TOWNS ALIVE BENCHMARKING

MEASURING THE PERFORMANCE OF TOWN CENTRES

COWBRIDGE

2014 REPORT

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EXECUTIVE SUMMARY

General

- 57% of the units in the town centre are A1 Shops which is slightly higher than the National Small Towns average of 53%. 12% of the units are A2 Financial and Professional Services.
- **An independent town centre;** 79% of the A1 Shops in Cowbridge are unique to the town centre which is 13% higher than the National Small Towns average. A range of qualitative suggestions centred on the need to keep the town centre 'independent'.
- **Convenience Shopping;** Replicating the National and Regional patterns 37% of the town centre users visited Cowbridge for convenience shopping.
- **Shoppers origin;** 44% of the post codes gathered were from those who were 'visitors', e.g. they do not live in Cowbridge but within a 30 minute drive, which was 13% higher than the National average.
- **High Zone A rents;** Zone A rents in Cowbridge, £52 per sq. ft are noticeably higher than the National (£27) and Regional (£29) averages. 70% of businesses felt that rental values/ property costs were a negative aspect of the town centre.
- **Car parking;** 90% of car parking in Cowbridge town centre is off street. 74% of all car parking is available for more than 4 hours, nearly double the National Small Towns figure. Overall on the Busy Day, 22% of car parking spaces were vacant, whilst this increased on the Quiet Day to 24%, both figures are lower than the National and Regional averages. To place these figures further in context, in 2013 at a British Parking Association Conference it was noted that if provision, policy and pricing are aligned vacancy rates should be 15%.

Positive

- **Low vacancy rates;** 2% of the units in Cowbridge town centre were vacant at the time of the audit which is noticeably lower than the National Small Towns (8%) and Regional (7%) figures. To place the data even further in context in March 2014 The Local Data Company reported that vacancy rates in town centre's across Great Britain was 14%.
- **Higher than average footfall on a Busy Day;** footfall on the Busy Day in Cowbridge, 208 persons per ten minutes, is vastly higher than the National (122) and Regional (112) figures.
- **Higher average spend;** 29% of town centre users spent £10.01-£20.00 on a normal visit to Cowbridge whilst 28% spent £20.01-£50.00, 8% higher than the National average.
- **Physical appearance;** 66% of town centre users stated physical appearance was a positive aspect of Cowbridge, 10% higher than the National figure.

- **Restaurants;** Over half of the town centre users rated restaurants as a positive aspect, a 13% increase on the National average and cleanliness.

Negative

- **Car parking;** the overriding theme to emerge from the qualitative comments supplied by both businesses and town centre users was the need to increase the provision of car parking in the town and change certain aspects of the policy such as the introduction of time limitations. Qualitative comments were substantiated by quantitative analysis with 90% of businesses and 78% of town centre users rating car parking as a negative aspect of the town centre.
- **Lower than average footfall on a Quiet Day;** the Quiet Day count (81) is slightly lower than the National (90) and Regional (84) averages.
- **Trading Conditions;** 41% of businesses reported that compared to last year their turnover had decreased, 13% higher than the National figure. Similarly, 64% stated that profitability had decreased over the last 12 months, almost double the National average.
- **Town centre user suggestions;** Alongside car parking, alleviating the heavy traffic flow and improving transport links, developing a swimming pool and overall enhancements of the retail offer were themes to emerge.

CONTENTS PAGE

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 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. **Cowbridge** with 140 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 2013.

Information on towns contributing to Benchmarking in 2013, 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: Commercial Units; Use Class	Visual Survey
KPI 2: Commercial Units; Comparison/Convenience	Visual Survey
KPI 3:Commercial Units; Trader Type	Visual Survey
KPI 4: Commercial Units; Vacancy Rates	Visual Survey
KPI 5: Markets	Visual Survey
KPI 6 and 7: Zone A Retail Rents and Prime Retail Property Yields	Valuation Office Agency/ Local Commercial Agents
KPI 8: Footfall	Footfall Survey on a Busy/Market Day and a Quiet/ Non Market Day
KPI 9: Car Parking	Audit on a Busy/Market Day and a Quiet/ Non Market Day
KPI 10: Business Confidence Surveys	Postal Survey
KPI 11: Town Centre Users Surveys	Face to Face Surveys/ Online Survey
KPI 12: Shoppers Origin Surveys	Shoppers Origin Survey

Before any KPI data is collected the core commercial area of the town centre is defined. The town centre area thus includes the core shopping streets and car parks attached or adjacent to these streets.

KEY FINDINGS

KPI 1: COMMERCIAL UNITS; USE CLASS

It is important to understand the scale and variety of the "commercial offer" throughout the town. A variety of shops and a wide range of services in a town are important to its ability to remain competitive and continue to attract customers. Sustaining a balance between the different aspects of buying and selling goods and services ensures that the local population (and visitors from outside) can spend time and money there, keeping the generated wealth of the town within the local economy. Importantly, it forms the employment base for a substantial proportion of the community too, helping to retain the population rather than lose it to nearby towns and cities.

The following table provides a detailed breakdown of each of the Use Classes

CLASS	TYPE OF USE	CLASS INCLUDES
A1	Shops	Shops, retail warehouses, hairdressers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes
A2	Financial and Professional Services	Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices
A3	Restaurants and Cafes	Food and drink for consumption on the premises- restaurants, snack bars and cafes
A4	Drinking Establishments	Public houses, wine bars or other drinking establishments (but not nightclubs)
A5	Hot Food Takeaways	Sale of hot food for consumption off the premises
B1	Businesses	Offices (other than those that fall within A2) research and development of products and processes, light industry appropriate in a residential area
B2	General Industrial	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.
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).
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.

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 **137** occupied units recorded.

	National Small Towns%	South West Small Towns%	Cowbridge%
A1	53	54	57
A2	14	14	12
A3	8	8	9
A4	4	4	3
A5	5	4	3
B1	3	2	6
B2	0	1	1
B8	0	0	0
C1	1	1	1
C2	0	0	0
C2A	0	0	0
D1	6	8	5
D2	1	1	0
SG	5	4	4
Not Recorded	0	0	0

57% of the units in the town centre are A1 Shops which is slightly higher than the National Small Towns average of 53%. 12% of the units are A2 Financial and Professional Services.

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%	Cowbridge%
Comparison	79	80	88
Convenience	21	20	12

Traditional retail theory suggests that the retail offering in a town centre should be at least two thirds comparison and one third convenience. In Cowbridge town centre 88% of the A1 Shops mainly sell comparison goods.

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.

