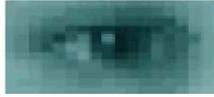


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**A Report of the
Economy & Culture Scrutiny Committee**

**Cardiff Central Market and
Historic Arcades**

October 2014



The City of Cardiff Council

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CHAIR'S FOREWORD

In recognition of the importance the Economy and Culture Scrutiny Committee places on small businesses in Cardiff, the Committee has recently undertaken three in depth pieces of work focused on this area of the economy. This report, which gives attention specifically to Cardiff Central Market and the historic arcades in the city centre, builds upon the findings of the 'Small Business' Inquiry published in January 2014 and the 'Higher Education Innovation in Cardiff' short scrutiny published in November 2013. The Economy and Culture Scrutiny Committee recognises the important 'offer' that the independent retailers and small businesses found within the Historic Arcades and Central Market bring to the city centre shopping experience, and hope that this report will support the growth of this sector.

Cardiff Central Market and the historic arcades have been frequented by shoppers and visitors to the city for well over 100 years and they are a unique selling point of the city centre, showcasing Cardiff's Victorian and Edwardian heritage. As modern developments and arcades have been built in the city centre, with nationwide chains and established brands populating their stores, the historic arcades have become the home for many of the independent traders and specialist stores in Cardiff.

Through this Inquiry, the Committee aimed to explore the role of Cardiff Council in running Central Market and supporting the historic arcades. The future of both the market and arcades are considered to be very important for the city, and as such Members wished to review future improvements the Council could make and explore initiatives undertaken by other local authorities across the United Kingdom in order to secure a successful environment for businesses within the arcades and market to thrive for years to come.

The Inquiry received evidence from a range of sources, including representatives of Cardiff Metropolitan University, Cardiff Central Market Traders Association, Ashdown Phillips, Curzon Real Estate, Cardiff Council, Rules of Play, the National Association of British Market Authorities and Wrexham Council. I wish to express my thanks to all those who contributed to this scrutiny exercise, either in person or in writing, who

willingly gave their time to assist us and without whom this Inquiry could not of taken place.



Councillor Craig Williams

Chairperson, Economy & Culture Scrutiny Committee

INQUIRY TERMS OF REFERENCE

As part of their 2013/14 Work Programme, Members of the Cardiff Council Economy and Culture Scrutiny Committee established a task and finish Inquiry into Cardiff Central Market and Historic Arcades. This inquiry sought to:

- Understand the Council's role in running and supporting Cardiff Central Market and the city's historic Arcades
- Understand the importance of Cardiff Central Market and the Arcades to the local economy
- Explore options for the future of Cardiff Central Market and the Arcades
- Review good practice from other local authorities in their support and promotion of Markets and Arcades
- Review public opinion and awareness of Cardiff Central Market and Arcades
- Understand the views of market stall holders and arcade store owners
- Understand the implications of a potential Business Improvement District proposed for Cardiff Council, and the impact this will have for Central Market and the Arcades.

The evidence collected would be used to make informed recommendations to the Cabinet and other relevant stakeholders.

Members of the Economy & Culture Scrutiny Committee volunteering to participate in this Inquiry were Councillors Craig Williams (Chair), Chris Weaver, Darren Williams, Gareth Holden and Georgina Phillips.

Subsequent to the Inquiry being initiated, Councillors Holden and Phillips resigned from Committee membership. We are grateful to former and existing Members for the time and commitment invested in the Inquiry.

KEY FINDINGS

Having received evidence from nine witnesses over four meetings, commissioning four pieces of research and considering a number of written reports, the Members identified the following key findings for the Inquiry:

Cardiff Historic Arcades

- KF1. Cardiff is often referred to as the 'City of Arcades', given that it has the highest concentration of Victorian, Edwardian and contemporary indoor shopping arcades of any British city. The historic arcades in Cardiff are considered to be one of the City's unique selling points and showcase Cardiff's Victorian and Edwardian heritage. They are home to many independent traders and specialist stores, and retain many of their original features, providing an intimate environment for shoppers away from the bustle of the high street and modern arcade developments.
- KF2. Cardiff city centre has changed significantly in recent years, with the expansion of St David's Arcade alongside the opening of John Lewis in 2009, and the pedestrianisation of St Mary Street in 2010. These developments have undoubtedly increased the number of shoppers in the city centre; however the benefits to this have not been seen by all the historic arcades. Those located in the Castle Quarter have reported decreased footfall, while the arcades that link through to the Hayes have reported increases.
- KF3. The historic arcades (and therefore the stores within them) have not responded to the extended shopping hours offered by stores within the St David's 2 Arcade, where shops are now trading until 8pm. Typically stores within the Arcades close at 5.30 pm. Evidence suggests that while some stores consider it a natural progression to keep the arcades open later, others would be reluctant as their resources are already stretched to the limit and could not open the store for longer hours.

Cardiff Central Market

- KF4. Despite significant change in the city centre, Cardiff Central Market provides a link back to the history of Cardiff, having opened in its current location in 1891. The history of the Market dates back to the early eighteenth century, and it occupied a number of sites across the city centre before settling in the former site of Cardiff gaol. This landmark is unique to Cardiff, with many of its original Victorian features remaining to this day, and is an essential part of Cardiff's tourist offer.
- KF5. Cardiff Central Market is currently operating with near full occupancy, combining traditional staple stalls, such as butchers, greengrocers and fishmongers, with a number of cafes and delis, and more specialist stalls. External national organisations describe the Market as “an architectural gem for the City of Cardiff”¹ and a “really impressive market hall”². However it must be noted that these organisations also identified opportunities for improvement in the Market's operations.
- KF6. Byelaws made in 1988 provide a framework for the operation of Cardiff Central Market. Most of these byelaws are required to set out rules for operating a stall in the Market, but some may be restricting changes or improvements taking place. For example, the days and hours of Market operation are limited to Monday to Saturday, 8 am – 6 pm, and the level of fine that can be imposed on traders who break the operating rules is limited to twenty five pounds.

Impact of City Centre Developments

- KF7. Traders in Cardiff Central Market and from across the Historic Arcades indicated that they have seen decreased levels of trade over the last two to three years, with the pedestrianisation of St Mary Street, the new St David's development and the cost of city centre parking being highlighted as some of

¹ NABMA – Cardiff Market Health Check: Visit Wednesday 14th May 2014

² NMTF – Cardiff Market Visit, Thursday 6th February 2014

the reasons why this is felt to have occurred. This is not a problem unique to Cardiff; evidence across the UK suggests that the plight of small and independent retailers is a big area of concern for many British cities.

- KF8. Traders and landlords feel that footfall in the city centre has shifted following recent developments. The arcades in the Morgan Quarter have experienced increased footfall as shoppers travel from the transport hubs at Central Square to St David's Arcade and John Lewis, while arcades at the Castle end of the city centre have reported a decline in pedestrian flow. Estimates suggest that there are around 100,000 people walking through the Morgan Quarter arcades per week, while only a fraction of this travel through the Castle Quarter arcades. That said, it is important to note that footfall does not necessarily mean increased sales, with stores responsible for turning this passing footfall into sales.
- KF9. There is a perception that the Council should be helping to address this problem of decreased footfall through the Castle Quarter arcades, with some traders commenting that if the area degenerates further they will have no option but to leave the Arcade. Individuals who originally supported the pedestrianisation of St Mary Street now feel it is having a negative impact on businesses in the Castle end of the city centre. Suggestions for improvement to footfall include; re-introducing limited numbers of buses or taxis along St Mary Street; reviewing which buses stop outside the Castle; reviewing the placement of pedestrian crossings outside the Castle; and improving promotion of the Castle Quarter.

Market Issues – Maintenance/Investment

- KF10. Research suggests that the performance of local authorities has a strong influence on in levels of disinvestment in markets across the United Kingdom. Local authorities often vest responsibility for market operation with departments not optimally suited to the task. This is a criticism that has been made of Cardiff Council, where the Market has traditionally sat under an asset management team, rather than under officers with retail and marketing experience, who could benefit and anticipate the Market's needs.

KF11. A major concern for traders and customers alike is the maintenance and upkeep of Cardiff Central Market. A building that has great historical significance, and is referred to as an “architectural gem” has been allowed to deteriorate through under investment from the Council. In various surveys the Market was described as ‘dirty’ and ‘grubby’, and it was highlighted to Members that the roof leaks in numerous places. A number of stakeholders commented that the Market needs to be thoroughly cleaned and given a fresh coat of paint – quick wins that could make it seem a far more attractive visitor and shopping destination.

KF12. The Council recognises its need to realise the potential of the great asset it owns, and as such City Centre Management has examined how the Market can become a destination of choice and attract a more diverse customer profile. Plans have been developed for a rebranding of the Market that give recognition to its history and heritage and propose promotion of the Market along St Mary Street and the surrounding area. It is important that internal appearance, retail operation and the vision for the Market are addressed before this promotion can be undertaken, as otherwise its success will be limited.

