Warminster

2015 Benchmarking Report

Report published April 2016

Summary

The benchmarking team has looked at the commercial make-up of Warminster town centre, counted the empty shops and asked businesses for their ‘take’ on having a business here. We have interviewed people in the street to find how much improve, and we have looked at the car parking in town. We have done this in the same systematic way at the same time of year (June to October) for the last five years. A picture of Warminster has emerged, which we think is unlikely to change significantly until the start of the proposed major housebuilding on the edge of town.

Naturally there have been slight changes over the five years, but statistical observation appears remarkably static. In 2011 the first report highlighted that businesses wished for free parking, a better variety of shops and more help and support. Those concerns remain. Town users looked for improved shopping and eating places, a better look to the town, and better leisure and community events. We now have a Wetherspoon (a suggestion in 2011) but many other suggestions to make the town better remain unfulfilled.

Parking remains of more concern to businesses than town users. It is noteworthy that there is much unused car parking. This may be accounted for because Warminster’s supermarkets and Castlemore Retail Park are near the town centre, with their own short stay free car parks. The report shows Warminster has a lower percentage of long stay car parking than other comparable towns.

The benchmarking team is unsure how the ongoing issues can be addressed. The same issues are raised each year. Who can look at them with a view to instigating changes? The businesses have no trade association to champion their concerns, the Town Council has limited powers to change things without Wiltshire Council, and Wiltshire Council (in common with other county councils) is strapped for cash. The problems have been identified but the solutions have yet to be found.

The information was gathered together by the benchmarking team of the Economy and Tourism Group, part of the Warminster and Villages Community Partnership. Sincere thanks are extended to the staff and students from Warminster School who helped gather data for the Town Users’ Survey.

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. **Warminster** with **214** 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 2015. Please note **Warminster** is classed as a **Typology 2** town.

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/ Face to Face Survey
KPI 11: Town Centre Users Surveys	Face to Face Surveys/ Paper Based Surveys/ Online Survey
KPI 12: Shoppers Origin Surveys	Distributed with KPI 10 and KPI 11

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 **192** occupied units recorded.

	National Small Towns %	South West Small Towns%	Typ 2. %	Warm. %
A1	52	55	51	55
A2	14	15	13	16
A3	8	8	9	6
A4	4	4	4	3
A5	5	5	3	5
B1	3	2	2	1
B2	1	0	3	0
B8	0	0	0	0
C1	1	1	1	1
C2	0	0	0	0
C2A	0	0	0	0
D1	6	5	6	8
D2	1	1	1	1
SG	6	5	5	5
Not Recorded	0	0	0	0

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 %	Warm. %
Comparison	82	84	82	85
Convenience	18	16	18	15

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

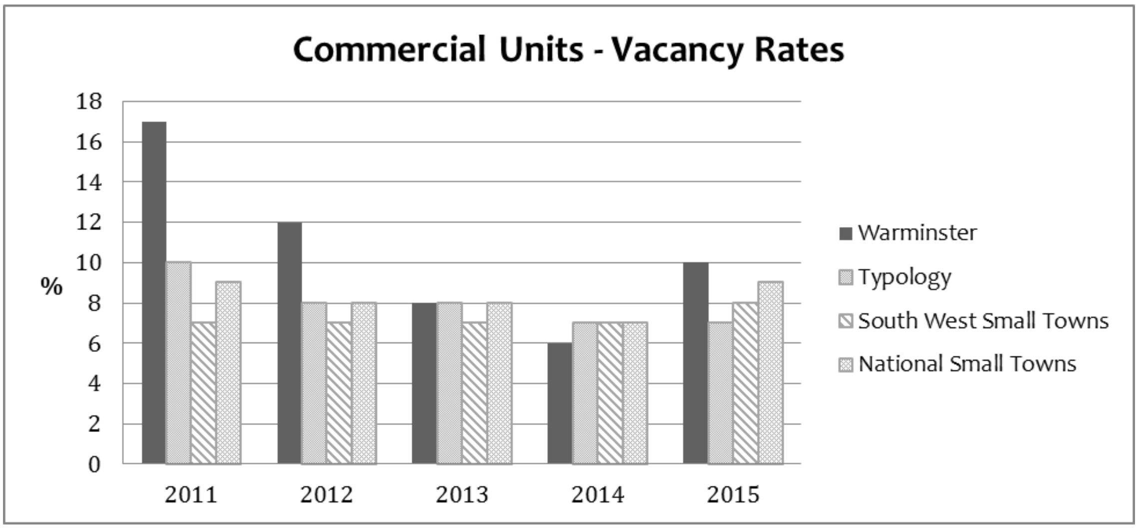
	Nat. Small Towns %	South West Small Towns%	Typ. 2 %	Warm. %
Key Attractor	5	7	6	6
Multiple	22	27	24	25
Regional	7	8	8	12
Independent	66	58	63	57

