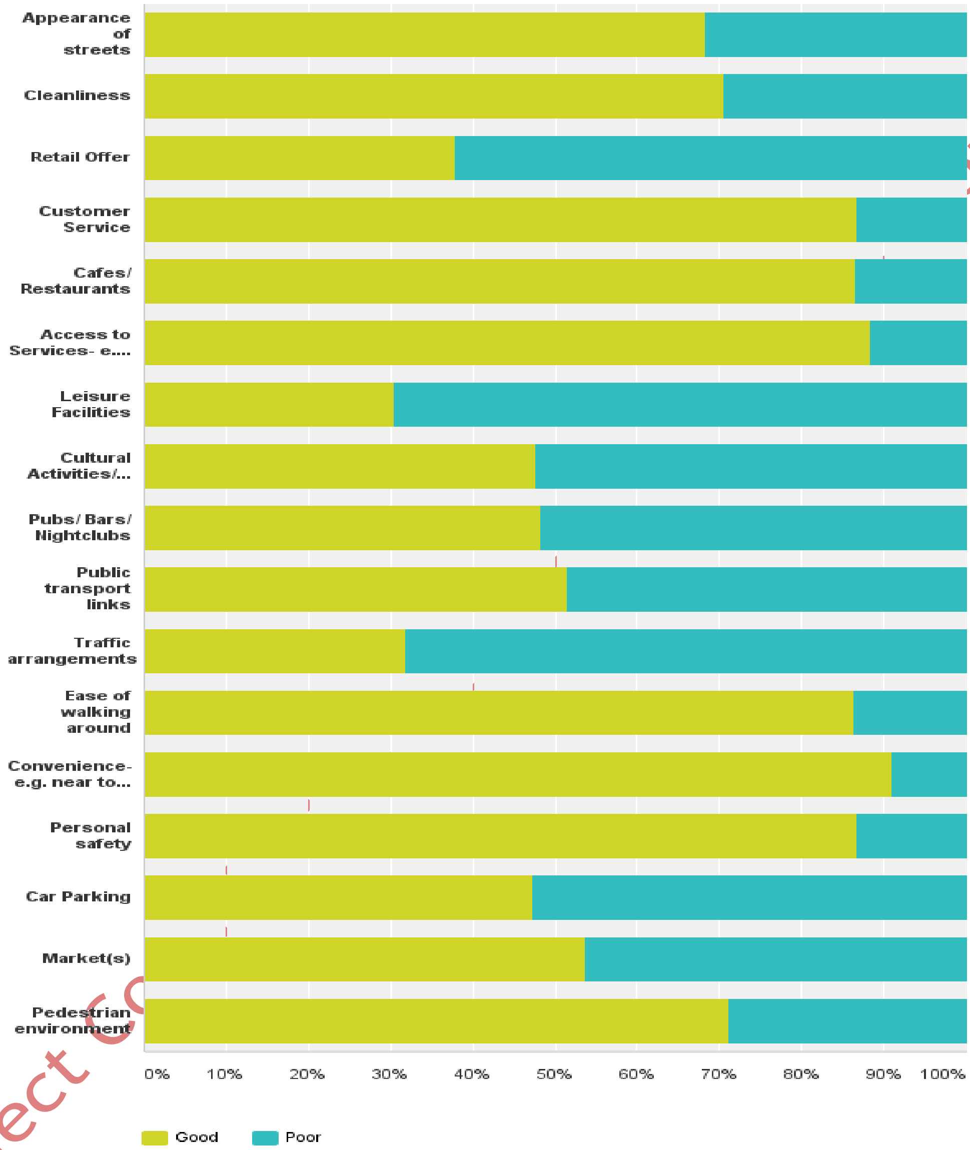
In case of each free text question from which the categorised data was produced the source file is noted.

Aspects of Ross-on-Wye town centre?

Town centre user 2014, Question 15 asked "*How do you rate the following aspects of Ross-on-Wye town centre?*" Respondents were asked to rate as positive or negative, with null responses being interpreted as 'fair' – though not all respondents seemed to understand this.