Market Issues – Tenant Relations

KF13. Relations between the Council and some traders within Cardiff Central Market have fluctuated for a number of years, with a series of ongoing disputes, mainly surrounding the introduction of tenancy agreements and rent reviews. In recent years, and particularly since the current Director of Economic Development came into post, significant effort has been made to resolve these issues. While improvements have been made it is clear that a number of issues remain, and that while these issues are outstanding limited progress can be made to move the Market and plans for its improvement forwards.

KF14. Within Cardiff Central Market, the space allocated to each tenant or stall is demarcated by a ‘blue line’ painted on the market floor. These blue lines

define the outermost space that stallholders can utilise for trading, and ensure that sufficient space is available between stalls for compliance with health and safety regulations and disabled access. The enforcement of this 'blue line' demarcation was highlighted by a number of sources as something that is not taking place, and throughout the market many stalls can be seen to set up and display their goods outside their individual permitted boundary.

Market Issues – Potential Improvements

KF15. A number of ideas have been put forward as improvement proposals for Cardiff Central Market. These include reviewing the hours and days the Market is open for trade; developing a business improvement plan and long term strategy for the Market; agreeing shared objectives with traders; exploring funding opportunities such as the Heritage Lottery Fund; participating in the *Love Your Local Market 2015* campaign; exploring social media opportunities; providing free wireless internet access; and exploring opportunities work experience placements or job seeker training.

Promotion and Signage

KF16. Witnesses commented that the Council is not doing enough to promote Cardiff Central Market and the Historic Arcades, and as such is missing an opportunity to exploit the unique identity that they create for the City. These links back to the Victorian era provide a balance to new modern developments – they are a unique selling point of Cardiff, and should be promoted accordingly. The Council has invested in 'way finders' in the city centre, but a perception exists amongst independent traders that these focus on directing people to the large modern developments and aren't suitably aimed at the historic areas. It is also felt that city centre 'way finders' miss an opportunity to provide an insight into the history of the arcades and the City as a whole.

KF17. Research findings suggest that traders within Cardiff Central Market and to a smaller extent the historic arcades have been slow to embrace e-commerce

and social media as a means to promote their business, and those that have find it hard to attract new custom, with existing customers being the individuals reached via various social media platforms. This is particularly important at a time when more people than ever carry a smart phone and when smart phone users are increasingly consulting their mobile while shopping.

KF18. It is suggested that the Council's social media assets provide a great opportunity to promote the Market and arcades, and to communicate information about individual businesses to both residents and tourists. For example, the Council's Twitter account has over 27,800 followers at the time of writing. A tweet or re-tweet from Cardiff Council regarding a small business in the city centre would reach far more people, and far more potential new customers, than a tweet made by the business itself could ever hope to. At a time when local authority advertising budgets are being cut, and when independent traders have limited resources to promote their business, social media is an avenue of free advertising and promotion that should be exploited.

Arcade Relationships

KF19. A positive relationship exists between the Council's City Centre Management senior officers and the Facilities Managers representing the owners of the historic arcades, with joint initiatives being arranged to help promote the arcades and surrounding areas. Landlord representatives were also positive regarding the Council's planning officers, who, in recognition of the troubled times the arcades are facing, relaxed regulations to allow for A3 premises (premises which are to sell "Food and drink) within the arcades.

KF20. Proactive landlords and facility managers can play a crucial role in the success of an arcade and the stores within it. There are clear benefits to an arcade where the landlord has a strategic approach to development, is willing to invest money in refurbishment, has a pragmatic approach to filling vacant stores and is willing to work with the Council on promotional activities. It will

be particularly important for the Council to engage and work with the new owners of the Castle Quarter Arcades, which evidence suggests have been struggling in recent times.

Local Currency

KF21. Support exists within the independent business sector of Cardiff for the concept of a local currency, similar to the Bristol or Brixton pound. This would need to be supported and driven by the independent sector, with the local authority playing an important role, acting as the 'bank' for the currency and accepting the currency in payment of business rates, Council Tax and other service payments.

Good Practice and previous Inquiries

KF22. Wrexham Council Employment, Business & Investment Scrutiny Committee undertook a task & finish Inquiry into its Town Centre Markets in 2013. Good practice that has come from this piece of work includes the following advice:

- establish a vision for the market before addressing day to day issues;
- maintain open and honest dialogue with market traders;
- establish performance measures to evaluate outcomes;
- identify improvements in the management arrangements of the market;
- address the branding and use of market heritage within promotional activity.

KF23. The Wrexham Inquiry highlighted the importance of the Council finding quick wins – where small changes can be implemented quickly, demonstrating a commitment to improve and enhance the Market. Members of the Cardiff Scrutiny Inquiry feel this will be important in terms of demonstrating to traders that the issues at hand are being taken seriously.

KF24. The Economy & Culture Scrutiny Committee undertook a Task & Finish Inquiry into 'Small Business' which was received by the Cabinet in June 2014. There are overlaps in the lines of inquiry of these two Inquiries, and as such Members wish to further endorse a number of recommendations made in the 'Small Business' report which (to date) have not yet received a Cabinet response. In particular these recommendations relate to educating small businesses about business rates; exploring the feasibility of a local currency and; consider improvements for sign posting and way finders and explore the means to encourage increased footfall through the arcades.

KF25. Cardiff Council has recently joined the National Association of British Market Authorities (NABMA), Britain's leading markets organisation. A 'market health check' of Cardiff Central Market has been undertaken by NABMA, which concluded that the market operates at an acceptable level but has yet to reach its full potential. Recommendations for improvement include investment in the fabric of market stalls, developing a strategic view with performance indicators, and empowering market management to enforce market rules – with the Council now able to access NABMA case studies that describe such improvements made elsewhere in the country.

KF26. The public perception survey carried out by Cardiff Scrutiny Research Team highlighted an issue with regards to the affordability of parking in the city centre. This was a view echoed by traders in Cardiff Central Market, who felt that parking arrangements in the city centre and the pedestrianisation of St Mary Street have discouraged people from popping into town quickly to shop in the Market, as savings made by shopping there are offset by parking charges. Good practice from across the United Kingdom suggests that other local authorities have introduced 'no-fee' and 'first hour free' parking to attract more shoppers.

RECOMMENDATIONS

Following the completion of this Inquiry, an analysis of the evidence gathered and an assessment of the key findings was undertaken. From this assessment, the Economy & Culture Scrutiny Committee recommends that the Council's Cabinet:

R1. Ensures that the Council develops a vision for Cardiff Central Market, with appropriate improvement strategies and business plans in place to support the achievement of this vision, and puts in place appropriate management arrangements to drive and coordinate improvements. These improvements must be co-produced with involvement of market traders and respond to the demands of the public.

Supported by Key Findings 11, 12, 15 and 22

R2. Develops a performance framework for Cardiff Central Market management to report progress within the Market, and provides a performance report to Scrutiny on an annual basis.

Supported by Key Findings 22 and 25

R3. Continues to work towards a resolution of the ongoing dispute with tenants within Cardiff Central Market, reaching an agreement that will allow for the development of a collaborative vision for the future of the Market.

Supported by Key Finding 13

R4. Addresses the maintenance issues that exist within Cardiff Central Market, demonstrating that the Council recognises the importance of the building from a tourism and heritage perspective.

Supported by Key Findings 11 and 12

R5. Ensures the Council opens dialogue with stall holders within Cardiff Central Market regarding the potential to alter opening hours and days of business for

Cardiff Central Market, and explores opportunities to trial new working arrangements.

Supported by Key Finding 6

- R6. Ensures a review of the byelaws in place for Cardiff Central Market is undertaken, ensuring these byelaws provide flexibility for changes management may wish to make and allow appropriate levels of fines for enforcement of market operating rules.

Supported by Key Finding 6

- R7. Enforces the 'blue line' demarcation in a consistent manner throughout Cardiff Central Market, and reviews NABMA case studies to develop operational guidelines to address such encroachment.

Supported by Key Findings 14 and 25

- R8. Supports the *Love Your Local Market* campaign and uses the opportunity to run events that celebrate Cardiff Central Market, independent traders and local traders.

Supported by Key Finding 15

- R9. Explore the opportunity to arrange work experience placements with traders within Cardiff Central Market, with a view to encourage a new generation of independent traders and business owners, and explore the possibility of dedicating stalls to new traders or start-up businesses who want to gain retail experience.

Supported by Key Finding 15

- R10. Increases city centre wireless internet coverage to allow for free internet access within Cardiff Central Market.

Supported by Key Finding 15

- R11. Explores options to address the decline in footfall at the Castle end of the city centre. This should include reviewing the buses that stop on Castle Street

(inbound), the location of pedestrian crossings and exploring options for reintroducing a limited number of buses along St Mary Street.

Supported by Key Findings 2, 8 and 9

- R12. Reviews the Council's current promotional activities for Cardiff Central Market and the historic arcades, particularly from a tourism point of view, and explores opportunities to promote the unique links to the history of the city that these destinations provide.

Supported by Key Finding 16

- R13. Explores the opportunity to promote individual historic arcades, independent stores, and Cardiff Central Market via the Council's social media outlets and the city centre big screens.