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 %	Warm. %
Vacancy %	9	8	7	10



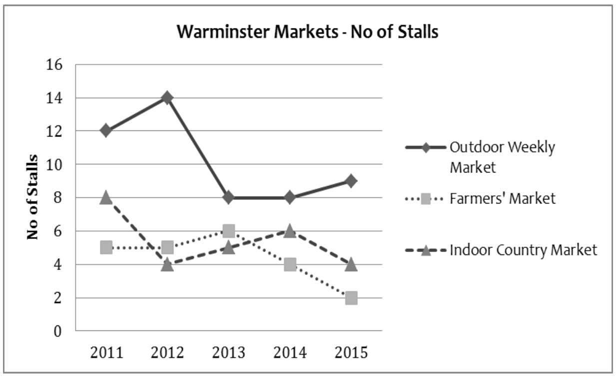
The Warminster vacancy rates are snapshots taken once a year in June.

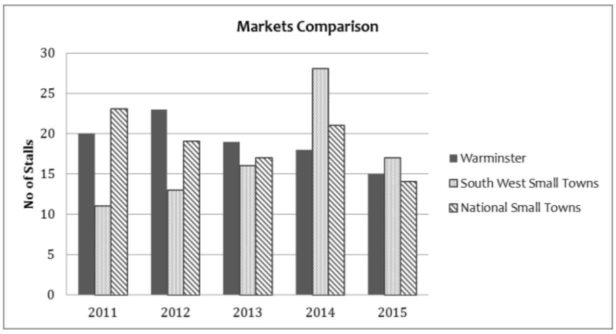
KPI5; MARKETS

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	Warm.
Average Number of Traders	14	17	34	15

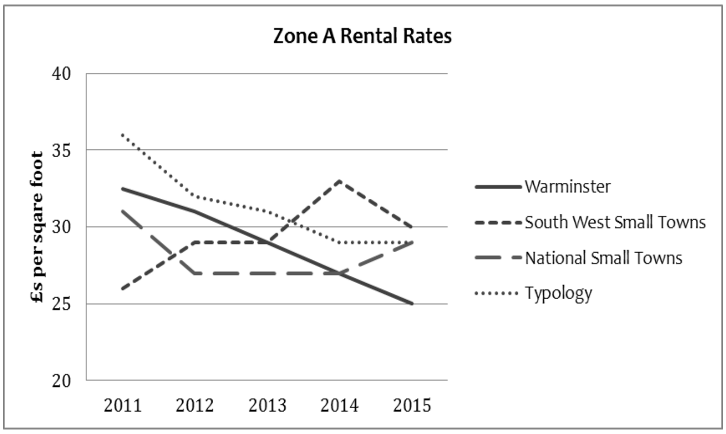




KPI 6 AND 7: ZONE A RETAIL RENTS AND PRIME RETAIL PROPERTY YIELDS

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	Warm.
Zone A	29	30	29	25
Yield	8	8	7	8



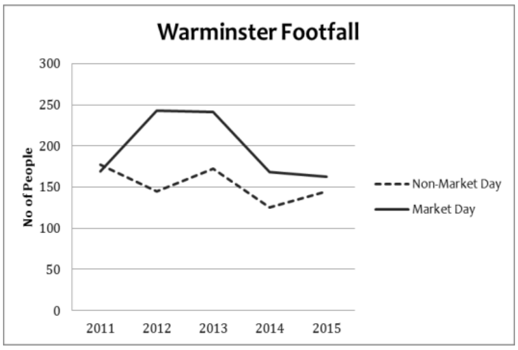
Cooper and Tanner provide the Warminster figures for the report. They commented in April 2016 on the above graph and reported that current retail deals provided no additional information in regard to Zone A rates. They felt the 2015 figure was unchanged and the market seemed to be 'pretty horizontal'.