	National Small Towns%	South West Small Towns%	Cowbridge%
Key Attractor	6	4	4
Multiple	19	14	9
Regional	7	10	8
Independent	68	73	79

79% of the A1 Shops in Cowbridge are unique to the town centre which is 13% higher than the National Small Towns average.

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.

	National Small Towns%	South West Small Towns%	Cowbridge%
Vacancy Rate	8	7	2

2% of the units in Cowbridge town centre were vacant at the time of the audit which is noticeably lower than the National Small Towns (8%) and Regional (7%) figures. To place the data even further in context in March 2014 The Local Data Company reported that vacancy rates in town centre's across Great Britain was 14%.

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 regular (at least once a fortnight) weekday markets within the locality.

	National Small Towns	South West Small Towns	Cowbridge
Av. No.	17	16	n/a

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	Cowbridge
Zone A Rents	27	29	52
% Yield	8	9	n/a

Zone A rents in Cowbridge, £52 per sq. ft are noticeably higher than the National (£27) and Regional (£29) averages.

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, outside Tesco, High Street.

	National Small Towns	South West Small Towns	Cowbridge
Busy Day	122	112	208
Quiet Day	90	84	81

The table illustrates that footfall on the Busy Day in Cowbridge, 208 persons per ten minutes, is vastly higher than on the Quiet Day, 81 persons per ten minutes. The Busy Day count is noticeably higher than the National (122) and Regional (112) figures whilst the Quiet Day count (81) is slightly lower than the National (90) and Regional (84) averages.

The tables below provide details on each and every footfall count and location. Outside the Dogs Trust, Eastgate Street recorded the lowest footfall counts averaging 34 persons per ten minutes on the Busy Day and 25 persons per ten minutes on the Quiet Day audit. The highest individual footfall count was recorded between 13.30-13.40 on the Busy Day audit outside Tesco. (275)

Count Point Location: Dogs Trust			
Time	Market Day/ Busy Day Count (22nd March)	Time	Non Market Day/ Quiet Day Count (28th January)
11:10-11:20	36	11:10-11:20	16
12:10-12:20	46	12:10-12:20	20
13:30-13:40	30	13:30-13:40	38
Count Point Location: Town Hall			
Time	Market Day/ Busy Day Count (22nd March)	Time	Non Market Day/ Quiet Day Count (28th January)
11:10-11:20	128	11:10-11:20	75
12:10-12:20	169	12:10-12:20	50
13:30-13:40	180	13:30-13:40	102

Count Point Location: Marketplace			
Time	Market Day/ Busy Day Count (22nd March)	Time	Non Market Day/ Quiet Day Count (28th January)
11:10-11:20	42	11:10-11:20	13
12:10-12:20	60	12:10-12:20	39
13:30-13:40	56	13:30-13:40	24

Count Point Location: Tesco			
Time	Market Day/ Busy Day Count (22nd March)	Time	Non Market Day/ Quiet Day Count (28th January)
11:10-11:20	163	11:10-11:20	63
12:10-12:20	185	12:10-12:20	101
13:30-13:40	275	13:30-13:40	78

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;

- 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 Day and on a Quiet 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 Day and on a Quiet 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 Day and on a Quiet Day.

Car Park:	**Nat. Small Towns %**	**South West Small Towns %**	**Cowb. No.**	**Cowb. %**
Total Spaces:	88	81	731	90
Short Stay Spaces: (4 hours and under)	47	39	119	16
Long Stay Spaces: (Over 4 hours)	41	48	588	80
Disabled Spaces:	4	5	24	3
Not Registered	8	7	0	0
Vacant Spaces on a Busy:	30	34	167*	24
Vacant Spaces on a Quiet Day:	38	45	115*	23
Illegal Spaces on a Busy Day:	n/a	n/a	8	n/a
Illegal Spaces on a Quiet Day:	n/a	n/a	5	n/a

On Street:				
Total Spaces:	12	19	85	10
Short Stay Spaces: (4 hours and under)	56	37	67	79
Long Stay Spaces: (Over 4 hours)	36	53	13	15
Disabled Spaces:	4	4	5	6
Not Registered	4	6	0	0
Vacant Spaces on a Busy:	14	13	6	7
Vacant Spaces on a Quiet Day:	22	22	26	31
Illegal Spaces on a Busy Day:	n/a	n/a	6	n/a
Illegal Spaces on a Quiet Day:	n/a	n/a	5	n/a
Overall				
Total Spaces:	n/a	n/a	816	n/a
Short Stay Spaces: (4 hours and under)	48	39	186	23
Long Stay Spaces: (Over 4 hours)	40	49	601	74
Disabled Spaces:	4	5	29	4
Not Registered	7	7	0	0
Vacant Spaces on a Busy:	28	30	173*	22
Vacant Spaces on a Quiet Day:	36	41	141*	24
Illegal Spaces on a Busy Day:	n/a	n/a	14	n/a
Illegal Spaces on a Quiet Day:	n/a	n/a	10	n/a

*Some car parks were not included in the Busy Day/ Quiet Day Audits, information is available in the Appendix.

90% of car parking in Cowbridge town centre is off street.

74% of all car parking is available for more than 4 hours, nearly double the National Small Towns figure.

Overall on the Busy Day, 22% of car parking spaces were vacant, whilst this increased on the Quiet Day to 24%, both figures are lower than the National and Regional averages. To place these figures further in context, in 2013 at a British Parking Association Conference it was noted that if provision, policy and pricing are aligned vacancy rates should be 15%.

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 22 returned Business Confidence Surveys. Please note that all the businesses listed in the Appendix received a survey and an accompanying freepost envelope.

	National Small Towns%	South West Small Towns%	Cowb.%
Nature of Business			
Retail	59	58	64
Financial/ Professional Services	18	20	14
Public Sector	2	2	0
Food and Drink	12	10	9
Other	10	11	14
Type of Business			
Multiple Trader	11	10	18
Regional	6	5	5
Independent	83	85	77
How long has your business been in the town			
Less than a year	7	7	0
One to Five Years	21	22	27
Six to Ten Years	15	14	9
More than Ten Years	57	57	64

Compared to last year has your turnover			
Increased	38	43	23
Stayed the Same	34	33	36
Decreased	28	24	41
Compared to last year has your profitability			
Increased	30	36	14
Stayed the Same	37	32	23
Decreased	33	32	64
Over the next 12 months do you think your turnover will			
Increase	44	47	33
Stay the Same	40	38	48
Decreased	16	15	19

41% of businesses reported that compared to last year their turnover had decreased, 13% higher than the National figure. Similarly, 64% stated that profitability had decreased over the last 12 months, almost double the National average. Despite these figures 48% of businesses reported that over the next 12 months their turnover would stay the same.