Supported by Key Finding 17 and 18

- R14. Undertakes a review of Council maintained city centre way finders to ensure that the historic arcades and central market have equitable promotion.

Supported by Key Finding 16

- R15. Engages with the new owners of the Castle Quarter arcades, developing a relationship that will encourage the creation of a shared vision, and joint initiatives, for the Castle end of the city centre.

Supported by Key Finding 20

- R16. Is supportive in the development of a local currency in Cardiff and explores the requirements necessary for a local currency to be accepted in payment of business rates, Council tax and other services.

Supported by Key Finding 21

- R17. Explores parking options within the city centre that will encourage increased numbers of visitors to Cardiff Central Market or independent retailers in the city centre.

Supported by Key Finding 25, 8 and 9

Background

1. As part of the Economy and Culture Scrutiny Committee's work programme for 2012/13, a task and finish inquiry was undertaken titled *Small Business in Cardiff*. During this Inquiry a listening event was held in the Castle Arcade, giving small businesses in the city centre the opportunity to discuss the issues they face with Members of the Committee. A significant number of independent traders from the city centre arcades and Cardiff Central Market attended this event and voiced their concerns about the ongoing future of small businesses in the city centre. As a result, it was decided that a dedicated Inquiry should be undertaken as part of the Committee's 2013/14 work programme, focussing on 'Cardiff Central Market and the Historic Arcades'.

Historic Arcades

Arcades History

2. Cardiff is often referred to as the City of Arcades, given that it has the highest concentration of Victorian, Edwardian and contemporary indoor shopping arcades of any British city. The Arcades are considered to be one of the City's unique selling points and they reflect Cardiff's Victorian and Edwardian heritage, with many of their original features still retained.
3. There are six historic arcades in Cardiff, three in the 'Castle Quarter' and three towards the south of the city centre linking from St Mary Street through to the Hayes area. These arcades are:
 - High Street Arcade
 - Duke Street Arcade
 - Castle Arcade

- Morgan Arcade
- Royal Arcade
- Wyndham Arcade.

4. **Figure A** provides an overview of these arcades, including the year they opened. As seen in the table, all these arcades are well over 100 years old, providing an important link back to the history of Cardiff, while the surrounding areas have modernised and developed.

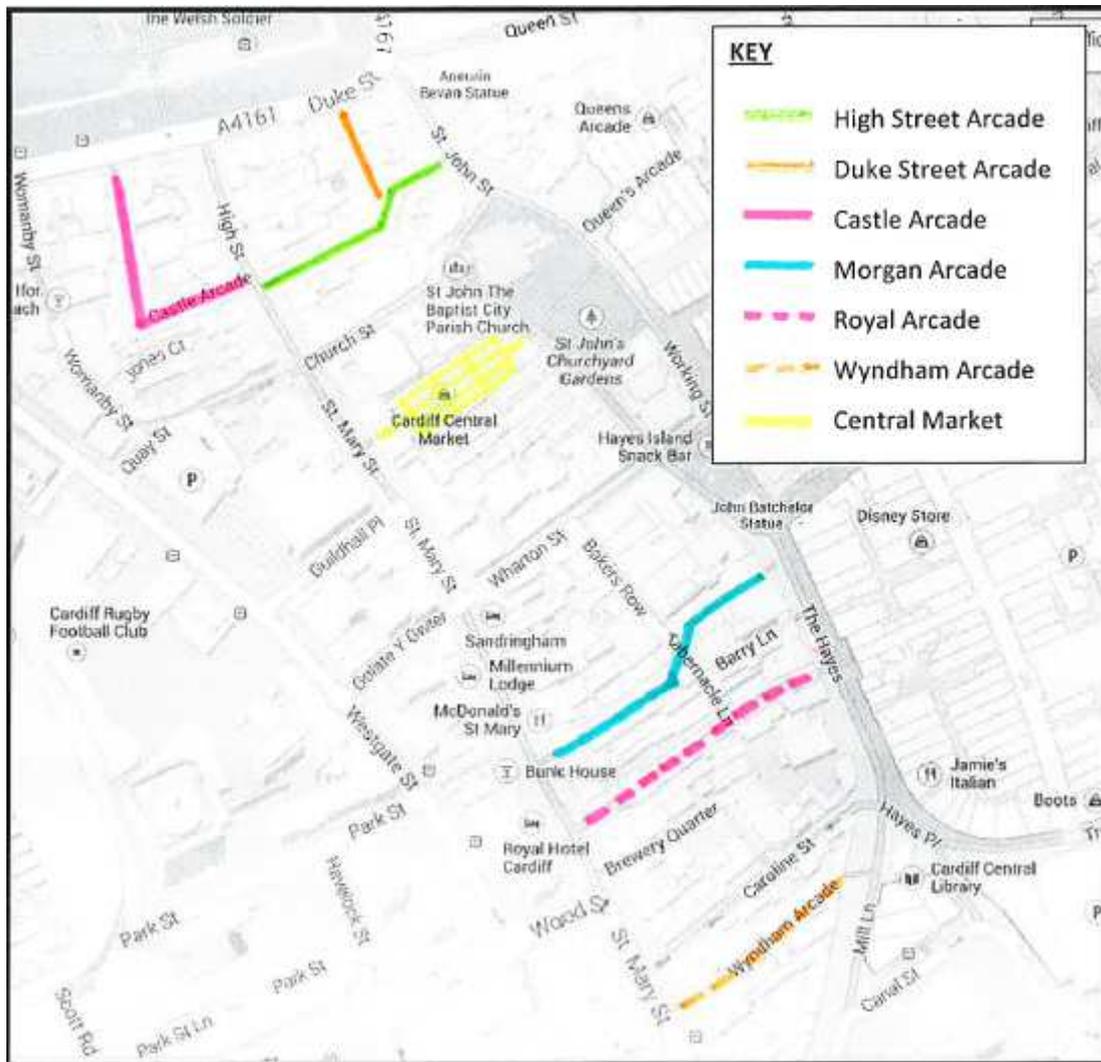
Figure B provides a map showing the location of these historic arcades and Cardiff Central Market.

Figure A - Victorian and Edwardian shopping arcades in Cardiff³

Name	Opened	Notes
Castle Arcade	1887	Castle Arcade opened in 1887 and is a Grade II* Listed building. As the name suggests, runs from opposite Cardiff Castle to High Street, north of St Mary St, in the Castle Quarter.
Duke Street Arcade	1902	Duke Street Arcade opened in 1902 is a Grade II Listed building. Duke Street Arcade joins High Street arcade, and is just opposite Cardiff Castle, in the Castle Quarter.
High Street Arcade	1885	High Street Arcade opened in 1886 and is a Grade II Listed building. It has entrances on High Street and St John Street in the Castle Quarter.
Morgan Arcade	1896	Morgan Arcade opened in 1896 and is a Grade II Listed building. It is the considered best preserved of Cardiff's arcades, with first-floor Venetian windows and original slender wooden storefronts. It has entrances on St. Mary Street and The Hayes.
Royal Arcade	1858	The Royal Arcade is the oldest arcade in the city, having been built in 1858. It is a Grade II Listed building. Royal Arcade still has some of the original shop fronts at numbers 29, 30 and 32 St. Mary Street. It runs from The Hayes through to St Mary Street.
Wyndham Arcade	1887	Wyndham Arcade is a Grade II Listed building. It opened in 1887 and has entrances on St. Mary Street and Mill Lane, running parallel to Cardiff's Café Quarter.

³ Adapted from http://en.wikipedia.org/wiki/List_of_shopping_arcades_in_Cardiff

Figure B – Cardiff City Centre map indicating the location of the historic arcades and Market