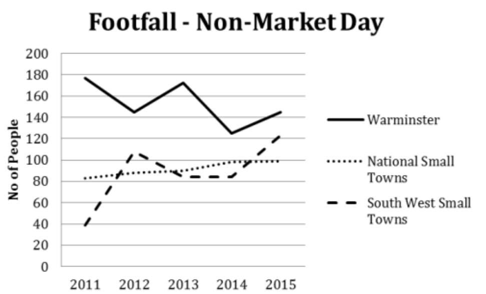
KPI 8: FOOTFALL

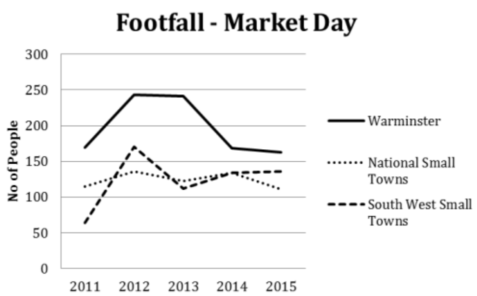
The arrival and movement of people, whether as residents, workers, visitors or a shopper is vital to the success of the majority of businesses within the town centre. The more people that are attracted to the town, the better it trades and the more prosperous the businesses in it become, provided there 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 on the relevant days recorded.

	Nat. Small Towns	South West Small Towns	Typ. 2	Warm.
Market Day	111	136	267	163
Non Market Day	99	123	158	145







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.

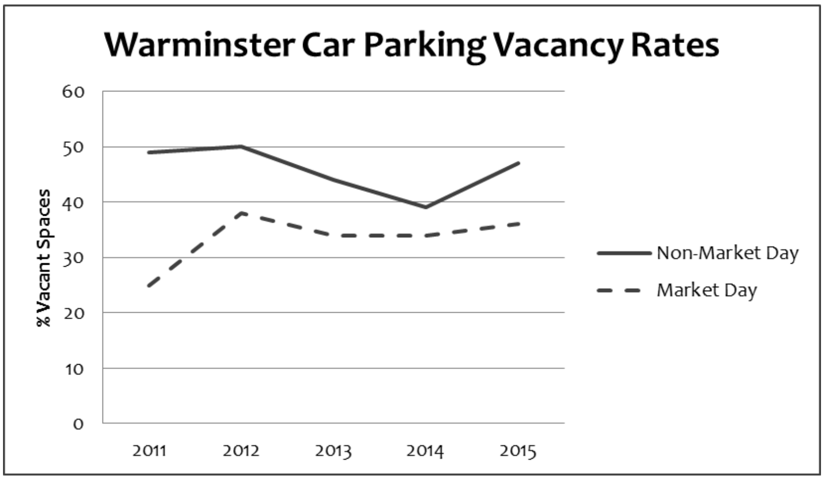
The following tables provide a summary of the Car Parking offering broken down into the;

- 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 %	Warm. %
Car Park:				
Total Spaces:	79	83	87	93
Short Stay Spaces: (4 hours and under)	38	46	53	64
Long Stay Spaces: (Over 4 hours)	51	44	43	30
Disabled Spaces:	5	5	4	6
Not Registered	6	5	0	0
Vacant Spaces on a Market Day:	26	25	24	37
Vacant Spaces on a Non Market Day:	39	39	37	49

	Nat. Small Towns %	South West Small Towns %	Typ. 2 %	Warm. %
On Street:				
Total Spaces:	21	17	13	7
Short Stay Spaces: (4 hours and under)	70	67	81	67
Long Stay Spaces: (Over 4 hours)	22	22	11	28
Disabled Spaces:	5	6	7	4
Not Registered	3	5	1	0
Vacant Spaces on a Market Day:	14	7	14	27
Vacant Spaces on a Non Market Day:	21	12	19	32

Overall	Nat. Small Towns %	South West Small Towns %	Typ. 2	Warm. %
Total Spaces:	n/a	n/a	n/a	n/a
Short Stay Spaces: (4 hours and under)	45	49	57	65
Long Stay Spaces: (Over 4 hours)	45	40	39	30
Disabled Spaces:	5	5	4	6
Not Registered	5	5	0	0
Vacant Spaces on a Market Day:	24	22	23	36
Vacant Spaces on a Non Market Day:	35	35	35	47

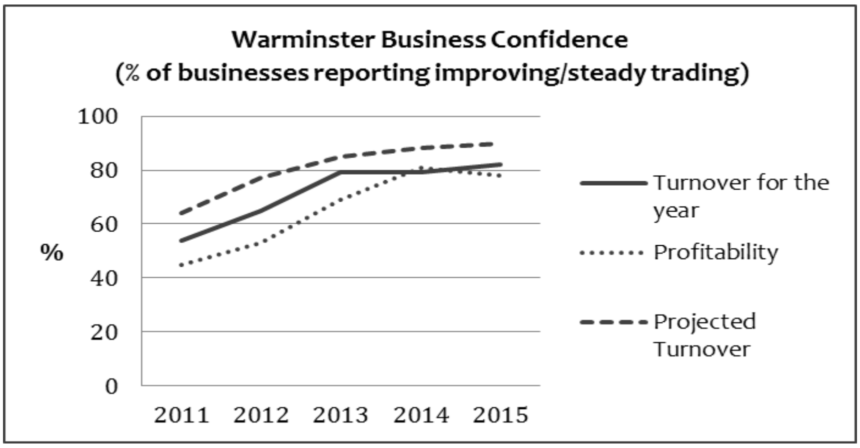


KPI 10: BUSINESS CONFIDENCE SURVEY

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 **63** returned Business Confidence Surveys from the 218 surveys delivered to town centre businesses.

