

Bridport Town Council
Centre of Bridport Health Check Report 2019
FINAL

Background

A Town Centre Working Group was re established by Bridport Town Council in 2018. The Working Group will take responsibility for delivery of the Centre of Bridport projects set out in the Referendum version of the Bridport Area Neighbourhood Plan. The first significant piece for the Group being to undertake the Town Centre Health Check 2019.

Town centres are complex places that serve a wide range of people and purposes. The complexity of issues affecting the performance and prosperity of town centres and high streets has become increasingly recognised. Businesses operating on the high street are facing a growing array of operational challenges, evidenced by a steady decline in store numbers on many high streets. Understanding and re-positioning themselves strategically to better serve their communities and visitors in line with the ethos (or 'personality') of each location, town centres can re-emerge at the centre of the community, cultural and civic life with retail as a key – though not always a dominant element.

The Association of Town and City Management report – *Successful Town Centres* (2018) suggests thinking of town centres as living ecosystems where retail alone may not be the only (or even necessarily fully dominant) factor affecting their performance as attractive places in which to live, work, play, visit and shop.

Why a Health Check?

Town Centre Health Checks are a means of assessing the vitality, viability, resilience and performance of town centres over time. The results of a health check exercises are used to formulate strategies for improvements and inform policy documents.

The submission version of the Bridport Area Neighbourhood Plan recognises that the retail and cultural offer of the Centre of Bridport is a critical element for the future viability of the local economy as well as underpinning the quality of life for residents. The neighbourhood plan includes a project to undertake regular health checks of the commercial offer provided by the Centre of Bridport. The data being used to inform development proposals and build a robust evidence base for future reviews of the local and neighbourhood plans.

High Streets have been under pressure since the financial crash in 2008. The widespread adoption of internet shopping has exacerbated issues for many retailers as customers exercise greater choice as to how they shop and spend leisure time. Health Check data is now more valuable than ever as retailers and councils try to adapt development policies to meet changing lifestyles and habits whilst retaining a strong economic and social offer.

Deciding on the area to be covered by the 2019 Health Check

West Dorset District Council and Bridport Town Council have undertaken Health Checks of Bridport Town Centre before in 2001/2 and 2006. Both previous Health Check reports surveyed retail and products found in the area defined as Bridport Town Centre by the West Dorset Local Plan ECON4. (See Appendix 1). This definition ruled out data on the market stalls and business parks outside the defined area although the 2006 Health Check did include a retail survey of West Bay.

In developing the Regulation 15 Submission version of the Bridport Area Neighbourhood Plan an enlarged area, defined as the Centre of Bridport (See Appendix 1), was agreed as a better representation of the area in Bridport providing retail and product services compatible with policies to safeguard the economy of the town centre.

Deciding what Health Check metrics to choose

The 2001/2 and the 2006 health checks both focused on available data on the range of products and services on offer across the town centre as defined by the Local Plan.

The 2001/2 surveys included a 'satisfaction' survey of customers considering the quality and range of products and services on offer. The 2006 survey decided against a qualitative survey on grounds of cost.

The 2019 Health Check provides the Town Council and others with an evidence base to inform policy development and underpin funding proposals for a range of town centre initiatives to support local businesses and build resilience into the town centre economy.

- **Section One – Survey Methodology**
- **Section Two- Summary of Findings**
- **Appendices: Maps defining the Town Centre/ Centre of Bridport, Questionnaires used.**

All health check data collected for 2019 is downloadable from:

<https://www.bridport-tc.gov.uk/healthcheck/>

BRIDPORT HEALTH CHECK 2019

SECTION ONE – SURVEY METHODOLOGY

The Government provides guidance for Town Centre Health Checks and offer the following indicators, and their changes over time, as relevant in assessing the health of town centres:

- diversity of uses,
- proportion of vacant street level property,
- commercial yields on non-domestic property,
- customers' views and behaviour,
- retailer representation and intentions to change representation,
- commercial rents,
- pedestrian flows,
- accessibility,
- perception of safety and occurrence of crime,
- state of town centre environmental quality.