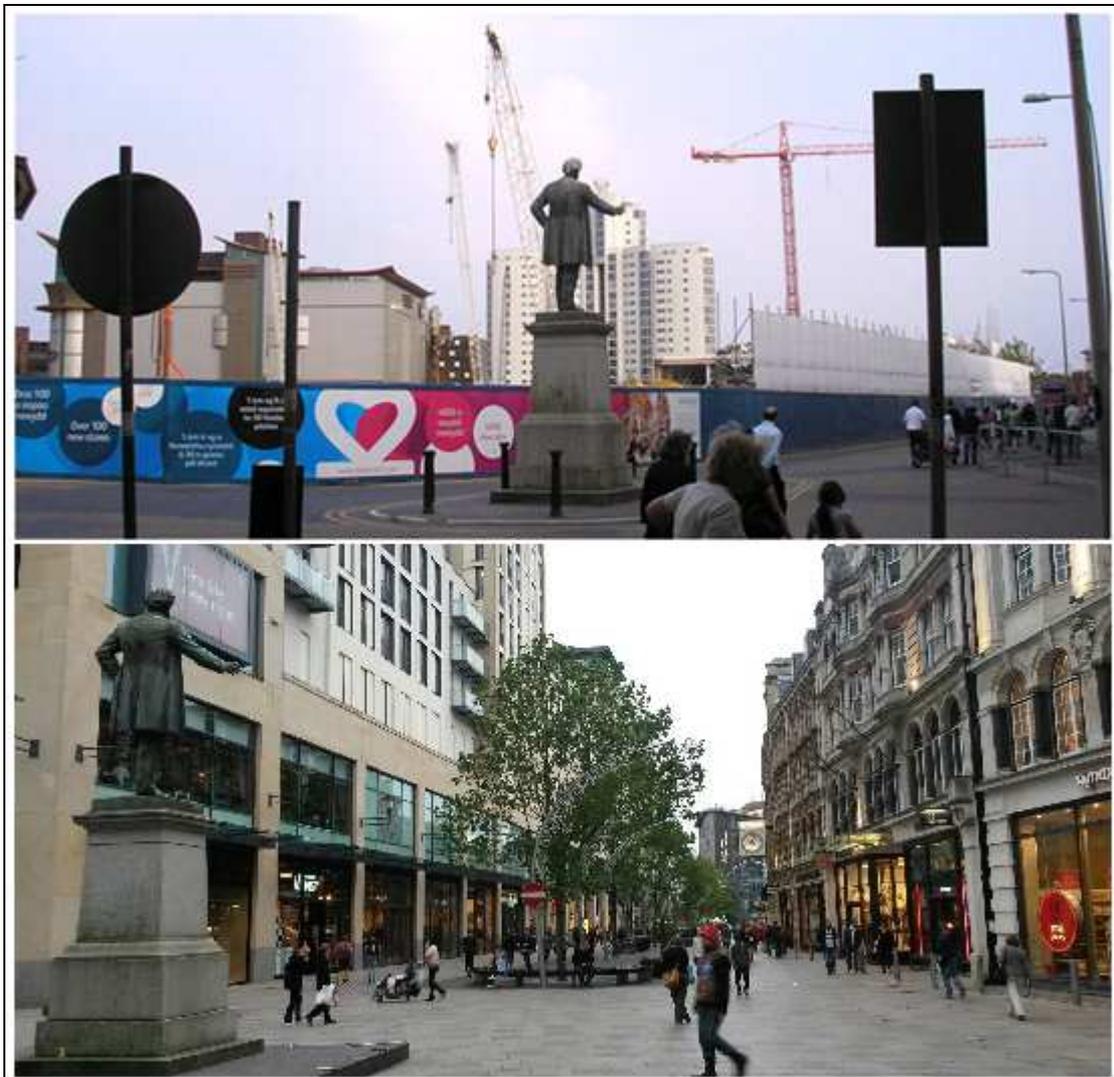
5. The arcades, which when constructed were symbols of modernity, are now preserved as historic monuments to the Victorian era. In 2009, artist Jennie Savage undertook the 'Arcades Project' in Cardiff, which explored what has happened between the building of the Victorian Arcades and the redevelopment of St Davids arcade. She comments that Cardiff's arcades *"have been 'Victorianised'; preserved to look like Victorian Shopping arcades in a form that we recognise as Victorian. However, they are still working spaces and an essential part of Cardiff's commercial economy."*⁴

⁴ The Arcades Project: a 3D documentary - http://www.arcadesproject.org/?page_id=3

Historic Arcades – Present

6. Cardiff and its city centre have changed dramatically since the historic arcades were opened in the late 19th and early 20th century. Significant change has also taken place very recently, with £675m invested in the expansion of St David's Arcade, which was completed in October 2009 (see **Figure C**). Further changes were completed in 2010, with the pedestrianisation of St Mary Street and High Street, opposite Cardiff Castle.

Figure C – St David's expansion and Hayes redevelopment



7. In order to gain an understanding of the current situation for traders within the historic arcades, Members met with a number of individuals who work in the

historic arcades and have been affected by the changes within the city centre. Members met with representatives of the companies that own the arcades in the Morgan Quarter and Castle Quarter respectively, and met with a store owner within the Castle Arcade. A consultation was also carried out by the City of Cardiff Council's Scrutiny Research team, with every unit within the historic arcades receiving a survey to complete - 46 of which were returned completed.

8. A representative of Ashdown Phillips, who manages the Morgan Quarter on behalf of its owners Helical Bar, met with Members to outline his experience working in Cardiff's historical arcades. He explained to Members that the arcades were what attracted him to work in Cardiff; there was a uniqueness to them that could not be matched by the modern shopping centres he had previously worked in. Members were informed that since acquiring Morgan Arcade, Royal Arcade and a number of shop fronts on St Mary Street and the Hayes, from the Morgan family, a further £26m has been invested in refurbishment and redevelopment.

Footfall

9. In relation to footfall through these arcades, Members were informed that approximately 100,000 individuals walk through the Morgan Quarter arcades each week. This footfall is a significant increase in the recorded levels for 2011, and a 3% rise from 2013. It was commented that the Hayes redevelopment and introduction of John Lewis has benefited the shop owners within the Morgan Quarter, with increased footfall through the arcades, as people enter town via the transport hubs at Central Square and travel through the arcades to shop in St David's or to access their place of work. It was stressed, however, that footfall does not automatically equal sales, and shops individually must attract this footfall into their store and generate sales through presentation, price and products.
10. A contrasting view was given by individuals who work within the Castle Quarter, who have not experienced increased footfall in the area, and feel that

the Hayes developments have diverted footfall and trade away from the Castle end of the city centre. The owner of Rules of Play, a shop within Castle Arcade, informed Members that footfall in the Arcade has been declining in recent years, and there are now empty units throughout the Arcade. The reason suggested for this being that the St David's redevelopment and onsite parking facilities mean that people have no need to leave the complex and no need to venture along St Mary Street and High Street.

11. This was a view supported by the Director of Curzon Real Estate, who at the time of undertaking the Inquiry owned the arcades within the Castle Quarter and also Wyndham Arcade on the opposite end of St Mary Street. The Castle Quarter arcades have since changed hands, with Mansford Investment group purchasing them for a reported £25m. The Director of Curzon informed Members that he felt the city centre was still finding its feet following the pedestrianisation of St Mary Street and the St David's development. While the arcades that link to the Hayes have benefited from increased footfalls, he felt the Castle Quarter arcades within his portfolio have suffered, with footfall shifting away from the Castle end of the city centre.
12. Members of the Inquiry were informed by the Council officer responsible for City Centre Management that footfall measurements have been undertaken for High Street, on which the entrances to Castle Arcade and High Street Arcade are located. Figures show that approximately 90,000 individuals walk along High Street each week, however only around 10% of these individuals cut through the Castle Quarter arcades.
13. He commented that the arcades are not doing enough to entice and attract potential customers through, and went on to say that, in his opinion, if these figures were presented to the manager of the Morgan Quarter arcades a strategy would be put in place to remedy the issue. However he felt that Curzon, the owners of the Castle Quarter arcades at the time, did not seem very responsive or have a plan of action to improve the situation.

14. In their meeting with the Director of Curzon, this point of view was rebutted, with Members being informed that Curzon has consulted with Council officers concerning the use of bus stops on Castle Street as a strategic method of reintroducing pedestrian flow and has made representations concerning the reintroduction of specific beneficial bus routes potentially benefitting the Castle Quarter Arcades along St Mary Street. Members also heard that Curzon had put promotional activity on hold pending the sale of the arcades to Mansford as they did not want to prejudice the new owner's plans in this respect.

15. The survey distributed to arcade shop owners contained a question asking how the number of customers has changed in their store in the past 2-3 years. As seen in **Figure D**, of the 46 shop owners who responded to this question, half (50%) reported that they have seen their number of customers decrease, while only 15% reported increases. A follow up question was asked exploring the level of decrease that individual shops felt they have experienced. **Figure E** shows that over half of the shop owners felt their number of customers was now 50–75 % of the level of custom they had enjoyed two to three years ago.

16. Shop owners were also given the opportunity to comment on why they felt there have been decreases in the number of customers in the past two to three years. The most common reasons given were:
 - the redevelopment and expansion of St David's Arcade taking away custom and diverting footfall;
 - a decrease in footfall through the arcades due to changes in bus routes;
 - high car parking costs;
 - the pedestrianisation of St Mary Street and High Street;
 - the recession.

Figure D – Arcade shop owners’ survey – How has the number of customers in your store changed in the last 2-3 years?