What are the positive aspects of the Town Centre?			
Physical appearance	n/a	n/a	77
Prosperity of the town	45	45	64
Labour Pool	10	11	5
Geographical location	49	50	55
Mix of Retail Offer	39	40	41
Potential tourist customers	41	33	27
Potential local customers	78	76	77
Affordable Housing	8	7	0
Transport Links	26	26	14
Car Parking	39	39	32
Rental Values/ Property Costs	16	19	5
Market (s)	18	16	23
Events/ Activities	n/a	n/a	32
Marketing/ Promotions	n/a	n/a	5
Local Partnerships/ Organisations	n/a	n/a	9
Other	5	4	n/a

Potential local customers (77%) and physical appearance (77%) were classed as the most positive aspects of the town centre. Prosperity of the town (64%), 19% higher than the Regional and National figures and geographical location, (55%) was also classed as positive aspects.

What are the negative aspects of the Town Centre?			
Physical appearance	n/a	n/a	0
Prosperity of the town	17	15	0
Labour Pool	6	7	10
Environment	5	4	0
Geographical location	7	9	0
Mix of Retail Offer	19	20	0
Potential tourist customers	7	10	5
Potential local customers	3	3	0
Affordable Housing	10	11	15
Transport Links	14	12	40
Car Parking	53	58	90
Rental Values/ Property Costs	35	34	70
Market (s)	10	9	0
Local business competition	18	18	20
Competition from other localities	33	33	20
Competition from out of town shopping	n/a	n/a	30
Competition from the internet	39	41	35
Events/ Activities	n/a	n/a	5
Marketing/ Promotions	n/a	n/a	0
Local Partnerships/ Organisations	n/a	n/a	0
Other	7	6	10

Car parking (90%) and Rental Values/ Property Costs (70%) were classed as the most negative aspects of the town centre by businesses, both figures vastly higher than the Regional and National averages.

Has your business suffered from any crime over the last 12 months			
Yes	26	27	27
No	74	73	73
Type of Crime			
Theft	72	72	67
Abuse	13	13	0
Criminal Damage	39	34	17
Other	6	3	17

73% of businesses had not suffered from any crime over the last 12 months.

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

Car parking was the key theme to emerge from the business suggestions concentrating on both increased provision and policy.

- "Unfortunately Waitrose has killed the trade in the town, with high traffic levels blocking up the road and the Waitrose staff blocking up all the parking bays. Do not let anymore national multiples into the town."
- "Better local transport between towns and villages within the vale and surrounding areas. More car and coach parking."
- "Improve car parking facility. Improve advertising for the town."
- "Provide better parking charge for parking to stop people leaving cars and taking public transport to Cardiff. Possibly pedestrianisation of central area of town opening up the possibility of street markets, festivals etc"
- "Improve transport both public and car parking for private. More advertising to improve Cowbridge as a town to visit to encourage more people to visit. Local traders need to be encouraged either through lower rates or rates to increase the independents here."
- "Reduce rents. Increase parking."
- "No more clothing chains. Improved information available to visitors from local areas and further afield. Better mobile phone reception- it is very intermittent."
- "Better car parking. Development of more family homes around the town."
- "More car parking space. Tourist information signs M4 and A48"
- "Better parking facility."
- "Do not build on cattle market but develop with good parking. Reduce rates/ rents. Avoid national chain retailers."
- "Stop local authorities giving planning to large supermarkets."
- "Improved car parking. Limit of three hours free, after which charges should be imposed in Town Hall car park. Some car s parked all day, occupants either car share

of go into Cardiff on bus. Transport links between Llantwit Major and outlying villages restored. Some elderly now very isolated in their homes."

- "Increased car parking. Better transport links between local villages."
- "Car parking"
- "CCTV paid for by all the businesses."
- "Art festival/ Music festival. Physic garden all through the towns please."
- "Better free parking for visitors. Park and ride for all commuters."
- "Lack of engagement of local businesses to work together/ promote Cowbridge as a destination. Chains and independents to work together. need cohesive action to promote Cowbridge as a great destination for shops/ food/ coffee etc"
- "Car parking has been an issue for many years. Cowbridge would benefit by having a small multi story car park."
- "Parking! More of 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 193 completed Town Centre User Surveys.

	National Small Towns%	South West Small Towns%	Cowb.%
Gender			
Male	38	37	37
Female	62	63	63
Age			
16-25	8	7	4
26-35	10	11	10
36-45	17	16	24
46-55	19	19	20
56-65	20	19	23
Over 65	26	27	19
What do you generally visit the Town Centre for?			
Work	15	12	20
Convenience Shopping	42	39	37
Comparison Shopping	5	6	6
Access Services	17	21	13
Leisure	13	13	20
Other	9	10	5

Replicating the National and Regional patterns 37% of the town centre users visited Cowbridge for convenience shopping.

How often do you visit the Town Centre			
Daily	29	27	33
More than once a week	39	41	42
Weekly	15	16	7
Fortnightly	5	5	5
More than once a Month	3	3	3
Once a Month or Less	7	7	11
First Visit	2	2	0
How do you normally travel into the Town Centre?			
On Foot	37	42	21
Bicycle	2	2	1
Motorbike	1	1	0
Car	53	48	67
Bus	6	6	2
Train	1	0	0
Other	1	1	0
On average, on your normal visit to the Town Centre how much do you normally spend?			
Nothing	3	2	6
£0.01-£5.00	13	14	10
£5.01-£10.00	26	27	20
£10.01-£20.00	32	34	29
£20.01-£50.00	20	18	28
More than £50.00	6	5	7

82% of those interviewed visited Cowbridge at least once a week whilst 67% travelled into the town centre by car.

29% of town centre users spent £10.01-£20.00 on a normal visit to Cowbridge whilst 28% spent £20.01-£50.00, 8% higher than the National average.

What are the positive aspects of the Town Centre?			
Physical appearance	56	62	66
Cleanliness	n/a	n/a	51
Retail Offer	49	54	39
Customer Service	n/a	n/a	26
Restaurants	44	47	57
Access to Services	75	79	65
Leisure Facilities	28	26	16
Cultural Activities	24	29	18
Pubs/ Bars/ Nightclubs	37	42	42
Transport Links	43	45	8
Ease of walking around the town centre	75	74	70
Convenience e.g. near where you live	70	69	64
Safety	48	49	29
Car Parking	46	44	16
Markets	34	42	21
Other	7	14	6

Replicating the National trend, ease of walking around the town centre was classed as the most positive aspect of Cowbridge (70%). 66% stated physical appearance was a positive aspect, 10% higher than the National figure, whilst 65% stated access to services and convenience e.g. near where you live. Over half of respondents rated restaurants as a positive aspect, a 13% increase on the National average and cleanliness.