Alongside the collection of health check indicators government recommends collating information on the local population, for example, numbers, demography and spend potential. If available population modelling data is useful in understanding future growth, future spend potential and to identify any life cycle issues. The implications of an ageing population are especially relevant given the nationally high levels of older residents in the Bridport area.

The National Town Centre Performance Framework produced by the Association of Town and City Management provides a toolkit for authorities to use in pulling together market research to gain a better understanding of town centres and the complexity of interactions between different parameters.

- 1) **People and Footfall** - This theme groups five key performance indicators: footfall, geographical catchment, access, car parking and community spirit. The overall aim in this theme is to provide an assessment of who comes to visit the town centre, what their socio-economic background is likely to be, how close they feel to the people around them in terms of community cohesion and how they travel to the town centre.

- 2) **Diversity & Vitality** - This theme groups five key performance indicators: retail offer, culture and leisure offer, events, reported crime and markets. The overall aim in this theme is to provide an assessment of the actual offer of the town centre and its diversity taking a holistic approach that includes its daytime, evening and night-time economies.
- 3) **Consumer and Business Perceptions** - This theme groups five key performance indicators: business confidence, town centre visitor satisfaction with retail offer, visitor experience satisfaction, attractiveness, crime and safety perception. The overall aim in this theme is to provide users with a glimpse into an issue that can make or break a town centre on its own, and can be one of the most challenging things to change – perceptions.
- 4) **Economic Characteristics** - This theme groups five key performance indicators: retail sales, partnership working, charity shops, vacant retail units and the evening/night time economy. The overall aim in this theme is to provide users with an assessment of static and dynamic elements linked to the economic performance of a town centre.

In selecting what information and which indicators to include in the 2019 health check consideration has been given to the following:

- Data readily available to the Town Council,
- Practical data collection issues for staff and volunteers,
- The costs of acquiring data sets and
- The repeatability of data collection.

The shopper and retailer questionnaires were available as online surveys between July and November with paper copies distributed at Town Council events and via the TIC.

All data collected for the 2019 health check will be held by the Town Council and made available to partners to inform town centre initiatives.

Centre of Bridport Health Check Report 2019 – Data Sets

Health Check Indicator	Health Check data required:	Approach to be taken:
People & Footfall	a) Footfall counts - Pedestrian counts/ flows b) Car park capacity counts & length of stay data from DC c) Postcode harvesting from consumer survey (see below)	TIC & Participating retail & cultural providers counts plus BTC street counts on 4 days July/Oct 2019
	d) Population numbers/ projections e) Life Cycle modelling	Census 2011 BANP evidence
Diversity and Vitality	f) Range and variety of retail outlets g) Primary and secondary products h) Number of Independent and multiple outlets	Survey undertaken by BTC/Volunteers using 2006 template
	i) Number of events across a 12 month period j) Reported Crime in range of categories 12 month period	BTC Dorset Police
	k) Primary Shopping frontages A1-A5 (metre/ %)	Dorset mapping service
	l) Floorspace (metre square) / rateable value	BANP evidence base
Consumer and Business perceptions	m) Retailer survey – satisfaction, business confidence and intentions to change	Survey carried out through Chamber of Trade
	n) Consumer survey – satisfaction, and rating of town centre attractiveness	Survey undertaken by BTC/Volunteers 4 days in July/Oct 2019
Economic Characteristics	o) Number of Charity Shops p) Number of vacant retail units	Survey undertaken by BTC/Volunteers

BRIDPORT HEALTH CHECK 2019

SECTION TWO – SUMMARY OF FINDINGS

People and Footfall 2019

1) Counter and footfall surveys 2019

Footfall data was collected from 3 locations in the Town Centre; West Street between the nationwide and Costs, East Street outside the Bull Hotel and South street outside the Launderette. Surveys were undertaken on 4 dates between July and November 2019. It was decided to survey on different days of the week in different months and during the morning and afternoon. Counts were for a standard 20 minutes.