	National Small Towns %	South West Small Towns %	Typ. 2 %	Warm. %
Nature of Business				
Retail	61	58	58	55
Financial/ Professional Services	16	17	16	18
Public Sector	3	4	3	6
Food and Drink	12	13	14	11
Other	8	8	8	10
Type of Business				
Multiple Trader	13	13	12	21
Regional	11	11	6	6
Independent	76	75	82	73
How long has your business been in the town				
Less than a year	6	7	6	3
One to Five Years	24	27	27	32
Six to Ten Years	14	12	15	13
More than Ten Years	55	53	53	52
Compared to last year has your turnover				
Increased	36	35	43	39
Stayed the Same	33	32	34	43
Decreased	32	32	22	18

Compared to last year has your profitability	National Small Towns %	South West Small Towns %	Typ. 2 %	Warm. %
Increased	31	30	38	33
Stayed the Same	36	36	35	45
Decreased	34	34	27	22
Over the next 12 months do you think your turnover will				
Increase	37	39	49	36
Stay the Same	43	41	41	54
Decreased	20	19	10	11



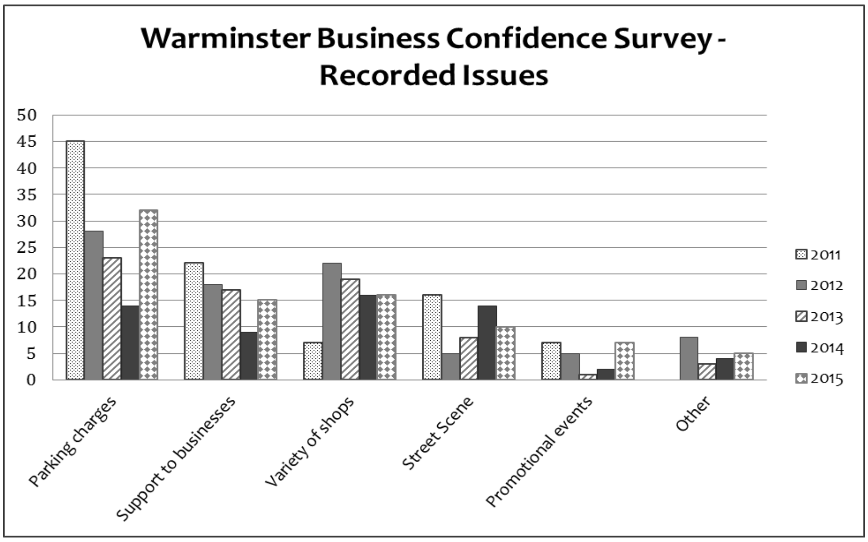
What are the positive aspects of the Town Centre?				
Physical appearance	37	41	43	21
Prosperity of the town	36	39	33	23
Labour Pool	8	4	5	0
Environment	18	19	20	15
Geographical location	45	40	50	47
Mix of Retail Offer	30	33	33	23
Potential tourist customers	26	36	44	28
Potential local customers	75	74	78	77
Affordable Housing	13	11	5	9
Transport Links	29	27	19	30
Car Parking	38	32	30	34
Rental Values/ Property Costs	23	23	16	17

Market (s)	18	21	28	9
Events/ Activities	16	17	27	2
Marketing/ Promotions	11	10	12	4
Local Partnerships/ Organisations	14	16	16	15
Other	2	2	1	2

What are the negative aspects of the Town Centre?	National Small Towns %	South West Small Towns %	Typ. 2 %	Warm. %
Physical appearance	26	23	16	23
Prosperity of the town	28	27	19	40
Labour Pool	9	12	16	25
Environment	11	11	5	6
Geographical location	6	5	6	4
Mix of Retail Offer	29	26	27	40
Potential tourist customers	13	7	2	2
Potential local customers	5	5	2	4
Affordable Housing	9	8	12	13
Transport Links	18	18	21	0
Car Parking	54	61	65	63
Rental Values/ Property Costs	28	26	26	19
Market (s)	10	11	8	6
Local business competition	20	18	22	23
Competition from other localities	20	18	17	13
Competition from out of town shopping	35	27	23	23
Competition from the internet	33	28	31	25
Events/ Activities	7	6	5	2
Marketing/ Promotions	11	11	5	6
Local Partnerships/ Organisations	4	4	2	4
Other	9	11	8	4
Has your business suffered from any crime over the last 12 months				
Yes	26	27	31	29
No	74	73	69	71