What are the negative aspects of the Town Centre?			
Physical appearance	29	22	2
Cleanliness	n/a	n/a	6
Retail Offer	42	38	7
Customer Service	n/a	n/a	5
Restaurants	28	26	3
Access to Services	10	10	3
Leisure Facilities	37	36	18
Cultural Activities	37	31	5
Pubs/ Bars/ Nightclubs	27	22	4
Transport Links	22	21	38
Ease of walking around the town centre	9	10	4
Convenience e.g. near where you live	8	7	2
Safety	13	13	7
Car Parking	39	41	78
Markets	29	22	2
Other	12	19	8

78% of town centre users rated car parking as a negative aspect of Cowbridge, double the National Small Towns average.

How long do you stay in the Town Centre?			
Less than an hour	36	36	25
1-2 Hours	40	43	43
2-4 Hours	12	12	20
4-6 Hours	3	2	3
All Day	8	6	8
Other	1	1	1
Would you recommend a visit to the Town Centre?			
Yes	n/a	n/a	95
No	n/a	n/a	5

68% of those interviewed stayed in the town centre for less than 2 hours whilst 20% stayed between 2-4 hours, 8% higher than the National and Regional averages.

95% of town centre users would recommend a visit to the town centre.

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

The key theme to emerge from the suggestions was the need to improve 'car parking' in terms of provision and increasing the number of spaces and pricing and policy in regards to limiting the length of time cars could park for. The second theme to emerge concerned the need to improve the 'retail offer' which highlighted both the need to keep independent shops at the heart of Cowbridge and the range of shops. 'Traffic/ transport' issues such as improved public transport and reducing the traffic flow in the town centre were also cited along with a range of comments on the 'Swimming Pool'.

- "stop cars parking on the high street and improve the farmers market"
- "leisure facilities more restaurants"
- "need more car parking facilities"
- "need more short term parking improve cycling prov for families"
- "better bus service to here"
- "better car parking"
- "more short stay parking"
- "better car parking"
- "less traffic better parking facilities"
- "more greenery make it look more rural"
- "redirect traffic town far too busy"
- "I don't know I don't like change for no need"
- "better car parking"
- "better car parking"

- "need a modern women's shop like Next"
- "closer car parking and Debenhams dept store"
- "enforcement of parking, better parking facilities"
- "parking
- "car parking"
- "car parking"
- "needs pedestrians on the high street, more car parking"
- "better parking "
- "better parking"
- "better parking"
- "car parking"
- "car parking"
- "more parking "
- "car parking"
- "more individual businesses, less charity shops"
- "car parking"
- "car parking stop dept store moving in"
- "Make the high street free of parking with a parking place outside the centre and a transfer by bus into the centre as an alternative. I always go by bike and it is not really cafe to cycle with all the cars parked along 2 sides."
- "The parking issue, a crossing near bijou."
- "Less cafes and no traffic wardens"
- "Better parking .More reasonably priced transport links to Cardiff"
- "Lower rentals to attract independent retailers. Swimming pool"
- "A swimming pool/a swimming pool/a swimming pool/ a swimming pool/a swimming pool/ a swimming pool!!!! And more parking charges for the Town Hall car park as it's usually full of the cars of people who work in Cowbridge and hence no spaces for visitors. Oh and a swimming pool too!!"
- "More individual shops rather than chain stores and better parking facilities"
- "Better car parking limit town centre car park to short stay only Better range of shops no more charity or dress shops Opening hours shops need to open at 8.30"
- "Better pavements & more parking"
- "Parking Loading bays as delivery vehicles often block roads"
- "Improved short term parking. Stop HGVs double parking while making deliveries."
- "Improve cattle market parking Develop an artisan quarter and/ or market"
- "Increase Car parking Spaces. Enforce existing parking regulations"
- "More parking, better public transport links."
- "Better parking, and a better leisure centre with a pool"
- "Better parking"
- "More markets. Greater car parking availability."

- "Swimming pool. Ensure diversity by encouraging independent, "different" shops and stop it from looking like every other high street in every other town."
- "More free parking off the high street. Less parking on the high street Easing traffic congestion through the town."
- "More car parking / Payment for long stay."
- "More parking. Swimming pool."
- "IMPROVE THE PEDESTRIAN AREAS, REPLACE THE BROKEN PAVING STONES CLAMP DOWN ON THE PARKING ON YELLOW LINES, PARTICULARLY OUTSIDE FILCO, IT IS A HAZARD AND BLOCKS THE ROAD."
- "Better parking Better road layout for Waitrose - very dangerous currently"
- "Stop traffic parking on both sides of the road; make it alternate sides or one side only. Make the car park behind the town hall be charged for more than 2 hours usage to prevent long stay parking"
- "Support independent traders in competing with national chains who are starting to come in."
- "BETTER PARKING FACILITIES AND BETTER RURAL PUBLIC TRANSPORT TO GIVE EASE OF ACCESS FOR THE GENERAL PUBLIC WITHOUT THEIR OWN CARS AND CONNECT ALL THE VILLAGES WITH THE TOWN CENTRE"
- "Better parking. Control traffic another toilet."
- "1) Better parking provision .i.e. better parking is needed for both town workers, residents and visitors. Without adequate parking visitors will not be able to spend their money in the town. Many park in the Town Hall car park to get on a bus to travel to Cardiff for work or to shop. Possibly a section of the car park could be restricted to 2-3 hours (paid after 3 hours) at the front of the Town Hall car park. This would allow visitors to park and visit the town, also avoiding people parking and leaving the town to go elsewhere for the day on the bus etc. A free car park would still be needed, but at the rear of the existing car park. Additional town parking is also needed at the top of the town. The Market is shockingly bad to park with the mud and surface. If this was better surfaced it would be ideal. As well as access even when the market is on. If town planners and councilors want a vibrant town then parking is a priority. Wardens will put people off coming to the town, and rumors of paid parking in all car parks is ridiculous. It had ruined many other town centres across the UK. My other suggestion is to really make Cowbridge a Food and Drink centre of excellence. The Festival does it bit, but I believe we are missing a trick. Make Cowbridge known nationally and internationally as a food and drink mecca."
- "Improve the parking"
- "Parking and also the accident waiting to happen junction, at Waitrose and the opposite junction at the town hall. If I could squeeze in a third, please, a swimming pool."
- "Car Parking Signage and Information"