Bridport Town Centre Health Check 2019 Footfall Counts

Location	Count 1 Weds July 17th		Count 2 Sat August 24th		Count 3 Thurs Sept 19th		Count 4 Tues October 22nd	
Weather	Dry/sunny/ warm		Dry/sunny /warm		Dry/sunny/warm		Dry/ cool some sun	
<i>Times</i>	10.30 10.50	14.00 14.20	10.30 10.50	14.00 14.20	10.30 10.50	14.00 14.20	10.30- 10.50	14.00- 14.20
South Street Outside Laundrette	246	194	467	202	78	83	82	84
West Street Outside Nationwide	157	135	258	172	131	57	85	63
East Street Outside Bull Hotel	187	137	396	183	110	83	105	116
Count totals	Day: 1056		Day:1678		Day: 542		Day:535	

Observations from the footfall counts 2019:

- Weather for surveys remarkably consistent across the four survey days, though the October count day was cooler than the rest. As a result it is difficult to assess the impact of weather on variations in footfall numbers.
- The August Saturday count returned the biggest footfall counts, 3 times the numbers collected in Sept and Oct and 50% bigger than the July counts.

- There is a significant difference between the July and Aug counts and the Sept and Oct counts. This suggests that the summer holiday season and street market days has a significant impact on footfall in the town. It is highly likely that the uplift in footfall numbers recorded in during July and August can be attributed to holiday makers/ visitors.
- There is a significant variation between morning and afternoon footfall numbers across all 4 count days. Morning counts are generally larger than afternoon counts by up to 100% in some cases. The difference between morning and afternoon counts is less marked in September and October.
- South Street recorded the highest footfall counts in July and August with West Street recording the lowest footfalls in the same two months. Higher footfall counts for South Street in July and August suggest that it is the more popular street with visitors.
- In September and October footfall counts exhibited less variation between streets with South Street now lower than the other two on most counts. The lower footfall numbers recorded in September and October suggests maybe looking at the local, baseload of shoppers rather than visitors. The switch to West St having a higher footfall than South Street at this time could then be explained as highlighting a popular route used by local people via Costa and across to Waitrose.
- Surveyors noted that the Bank holiday Saturday counts included more family groups and couples than had been found on the Wednesday which tended to be individual shoppers.
- Trader comments suggest that Saturday shoppers are shifting to early morning shopping to avoid the car parking issues during the mid morning rush and ensure they get the products/ services they want.

2) Counters in retail outlets and other Town Centre 2019

As part of the health check a number of retail stores and public service operations agreed to provide footfall counter data for the 4 days selected for surveys. At the time of compiling this report not all outlets had returned data and a number had not been able to provide consistent data across the 4 days.

Location	Count 1 Weds July 17th		Count 2 Sat August 24th		Count 3 Thurs Sept 19th		Count 4 Tues October 22nd	
Weather	Dry/sunny/ warm		Dry/sunny /warm		Dry/sunny/warm		Dry/ cool some sun	
Times	10.30 10.50	14.00 14.20	10.30 10.50	14.00 14.20	10.30 10.50	14.00 14.20	10.30 10.50	14.00 14.20
TIC counter	16	26	81	64	46	38	30	42
	Day: 321		Day:589		Day: 355		Day: 264	
Waitrose counter								
Museum counter	9	25	38	26	12	14	12	2
LSI	22	9	20	7				
Fruits of the Earth	14	3			6	10	7	5
Peaches Electrical	6	9	10	11	Day: 5		Day: 8	
Auto-Bitz	8	1			Day: 45		Day: 41	

Observations on Footfall counters in stores:

- Largely reflects and re inforces the patterns from the street footfall counts; August Saturday saw the highest counts and October Tuesday the lowest counts.
- Retail shop counts reflect the street footfall findings by having higher morning counts but for the TIC and Museum afternoon counts were equal to if not exceeding morning counts.

3) Car park capacity counts 2019

As part of the 4 street surveys car parks were visited to record spaces available at selected times of the day.