Type of Crime				
Theft	69	75	74	88
Abuse	18	16	11	12
Criminal Damage	38	40	35	41
Other	6	2	9	0

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



Parking Charges – 32 separate suggestions from the business community i.e.
Parking is reasonably priced but free parking would attract people;
Car parking is an issue, it is obvious that it has been for some time and it's also quite a big waste of time filling in a questionnaire every year as all the same points are always pointed out – but nothing is achieved!
Iceland car park now offers 3 hours free parking – positive effect as people say they browse more and don't rush, possibly look at offering longer free parking in some of the council car parks;
£1 for 3 hours parking – more of an incentive for people to stay in town & spend more money;
Free parking may encourage people from the surrounding areas to come and visit and shop in Warminster;
Free parking (7 times); free car parking (2 times); parking should be free; improve free parking provision; stop parking charges; bring back all day free car parking; free parking in town centre; free car parking for shoppers; need more free parking for workers; abolish parking charges as pub people put off coming to a small town, free parking all day (2 times); parking free in competitors' car parks; more car parks; more 2 hrs free parking; free parking up to 2 hours ; 1hr free car parking in main car park; 1 hr free parking in Central car park; cheaper parking rates.

Support to Businesses – 15 separate suggestions from the business community i.e.
Lower business rates to encourage people to set up in empty shops;
Keep council rates down to encourage local businesses to join the town;
Reduce level of business rates on larger property to within small business rate relief bracket for independents;
Reduce business rates for retail business;
Lower business rates/rents;
Apply pressure on commercial landlords to reduce rents for start ups;
There are too many empty shops due to greedy landlords. We need to reduce the rents to encourage more independent retailers;
Vacant shops on High Street are unappealing. Lower rates will attract new businesses and make all our lives easier;
To have the same business trade that has made 5 other independent businesses to close;
Build starter units in new business park;
Greater support for local independent stores perhaps sign posting etc;
Support planning applications for local independents;
Invest in Warminster;
As a worker in town with nowhere to park I feel undervalued;
More CCTV in all car parks. As in Chinns Court – got impression town's CCTV don't care about us.

Variety of shops – 16 separate suggestions from the business community i.e.
The town needs to work harder to get a good mix of shops to encourage shoppers to stay in the town instead of going elsewhere. The town also lacks a good anchor store;
Shoe shop – children's shoes/men's shoes; We need a shoe shop; More shoes;
Better mixes of shops i.e. shoe shop, men's shop; Men's shop;
Better shops that people use – similar to Trowbridge, New look, Next, more restaurants;
Too many of same shop;
An introduction of large multiple;
Stop allowing coffee shops to open. We have more than enough in Warminster and this may be why smaller independent cafes have been forced to close;
More independent shops; More shops;
Less empty shops; Pop up shops on short low lease to fill empty sites;
Do not need big chains in Warminster. More shops wouldn't be empty on the High Street;
We need to look at Frome – fabulous independent shops/great weekly markets and fab monthly artisan markets which people come from miles around to attend.

Street Scene – 10 separate suggestions from the business community i.e.
Need to look prettier i.e. flowers, fresh paint, patios need a good clean;
Dirty pavements and litter left through the town especially after a weekend, so could be much more clean and tidy;

Road sweepers could be doing better as rubbish on floor has been in the same spot for 3 days; Need to look at cleanliness of the town, lots of my customers comment on how dirty it looks and there is always lots of rubbish;
Smarten up East Street;
East Street very run down – on going for some years;
Appearance - entry to town poor;
Parking is a nightmare in Victoria Rd/West Street;
Scrap traffic lights at Town Hall – better flow you'll see!;
'Narrowing of town's High Street and scrapping parking that was available only serves to drive custom to free parking areas. The car and the shopper cannot be separated. Why we need pavements as wide as they are beats me. We surrendered a wide High Street so that now the emergency services Ambulance and Police have difficulty getting out of town to attend the accidents which are in the main on the A36, A350 and A303. It means delay in getting through the town. But there we are – wiser men than me think it's ok!!';
Traffic is so bad, how about an in-out system for Waitrose – in from Station Road and out into Fairfield Road.