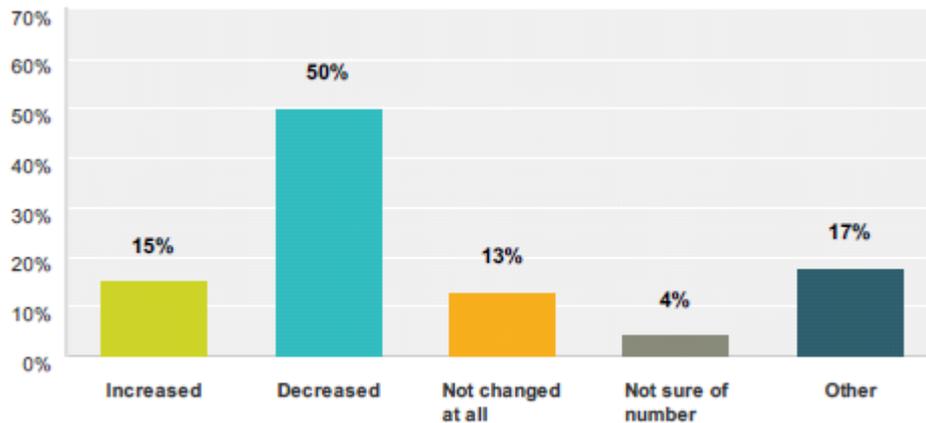
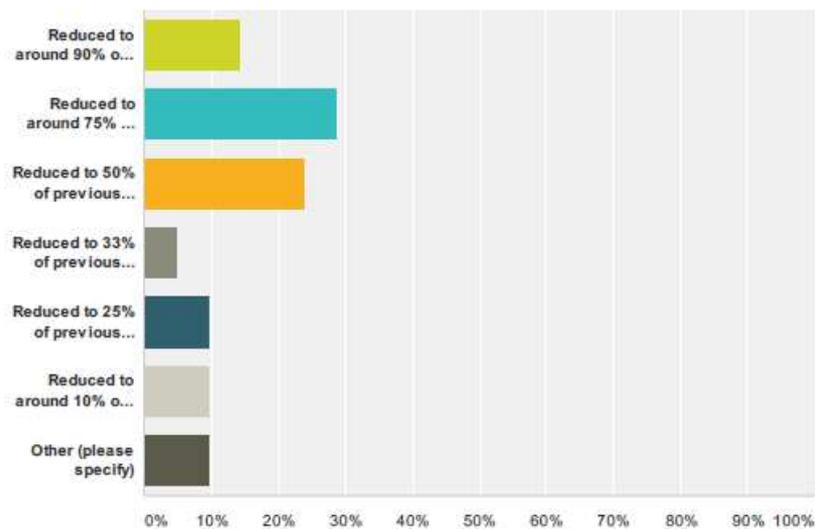


Figure E – Arcade shop owners’ survey – If the number of customers has decreased, how much has it reduced to?



Nationwide Decline

17. A Cardiff Metropolitan University academic with expertise in retail management and entrepreneurship met with Members to discuss her research and to give an overview of wider research and policy reports that have been recently published in relation to independent traders and the future of the high street. She highlighted to Members that the issues being faced by businesses within the historic arcades and the Market were not unique to

Cardiff. Across the United Kingdom, the future of small businesses and independents is a real concern.

18. One of the reports she shared with the Members, *The Grimsey Review – An alternative future for the High Street*, gives figures to support a view that the retail sector and high street has seen decline in customers in recent years, and that many businesses have been forced to close. It states that “*there are around 40,000 empty shops in the UK, and this has remained constant over the past three years*”.⁵

19. The *Grimsey Report* goes on to outline Company Watch data, which analyses the financial health of retail companies and can be used to give an indication of the financial fragility of the retail sector. The data shows that:

*“20,480 retail companies are in the Company Watch ‘warning area’ with a financial health rating (H-Score®) of 25 or less out of a maximum of 100. [...] Most concerning of all, almost two thirds of small retailers (with assets less than £20k) are in the warning area. [...] Over the past 15 years, one in four businesses in the Company Watch warning area has gone on to fail or undergo a major financial restructuring, suggesting that over 5,000 of these retailers will suffer this fate. The carnage among the even smaller, unincorporated retailers will of course be even greater still.”*⁶

20. The Cardiff Metropolitan University academic Members met with was however keen to emphasise that within the retail sector, and particularly with small independent businesses, it is natural that some may fail because they don’t have the right business model, or are not offering the right products. Equally, during the same period others within the arcades will have managed to grow their business despite the recession and despite all the changes in the city centre. Care must be taken if government or local government is to intervene to protect or support businesses that may not have adapted correctly to the current retail climate and demands of shoppers.

⁵ The Grimsey Review – An alternative future for the High Street (page 4)

⁶ The Grimsey Review – An alternative future for the High Street (page 15)

Opening Hours

21. An example given for where independent businesses and the arcades have not responded to changes in the demands of the modern consumer is in relation to shop opening hours. The expansion and redevelopment of St David's Arcade was accompanied by the introduction of longer open hours, with stores in the new arcade remaining open until 8pm on weekdays where previously only Thursday evening was the opportunity for 'late night shopping'. However the open hours of the historic arcades adjacent to the new development have not changed, with the majority of shops closing at 5.30pm.
22. As part of her research, the academic from Cardiff Metropolitan University has conducted a number of interviews with arcade store owners, and has received mixed opinions with regard to opening hours. Some owners indicated that they felt the idea was a 'no-brainer' and were willing to be flexible and adopt later working hours, while other owners indicated that they were already stretched to the limit in terms of the hours they can work and the number of staff they can employ, and so would not be able to afford opening any longer.
23. Members heard that, in the academic's opinion, the effects of the St David's redevelopment should now have settled given that it is almost five years since the new arcade was opened. Independent businesses need to be developing their business plans based on the current situation within the city centre and not expect any further dramatic changes. The St David's development has significantly increased the number of shoppers and amount of money being spent in Cardiff city centre on retail. Small businesses need to adapt and develop a strategy to attract custom from these new visitors to the city, who may well be unaware of the shops and products available within the historic arcades.

Promotional Activity

24. A number of witnesses to the Inquiry stated that the Council could be doing more to help independent traders in the city centre, particularly in relation to

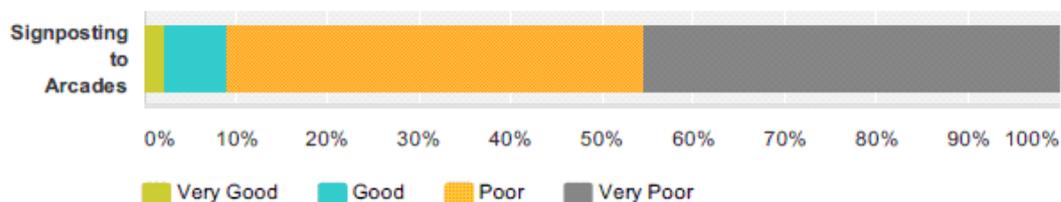
promoting the arcades to tourists and addressing the footfall issues in the Castle Quarter. It was commented by both the Cardiff Metropolitan University academic and the manager of the Morgan Quarter that Cardiff is not taking advantage of the unique selling point that the historic arcades bring to Cardiff, and that more promotional activity is required to do this.

25. A suggestion made to the Members of the Inquiry was that the Council could be using its social media accounts to promote the arcades to both local residents and visitors to the city. The Cardiff Council Twitter account was used as an example for this - an account which currently has over 27,800 followers.
26. A tweet promoting one of the arcades or an individual shop would have the potential to reach far more individuals than a tweet made by the shop themselves could ever hope to. Additionally a promotional tweet made by an independent business' account is likely to only be seen by individuals who already know about and make purchases at the shop, while a tweet made by the Council account could reach individuals who may never have visited the business, or not even know it existed.
27. It was suggested to Members that the Council could adopt a policy where the different arcades are promoted on a weekly rotation, or where a different shop within the arcades was promoted each day. A further suggestion was that individual shops or arcades could be promoted on the 'big screens' that exist throughout the city centre, in sync with any promotional activity being undertaken via social media.
28. Members are aware that the Council's advertising budgets are being reduced, with the authority actively seeking income to advertise businesses, and that local businesses have limited resources for promotional activity. It was felt that social media was a source of free exposure that the Council could be using to support businesses within the arcades, and to make individuals aware of the unique experience the arcades provide.

Way Finders

29. A perception exists amongst traders within the historic arcades that the 'way finders' and signposts in the city centre do not advertise the arcades enough and an opportunity to emphasise their history and uniqueness is being missed. The representative of Morgan Quarter management commented that Cardiff really should be taking every opportunity to shout about the arcades and drive tourists in their direction, as they are something that other cities in the UK do not offer.
30. This point of view came across in the survey carried out with traders from the historic arcades. When asked to rate various aspects or conditions related to the historic arcades, shop owners were given the opportunity to comment on signposting to the arcades. 91% of respondents gave a negative response, stating that signposting was either poor or very poor – see **Figure F**.

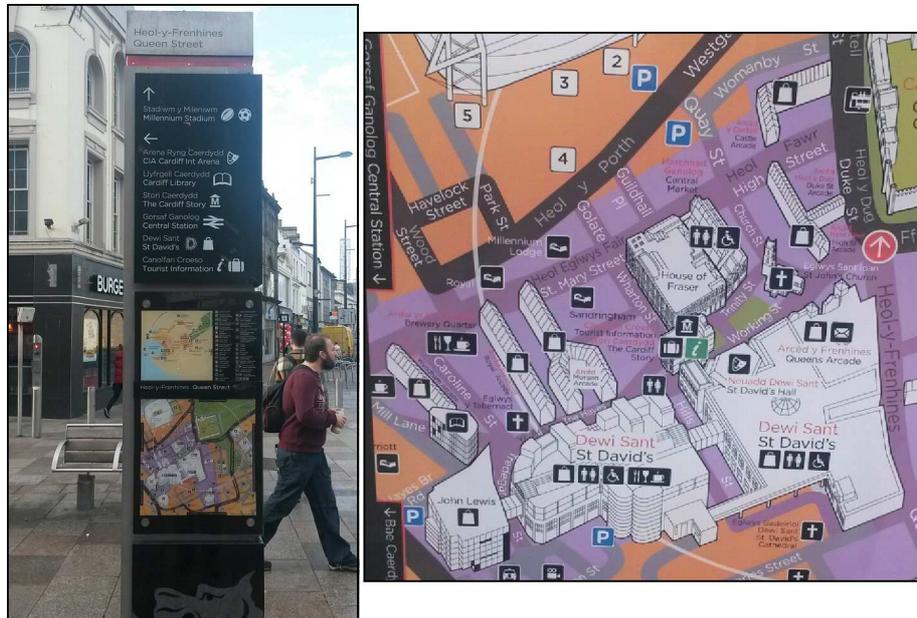
FIGURE F – How would you rate the signposting to the Arcades?