In addition, there were 50 free text responses, categorised as 80 comments which break down as in the following graph.

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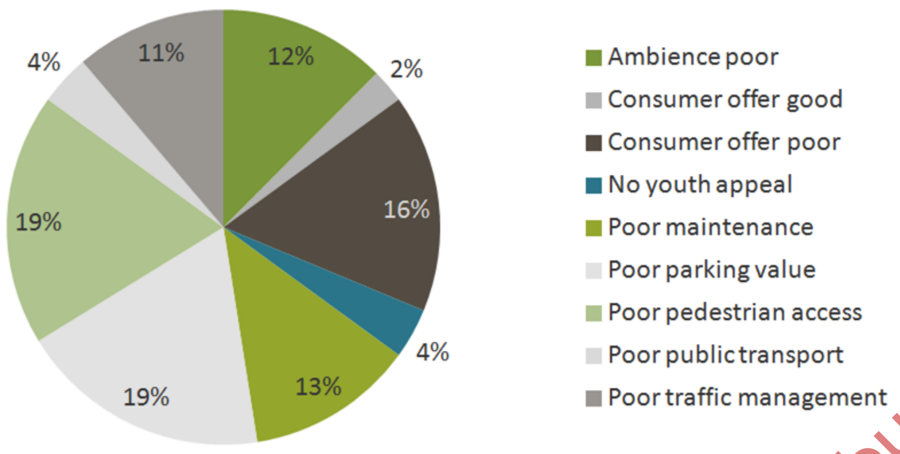
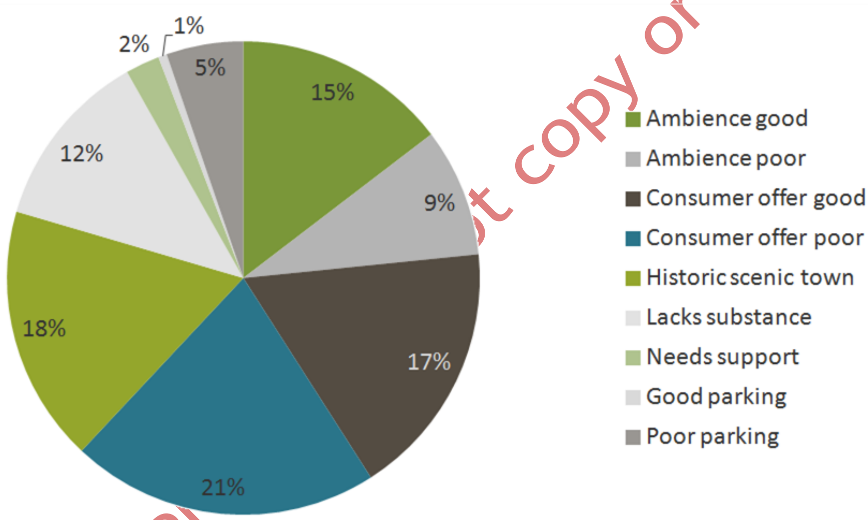


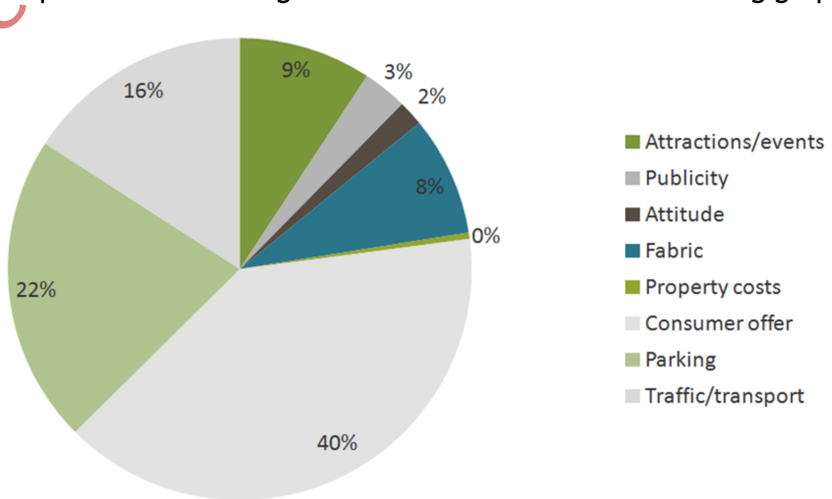
Visiting Ross-on-Wye town centre

77% of 224 respondents said they'd recommend a visit to Ross-on-Wye town centre, and 23% that they would not. The categorised reasons are given in the following graph.