Promotional events – 7 separate suggestions from the business community i.e.
Invest in Warminster's tourist points and put together 'traditional events' as people miss raft race & town fayres (not rides);
Promoting town in other local presses like Frome etc;
Street fayre like Frome;
Have a monthly market on a Sunday – same as Frome. Close Market Place for half a day and hold it there – not hidden away at the back near the library;
Bigger market. Improvement in size and variety of weekly market. Very limited;
The market should be located in centre of town;
Bigger market. Devizes is a thriving market town with the market in the centre – it should be the same in Warminster.

Other – 5 separate suggestions from the business community i.e.
Build more houses;
Out with the corporation! Think globally act locally! More independent shops without corporations. Corporation businesses don't even have the right licences to operate;
Spend more money on local amenities and less on council officers;
Lack of Rotary presence;
The town needs to modernize to keep young people in it.

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 **203** completed Town Centre User Surveys.

	Nat. Small Towns %	South West Small Towns%	Typ. 2 %	Warm. %
Gender				
Male	37	43	38	46
Female	63	57	62	54
			100	
Age				
16-25	7	8	8	16
26-35	11	11	13	14
36-45	20	16	18	9
46-55	20	19	24	16
56-65	18	22	20	20
Over 65	23	25	17	26
				100
What do you generally visit the Town Centre for?				
Work	10	12	14	23
Convenience Shopping	40	39	32	44
Comparison Shopping	6	6	19	7
Access Services	22	19	11	11
Leisure	12	17	17	13
Other	9	7	6	2

How often do you visit the Town Centre	Nat. Small Towns %	South West Small Towns%	Typ. 2 %	Warm. %
Daily	20	24	21	34
More than once a week	38	43	33	39
Weekly	21	17	21	19
Fortnightly	7	5	8	3
More than once a Month	4	5	5	3
Once a Month or Less	9	6	12	2
First Visit	1	0	0	1
How do you normally travel into the Town Centre?				
On Foot	34	39	32	31
Bicycle	2	3	3	6
Motorbike	1	2	2	9
Car	57	48	56	43
Bus	4	5	4	6
Train	1	2	2	5
Other	1	1	1	2
On average, on your normal visit to the Town Centre how much do you normally spend?				
Nothing	3	1	2	5
£0.01-£5.00	13	13	7	8
£5.01-£10.00	25	27	21	25
£10.01-£20.00	32	33	28	24
£20.01-£50.00	21	20	33	24
More than £50.00	6	5	9	14

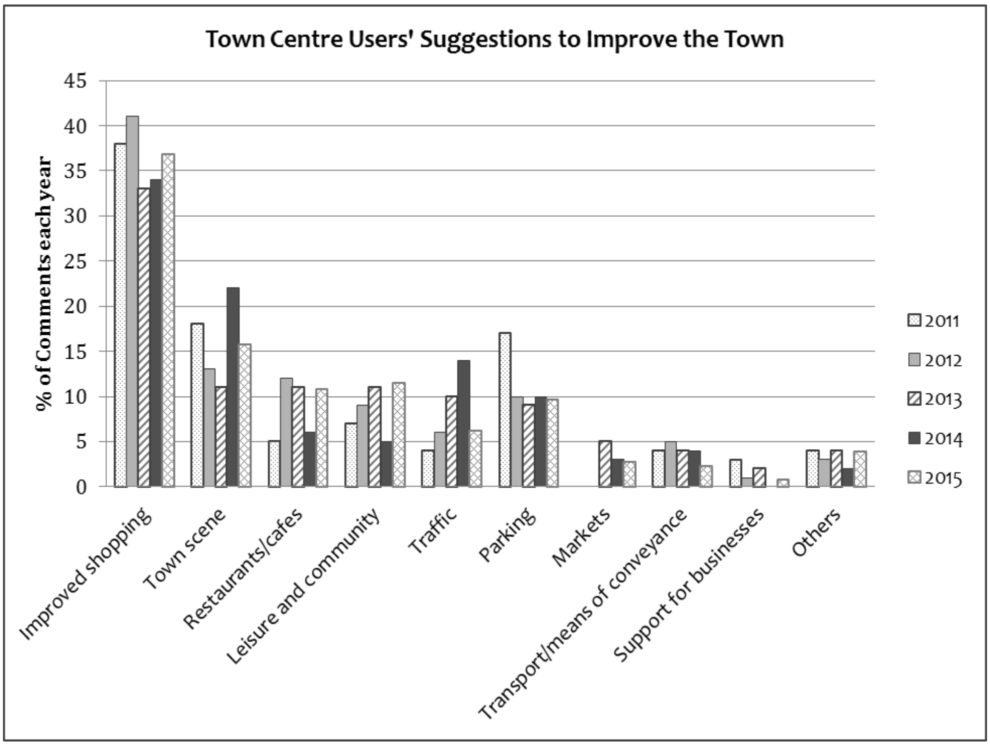
The larger spend observed in Warminster may be accounted for because some of the town users' surveys were conducted outside three of the town's supermarkets, where the spend could be presumed to be higher.

