

TO: ENVIRONMENT SCRUTINY COMMITTEE - 4TH MARCH

SUBJECT: TOWN CENTRE PERFORMANCE INDICATORS.

FROM: LEISURE AND AMENITIES.

1. PURPOSE OF REPORT

To update members of the performance indicators used to monitor the three town centers and on the basis of those indicators to judge how the towns have performed.

2. BACKGROUND

2.1 The overall performance of the town centers has been encouraging when set against the general difficult trading conditions which have existed on a regional and national basis.

2.2 The following data has been collected on a monthly, quarterly or yearly basis since the introduction of Town Center Management in 1998. Car Park usage, Pedestrian Flow data, Vacancy rates and Sales data have been recorded since 1999. Data relating to CCTV incidents per town has only been recorded from 2002.

2.3 Overall Town Centre performance can only be assessed by putting a number of different indicators together. Each piece of information helps to judge the overall position in each town.

2.4 A large amount of data on the Car Parks is recorded on a monthly basis and reported to the scrutiny committee on a quarterly basis. This covers income from all sources and the level of usage (visits) to the car parks for both "paid for" and "15 minute free". Overall Car Park usage data is shown in Appendix 1.

2.41 Car park "paid for usage" is up by 8% overall whilst the usage of "15 minute free" tickets is down by 13.6% during the last 9 months compared to 2001.

2.42 Paid for tickets issued has increased by 22.2%. Overall Car Park usage in Kenilworth is down by 2.3% during the last 9 months due to a large decrease in the level of "15 minute free" tickets issued of 23.8%.

2.43 Overall Car Park usage in Old Town is down by 16.7% during the last 9 months. The loss of the physiotherapy center from Court Street and the increase in car park provision at the railway station has had a negative impact on the usage.

2.44 Overall Car Park usage in Leamington is up 4.3% during the last 9 months.

2.44 Overall Car Park usage in Warwick is up 0.45% during the last 9 months.

2.5 Pedestrian Flow data is collected on a yearly basis from a number of “count points” in each town center. The counts take place on the same week each year outside any special town center “activity”. Pedestrian Flow data for the three towns is shown in Appendix 2.1 for Kenilworth, 2.2 for Old Town, 2.3 for Leamington and 2.4 for Warwick.

2.51 Pedestrian flows in Kenilworth were up by 5.0% in 2002 against 2001. There has been a wide variation in flows since 1999 with no real trend.

2.52 Pedestrian flows in Old Town were up by 3.5% in 2002 against 2001. The trend since 2000 has seen a gradual increase towards the levels recorded when counts first took place.

2.53 Pedestrian flows in Leamington were down by 3.1% in 2002 against 2001. This was due to work taking place during the count period in Royal Priors. The overall trend since 1999 had been up.

2.54 Pedestrian flows in Warwick were down by 5.5% in 2002 against the high levels in 2001 when the town benefited from impact on the countryside of Foot and Mouth. There was a large increase in counts in 2000 against 1999, since then levels have fallen.

2.6 Vacancy rates are collected on a yearly basis. Data shows the number of properties in use under the various “bands”. This allows us to be able to track any trends in the move from A1 to A3. Data for 2002 not yet fully available but the data on the three towns is shown Appendix 3.

2.61 Vacancy rates in Kenilworth have increased from 6% in 1997 to 9% in 2001.

2.62 Vacancy rates in Old Town have fallen from 14% in 1997 to 12% in 2001.

2.63 Vacancy rates in Leamington have fallen from 13% in 1997 to 7% in 2001.

2.64 Vacancy rates in Warwick have fallen from 9% in 1997 to 7% in 2001.

2.65 The other interesting information shows the increase in the level of A3 units in Leamington and Warwick town centers. A3 units have increased by 10 in both Leamington and the Old Town during that 5 year period and by 4 in Warwick.

2.7. Data comparing the type and level of incidents within the areas covered by CCTV is recorded for each town on a monthly basis and shown in Appendix 4.1 - 4.3. This is new data for 2002 and no comparative data is available until 2003.

2.71 CCTV incidents in Kenilworth average 33 per month with 3 major incidents all of which involve the Police resulting in an average of 1 arrest per month.

2.72 CCTV incidents in Leamington average 1322 per month with 102 major incidents and 97 of which involve the Police resulting in an average of 53 arrests per month.

2.73 CCTV incidents in Warwick average 56 per month with 4 major incidents all of which involve the Police resulting in an average of 2.75 arrests per month.