Location	Count 1 Weds July 17th			Count 2 Sat August 24th			Count 3 Thurs Sept 19th			Count 4 Tues October 22nd		
Weather	Dry/sunny/ warm			Dry/sunny /warm			Dry/sunny/warm			Dry/ cool some sun		
Times	9.00	11.0 0	14.3 0	9.0 0	11.0 0	14.3 0	9.00	11.0 0	14.3 0	9.00	11.0 0	14.3 0
East Street Car Park(Long Stay - 79 spaces))	Full	0	10		0	50	12	1	12	13	10	5
East Street (Short Stay 64 + 2 disabled spaces)	21	0	11		0 (+2 dis)	27	29	5	10	40	6	4
South Street Car Park (98 + 5 disabled spaces)	66	4	44		1	49	84	29 (+1 dis)	53 (+2 dis)	87	37 (0 dis)	44 (3 dis)
Wykes Court Car Park (96 spaces)	75	24	51		0	46	80	45	62	87	30	41

Observations on car park capacity counts:

- East Street Car parks appear to be the most popular recording the lowest levels of available spaces across the 4 days of survey.
- East Street long stay car park has the fewest available spaces at the 9.00 am count suggesting it is used by workers in the town.
- The 11.00 am counts are generally the point in the day with fewest parking spaces. This is particularly true for the Saturday count when there was only 1 free spaces (2 disabled spaces) across the 4 car parks surveyed.
- There is generally more car park capacity in the afternoon, reflecting the reduced footfall counts in the afternoon.

- Of the car parks surveyed Wykes Court appears to be the most under used with available spaces at times others are full. That said South Street and Wyke Court car parks do have similar patterns of spaces available.
- From the data it would appear sensible to consider ways of shifting the peak footfall and car parking pressures away from mid-morning. Consideration should be given to offer shoppers incentives to visit the town on Saturday and to a lesser extent Wednesday afternoon. For example, Refunds on parking with afternoon purchases, perhaps through independent shops? Or promoting afternoon music concerts or other events to act as an attractor for afternoon visits.

Diversity and Vitality

1) Range and variety of retail outlets in the town centre and more widely across the centre of Bridport

The 2002/2006 surveys undertaken by West Dorset District Council were repeated in July 2019 using the same business classifications. Comparisons between the 2002/2006 data and the 2019 data is problematic as the 2002/2006 survey didn't list businesses allocated to each category. As a result it is likely that across the 3 data sets there will be inconsistencies in the allocation of businesses into categories. For the 2019 survey the names of the businesses allocated to each category have been recorded so that this will not be a factor in future survey comparisons.

The WDDC 2002 and 2006 surveys only included the area defined in the Local Plan as Bridport Town Centre. Data has been collected for this area in 2019 for comparison purposes and a new baseline for the larger Centre of Bridport area as defined by the Bridport Area Neighbourhood Plan has also been collected.

Observations of changes in Town Centre retail between 2002/2006 and 2019:

- Total number of retail premises grew from 165 (2002) to 187 (2006) and has reduced slightly to 183 (2019),
- Number of **retail categories with reduced number of outlets in the town between 2006 and 2019 = 43**
Including reduced numbers of; Architects, Banks, Building Societies, Bakers, Clothing shops, Electrical shops, Flower shops, Gift shops, greengrocers, Stationers and Toy shops.

- Number of **retail categories with increased outlets in the town between 2006 and 2019 = 19**
Including; Cafes, Betting shops, Charity shops, Nail Bars and Supermarkets/ min markets.
- Number of **retail categories unchanged between 2006 and 2019 = 14**
Including; Estate Agents, Hairdressers, Funeral Services and Social Clubs.

2) Floor space

Using data harvested from the Valuation Agency website Oct 2019 we now have a baseline of the total retail area and the average retail unit size for each of the 3 primary shopping streets in Bridport:

Street	Retail total area	Retail ave unit size		Office total area	Office ave unit size
West Street	5900	148		3136	224
East Street	8023	160		2308	165
South Street	4057	67		2169	128
Total	17,980	119		7,613	169

NB Government definition of small is below 280 sq m

Shopper Survey 2019

A survey aimed at shoppers in the Town Centre was produced and made available between July and November 2019. The survey was intended to be completed online but it became apparent that producing and distributing paper version of the survey was more effective at generating feedback.