What are the positive aspects of the Town Centre?	Nat. Small Towns %	South West Small Towns %	Typ. 2 %	Warm. %
Physical appearance	45	55	73	67
Cleanliness	52	50	60	70
Retail Offer	27	36	47	43
Customer Service	43	40	35	66
Cafes/ Restaurants	52	58	70	66
Access to Services	63	49	60	67
Leisure Facilities	20	18	24	39
Cultural Activities/Events	23	21	34	31
Pubs/ Bars/ Nightclubs	35	32	36	50
Transport Links	28	37	22	63
Ease of walking around the town centre	67	75	76	80
Convenience e.g. near where you live	71	72	63	70
Safety	43	41	43	76
Car Parking	39	26	33	53
Markets	27	19	46	42
Other	5	5	4	3

What are the negative aspects of the Town Centre?	Nat. Small Towns %	South West Small Towns%	Typ. 2 %	Warm. %
Physical appearance	34	24	14	30
Cleanliness	19	25	20	27
Retail Offer	54	43	35	47
Customer Service	9	10	11	22
Cafes/ Restaurants	15	11	9	19
Access to Services	13	16	14	22
Leisure Facilities	30	23	18	36
Cultural Activities/Events	28	22	18	46
Pubs/ Bars/ Nightclubs	18	16	13	23
Transport Links	23	14	26	20
Ease of walking around the town centre	7	8	7	10

Convenience e.g. near where you live	6	7	9	20
Safety	9	8	7	12
Car Parking	43	62	51	38
Markets	25	27	16	42
Other	10	10	12	3
How long do you stay in the Town Centre?				
Less than an hour	42	29	18	22
1-2 Hours	38	44	38	31
2-4 Hours	12	17	32	30
4-6 Hours	2	2	6	5
All Day	5	7	7	12
Other	1	1	1	1
Would you recommend a visit to the Town Centre?				
Yes	65	79	88	69
No	35	21	12	31

What two suggestions would you make to improve the town centre? 261 suggestions.



Improved Shopping - 96 separate suggestions from people interviewed in the street

Fewer empty shops (14 times)
Pop up shops in empty shops
More variety (16 times)
More shops (13 times)
More high quality shops (2 times)
Encourage more independent shops (5 times)
Updating range of shops (2 times)
Big shops to make more people come
More brand clothes shops
Primark
More clothes shops (7 times)
More fashion shops
Children's shop (clothes, toys, activities) (2 times)
Baby shop
Shoe shops (6 times)
More shops for men (12 times)
More DIY shops
More specialist sports shops
Town planners to look at flows to attract more people into shops
Book shop
More gaming shops
More charity shops
Fewer charity shops (4 times)
Fewer antique shops

Town scene – 41 suggestions from people interviewed in the street

A nice pleasant town with lots of flowers
Too cluttered on street
Remove cluttered tables and chairs blocking narrow roads
Improve access to retail areas
Bin town centre development plan
Improve East Street appearance
Brighten up Cornmarket
Easier access to facilities
Access routes
Cleanliness (9 times)
Discourage food eating and drinking in the street
Get rid of pigeons
Town Hall needs attention
Get rid of scaffolding (7 times)
3 High Street needs attention (i.e. pulling down)
Better litter clearance, keep litter collecting going

Clean areas beyond the main street
Longer opening times
Banks open longer
Signposting
More toilets (2 times)
Another public convenience and better directions to the one
More ramps
Train station clean and make more pretty
Knock it down and start again
More things

Restaurants/cafés/eating places – 28 suggestions from people interviewed in the street

More restaurants
More variety of restaurants (5 times)
More eating out options e.g. Pizza Express
Some good chain food - TGIF, Frankie and Bennys
McDonalds (5 times)
Burger King
Starbucks
Sushi restaurant (2 times)
More pubs
More fast food (3 times)
Less fast food
Fewer food outlets
Fewer cafes (2 times)
Less cafes and restaurants (3 times)

Leisure and Community – 30 suggestions from people interviewed in the street

More leisure facility for young (3 times)
More facilities
Improve sports facilities
Library open longer
Don't knock the library down - it's a good building and facility
Improve park
More bands coming to Warminster
Cinema (10 times)
Bowling alley (2 times)
Ice rink
Night life (5 times)
More community events
More plays and performances in the theatre
History museum