Aspects for improvement

Asked "What one improvement would persuade you to visit … more often, or stay longer?" the 185 respondents provided 206 categorised comments as in the following graph.



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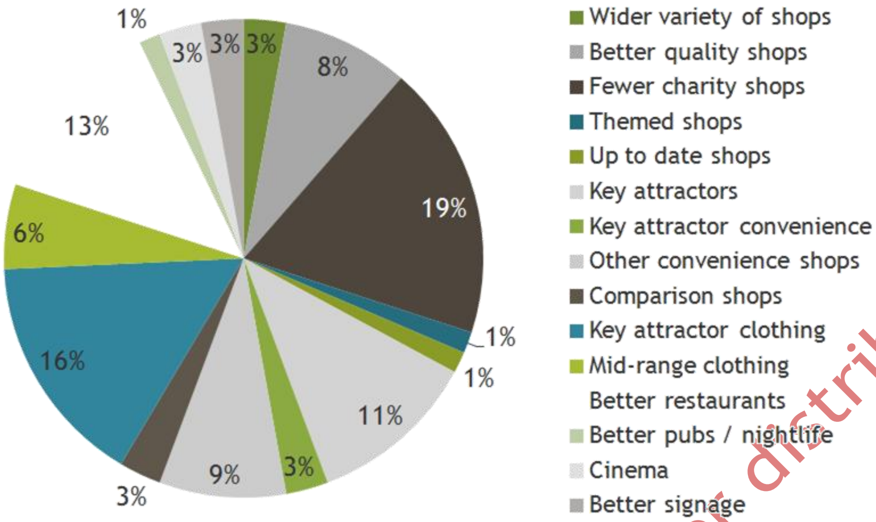
The consumer offer is by far the biggest issue at 40% so it was analysed in more detail. The 91 responses indicating a wish for a better consumer offer produced 93 categorised comments as in the following graph.



Notable is the wish for fewer charity shops.

In total, 23% explicitly wish for more comparison shops. Even if half of the total (22%) number wishing for a better variety and quality of shop, and for key attractors, is added to the wish for more convenience shops (in reality it should probably be a 1:2 split) then the wish for that mix makes 22%, with the comparison segment growing to 36%. The leisure segment makes up, in total, 20% (the call for better signage was related to tourism).

It would therefore appear that discretionary spending (as distinct from 'essentials' shopping) is increasingly important to Ross because it shows as a driver from 56% of this subset of responses, and so 25% of all responses to this question. Taken with the other non-essentials (attractions and fabric at 17%) this shows 42% calling for a growth in leisure-oriented provision.

Attitudes to incentives

Of the 224 respondents to the question "*Do you think financial or other incentives would persuade you to make more use of Ross-on-Wye town centre shops and facilities?*" 51% indicated that they would, and 49% not. Of the 106 respondents specifying their favoured incentives 63% said parking vouchers, 51% vouchers and 29% sales discounts would induce them to make more use of the town shops and facilities.

Attitudes to e-enabled working

This section was deliberately divided into sub-sections to address different groups of consumers.

Use of internet shopping to 'click & collect

Asked "*Would you use internet shopping to 'click & collect' if town traders were to offer it?*" 7% indicated they already used it (3:2 for in-town:out-of-town purchases), 57% would use it if offered, and 36% would not.

Amongst 38 free-text responses the 40 categorised indicated 15% with no understanding of the question, and 22% as dislike of the internet; whereas 41% indicated they used internet shopping now, and a further 19% would do so if the right conditions were present in town.