Shopper surveys were distributed at a number of Town Council events during the summer, including the Melplash show and Charter Fair. In total 214 shopper surveys were completed and returned. A summary of the survey findings Appendix 1. Headline findings were:

- Responders 64% female, 51% over 60, 98% White/British,
- High number of responders walk to the shops (46%), car use (43%). Less than 6% use public transport,
- 62 % Favour morning shopping 9.00am to noon,
- Overall satisfaction level with Bridport Town Centre high - >54% score town as > 8 excellent. High satisfaction returns for range of eating and drinking (52% score >8 excellent) range of shops (43% score >8 excellent) and safety (51% score >8 excellent),
- Dis satisfaction scores for public transport (49% score <3 disappointing),
- Majority of responders felt that overall Bridport town centre was staying the same (45%) or improving (28%).

Retailer Survey 2019

A survey for Retailers was produced and made available between July and November 2019. The online survey was promoted through the Chamber of Trade and following a disappointing response rate paper copies of the questionnaire were distributed to all independent shops in the town centre area.

In total 14 responses were received. A summary of findings is at Appendix 2. Headline findings were:

- 12 of the 14 Retailers (85%) had been in business in Bridport for over 10 years
- At least 5 retailers had been operating in the town over 25 years,
- In terms of trading performance in 2019: 23% reported 2019 as better than 2018, 23% reported worse than 2018 with 54% reporting same as 2018,
- Looking ahead to trading in 2020: 17% expect 2020 to be better than 2019,8% worse than 2019 and 75% the same as 2019,

- 50% of respondents reported they would be investing in their business, exclusively in goods and services,
- Town strengths listed were: variety of independent businesses, the twice weekly street market, sense of community and customer support for local shops,
- Opportunities included: Collective advertising, marketing, promoting local shops and produce,
- Town weaknesses listed were: parking, too many Charity shops and traffic congestion,
- Constraints included: lack of public transport.

Market Data

Market takings data (Electric Red Book) for each week between July - Oct 2019 has been collected and provides comparison for market takings data going back to 2013. Data collected includes; weather conditions, other local event activity, number of regular and casual stalls etc.

Population Data

Projected distribution of Households by age of Household Reference Person in the Bridport Area NP (Bridport, Allington, Bothenhampton, Bradpole, and Symondsburry):

Year	Age of HRP 24 and under	Age of HRP 25 to 34	Age of HRP 35 to 54	Age of HRP 55 to 64	Age of HRP 65 and over
2011	186	482	2,082	1,439	2,829
2014	220	463	1,882	1,441	3,153
2036	220	463	1,882	1,441	4,613

Source: AECOM Calculations

A significant increase in households in age group >65 yrs in the next 15 years whilst most other age groups remain similar to 2014 levels. This will have implications for a whole range of service provisions and possibly shape future retail needs.

Crime Data

Crime data for the period November 2018 to October 2019 was captured from Dorset Police Website. The data shows that of some 500 reported in the period November 2018 to October 2019 anti- social behaviour accounted for 36% of crimes and violence and sexual offences accounted for 29%. 61% of crimes reported resulted in no further actions by the Police.

Conclusions from the 2019 Health Check Survey

"We live in interesting times at the moment - I think the next year will be challenging but I believe that whatever the product or service a business offers, if it is a quality product or service in this town it will do well". **Comment from Retailer 2019**

The 2019 health check surveys on footfall, shopper and retailer surveys and range of products and services will provide useful baseline data to inform actions and initiatives aimed at improving the retail offer and public realm of the Centre of Bridport.

