

## **Appendix B**

### **Benchmarking**

#### **Cluster 1 - Development, Conservation & Design**

##### **Development Management**

Benchmarking against the All Wales Annual Performance Report (2015/16) for Local Planning Authorities in Wales indicates a consistent approach to in-house provision of the statutory development management service. Few Local Planning Authority have the same structure or level of resources and there are few examples where the statutory planning service sits within the same service area as the economic development function.

<http://gov.wales/topics/planning/planningstats/annual-performance-report/planning-annual-performance-report-2015-16/?lang=en>

Collaboration and partnership working, particularly for specialist services such as minerals planning, is also identified as good practice in response to current budgetary pressures, albeit for a limited number of Authorities. This also reflects Welsh Government commitment to strategic planning and regional working promoted through the Wales Planning Act 2015 and the recently published White Paper (Reforming Local Government: Resilient and Renewed) issued by the Cabinet Secretary for Finance and Local Government issued on 31<sup>st</sup> January 2017.

The Killian Pretty Review of the planning system in England

[http://webarchive.nationalarchives.gov.uk/20151113141044/http://www.planningportal.gov.uk/uploads/kpr/kpr\\_final-report.pdf](http://webarchive.nationalarchives.gov.uk/20151113141044/http://www.planningportal.gov.uk/uploads/kpr/kpr_final-report.pdf) and the subsequent Welsh Government review of the planning system in Wales did not consider outsourcing to the private sector as a scenario.

<http://gov.wales/topics/planning/planningresearch/publishedresearch/towardsawelshplanningact/?lang=en>

Outsourcing of the statutory development management function in Wales has been limited and focussed mainly on the processing of a discrete range of planning applications to address resource and/or recruitment issues during periods of workload pressure.

This Authority, Pembrokeshire Coast National Park Authority and Torfaen BC have previously outsourced elements of the statutory development management function, however, this has been limited and focussed mainly on the processing of a discrete range of householder or minor planning applications to address resource and/or recruitment issues during periods of workload pressure. Torfaen BC reported benefits in terms of speed of determination but increased costs per application with a reduced quality of service to applicants/agents and third parties despite administrative, technical, validation, consultation and decision making costs being shouldered by the respective Authorities.

Commercial rates would increase the cost of the service that in South Wales range between £70-£145 per hour compared to £20-£35 inclusive of on costs for professional planning officers within the Authority.

### **Urban Design and Conservation**

The majority of cities in England and Wales have design and heritage expertise within the Council to capture the maximum benefit for the public good through the exercise of the development management function and through Council regeneration projects. These functions are often combined into a team or single individual and they are usually embedded into the development management service area. For example Cardiff, Bristol, Plymouth, Gloucester, Bath all have design and heritage officers/ teams. The importance of 'Place Leadership' to deliver place making and quality at the Council level is currently being emphasised by both the Welsh Government and the Design Commission for Wales as a key element of the Well Being of Future Generations Act

The Design and Conservation Team in Swansea has been benchmarked against the Place making Team in Cardiff which falls with the Strategic Development Management service area. The Swansea and Cardiff Teams provide very similar functions including design and heritage advise for development management and listed buildings, input into strategic regeneration projects, preparation of Supplementary Planning Guidance and master planning work. However the key difference is that the Swansea Team provides a comparable service with a much smaller team of 2 full time posts in comparison to 6 full time posts in Cardiff. Whilst Cardiff may have more listed buildings, there are more conservation areas in Swansea and both cities are facing considerable growth pressures with city centre regeneration and strategic housing expansion. Furthermore the Team in Swansea commented on an identical number of planning applications in 2016 as the Cardiff Team, with less than half the resources of Cardiff. Therefore whilst the Team in Swansea is very lean as a result of previous savings and restructure, it is able to process a significant workload, playing a central role in strategic growth and key regeneration projects that is welcomed and well respected by developers as demonstrated by very positive user feedback.

In contrast whilst Newport is Wales's third city, it has a much smaller population than Swansea and covers a much less varied planning environment. As a result whilst Newport has a Conservation Officer, there is no urban designer and instead they rely on the Design Review service of the Design Commission for Wales for design input into the development management of major schemes and they buy in design services for regeneration projects. Newport has indicated an interest in buying in or sharing design advise services for development management from Swansea.