- "More car parking"
- "More Parking Swimming Pool"
- "Improve car parking; car parks are always full, even at night. Maybe a charge would deter people from parking for hours on end. More cultural activities would be welcome."
- "More parking provision. Better pavements throughout the town."
- "more parking outdoor market"
- "Places to tie dogs outside shops."
- "Parking provision. Paid for parking would improve the current situation. Cowbridge has a reputation for rudeness which cannot be denied. Shop keepers would benefit from improving customer service."
- "1. Extra Car Parking 2. Not sure!"
- "More parking"
- "More disabled access to banks and shops and easier access to Waitrose"
- "More organized parking Better management of the traffic on the main road, especially the loading/unloading taking place"
- "Reduce Traffic congestion Remove some street parking"
- "- More FREE car parking - More independent retail outlets as opposed to high street brands - to keep Cowbridge unique and not become like any other town across the UK."
- "Improved bus service increase frequency of market"
- "Find more parking a little further out of town - it gets really busy at peak times. Encourage bars to have Sky Sports as this would attract more people to the area on key sporting dates"
- "Better links between High Street and Town Hall Bus stops for transport interchange. Encourage visitors to use public transport for events rather than cars."
- "Improve parking - time limits on town hall parking so that shoppers can park as sometimes spaces are filled"
- "Increase parking and renovate some of the buildings"
- "Parking. Don't know how but..."
- "Less chain stores. More independent shops."
- "Better car parking. Better car parking"
- "Parking. Don't leave shops empty."
- "Increase parking: low multi storey, low charge for first 3 hours Keep chains out with preferential rent & rates for independents"
- "Lower price retail broaden appeal PARKING"
- "Tourist information centre and maybe Band stand/summer?"
- "Improve parking - Cattlemarket site is in appalling condition. Enforce parking restrictions on high street to improve traffic flow."
- "Swimming pool built. Less nationwide retailers"

- "Better parking and better parking"
- "more disabled access traffic lights around all the roads of the town hall"
- "Keep the chain stores out to keep the sense of uniqueness that is Cowbridge. Improve the Traffic around the Town Hall/Waitrose junctions."
- "Some sort of crossing/traffic lights on road between Costa and Beauty Within as is very difficult to cross with children at peak times. Hand out fines to people letting their dogs foul and not picking it up."
- "Sunday opening. Better pubs and restaurants to make it a destination where you cannot just shop and access services, but stay and enjoy (and of course spend money). Cowbridge should look at places like Oystermouth (Mumbles, Swansea) as an example of the above two suggestions working in practice."
- "No more national retail / coffee shop etc. chains because independent retailers make Cowbridge unique and more appealing to visitors. Better offer at leisure centre especially in the evenings."
- "deal with the double parking in the main street during the night time."
- "MORE CAR PARKING AND CLEARER SIGNS. MORE CLOTHES SHOPS IN THE EMPTY SHOPS"
- "better car parking and reduced through traffic"
- "Introduce parking fee machine making it free for up to 2 hours and charges for longer stays - currently overstaying not monitored or controlled. Redevelop old cattle market to provide new livestock market and fixed location for farmers' market."
- "Active but sympathetic use of traffic wardens. Improve transport facilities"
- "Limit the amount of time commuters and shop staff can leave their cars in the best places"
- "Allow visitors to park without being ticketed. Limit heavy duty vehicles from accessing town at certain peak times, deliveries should be done early hours of the morning when it doesn't affect other town users, etc."
- "Better car parking facilities and more normal (ie. not so expensive) shops."
- "Train station"
- "Pay and Display Car Parking with the proviso of the first two hours being free. Improved traffic control of the junctions of Town Hall Square, the High Street and the entrance to Waitrose linked with improved contral of the Pelican crossing."
- "Introduction of pay & display car park charging for car parking at rear of Town Hall and improved access to Llantwit Major (B4270) direct from A48 Cowbridge By-pass to save traffic going through the town centre."
- "Less traffic. More FPN's served for dog fouling."
- "1. Restrict use of the car parks to 2 hours maximum. 2. Re-surface the Cattle Market parking area to make it more user acceptable (no uneven surfaces / puddles)"

- "More leisure facilities especially for children e.g. swimming pool, splash pool, improved playground, outdoor activities More cultural events e.g. theatre choice, a cinema, gigs.No more chain shops/restaurants"
- "transport links to the town centre from Cardiff are far from good-before 8.30am they are non existent! (mon-fri) and are even worse on a Saturday with the first bus getting in at 9.45 am-wholly unacceptable! Buses from other more rural parts of the vale are no-existent! No links to Pontyclun or to Llantwit Major and Bridgend very limited-not good for commuters or business! When new street furniture such as lighting columns or bollards go in, they should be in "keeping" with the town centre, ie. The new set of bollards that have gone in outside of the Vale of Glamorgan pub and Gail Armatige florist look stunning and the engineer that improved that should be commended. other street furniture such as black and white bollards sticking out all over the place are not in keeping with an ancient Borough and in my view ""lower the tone"" of such a pretty town."
- "Repair pavements, very difficult for my Mother who is 90. She no longer walks round Cowbridge on her own for fear of tripping."
- "Less chain stores. Another clever feature like the Physic Garden including Sculptures /Statues / Street furniture"
- "Abolish on street parking (because adds to congestion). Restrict the onslaught of multiples (shops) because they reduce the uniqueness of the town."
- "Improve parking. Improve junction at Birds Lane for cars and also pedestrians"
- "Improve traffic congestion Stop parking on both sides of Main St"
- "A swimming pool. More free parking spaces"
- "More car parking for shoppers etc - spaces in free car park are filled by 8-8.30 with workers catching a bus into work in Cardiff and Bridgend Market place car park is very muddy and not available on Tuesdays - market day. More variety of shops - we have 5 jewellery shops and 4/5 charity shops."
- "Resurface some of the roads at the back of the main street. A swimming pool"
- "Improve car parking and introduce a period of 2 - 3 hours free parking and then charge. This would prevent people using the car parks and then travelling to Cardiff for shopping."
- "More parking. Even more parking!"
- "1.improve parking facilities 2.improve information for visitors"
- "Improved parking provision and redevelop the market area"
- "Increase car parking facilities. Improve the appearance and surface of cattle market"
- "Extra car parking facilities, and improved public transport."
- "Improve parking and reduce congestion."
- "Sort out the parking allowance in the town - charging nominal amounts for short term parking, higher for longer to enable people who want to drop and shop the

opportunity of a space. Need a diversionary road to take heavy traffic flow out of the high street."