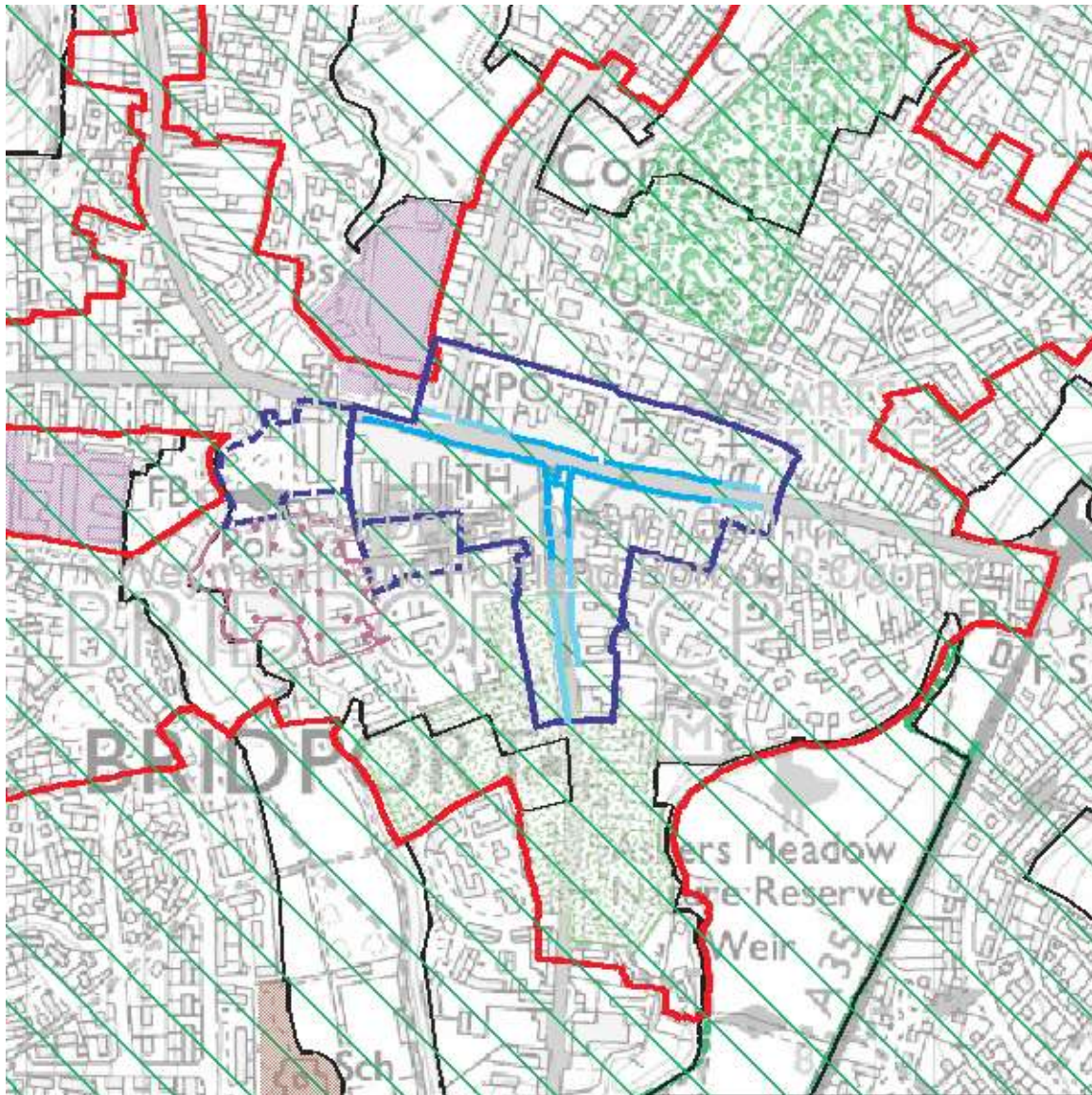
With limited comparison data at this stage only tentative conclusions can be drawn from the health check data collected in 2019. Key points include:

- Summer footfall counts higher than autumn counts,
- Morning footfall counts higher than afternoon counts,
- Market day footfall counts higher than non market days,
- Car parking capacity issue acute on Saturday mornings in the summer.
- Slight decline in number of retail outlets in the town centre between 2006 and 2019,
- Changes to retail composition: reduced numbers (43 categories) of; Architects, Banks, Building Societies, Bakers, Clothing shops, Electrical shops, Flower shops, Gift shops, greengrocers, Stationers and Toy shops,
- Increased numbers (19 categories) in Cafes, Betting shops, Charity shops, Nail Bars and supermarkets/ min markets,
- Market takings roughly similar to 2018 and not significantly different from the period averages 2013 -2019,
- Shoppers express overall satisfaction with the town centre and retail offer,
- The lack of and continuing decline in public transport is a major concern for shoppers,
- The weekly market and the number and range of independent and local shops continue to be a key attractor for shoppers,
- Retailers key concern is parking provision and traffic,
- A number of retailers expressed interest in collective marketing initiatives,
- Low number of vacant premises in Bridport town centre (8 out of 183 premises). At least 2 of the 8 vacant premises re opening as retail in 2019. This appears healthy especially when compared with reports of nationwide decline of High Streets and growing numbers of vacant retail properties nationally.