Evidence provided by Cadw shows that of the 25 authorities across Wales, 22 have at least one post providing heritage advise in respect of listed buildings and conservation areas, but their role typically does not extend to place making and as a result they often take a narrow protectionist approach to change. In Swansea the broader place making context of the heritage role allows the wider benefits to be captured with a focus on delivery. The lack of capacity in the heritage sector across Wales has been highlighted by Cadw as a risk to the historic environment and they

are currently investigating the scope for and barriers to collaboration between authorities with input from Welsh Councils including the City and County of Swansea. As there is no Conservation Officer in Neath Port Talbot, this is an opportunity for Swansea to offer this service to a neighbouring authority. Furthermore as the neighbouring authorities of Neath Port Talbot and Carmarthenshire do not have imbedded design advisors there is also scope for the City and County of Swansea to offer a collaborative design service to advise on strategic projects within the Swansea Bay City Region.

Design and heritage consultants charge out at £50-£110 per hour. However these consultants do not typically offer the day to day advise feeding into the development management process as provided by the Swansea Design and Conservation Team. Instead consultants typically focus on task and finish projects such as public realm studies and area regeneration studies. These consultants are typically located in Cardiff and Bristol so there are significant travel costs associated with buying in a comparable day-to-day service. No other Council has outsourced place-making and listed building advise to the development management system, however specific design projects such as public realm has been outsourced by Regeneration colleagues in Swansea and the Design and Conservation Team acts as client advisors in these project.

### **Land Searches & Charges**

The land charges and searches function is furnished by 7 separate departments within the Authority with fee income circa £200K retained by Legal Services which covers legal staffing and IT costs.

Two officers are employed by the Development, Conservation & Design Service providing the largest number of search hours, search information and resources of any of the respective departments. Provision of this service is, however, currently subsidised by planning application fee income posing a risk the continued delivery of this element of the service making it vulnerable to economic pressures.

Benchmarking against the London Borough of Newham indicates that this service can be provided by a core land charges team with access to all relevant systems which would provide an efficient, resourced and timely service to the public.

Flintshire County Council have a land charges and searches function that is provided directly by the Development Management Team.

## **CLUSTER 4 – City Centre Management**

The Association of Town Centre Management (ATCM), the sector's leading body, recognises that that of its 400 town and city centre management practitioners; no two services are the same however, the majority focus on the execution of cross cutting partnerships to develop and implement shared visions, strategies and actions plans.

The ATCM membership consists of a mix of publically funded town centre managers, Business Improvement Districts (BID), Community Interest Companies (CIC's), Town Teams and more. They span across the private, public and voluntary sector, as a collective, and do not usually have a sector specific agenda rather they focus on the promotion of healthy places for the benefit of all stakeholders.

Many town and city centre management services were incepted, as is the case in Swansea, as operational schemes to improve high street retailing by, for example, cleaning the streets, reducing shop theft and enhancing the trading environment. Today however many have evolved beyond this operational role and are helping to support more clearly defined economic regeneration benefits.

In their 2015 paper *Closing the Productivity Gap*, ATCM highlights Rotherham's in Town Living Scheme, Digital Infrastructure Delivery in Mansfield and Youth Employment in Kirklees as examples of the contribution town centre management is making to the economic regeneration agenda in these areas.

ATCM states *'The proactive management of town and city centre has emerged as a key route to translating abstract economic objectives into real productivity gains'*.

*'Making town centre management an investment priority is an easy win for anyone involved in economic development. Whether the aim is developing the skills of business and entrepreneurs, matching school leavers and graduates to the right apprenticeships and employment opportunities or helping to deliver national infrastructure, then town centre management provides a compelling solution'*.

Whilst ATCM advocate closer affiliation of town centre management services with economic regeneration; in terms of models of delivery according to British BIDs, as of May 2017 there are currently 273 BIDs in operation across the UK 225 of which are town centre focused. In Wales there are 5 established BIDs including Wales' first designated BID being Swansea and its newest Cardiff.