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Use of phone shopping to collect later

Asked "*Would you use phone shopping to 'shop & collect' if town traders were to offer it?*" 2% indicated they already used it, 34% would use it if offered, and 64% would not.

Amongst 21 free-text responses the 21 categorised indicated 19% with no understanding of the question, and 24% as dislike (they seemed to think it involved the internet); whereas 19% indicated they used phone shopping now (3:1 for in-town:out-of-town purchases), and a further 36% would do so if the right conditions were present in town.

Use of personal shopping to collect later

Asked "*Would you use a 'buy now, collect from elsewhere in Ross-on-Wye later' service if town traders were to offer it?*" 1% indicated they already used it, 41% would use it if offered, and 58% would not.

Amongst 16 free-text responses the 19 categorised indicated 37% with no understanding of the question, and 16% as dislike (they seemed to think it involved the internet); whereas 19% indicated they use such a service now, and a further 36% would do so if the right conditions were present in town.

Use of a timed local delivery service

Asked "*Would you use timed local delivery if town traders were to offer it?*" 1.5% indicated they already used it, 54% would use it if offered, and 44.5% would not.

Amongst 19 free-text responses the 27 categorised indicated 10% as dislike, whereas 10% indicated they such a service for out-of-town shopping now; a further 80% would do so in the town if the right conditions were present.

Use of a unified town information service

Asked "*Would you use a unified town information service to find out about accommodation, outlets, services and promotions?*" 6% of the 219 respondents indicated they already used something, 67% would use it if offered, and 27% would not.

Amongst 12 free-text responses the 17 categorised 12% indicated no understanding of the question, whereas 41% indicated they currently use 'old media'; a further 47% new media.

The favoured information gathering means are internet and walk-in, with phone and text both favoured less.

Use of a unified town service to report problems

Asked "*Would you use a unified town information service to report problems with aspects of the town?*" 2% of the 214 respondents indicated they already used something, 79% would use it if offered, and 19% would not.

There were only 4 free-text responses so no conclusions could safely be drawn from them.

The favoured information gathering means are, in order of preference, internet walk-in, telephone and then text.

Conclusions

Business implications

There is something of a mismatch between traders view of the offering in the town and users perceptions; businesses are either content with their offering or blame others for the decline in their prosperity. If the customer is always right these both imply a need for a radical re-think, and for the consumer offering somehow to be better matched to their expectations.

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Infrastructure

We have seen that a number of significant infrastructure areas are currently beyond the control of both businesses and the Ross town council. Most responsibility lies with the Herefordshire Council, the major focus of which is on the Hereford conurbation; but even they have no control over business rates except with respect to discretion on the extent of any rebate charity shops.

Establishment of a Business Improvement District by the town centre businesses could give them greater control over the town and help to attract new businesses to boost the town. More strategic thinking rather than a 'next event' focus would be necessary to carry this off.

Ways of working

The appetite, or even basic understanding of the means and potential, seems to have passed most consumer-oriented businesses by. Unless they generally improve their skills and offering their businesses, ignoring any infrastructure issues, will decline.

Community

Given the focus by Herefordshire Council on job creation in the Hereford conurbation it is unlikely that there will be much significant short term job growth in Ross. This means that any growth in new housing stock will largely be filled, directly or indirectly, by people moving into the area to retire or to work elsewhere. Unless public transport services are markedly improved this will bring more car use into the town.

The emerging Neighbourhood Plan could be a means to enable community needs to be met at the same time as providing the right conditions for optimal use of the built, information and transport infrastructure in the town centre.

The newly acquired Herefordshire Council assets have the potential to be the springboard for new events and attractions as well as providing a basis for delivery of new services on behalf of the business community sand residents.

Technology

Feasibility analysis of the technical means to deliver on the conclusions from this survey are covered in the deliverable of the remaining workpackages in Phase 1 of rTown.

Intellectual property

Beyond the rTown questions and the analytical techniques applied to them, we assert no new intellectual property as part of this workpackage.

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Bibliography

To be completed

[i] http://factsandfigures.herefordshire.gov.uk/docs/Area_Profiles/Ross-on-Wye_2011_Census_Profile.pdf

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