Actions to be considered by the Town Centre Working Group in response to health check 2019:

- Spreading the concentration of shopping visits away from mornings. Offering incentives to afternoon shoppers; free parking, free entertainment, discounts in store?
- If actions are to be taken to promote and support local, independent shopping in Bridport it would be appropriate to clearly define what we understand to be both local and independent. For example can shops with multiple outlets restricted to 25 mile radius of Bridport be considered local?
- There appears to be interest in developing collective marketing by independent retailers – building on promotions such as ‘Totally Local’ £5 scheme,
- Investigate how support might be directed to new retail start-ups, community led enterprise and young entrepreneurs proposals, especially for vacant properties,
- Lobby for improved public transport,
- Consideration should be given to improving signage to Wykes Court car park or investigating ways of offering drivers information about car park capacity around the town,
- Re visiting consideration of sites for a park and ride scheme to operate during the summer months.

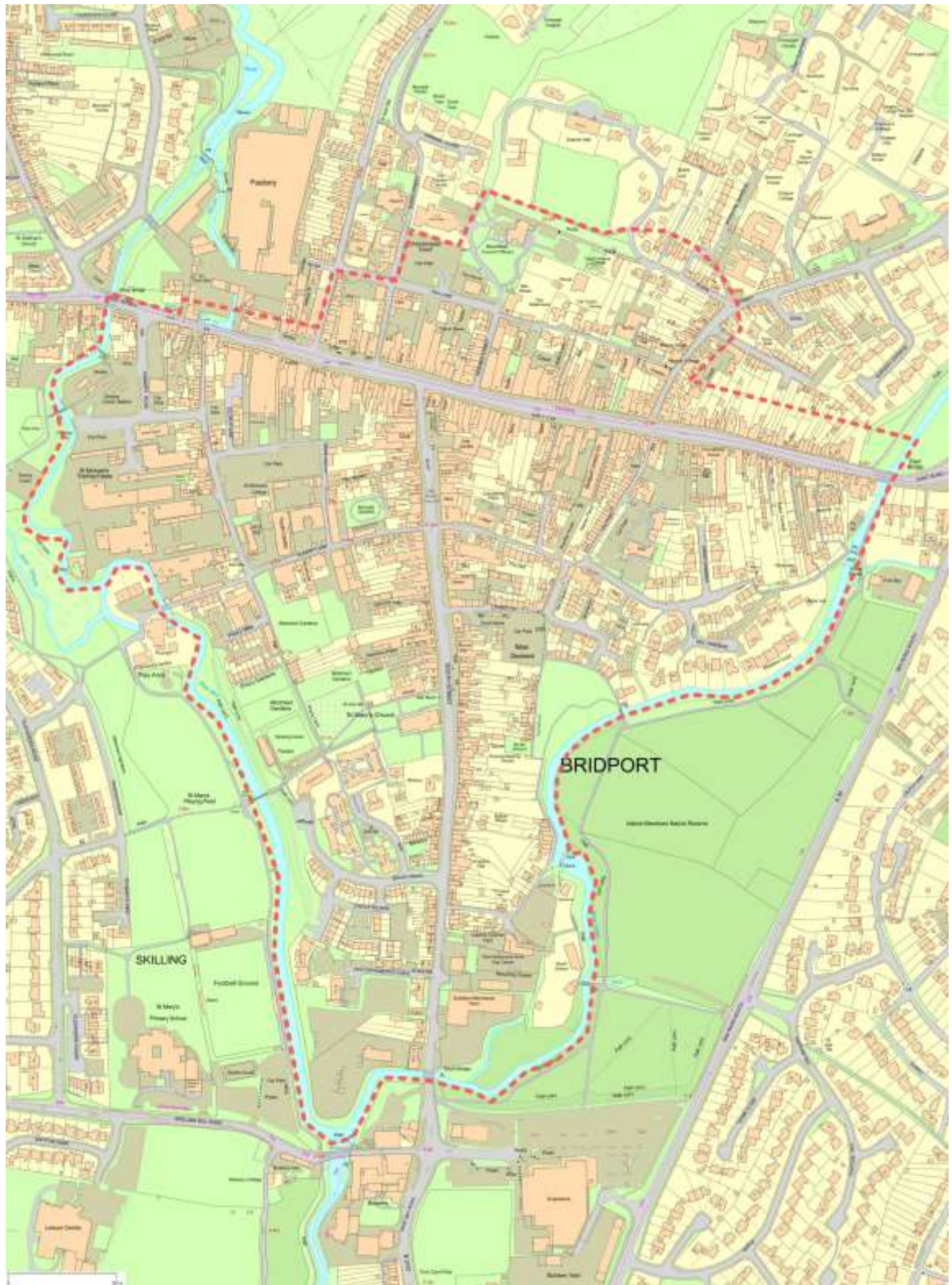
Appendix 1 - Defining Bridport Town Centre
a) West Dorset Local Plan ECON4