### **Operational Services**

#### ***Ranger's***

One area of the City Centre Management service where clear comparisons can be drawn is in regards to the City Centre Rangers Service. This was subject to a review process which was completed towards the end of 2015 the outcomes of which included rebranded uniforms, enhanced performance management and reporting measures and the refocusing of roles and responsibilities.

There are multiple examples of Ranger type services being provided in towns and cities across the UK that demonstrates their value. The role of these teams is usually

either ambassadorial as in Leeds, Sheffield and Newport and/ or environmental management as in Wolverhampton, Aberdeen and Leicester or a combination as per the model used in Swansea.

In terms of the management and funding of such services there appears to be a relatively even split between those over seen by BID companies and those that are run by local councils. The case in Swansea is that the Swansea BID covers 25% of the running costs.

### **Cluster 5 - Swansea Mobility Hire**

Research was conducted during February 2017 regarding the services and charges applied in relation to similar mobility hire services operating across the UK. The findings are summarised below and have been compared to the current services and charges in relation to Swansea Mobility Hire:

<b><u>Area</u></b>	<b><u>Services</u></b>	<b><u>Charges</u></b>
<u>Swansea</u>	- <u>Hire of mobility equipment.</u> - <u>Also sell mobility aids.</u> - <u>Left luggage and shopping facilities provided.</u>	<ul style="list-style-type: none"> <li>• <u>As from January 2015:</u> - <u>£12 per annum membership.</u> - <u>£5 one-off visitor's fee.</u> - <u>£2 half day equipment hire.</u></li> <li>• <u>£3 full day equipment hire.</u></li> <li>• <u>£1 parking fee.</u> - <u>Locker hire rates between £2-£6 per day/ half day subject to locker size.</u></li> </ul>
<u>Tamworth</u>	- <u>Hire of mobility equipment.</u> - <u>Also sell mobility aids.</u>	- <u>£5 per day.</u>
<u>Cheltenham</u>	- <u>Hire of mobility equipment.</u> - <u>Also sell mobility aids.</u>	- <u>£28.56 per annum membership.</u> - <u>£5.10 per use.</u>
<u>Bath</u>	- <u>Hire of mobility equipment.</u>	- <u>£1 per hour</u> - <u>£5 late return fee.</u>
<u>Stoke</u>	- <u>Hire of mobility equipment.</u>	- <u>£24 per annum membership</u> - <u>£2 per use.</u> - <u>£5 for day visitors.</u>
<u>Bolton</u>	- <u>Hire of mobility equipment.</u> - <u>Also sell mobility aids.</u> - <u>Undertake repairs to privately owned mobility equipment.</u>	- <u>£3 per use.</u>

As part of an earlier review process regarding Swansea Mobility Hire, the following information was collated at the time. Information in relation to Swansea Mobility is also provided for comparative purposes.

<u>Area</u>	<u>Operating Model</u>	<u>Funding</u>	<u>Status</u>	<u>Other Info</u>
<u>Swansea</u>	- Council service. - 2 full time, 1 part time and 1 casual worker.	- Fees and charges (income approx. £31,000 per annum). - Council subsidy (£94,000 per annum)	- Service relocated to Swansea Bus Station and rebranded in 2011 to Swansea Mobility Hire. - Review undertaken in 2015 resulting in the subsidy reduction from approx. £114,000 to approx. £94,000 per year.	- Web presence: <a href="http://www.swansea.gov.uk/mobilityhire">http://www.swansea.gov.uk/mobilityhire</a>
<u>Cardiff</u>	- Registered charity.	- Fees and charges. - Lamb Securities, the owners of St. David's 2 complex, contribute £30,000 per annum.	- Staff made redundant in 2015 and threatened with closure previously.	- No web presence, email etc.
<u>Bristol</u>	- Registered charity.	- Fees and charges. - There is a webpage which links other organisations and it appears that these organisations pay for this which is likely subsidising the service.	- Scheme targets visitors, tourists etc.	- This scheme was built into the redevelopment of Cabot Circus. - Web presence: <a href="http://www.bristolshopmobility.co.uk/contact-us.html">http://www.bristolshopmobility.co.uk/contact-us.html</a>
<u>Wrexham</u>	- Run by AVOW (Association of Voluntary Organizations in Wrexham).	- Fees and charges (modest charging). - Council subsidy.	- Previously a service provided by the Council.	- Web presence: <a href="http://www.wrexham.gov.uk/english/community/Shopmobility.htm">http://www.wrexham.gov.uk/english/community/Shopmobility.htm</a>
<u>Chester</u>	- Limited company with charitable status. - Volunteers and paid staff - Part of consortium of 4 mobility	- Fees and charges (split pricing for members and visitors). - Part funded by the local council. - Donations also received.		- Web presence: <a href="http://www.cheshirewestandchester.gov.uk/residents/health_and_social_care/adultsocialcare/getting_out_and_about_-_transp/shopmobility.aspx">http://www.cheshirewestandchester.gov.uk/residents/health_and_social_care/adultsocialcare/getting_out_and_about_-_transp/shopmobility.aspx</a>