31. The public perception survey carried out gives a slightly more positive view of the signposting for the arcades; with 61% of respondents stating that signposting of the arcades was poor. Similarly negative views are given for the signposting of Cardiff Central Market from both the public and market stall owners.
32. Members were informed by officers that, contrary to public perception, the Council has invested in the 'way finders' across the city centre, and these do direct shoppers towards the historic arcades within the city centre. As seen in **Figure G**, the city centre signposting does direct individuals to both the new and historic shopping arcades. However traders are correct in that there is no

mention of the historical significance of the arcades on any of these 'way finders'.

Figure G – Way Finders in Cardiff City Centre



Way finder on corner of Queen St and St. John Street showing location of historic and modern arcades



Way finder on the Hayes giving directions to St Davids shopping centre and Cardiff Central Market

33. A Good Practice review undertaken by the Scrutiny Research Team highlights that the signposting of the Royal Arcade in Norwich, an 1899 shopping arcade within the city centre, is an example of good practice (see **Figure H**). The arcade is signposted throughout the city, and despite the development of major retailing centres within the city, remains a busy shopping and socialising centre. Each shop within the arcade has identical black and gold signage, including the signage on the alley entrance to the arcade which

features arrows pointing into the arcade and lists of the businesses within. In the blanked out windows, boards have been installed listing all the businesses operating within the arcade, with a style which matches the individual shop signage. This has been funded through a combination of private investment, service charges and local authority money.

Figure H – Royal Arcade Norwich



*Signage developed by Concept Sign and Display Ltd (<http://www.conceptsigns.co.uk/>)

Pedestrianisation

34. It was suggested to Members that the Council should be acting to help remedy the issues with footfall in the Castle end of St Mary Street and the surrounding areas, given that it was a Council decision to pedestrianise the area. The Director of Curzon suggested that a way to improve footfall in the Castle Quarter could be to reintroduce transport (such as buses and taxis) one-way, along High Street and St Mary Street. This would provide drop off points in the vicinity of the historic arcades and Central Market to boost the area, and would also help to address the air quality and pollution issues that exist on Westgate Street.
35. Members heard that the Director of Curzon supported the plans to pedestrianise St Mary Street and High Street when it was proposed in 2010. This was on the basis that the bus stops alongside the Angel Hotel would be used as a drop off point for many of the major routes into the city, with

commuters then cutting through the arcades to get to their place of work. However the Director stated that he now feels let down by the Council and that he was mis-informed. Had he known how the area would be affected, he wouldn't have supported it and wouldn't have encouraged shop owners within the Castle Quarter to support it too. While there are bus stops in place alongside the Angel Hotel, Members were informed that no major routes use them as a stop off point, or they have set down their commuting passengers at an earlier stop.

36. This was also a view that came across strongly from the survey undertaken with arcade shop owners. In response to the question 'What do you think should Cardiff Council do to help increase customer footfall or shopper numbers within the Historic Shopping Arcades?' a number of shop owners responded that they would like to see buses reintroduced along St Mary Street and High Street. Responses included:

"Let buses and cars go through the St. Mary Road. We need traffic in this road."

"Restore buses to the area - the Council has removed all bus stops away from us"

"A shoppers' bus dropping customers off in High Street/Mary St allowing them to walk through the Arcades"

"Cardiff Council needs to allow shoppers buses to be able to use the pedestrianised streets"

"Part pedestrianising St Mary's - I loved this change (I have noticed the air is much cleaner now that the buses do not run along that road) but this has forced people to alight at bus station and walk straight to the new centre."

37. Further suggestions that Members received during their meetings with various witnesses included reviewing the placement of pedestrian crossings outside

the Castle and improving the promotion of the Castle Quarter. Members were informed that the pelican crossing outside Cardiff Castle does not encourage people to travel through Castle Arcade, as it is not in their direct line of travel, while if the crossing was moved further along the road people would naturally be encouraged to detour through the Arcade.

Relationship with Council

38. It is clear to Members of the Inquiry that senior officers within the Council's City Centre Management team have worked hard to develop good relationships with the respective facility managers within the Historic Arcades. Members heard praise for the City Centre Management Operational Manager for taking time to listen to the Arcades and take on board their comments, with a representative of Ashdown Phillips, who has worked in a number of cities in the UK, commenting that he is one of the best City Centre managers he'd ever worked with.
39. These relationships are important to allow the Council and Arcade landlords or owners to undertake joint initiatives for the benefit of both the city centre and the individual arcades. For example, the Council worked with Ashdown Phillips/Helical Bar to advertise the Morgan Quarter arcades and to introduce large promotional banners and flags along the Hayes. Helical Bar has also contributed towards Council run events such as 'Step into Christmas' and fully involved the arcades within these campaigns. The Council has also successfully worked with Curzon to introduce initiatives such as 'menu boards' outside the Castle Quarter arcades, however Members heard a view that Curzon at times has not been ready and willing to work together with the Council on promotional activities for the benefit of the area.
40. In meeting with the Director of Curzon, Members heard that working with the Council on initiatives to boost the Castle Quarter area has at times been a source of frustration. Curzon was one of the prime promoters of St Mary Street outdoor market, which was proposed to be established outside the Castle Quarter Arcades. However, when the market was set up, it was placed

100 yards further up St Mary Street outside the entrance to Cardiff Central Market. Members were informed that while this may seem only a small shift in the placement, it is perceived to be drawing custom away from the arcades. The Director of Curzon went on to inform members that positive discussions took place to move the market back towards the arcade entrances, only for Council officers to make an apparent u-turn and propose the market moves elsewhere.

41. The respective arcade representatives were also positive about the Council's planning officers, who have provided flexibility for the arcades to introduce different categories of shops to fill vacant premises. Members were informed by the Director of Curzon that planning officers should be applauded for recognising the difficulties that were being faced in filling vacant shops, and for allowing A3 premises (premises which are to sell "food and drink") to be introduced in the arcades, rather than just purely retail outlets. As a result, coffee shops such as Barkers in Castle Arcade could be established, which is successfully drawing custom and footfall back to the arcade.
42. This approach of planners working with landlords is something that is supported in an Advisory Group report to the Scottish Government, *Community and Enterprise in Scotland's Town Centres*. It comments that *"Planning policy for town centres should be simple and proactive, encouraging public, private and social enterprises to be creative in how they create and retain jobs, support the local community, support town centre living, contribute to creating a sustainable, low-carbon environment and realise locally agreed vision and plans."*⁷
43. In meetings with traders who own stores within the arcades, and officers who work closely with them, Members heard how important the work of facility managers and landlords is in contributing to the success of an arcade. Praise was given to those responsible for the Morgan Quarter for the strategic approach they have taken to promotional activity, their willingness to invest

⁷ National Review of Town Centres External Advisory Group Report: Community and Enterprise in Scotland's Town Centres

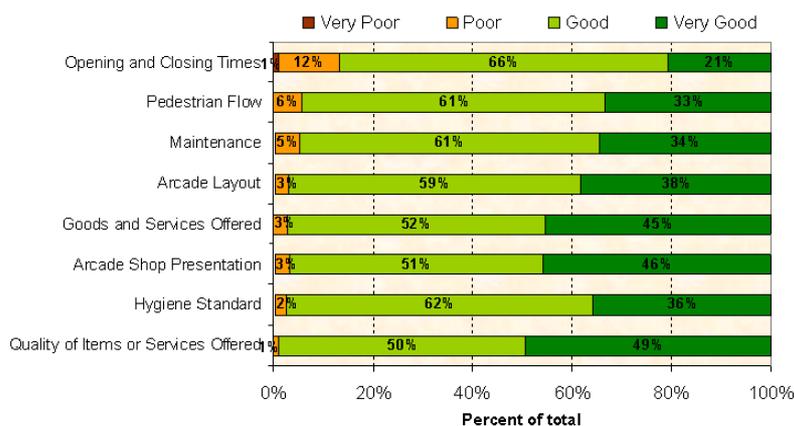
money in redevelopment of the arcades and for working with the Council on various initiatives.