Key:

Town Centre area **purple**
Extension areas **dotted**

b) Centre of Bridport Area Referendum Version Neighbourhood Plan:



Questionnaire to be available online and via BTC/TIC and participating shops during July- October 2019. Draw prize available to encourage returns by set date.

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Less frequently
- ☐ First Visit

- ☐ Morning (9am - 12 noon)
- ☐ Afternoon (12 noon - 4pm)
- ☐ Evening (6pm - 12 midnight)

- ☐ On Foot
- ☐ By Bike
- ☐ Car or van
- ☐ Motorcycle or scooter
- ☐ Bus
- ☐ Taxi

[illegible]

Q5.How satisfied or dissatisfied are you with the following elements of the Bridport town centre? (Please choose one answer for each aspect)

[illegible][illegible][illegible][illegible][illegible][illegible]

Q6. Overall is Bridport Town Centre:

- ☐ Improving
- ☐ Staying the same
- ☐ Getting worse
- ☐ Don't know

Q7. Suggested improvements to Bridport town centre:

1.	
2.	

Q8 Any further comments you would like to make about Bridport town centre?
We are particularly interested to hear more about any mobility/ access issues

encountered..

About you

This information will help us understand what different groups of people need from Bridport town centre both now and into the future.

Gender

Man	
Trans man	
Woman	
Trans woman	
Not listed – please specify	
Prefer not to say	

Age

Under 18	
19-30	
31-50	
51-65	
Over 65	

Ethnicity

Asian	
Black	
Mixed	
White	
Not listed – please specify	
Prefer not to say	

Disability

Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?	
Yes a lot	
Yes a little	
No	

Thank you for completing the questionnaire.

Appendix 3 – Retailer Survey

About your business

Q1. How would you describe your town centre business?

- ☐ National Multiple outlet
- ☐ Franchise outlet
- ☐ Independent outlet

Q2. Please list the primary and secondary Goods / Services you retail:

Q3. How long has your business operated in Bridport:

First year	
1-5 years	
5-10 years	
➤ 10 years	

Q4. How long has your business operated from existing site:

First year	
1-5 years	
5-10 years	
Over 10 years	

Q5. How many staff are employed in the business?

None		
Family staffing only		
	Full time	Part time
1-		
2		
3-5		
Over 5		

Business Performance

Q5. How has trading been for you over the last 12 months?

- ☐ Better than 2018
- ☐ Worse than 2018
- ☐ About the same

Q6. What is your sense of the trading environment over the next 12 months?

- ☐ Better
- ☐ Worse
- ☐ About the same

Q7. Are you considering changes to your business over the next two years?

- ☐ Yes
- ☐ No
- ☐ Don't Know

If Yes to Q8 then. What will the investment be in?

Premises	
Goods and services offered	
Staffing	
Business promotion	
Other (please describe)	

Q9 Please complete the following SWOT frame for Bridport town centre:

Strengths of Bridport town centre	Weaknesses of Bridport town centre
Opportunities for Bridport town centre:	Constraints for Bridport town centre:

Q10. Any other comments you'd like to make about Bridport town centre:

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Thank you for completing the questionnaire.