	<u>services.</u>			
<u>Neath</u>	- <u>Registered charity.</u> - <u>2 part time staff on a temporary contract.</u>		- <u>Uncertain future at the time of the review.</u>	- <u>No web presence.</u>
<u>Carmarthen</u>	- <u>Service manned by volunteers.</u>			
<u>Abergavenny</u>	- <u>Council service.</u> - <u>One staff member and volunteers.</u>	- <u>Funded by a small budget via Abergavenny Town Council.</u> - <u>Sponsorship open to local businesses to sponsor a wheelchair (A4 placard on basket and back of chair).</u> - <u>Service is free to users.</u>		

## **Cluster 6 - Swansea Market**

### **I. Performance**

Research was also undertaken in February 2017 to consider the performance of Swansea Market in relation to other markets across the UK using a variety of data sources and performance measures.

#### *Footfall*

Information on footfall data derived over a period of three consecutive years from 2014 onwards is provided by the UK Markets Index (UKMI) which is the only independent measure of performance in retail markets in the UK.

As at January 2017, the UKMI advised that according to their national footfall data from January to November 2016 there was a 3.5% drop in footfall in participating markets compared to the same period in 2015. This data is outlined below in comparison to the previous year.

<b>Year</b>	<b>Period</b>	<b>% change</b>
2016	Jan - Nov	- 3.5%
2015	Jan-Nov	- 6.0%





## ii. Mission for Markets Survey

Of the 310 retail markets that participated in the joint NABMA (National Association of British Market Authorities) and NMTF (National Market Traders Federation) *Mission for Markets 2016 Survey*, the following general performance trends were identified which have been compared with the performance of Swansea Market.

	<b>Footfall</b>	<b>Income</b>	<b>Occupancy</b>
<b>Mission for Markets Survey Findings</b>	<ul style="list-style-type: none"> <li>- 43% of markets reported footfall was down.</li> <li>- 40% of markets reported footfall was about the same.</li> <li>- 17% of markets reported footfall increased.</li> </ul>	<ul style="list-style-type: none"> <li>- 45% of markets achieved a surplus.</li> <li>- 25% of market reported a deficit.</li> <li>- 20% of market said they broke even.</li> <li>- 8% of market operators didn't know.</li> </ul>	<ul style="list-style-type: none"> <li>- The overall national average was 77%.</li> <li>- The national average for indoor markets was 86%.</li> </ul>
<b>Comparison with Swansea Market</b>	Swansea Market is showing declining footfall (- 3.5% YOY) in line with 43% of other UK markets.	According to the 2014-2015 budget, Swansea Market achieved a surplus (£772,178) in line with 45% of other markets.	Swansea Market achieved above the national average of 86% occupancy with a consistent occupancy rating of between 96% and 98%.

Further findings from the Mission for Markets Survey are set out below, a commentary on which in regards to the status of Swansea Market is also provided.