- "Improved parking. More community events-markets etc"
- "Expanded and reorganized car parking system and facilities with good parking facilities at each end of the town, eliminating some of the through traffic. This could include park and ride. Diversion of heavy goods through traffic away from the town centre"
- "Can't think of any - the town centre is perfect as it is!"
- "Better parking"
- "PARKING - I know there are plans to improve the parking but it really has to be sorted ASAP. Swimming Pool - The leisure centre has good gym facilities but I think a swimming pool would benefit the whole town."
- "Provide a weekend food and retail market on a regular basis run by the council on one of the two car parks"
- "Extend parking by upgrading the cattle market site, and re-introduce the bus service to the rural Vale."
- "Enforce parking restrictions for delivery vehicles and make them deliver outside busy periods. It is done elsewhere and would transform the amenity of the centre Weight restriction on vehicles in the High Street"
- "Lower rents/rates to encourage more independent retailers. Town is much less interesting and individual now that more chains are here. Build a swimming pool (bigger than Llantwit's)"
- "Improved main car park with more and wider spaces. Get rid of some of the pubs and replace them with real independent shops."
- "Improved car parking Improved welcome in shops"
- "Better parking. More artisan shops."
- "Parking on one side of the road only. More promotion of town walks/heritage trails."
- "Reduce on street parking to improve traffic flow. Extra parking"
- "New shops, better restaurants"
- "Better car parking. Fewer 4x4 and other ""gas-guzzling"" vehicles"
- "Free parking with more spaces. Reduce congestion to allow movement of vehicles i.e. at end of school day"
- "People parking on the side of the road blocks the road. The main crossing should be traffic light operated cause the elderly people in Cowbridge barge on to the road without looking. I've seen many cars having to slam their brakes on... very dangerous."
- "NO MORE CHARITY SHOPS. PARKING, OTHERWISE PEOPLE ARE GOING TO GO TO CULVERHOUSE AND BRIDGEND"

- "More (free) car parking. I know people have come, can't park and gone elsewhere. Have a swimming pool or arts centre"
- "Better leisure and after school facilities so the youth of today could get off the streets. Save and build a swimming pool in the town which in my opinion would help"
- "Make parking better. More events like the food festival"
- "more seats outside"
- "More car parking"
- "More car parking spaces Less traffic flowing through the town i.e. big lorries"
- "More Parking Facilities Re-develop Cattle Market Site"
- "MORE CAR PARKING LESS CARS PARKED ON WESTGATE OR PAKING ON ONE SIDE ONLY HEALTH CENTRE CAR PARK USED WHEN FUNCTIONS IN THE LEISURE CENTRE OR OTHER TOWN EVENTS"
- "Start to charge for car parks. No car parking between 8 am and 6pm on both sides of road (including Blue badge holders)between Horse and groom pub and river bridge(Nisa supermarket)"
- "more parking"
- "Better transport links if my car was off the road there would be no way of me getting back and fore to work! Street parking time lengthened"
- "NO MORE SUPERMARKETS TO BE BUILT. INTRODUCE CAR PARKING CHARGES i.e FIRST TWO HOURS FREE AFTER THIS £1-00FOR NEXT TWO ALL DAY £3-00"
- "pedestrianise it, build a new car park"
- "Better parking"

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.

899 postcodes were gathered from shoppers at the point of sale by businesses and via face to face town centre user interviews. The post codes were 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%	Cowbridge%
Locals	53	52	28
Visitors	31	33	44
Tourists	16	15	28

44% of the post codes gathered were from those who were ‘visitors’, e.g. they do not live in Cowbridge but within a 30 minute drive, which was 13% higher than the National average.

APPENDIX

PARTICIPATING TOWNS IN 2013

The following towns all contributed to the Benchmarking System in 2013.

Town Name	Small or Large	Region	Typology
Clay Cross	S	East Midlands	6
Melton	L	East Midlands	2
Bury St Edmunds	L	East of England	2
Diss	S	East of England	2
Ely	S	East of England	5
Huntingdon	S	East of England	4
Ramsey	S	East of England	4
St Ives	L	East of England	4
Wickham Market	S	East of England	2
Alnwick	S	North East	2
Amble	S	North East	6
Ashington	S	North East	6
Bedale	S	North East	2
Bedlington	S	North East	6
Berwick	L	North East	6
Blyth	S	North East	6
Cramlington	S	North East	6
Haltwhistle	S	North East	2
Hexham	S	North East	5
Hornsea	S	North East	2
Morpeth	S	North East	1
Ponteland	S	North East	1
Prudhoe	S	North East	6
Ripon	S	North East	2
Alsager	S	North West	1
Alston	S	North West	n/a
Appleby	S	North West	2
Buckley	S	North West	n/a
Colwyn Bay	L	North West	n/a
Congleton	S	North West	8
Connahs Quay	S	North West	n/a
Crewe	L	North West	n/a
Disley	S	North West	1
Flint	S	North West	n/a
Handforth	S	North West	n/a

Holmes Chapel	S	North West	8
Holywell	S	North West	n/a
Kendal	L	North West	2
Kirkby Stephen	S	North West	2
Knutsford	S	North West	5
Llangefni	S	North West	n/a
Macclesfield	L	North West	n/a
Middlewich	S	North West	4
Mold	S	North West	n/a
Nantwich	L	North West	2
Penrith	L	North West	2
Poynton	S	North West	n/a
Queensferry	S	North West	n/a
Rhyl	L	North West	n/a
Saltney	S	North West	n/a
Sandbach	S	North West	8
Shotton	S	North West	n/a
Wigton	S	North West	7
Wilmslow	L	North West	n/a
Wrexham	L	North West	n/a
Barrhead	S	Scotland	n/a
Forfar	S	Scotland	2
Bagshot	S	South East	4
Basingstoke (Top of Town)	S	South East	n/a
Hungerford	S	South East	4
Sandwich	S	South East	5
Stony Stratford	S	South East	n/a
Amesbury	S	South West	4
Blaenavon	S	South West	n/a
Bradford On Avon	S	South West	5
Callington	S	South West	2
Calne	S	South West	4
Chepstow	S	South West	n/a
Cirencester	L	South West	2
Corsham	S	South West	2
Cricklade	S	South West	8
Devizes	L	South West	2
Frome	S	South West	2
Liskeard	S	South West	2
Ludgershall	S	South West	4
Melksham	S	South West	2

Pewsey	S	South West	2
Royal Wootton Bassett	S	South West	8
Tavistock	S	South West	2
Trowbridge	L	South West	2
Warminster	S	South West	2
Westbury	S	South West	2
Westbury on Trym	S	South West	n/a
Wilton	S	South West	2
Winchcombe	S	South West	3
Alcester	S	West Midlands	2
Great Malvern	S	West Midlands	2
Ledbury	S	West Midlands	2
Ludlow	S	West Midlands	2
Newport	S	West Midlands	8
Southam	S	West Midlands	4
Tenbury Wells	S	West Midlands	2
Upton Upon Severn	S	West Midlands	3

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 agricultural and manufacturing occupations and in the wholesale trades. Unemployment (in April 2001) was low. As might be expected this group maps onto two main types of area: rural areas and generally those with labour intensive agricultural production of various kinds (e.g. Norfolk, the Fens, mid Somerset and Lincolnshire/North Lincolnshire) and around the major manufacturing centres of the West and West Midlands, West Yorkshire and Humberside.