44. However witnesses were not as positive about those responsible for the Castle Quarter arcades, with Members receiving comments that the Landlord was not particularly proactive in promotional activity and not very innovative in their response to the issues faced by the arcades. In this respect it should be noted that the Director of Curzon informed Members that promotional activity has been put on hold in recent months pending the sale of the arcades.
45. Members feel it will be particularly important for the Council to develop a relationship with Mansford Investment Group, the new owners of the Castle Quarter. Members recognise that the Castle Quarter is affected by reduced footfall and that a number of traders may be forced to move on if the fortunes of the Arcade continue to decline. It is hoped that the early development of good relationships will result in promotional activities and other initiatives undertaken in partnership with the owners could help turn around the arcades and the shops within.

Public Views on Historic Arcades

46. A public perception survey was undertaken by the Scrutiny Research Team, which received a total of 2,048 responses (1,815 completed online and 233 collected 'on-street'). The public were asked to give their views on various features and conditions within the historic arcades as part of the consultation undertaken by the Scrutiny Research Team. **Figure I** shows that the vast majority of respondents gave positive responses about the various features, with only "opening hours of the arcades" given a noticeable level of poor ratings – an issue covered previously in this report.

Figure I – Respondents’ ratings of the conditions and features of the ‘Historic Shopping Arcades’



Cardiff Central Market

Historical Overview

47. Cardiff Market has been trading in one form or another since the 1700s. Originally a farmers' market trading in livestock and farm produce, Cardiff Market has evolved over the centuries to suit the changing needs of traders and consumers both locally and further afield.

48. Central Market has been in its current location for well over 100 years, with its official opening on 8 May 1891 by the Lady Mayoress of the day, the Marchioness of Bute. A plaque to commemorate the occasion can still be seen near the Trinity Street entrance. 349 stalls were provided in the original layout, ranging from simple open counters to lock ups. There was a determined attempt to group tenants by trade and to confine non-food sales to the balcony in an effort to ensure that shoppers did venture upstairs. A raised office for the Market Superintendent was provided on the ground floor surmounted by a clock tower – this is still used by the Market Manager.

49. Cardiff Central Market was a popular shopping venue in late Victorian Cardiff, complementing the arcades as a location for small, specialist retailers. Ashton's Fishmongers, one of the best known stallholders in the Market today,

have been tenants since the opening. In 1930 the firm claimed to have been tenants in the previous market since 1866. Marks & Spencer also opened one of their original 'penny bazaars' in Cardiff Central Market in 1895, and have had a presence in Cardiff city centre ever since.

Cardiff Central Market – current

50. Central Market is currently owned by Cardiff Council and is managed by the Strategic Estates Group. Stalls within the Market are rented from the Council, and an additional service charge is applied to cover running costs. Many of the 243 stalls within the Market have been combined to create larger areas and are occupied by 66 stallholders.
51. Cardiff Central Market is currently operating at near full capacity, with one or two stalls vacant at any one time while they are prepared for new tenants. There is a range of produce available, balancing traditional stalls such as green grocers, butchers and florists with a number of cafes and deli counters and more specialist items such as a vinyl records stall.
52. As part of the inquiry, Members have received evidence from two national organisations, the National Association of British Market Authorities (NABMA) and the National Market Traders Federation (NMTF). A report from NABMA refers to the market as *“an architectural gem for the City of Cardiff and the retail market industry in Wales”*⁸, while a written submission from NMTF commented that Cardiff Central Market was *“a really impressive market hall plonked bang in the middle of the city, [...] The market has full occupancy and has everything needed in a market.”*⁹
53. The report from NABMA, which was a basic market health check available to member authorities, did, however, highlight that improvements can be made within Cardiff Central Market. It states that Cardiff has *“an asset that works at an acceptable level for now but has yet to reach its full potential”*.

⁸ NABMA – Cardiff Market Health Check: Visit Wednesday 14th May 2014

⁹ NMTF – Cardiff Market Visit, Thursday 6th February 2014

Disinvestment

54. Research undertaken by the Scrutiny Research Team suggests that local authorities across the United Kingdom are linked with disinvestment in their markets. This disinvestment is seen as partly responsible for the decline in the fortunes of traditional markets. It is suggested that inappropriate departments of the Council are given responsibility for the management of markets, and as a result officers do not have sufficient retail experience to drive the market and respond to challenges.
55. This is a view given by Gonzalez and Waley in their report *Traditional Retail Markets: The New Gentrification Frontier?* This report states that “markets may have become urban blind spots, where local authorities have often failed to make the right connections with wider policy agendas, but have tended to limit themselves to a regulatory role, granting licenses and making sure that markets meet health and safety regulations; their management has been the responsibility of inappropriate departments of local government (Kirkgate Market in Leeds, for example, was for years under the control of the council’s asset management team) [...]. However, markets have been treated as “cash cows” by local authorities, collecting rents from traders that go into the public budgets with little reinvestment, resulting in a general state of physical decline (House of Commons 2009).”¹⁰
56. This was an underlying criticism made of Cardiff Council and its management of Cardiff Central Market through the Inquiry. As in Kirkgate in the example above, Cardiff Central Market has traditionally sat under an asset management team and may not have benefited from management that would drive the market as a successful retail operation.

Maintenance and Upkeep Concerns

57. Throughout the Inquiry Members have heard that Cardiff Central Market is in desperate need of upkeep and maintenance improvements as it is beginning to look “tired” and “grubby”. On a tour of the Market, the Market Manager

¹⁰ Traditional Retail Markets: The New Gentrification Frontier? - Gonzalez and Waley (page 4)

highlighted to Members how the stalls on one side of the market had its roof upgraded a few years ago, while half did not, making the market look unattractive from the balconies. She also highlighted how the main roof of the market leaks, and a number of stalls need buckets on their roof to collect rain water and protect their stall – this can be seen in **Figure J**.

58. The Market Manager also commented that the current colour scheme within the Market is quite dull and maybe doesn't help attract tourists and new customers. As seen in Figure K, the current appearance of the St John's Church entrance to the Market can be compared with the brighter appearance it had a number of years ago.

Figure J – Cardiff Central Market, view from balcony



Figure K – St Johns Church entrance, now and then



59. These views were echoed by the Hon. Sec of the Cardiff Central Market Traders Association (CCTMA), who commented that the attractiveness of the Market needs to be addressed if it is to attract new and younger customers. This was reinforced within the survey undertaken with market traders, which was completed by 43 traders within the Market, where the following was commented;

“[the market] badly needs good clean and decorate - has not been done for 25 years”

“make [the market] more welcoming. Paint [it] brighter. [It is] so dark and not welcoming at the St Mary Street entrance”

“[the market is] dark, dingy and depressing in the winter. The lighting should be scrapped and replaced with bright, welcoming lighting. Modern shoppers don't want to shop in a dirty, cold, dark place”

60. The St Mary Street entrance to the Market was also singled out as an area of concern for traders and market management. Not only is the entrance reasonably dingy, but the flooring is cracking, and the H Samuel clock (**Figure L**) is far from its former glory, lacks working hands and gives a poor appearance to the Market before people have stepped inside.

Figure L – H Samuel Clock, St Mary Street entrance ¹¹

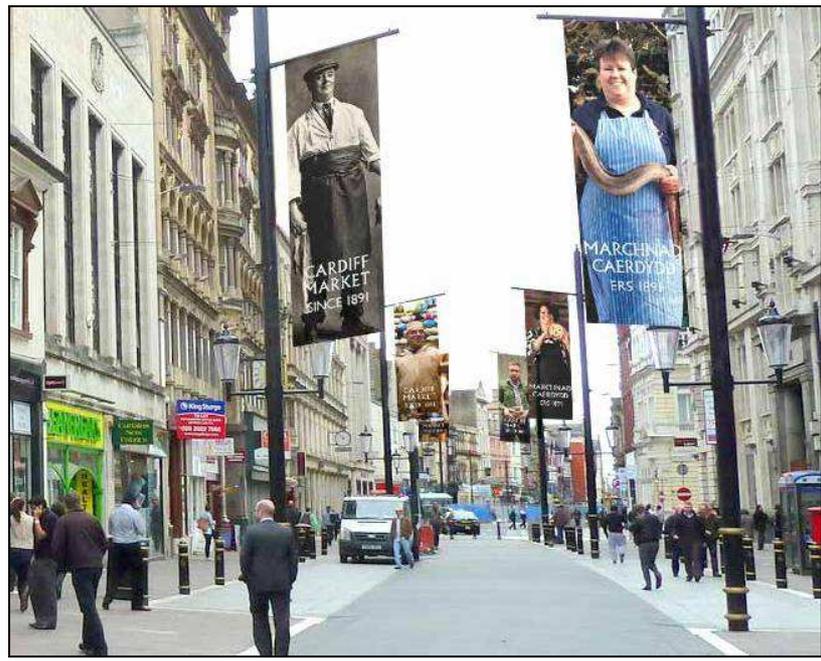


¹¹ <http://www.urban75.org/blog/photos-of-cardiff-central-market-a-victorian-indoor-market-in-the-castle-quarter-wales/>

61. Members of the Inquiry met with the Council's Operational Managers for Strategic Estates and City Centre Management, where it was acknowledged that the 2009/10 refurbishment in the Market was not completed, and that the Market is starting to look dated. It was commented that the Market may have been left alone for too long and now is the time for the Council to realise the potential of one of the greatest assets it owns.
62. The Council's City Centre Manager informed Members that the Council is looking at how the Market can be rebranded and diversify in order to attract new customers, and he shared plans that have been developed as a potential new look for the Market. As seen in **Figure M** this rebranding focuses on the heritage and history of the Market, and making the Market a destination to visit with the city centre. Members were informed that work is in place to explore funding opportunities such as Heritage Lottery funding in order to address the upkeep of the Market.