<b>Mission for Markets Survey Findings</b>	<b>Comparison Swansea Market</b>
There are 1,227 retail markets in the UK. 65% of retail markets are run by local authorities and 18% are operated by private companies. The remainder comprise retail markets managed by trader cooperatives, social enterprises and community interest companies.	Swansea Market is run by the local authority in line with 65% of the retail markets responding to the Survey.  In relation to market operators in Wales, the trend is that the majority of markets are managed by local councils.
32,000 businesses trade on retail markets in the UK, providing employment for 24,500 people. The majority of these jobs are part-time. There has been a huge change in the employment structure of the sector. In 2014-15, 33,000 businesses employed 21,500 people and most of these roles were full-time.	There are 110 stalls currently available in Swansea Market ranging in size and the number of workers employed at each stall.  On the basis of a rudimentary analysis it is estimated that between 250 and 500 people work in the Market the majority of whom would be expected to live locally.  These figures do not reflect the supply chain

	that indirectly supports the operational and management of the Market.
<p>In financial year 2015-2016, traders on retail markets in the UK collectively turned over £2.7 billion. Combined with the turnover of the 26 wholesale markets in the UK, the annual turnover of markets was £5.95 billion. Turnover is gradually increasing year on year by around £200 million.</p>	<p>Information regarding the collective turnover of Swansea Market traders is not available.</p> <p>However the total rental and other income derived from the Market according to the 2014-2015 outturn is £1,128,818 of which £772,178 is surplus and used to support the delivery of other Council services and projects.</p>
<p>The sector has been challenged by radical changes in the retail industry, notably the rise of the discounters and online shopping. Retail markets are adapting to compete. Traders are specialising or diversifying their business models. Operators invested £51.6 million into improving their retail markets in 2015-16.</p>	<p>There are multiple examples of entrepreneurialism and diversification being applied by traders in Swansea Market for example, whole-sale and provision of customer delivery services. There are however many more traditional traders who are failing to embrace change and in particular do not engage in social media and on-line opportunities.</p> <p>CCM works closely with the Swansea branch of the National Market Traders Federation and together have brought forward a number of recent operational improvements. For example, parking enforcement in the Market Loading Bay and the development of a communal trolley system.</p> <p>In addition, the Local Authority has invested significant sums in 2015-2016 together with grant funding to replace the Market roof.</p> <p>Going forward a Masterplan has been developed setting out the ambitions for the Market over the medium to long term. Aspirations to enhance the Market entrances and provide customer toilet facilities are among the projects which are being considered subject to funding.</p>
<p>It is estimated that there are 26 billion shopping visits to retail markets in the UK per year. Operators of markets are reporting a decrease in footfall and profitability since 2012. As traders are reporting a gradual increase in turnover, this suggests they are adapting quicker and more effectively.</p>	<p>As per the information provided above, footfall into the Market has been declining over several years.</p> <p>Traders are also reporting concerns about the profitability of their stalls which the majority contribute to the declining performance of the City Centre as a whole. The realisation of the City Centre regeneration programme is therefore critical to the long term vitality of the Market.</p>

<p>Traders on retail markets have a mature age profile with over 65% having 50 years of age. Data on self-employment suggests that older people make up the majority of self-employed workers in the UK. 58% of business owners are male. The sector is still above average for the amount of businesses run by women, demonstrating the inclusivity of markets.</p>	<p>Research consistently shows that the main demographic of the Market represents an age profile of 55 years and above. The Market's Marketing Strategy has responded to this by targeting students, families and those working in the City Centre, the positive impact of which has however been diluted by the declining trends in footfall .</p>
<p>The highest proportion of market traders is in the South of England (38%) and this gradually decreases through the Midlands (28%) to the North of England (27%). 9% of market traders are based in Northern Ireland, Scotland and Wales combined. Business owners prefer trade from indoor markets in the North, outdoor markets in the Midlands, and events are the predominant trading channel in the South.</p>	<p>Whilst markets appear to be less popular in Northern Ireland, Scotland and Wales, there is a South Wales network of approx. 10 market operators that meets relatively regularly to share information and best practice. Among this group Swansea Market is held up as a model of success given its overall performance and operating practices.</p> <p>In 2015 Swansea Market was awarded the title of Britain's Best Large Indoor Market by NAMBA (National Association of British Market Authorities) and also maintains Trip Advisor's Standard of Excellence.</p>
<p>Market traders are incorporating more events and specialist markets in their business models. 64% trade on events, 50% on outdoor markets, and 43% on indoor markets. In addition, 23% trade online. There remains a challenge for the sector to adapt to new technologies and engage with digital. 40% of market traders take cashless payments. 45% have a website. 55% use social media to promote their business.</p>	<p>As part of its Marketing Strategy, Swansea Market has a standalone website and social media presence. Whilst a number of traders have their own digital platforms and engage with the Markets, many more do not.</p> <p>The Market also benefits from a programme of regular events and activities to raise the profile of and drive footfall into the Market in line with local and/or national events.</p> <p>Outdoor radio broadcasts, photography, exhibitions, choirs and children's activities and entertainment, among other activities, feature through the year. Limited space within the Market however restricts the type and scale of events that are organised.</p> <p>Swansea Market Traders Federation are keen to see the reinstatement of the annual Swansea Market Cockle Festival as a destination event in the City Centre. This is not however currently feasible due to funding and resources.</p>
<p>In 2014-15, respondents were asked to identify lines that would go up and down. They were right. There has been an increase in food, entertainment/communications, and arts and</p>	<p>Over the years whilst the number of fish and seafood stalls have remained relatively stable, Recorded changes in the number and types of other businesses operating in the Market can</p>