2.80 Sales performance is difficult to monitor as retailers are not prepared to provide "hard" sales data.

2.81 To try and overcome this difficulty we make use of data produced by the Lockwood Survey. This survey compares town centre performance across 250 town centres and includes sales information for over 45 multiple retailers represented in each town included in the survey. Data relating to Leamington is included in Appendix 5.

2.82 Kenilworth and Warwick are not included in the Lockwood survey as there are insufficient of the stores included in the survey represented in those town centres.

2.83 Over the past five years sales performance in Leamington has been in front of all the other towns in the region included in the survey other than in 1999. The data includes sales in Coventry, Solihull, Walsall, Northampton, Worcester, Redditch, Rugby and Stratford on Avon. The impact of Touchwood on sales performance will be seen when data from the 2002 survey is gathered later this year.

2.9. Overview for Kenilworth. There are tremendous opportunities for the whole town center from a number of significant development opportunities which are at present being considered.

2.91. The loss of the potential Waitrose development has held back other development opportunities which would have had a positive impact on the town center. However, footfall in the town stabilized during 2002 following a fall from 1999 to 2001 and there has been a large increase in the level of paid for car park usage.

2.92. Although the vacancy rates stand at 8.5% this must be read in conjunction with the fact that the majority of the vacancies are for units which are under offer or being kept vacant to facilitate larger scale developments in the pipe line.

2.93. The pattern of trade in the town centre is subject to fluctuations that do not follow any discernable pattern. Special events such as Craft and Farmers' Markets do have a positive impact on the town.

2.94. The medium term prospects for Kenilworth look to be good based on the very high level of private sector interest and the general affluence of the town and it's surrounding area. The go ahead of one major development has the potential to bump start a rapid development of the town centre which would put significant pressure on the Town Centre Management role.

2.95. Solihull and Touchwood Court has clearly had an influence on the residents shopping habits as Kenilworth was identified as a prime target for marketing by the developers. However those additional trips to Solihull are not so much at the expense of Kenilworth but in place of trips made for comparison shopping to the other larger retail centers in the area.

2.10. Overview for Leamington / Old Town. The significant development investment at the Royal Priors Shopping Centre has improved both the shopping environment and tenant mix with the acquisition of tenants such as Gap. In turn this has helped sustain town centre usage and pedestrian figures are now also on the increase in the Old Town.

2.101 The impact of Touchwood has not been as damaging to the town as some people thought. Overall the number of visits to the town continue to increase. There is demand for retail units which at present cannot be fulfilled.

2.102. Solihull, Banbury and Coventry continue to target core Leamington Town centre customers with aggressive marketing campaigns. However, Leamington continues to hold it's own in both the day time and night time economies despite the vast competition.

2.103. The number of CCTV incidents in Leamington is mainly attributable to the success of the night time economy and the efficiency of the partnership approach to monitoring and apprehension.

2.104. The declining vacancy rate for empty premises is a positive trend which is indicative of growing business confidence in the future of Leamington town centre. There is a demand for retail property in the town center but most of the units available are smaller than those being sought.

2.11 Overview for Warwick. The development of the evening economy is likely to play an important part in the success of Warwick.

2.111. Warwick's footfall has remained broadly in line with 2001 totals - despite a 6% fall in tourism numbers visiting the TIC.

2.112. The concerts at the castle during 2002 may well have boosted visitor figures above the general trend. The growing success of the evening economy has not been measured as it falls outside of the normal monitoring regime - but this reflects the greatest success in Warwick during 2002.

2.113. Vacancy rates are almost 7.7%. Of this total the majority are now on Smith Street (13 of the 19 vacant properties).

2.114. On the basis of feedback from certain businesses trade appears to be healthy, although a lack of on-street parking enforcement means that difficulties with parking capacity affecting trade are compounded.

2.115. Lack of parking enforcement makes the true situation in Warwick difficult to assess, although there are crucial shortfalls in parking provision in certain areas (e.g. Smith Street / St Johns) which clearly have an impact on performance.

3. OUTCOME REQUIRED

3.1 Members are requested to note the information in the report and further information included in Appendix 1 to 5.

3.2 This data will be pulled together on a yearly basis and reported to the Scrutiny Committee in March each year.

Ian Coker
Amenities Manager.

BACKGROUND PAPERS

NIL

Appendix 1, 2.1, 2.2, 2.3, 2.4, 3, 4.1, 4.2, 4.3, and 5.

Areas in District Affected: Kenilworth, Leamington and Warwick Town Centre..

Executive Portfolio Area and Holder: **Councilor Tamlin - Development Services.**

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