Group 8 : Age Mix, Professional Jobs

290 places (18%)

This, the largest single group in the typology, is also typified by professional and managerial workers and high levels of educational qualifications but is distinguished from Group 1 by a broader age range (relatively high numbers of young people, but also of middle aged and older people) and from Group 6 by lower levels of longer distance commuting. Also unlike either of these groups there are high proportions of households in detached houses and very low levels of public transport use. The geography of this group is similar to Group 4 in that it is mostly concentrated within the 'Golden Belt' of Middle England. However, it is nationally more widespread than Group 4 and includes locations on the outskirts of all the major urban centres outside London with the notable exception of Tyneside where only Castle Morpeth and Coxhoe (both somewhat distant from the conurbation), are of this type.

BUSINESS UNIT DATABASE

Marleys (Barber)	A1	Comparison	independent	
Katie's Beauty	SG			
Oriel Kathy Gittings	A1	Comparison	Independent	
OBI Camping	A1	Comparison	Independent	
Natwest	A2			
The Balti House (Restaurant)	A3			
The Little Shop of Calm	A1	Comparison	Independent	
The Market Place	A3			
Curves	SG			
Homes of Elegance				Vacant – soon to be GWs of St Clare
Daisy & Jack	A1	Comparison	Independent	
Yorkshire Building Society	A2			
David Burt	A2			
Huddarts	A3			
Sorrento	A1	Comparison	Indepedent	
Brinsons	A2			
Oscars	A3			
The Bear	C1			
HSBC	A2			
HRT	A2			
Spar				vacant
Sam Smith Travel	A1	Comparison	Independent	

Watts & Morgan	A2			
Dentist	D1			
Vale of Glamorgan	A4			
Gail Armytage	A1	Comparison	Independent	
Robert E. Lloyd Optician	D1			
Arthur John (Clothes)	A1	Comparison	Independent	
Arthur John (Hardware)	A1	Comparison	Independent	
Lloyds Pharmacy	A1	Comparison	Multiple	
Xantipee	A1	Comparison	Independent	
The Bay Tree	A1	Comparison	Independent	
Dry Cleaners	A1	Comparison	Independent	
Lloyds Bank	A2			
Elephant & Bun	A5			
Emporium Ty Hafan	A1	Comparison		
Greggs	A5			
Thomson	A1	Comparison	Multiple	
Cowbridge Podiatry & Chiropody	D1			
Jenny Wren	A1	Comparison	Independent	
E91 Classic	A1	Comparison	Independent	
Pebble	A1	Comparison	Independent	
Christmas Emporium	A1	Comparison	Independent	
Joanna Fisher Law	A2			
Fich & Ramous	A1	Comparison	Independent	
Barefoot Studio	n/a			vacant
Coco Blush	A1	Comparison	Independent	
Glamorgan Law	A2			

FUW	B1			
Browns Printers	B1			
Cowbridge Antiques	A1	Comparison	Independent	
Emma – Kate Francis	A1	Comparison	Independent	
High Society	A1	Comparison	Independent	
O'Sullivans Optician	A1	Comparison	Regional	
HT accountants	A2			
E91	A1	Comparison	Independent	
Harvard & Harvard	A1	Comparison	Independent	
Rogers Cantonese	A3			
The Thai Elephant	A3			
Horse & Groom	A4			
Free to Explore Beauty	sg	n/a	n/a	
VADA Telier	A1	Comparison	Independent	
Health With Herbs	A1	convenience	Independent	
Russell Heath Accountants	A2			
Visage	A1	Comparison	Independent	
Strawberry Fields	A1	convenience	Independent	
Shoecare	A1	Comparison	Independent	
The Dress Agency	A1	Comparison	Independent	
Liquorice Laces	A1	Comparison	Independent	
British Red Cross	A1	Comparison	Multiple	
Sweet Occasions	A1	convenience	Independent	
La Mercerie (Knitting)	A1	Comparison	Independent	
River View (restaurant)	A3			
Café Nia	A3			

Beagles	A1	Comparison	Independent	
Scallywags	A1	Comparison	Independent	
King Fisher Gallery	A1	Comparison	Independent	
Symmons Madge (training)	B1			
Foundations Nursery	D1			
Cowbridge Valet Centre	B2			
Arthur John	A1	Comparison	Independent	
R.A Hitchings Ltd (electrical)	B1			
West Farm Vets	SG			
Vale 4x4 Ltd.	SG			
Coyoti	A1	Comparison	Independent	
Pocket Full of Presents	A1	Comparison	Independent	
CRC	B1			
Community College	B1			
Barclays	A2			
Johnsons Jeweller	A1	Comparison	Regional	
Quarter Penny Café	A3			
Viyella	A1	Comparison	Multiple	
Marooned	A1	Comparison	Independent	
Goose Island	A1	Comparison	Regional	
Hopkins Law	A2			
The Shop	A1	Comparison	Independent	
Happy Days	A1	Comparison	Independent	
The Duke of Wellington	A4			
Tenovus	A1	Comparison	Multiple	
Ushi's	A1	Comparison	Independent	