crafts. There has been a decrease in clothing and children's goods. This year's hot line is speciality goods and, arguably, the most underperforming line is electrical goods. This year, traders expect a boom in hot food, alcoholic drinks, and vintage and handmade goods.

be seen.

The number of butchers, fruit, vegetable and flower units and clothing and footwear stalls have declined. In sharp contrast places to eat, services and supplies (such as key cutting and jewellery repair) and jewellery, cosmetics and leather goods have been growth areas.

### C. Case Studies - Other Markets

The following information has been extracted from the Swansea Market Master Plan which was undertaken by consultants The Urbanists in May 2015.

Comparisons are drawn from a management and regeneration perspective of Swansea Market with several key retail markets across the UK. These are St. George's Market in Belfast, the recently refurbished Newport Market, market leader Bury Market and Kirkgate Market in Leeds.

#### Comparison: Swansea and Belfast

##### Similarities:

- Central location close to amenities such as rail and bus stations
- Managed by local councils
- Regeneration projects focused on infrastructure
- Both are tourist attractions

##### Differences:

- Specialisation in Belfast with different market themes each day
- St George's project has led to regeneration of surrounding area
- St. George's market is based upon flexible stalls that enables the market to adapt its offer over time and on different days of the week
- St. George's market is in a part of Belfast city centre that has undergone significant transformation - the market is an important part of this but there are other attractions that have helped to create a lively context around the market building (such as the Titanic Quarter)

### Comparison: Swansea and Newport

#### Similarities:

- Central location close to amenities such as rail stations and universities
- Managed by local councils
- Regeneration projects focused on infrastructure
- Both have fixed market stalls

#### Differences:

- Newport makes use of its extra space by hosting events
- The regeneration in Newport has resulted in a more multiuse space with the gallery and business loft

### Comparison: Swansea and Bury

#### Similarities:

- Both settlements have pockets of deprivation, but are able to draw upon areas with disposable income. Both face considerable competition from nearby centres (Swansea: Trostre, Carmarthen and Cardiff) (Bury: Bolton, Rochdale and Manchester)
- Both markets have been rebuilt in the 20th century following destruction of previous accommodation
- Both regions have a good reputation for excellent local produce
- Both markets are connected to covered malls of a similar age, size and configuration
- Public transport is located within close proximity of both markets
- Both are managed by local councils

#### Differences:

- Bury market is zoned - different parts of the market offer different kinds of tenancy, produce and opening hours/days
- Bury has a range of different kinds of accommodation to suit different kinds of trader
- Bury has recognised that its local catchment is limited and that to continue to prosper it needs to deploy active strategies to attract visitors from outside the town
- Bury has been successful in securing a contemporary mixed use development

## Comparison: Swansea and Leeds

### Similarities:

- Central location close to amenities such as railway stations and universities
- Managed by local councils
- Regeneration proposals focused on infrastructure (namely the roof), but also to turn the stalls to face outwards, extend opening hours and reconfigure the layout
- Both have fixed indoor market stalls

### Differences:

- Kirkgate operates strategies to encourage businesses into the market
- Leeds host events to increase revenue, something not seen in Swansea
- Kirkgate have an active online and social media marketing strategy
- Collaborations with academia to improve business performance
- Leeds is benefiting from a number of modern retail developments - all in the context of the market