Traffic – 16 comments/suggestions from people interviewed in the street
Traffic (5 times)
Traffic control (2 times)
Co-ordinating the traffic lights thus relieving the gridlock
Too much traffic (7 times)
Impact on town centre and parking of the West Urban extension

Parking – 25 suggestions from people interviewed in the street
One hour free parking
More parking around businesses
Improve parking
More parking (8 times)
Free parking (7 times)
More all day parking (2 times)
More bike parking
More motorbike parking
On street parking in the market place
3 hours free stay in Iceland is brilliant
Portway – too much on street parking

Markets -7 suggestions from people interviewed in the street
Better markets (5 times)
Better advertising of markets
More markets

Support for businesses – 2 suggestions from people interviewed in the street
Lower business rates (2 times)

Transport – 6 suggestions from people interviewed in the street
Better localized transport links
Cheaper travel
More frequent buses (2 times)
Last bus to Frome too early
More transport

Other – 10 suggestions from people interviewed in the street
Improve apathy of general public
Convenient for us, we don't need to go anywhere else
Nothing to improve
Less surveyors (2 times)
Less .. (*travellers*)
Don't know (4 times)

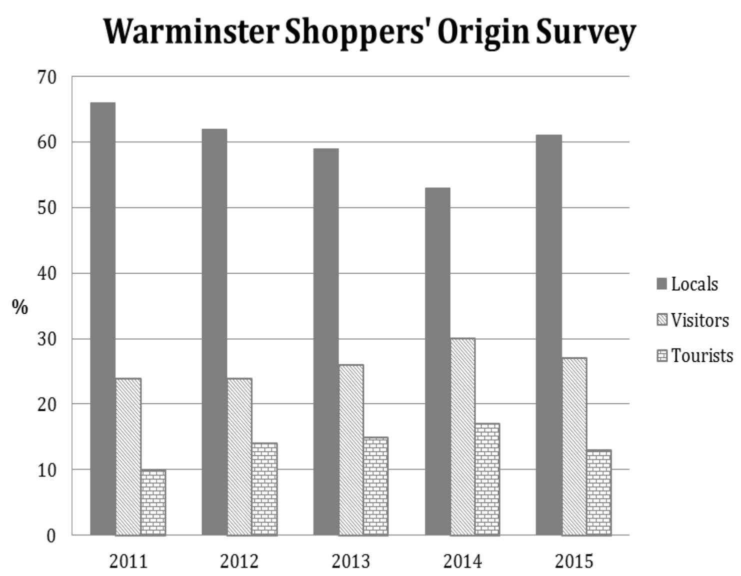
KPI 12: SHOPPERS ORIGIN SURVEY

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 **924** 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 %	Warm. %
Locals	58	66	59	61
Visitors	33	23	28	27
Tourists	9	10	13	13



Appendix

Participating Towns in 2015

Town	Region	Size	Typ.
Blaenavon	SW	Small	n/a
Chippenham	SW	Small	4
Corsham	SW	Small	2
Devizes	SW	Large	2
Frome	SW	Small	2
Ludgershall	SW	Small	4
Newport	SW	Large	n/a
Penarth	SW	Small	n/a
Port Talbot	SW	Large	n/a
Tidworth	SW	Small	n/a
Warminster	SW	Small	2
Westbury	SW	Small	2
Basingstoke (Old Town)	SE	Small	n/a
Camberley	SE	Large	n/a
Caterham	SE	Small	n/a
Dunstable	SE	Large	n/a
Fleet	SE	Small	5
Frimley	SE	Small	n/a
Great Dunmow	SE	Small	5
Saffron Walden	SE	Small	5
Aberystwyth	WM	Large	n/a
Bidford-on-Avon	WM	Small	4
Southam	WM	Small	4
Rhayadar	WM	Small	n/a
Upton	WM	Small	3
Loughborough	EM	Large	n/a
Melton	EM	Large	2
Raunds	EM	Small	7
Uppingham	EM	Small	5
Bury St Edmunds	EoE	Large	2
Caernarfon	NW	Large	n/a
Colwyn Bay	NW	Large	n/a
Connahs Quay	NW	Small	n/a
Garden City	NW	Small	n/a
Halton Lea	NW	Small	n/a
Holyhead	NW	Small	n/a
Llangefni	NW	Small	n/a
Llanwrst	NW	Small	n/a
Queensferry	NW	Small	n/a
Runcorn	NW	Small	n/a
Shotton	NW	Small	n/a

Widnes	NW	Large	n/a
Wrexham	NW	Large	n/a
Haltwhistle	NE	Small	2
Leyburn	NE	Small	n/a
Ponteland	NE	Small	1
Richmond	NE	Small	2
Ballinsasloe	ROI	Small	n/a

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