Bar 44	A4			
Tesco	A1	Convenience	Key Attractor	
Sylvia Williams	A1	Comparison	Independent	
Country Casuals	A1	Comparison	Multiple	
WG Davies	A1	Convenience	Independent	
JRC Jewellery	A1	Comparison	Independent	
Coco Plum	A1	Comparison	Independent	
Cowbridge Dental	D1			
Ogmore Vale Bakery	A3			
Principality	A2			
IG Nicholas Butchers	A1	Comparison	Independent	
Cowbridge Fish Bar	A5			
WH Smith	A1	Convenience	Key Attractor	
John Ian Footwear	A1	Comparison	Independent	
The Hair Business	A1	Comparison	Independent	
High Street Jewellers	A1	Comparison	Independent	
Costa Coffee	A3			
Beauty Within	SG			
Fiore	A1	Comparison	Independent	
Eastgate Jewellers	A1	Comparison	Independent	
RB’s Off Licence	A1	Convenience	Regional	
Filco	A1	Convenience	Regional	
The Eating Place	A5			
All Pets	A1	Comparison	Independent	
Capel Jones	A1	Comparison	Independent	
Barber’s 72	A1	Comparison	Independent	

Cowbridge bookshop	A1	Comparison	Independent	
Shampan	A3			
Arboreal	A3			
Dogs Trust	A1	Comparison	Multiple	
Colours	A1	Comparison	Independent	
VIP Dental Care	D1			
FUW	B1			
L'Amoire	A1	Comparison	Independent	
Coco Blush	A1	Comparison	Regional	
Glamorgan Law	A2			
Gibson and Bond (clothes)	A1	Comparison	Independent	
Bijou Play	D1			
The Pencil Case	A1	Comparison	Independent	
Cowbridge Flooring	A1	comparison	independent	
The Old Wool Barn	B1			
Waitrose	a1	Convenience	Key Attractor	

CAR PARKING DATABASE

Name:	Town Hall
On Street/ Car Park:	Car park
Total Spaces:	150
Short Stay Spaces: (4 hours and under)	No limit
Long Stay Spaces: (Over 4 hours)	143
Disabled Spaces:	7
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	0
Vacant Spaces on a Non Market/Quiet Day:	10
Illegal Spaces on a Market/ Busy Day:	5
Illegal Spaces on a Non Market/ Quiet Day:	3

*markings at the rear of the car park is unclear, therefore people tend to park wherever they see space.

Name:	Marketplace
On Street/ Car Park:	Car park
Total Spaces:	26
Short Stay Spaces: (4 hours and under)	No limit
Long Stay Spaces: (Over 4 hours)	26
Disabled Spaces:	0
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	0
Vacant Spaces on a Non Market/Quiet Day:	1
Illegal Spaces on a Market/ Busy Day:	3
Illegal Spaces on a Non Market/ Quiet Day:	2

*markings are not clear on some of the car park, therefore people park wherever they see space

Name:	Nursery
On Street/ Car Park:	Car park
Total Spaces:	16 (plus 6 reserved for nursery)
Short Stay Spaces: (4 hours and under)	No limit
Long Stay Spaces: (Over 4 hours)	15
Disabled Spaces:	1
Charge:	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	0
Vacant Spaces on a Non Market/Quiet Day:	1
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

Name:	Cattle market
On Street/ Car Park:	Car park
Total Spaces:	26
Short Stay Spaces: (4 hours and under)	No limit
Long Stay Spaces: (Over 4 hours)	26
Disabled Spaces:	0
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	0
Vacant Spaces on a Non Market/Quiet Day:	On a market day this area is closed to the public and is used for cleaning vehicles. It is unclear when this car park reopens to the public. Gates can be open but it still being used, people are therefore nervous of using it.
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

- No markings on this car park

Name:	Biffa
On Street/ Car Park:	On street
Total Spaces:	4
Short Stay Spaces: (4 hours and under)	No limit
Long Stay Spaces: (Over 4 hours)	4
Disabled Spaces:	0
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	0
Vacant Spaces on a Non Market/Quiet Day:	3
Illegal Spaces on a Market/ Busy Day:	?
Illegal Spaces on a Non Market/ Quiet Day:	?

*this small area is used for parking but it's not official. There are double yellow lines present but parking is possible by parking on the curb. Traffic wardens have booked people for this in the past but seemed to have stopped now. Clarity needed on whether parking is permitted.

Name:	Sheep market (front)
On Street/ Car Park:	Car park
Total Spaces:	26
Short Stay Spaces: (4 hours and under)	No limit
Long Stay Spaces: (Over 4 hours)	26
Disabled Spaces:	0
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	2
Vacant Spaces on a Non Market/Quiet Day:	3
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

*this is not an official car park and there are no markings. Not clear to say exactly how many car parking spaces there are and whether some are illegal. Plans are afoot regarding this whole area.

Name:	Sheep market (main)
On Street/ Car Park:	Car park
Total Spaces:	200 (approx.)
Short Stay Spaces: (4 hours and under)	No limit
Long Stay Spaces: (Over 4 hours)	200 (approx.)
Disabled Spaces:	0
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	50 (although the car park had a lot of muddy puddles which deter people from parking in some spots)
Vacant Spaces on a Non Market/Quiet Day:	Lots!!! Too many to count and no marking present so hard to know.
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

Name:	Leisure Centre
On Street/ Car Park:	Car park
Total Spaces:	50
Short Stay Spaces: (4 hours and under)	No limit
Long Stay Spaces: (Over 4 hours)	50
Disabled Spaces:	2 (plus 4 parent and child)
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	9
Vacant Spaces on a Non Market/Quiet Day:	26
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

Name:	Health Centre
On Street/ Car Park:	Car park
Total Spaces:	110
Short Stay Spaces: (4 hours and under)	No limit
Long Stay Spaces: (Over 4 hours)	104
Disabled Spaces:	6
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	106
Vacant Spaces on a Non Market/Quiet Day:	37
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

Name:	Waitrose
On Street/ Car Park:	Car park
Total Spaces:	127
Short Stay Spaces: (4 hours and under)	119
Long Stay Spaces: (Over 4 hours)	None (2 hr limit)
Disabled Spaces:	8 (plus 6 parent and child)
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	0
Vacant Spaces on a Non Market/Quiet Day:	37
Illegal Spaces on a Market/ Busy Day:	0
Illegal Spaces on a Non Market/ Quiet Day:	0

*car parking attendant present

Name:	High Street
On Street/ Car Park:	On street
Total Spaces:	81
Short Stay Spaces: (4 hours and under)	72
Long Stay Spaces: (Over 4 hours)	9
Disabled Spaces:	5
Charge: no charge	HOW MUCH DOES IT COST TO PARK FOR AN HOUR? HOW MUCH DOES IT COST TO PARK FOR 4 HOURS? HOW MUCH DOES IT COST TO PARK FOR MORE THAN 4 HOURS?
Vacant Spaces on a Market/ Busy Day:	6
Vacant Spaces on a Non Market/Quiet Day:	23
Illegal Spaces on a Market/ Busy Day:	6
Illegal Spaces on a Non Market/ Quiet Day:	5