Figure M – Potential rebranding of Cardiff Central Market





63. Members were given the example of Stockport Council as an illustration of a successful regeneration project for a covered Victorian market. The Council secured just under £1m Heritage Lottery grant funding in 2006 in order to restore Stockport Covered Market Hall. The restoration project aimed to maintain the building's original function and character while vastly improving the facilities offered, and has subsequently won numerous awards for conservation and regeneration.¹²
64. The City Centre Manager was, however, keen to stress that there is no point in putting resources into a rebranding and promotion of the Market if the retail operation within has not been addressed first. Regardless of how well promoted the Market is, if customers are greeted by a dirty building, with poorly presented stalls, they will not shop there or encourage friends to visit. The image of the Market that is promoted needs to match what greets potential customers when they walk through the doors.
65. A move towards an emphasis on the historical importance of Cardiff Central Market is something that was also suggested by the Hon. Sec of the CCMTA. He informed Members that the St Mary Street entrance to the Market has historical significance to Cardiff, with Dic Penderyn, who is considered a Welsh martyr, being hung there following the Merthyr Rising in 1831. He felt that the small plaque in the entrance to the Market doesn't do this justice, and that a revamp of the Market could take advantage of the wealth of history that Cardiff has, as it is something not many current residents let alone tourists are aware of.
66. Council management also commented that the Council currently lacks a vision for the Market, and as a result business plans and improvement strategies are not in place to drive improvements within Cardiff Central Market. A long term strategy and programme of activity is required in order to guide improvements for the Market.

¹² <http://www.stockport.gov.uk/services/environment/planningbuilding/conservationheritage/projects/completedprojects/coveredmarkethall>

Central Market – Tenant Relations

67. In meetings with Council Officers, market traders and the Hon. Sec of the CCMTA, it became apparent to Members that there are some issues preventing a robust and productive relationship between the Council and market traders, and there have been a number of disputes in recent years. It was highlighted that these relationship issues may hinder any progress or improvement plans for the Market, and everyone involved in the Market must be working together towards a shared vision for plans to truly be successful. The key points of dispute between the Council and traders are surrounding historic rent reviews, service charge apportionment and the proposed introduction of formal tenancy agreements with the Council.

68. A paper submitted to Cabinet in September 2013 titled *Cardiff Central Market: Management Review* gave an overview of these issues. In relation to the introduction of formal tenancy agreements the report states;

“Historically the Market has operated without tenancy agreements relying instead on custom and practice. However, good tenant management practice is such that a draft tenancy agreement was produced in 2009 for consultation with the tenant representative body (Cardiff Central Market Traders Association - CCMTA). [...]In addition, a risk assessment audit of market operations was conducted during 2012 by the council's insurers, Zurich Municipal which resulted in a mandatory requirement for the Council to put in place formal tenancy agreements with all its tenants by November 2013.”¹³

69. The paper explains that this introduction of tenancy agreements was initially resisted by the CCMTA, while a number of newer tenants have agreed to accept them. In meeting with Council officers, Members were informed that the deadline of November 2013 was not achieved and that final amendments were being made prior to them being circulated to all traders within the

¹³ Cardiff Central Market: Management Review, Cardiff Council Cabinet paper, 23 Sept 2013

Market. Once in place, there will be agreed practices in place that should assist the improvement plans for the Market.

70. In meeting with the Hon. Sec of the CCMTA, the representative group for market traders in Cardiff, Members were informed that a number of traders within the Market feel that the Council owes them money following a rent review undertaken in 2010. It is claimed that the Council did not back date the payment to the correct date and that traders are not content with the level of repayment received.
71. This rent review is referenced in the September 2013 Cabinet paper which states that the level of repayment has been agreed and underlined the need to get tenancy agreements in place that will set out future rent reviews. The report states;

“There is no formal rent review mechanism in place, but the council has a statutory power to revise the rents as it determines from time to time provided that the revised rents are reasonable in the circumstances. Prior to 2010 the previous review took place in 2001 when a standstill rent was agreed. [...]

Whilst the overall expectation was that rents would increase, this fundamental and more wide-ranging reassessment meant that many rents in practice actually reduced. At the time of review the council endeavoured to secure an agreement with tenants involving two other issues of tenancy agreements and the apportionment basis of service charges. Protracted negotiations continued on these without positive conclusion for over a year at which point the Council reached agreement with the CCMTA on the rent review aspect only and agreed that the review should be applied with effect from 1 June 2011 and fixed until 1 June 2016. Legal advice was that, in the absence of formal provisions specifying a review date, it was not possible to backdate the agreement. However, as a gesture of goodwill the Council agreed, on an ex gratia basis, to reimburse those tenants whose rents had reduced, the amount of the additional rent they had paid during the intervening period from April

2010 and further agreed not to retrospectively seek rent increases from those tenants whose rents would have increased.”¹⁴

72. It must however be noted that the content of the Cabinet report referenced above is a source of discontent for the CCTMA. The Hon. Sec of the CCTMA informed Members that much of what is contained within the report is inaccurate or false and has subsequently been disputed with the Council, particularly issues in relation to the back dating of the rent review. Members of this Inquiry had reservations about immersing themselves within the intricacies of this debate, particularly where there is talk of legal action, but feel it is diligent to record their awareness of this dispute regarding the accuracy of the report presented to Cabinet.
73. Members were informed by the Council’s Director of Economic Development that agreement in principle has been reached with traders and that he is confident no legal proceedings will be taken against the Council. He and Council officers commented that in recent months progress has been made with regards to the relationship with the CCMTA and the traders it represents. Recurring meetings have been put in place to discuss issues in the Market and for the Council and traders to work together to resolve them. This was a view echoed by the CCMTA Hon. Sec, who informed Members that since the Economic Development Director has come into post these meetings have helped the relationship with the Council improve and that the Director had good ideas on how to push the Market forwards.

Blue Line Enforcement and Byelaws

74. A further issue highlighted by the Market Manager was the inability to enforce rules within the Market, and it was commented that the introduction of tenancy agreements will help remedy this. One particular rule highlighted by the Manager, and by traders within the survey undertaken with Market traders is the fact that many stalls do not adhere to their allocation of space within the

¹⁴ Cardiff Central Market: Management Review, Cardiff Council Cabinet paper, 23 Sept 2013

Market. The space that each stall is allocated is demarcated by a blue line painted on the market floor – these lines define the outermost space that stallholders can take up for their goods to be displayed. The spacing of these lines also ensures that sufficient space in the Market is given for walkways, disabled access and to ensure the Market complies with Health and Safety regulations.

75. Members were informed that a number of stalls are advertising their goods outside of these blue lines, clogging up walkways and not allowing enough room for individuals in wheel chairs or mobility buggies to move freely around the market. The Market Manager indicated she is limited in her ability to force traders to comply with the blue lines because there are no formal tenancy agreements in place, and the byelaws governing the market only allow for a £25 fine to be made.

76. This issue is something that traders themselves highlighted within the Central Market Stall Holders Survey, with some traders feeling that others flaunting the market rules to the detriment of the market as a whole. Comments included;

“Regarding building out to blue lines. People are taking advantage of the leniency being showed by the Council management. Thus we are getting unsightly constructions blocking the aisle way which is not in keeping with the rest of the market.”

“Keep all stalls behind blue line for better flow for customers and wheelchairs”.

77. Having heard about this issue Members reviewed the byelaws that are in place for the Market. These byelaws, made in 1988, provide the rules for the running of Cardiff Central Market, including the market open hours, trading guidance and how to keep food free from contamination. While many of the byelaws appear sensible, Members commented that some may be restricting changes from taking place in the market and that some also seem to be ignored by traders.

78. For example, the byelaws clearly state *“No occupier of a stall shall allow or cause good in his charge to be placed on any stall or space so that such goods project beyond the allotted limits assigned to such stall or space”*. However as already commented, this byelaw is ignored by a number of traders and the Market Manager feels limited in her ability to enforce this rule.
79. The byelaw outlining the open hours for the market was seen as restrictive by the Members of the Inquiry. It states that the Market is allowed to open Monday – Saturday, from 8am to *“such hours as the Council may from time to time appoint being not later than 6 pm nor earlier than 1 pm.”* Members are concerned that this byelaw will create issues should it be decided that the Market should explore opening on Sundays, given they are the second busiest shopping day in the city centre behind Saturdays.
80. This was a view that was supported in the surveys undertaken with market traders and members of the public. Comments from traders included;
- “Personally, I feel the market should get in line with the rest of the town and open on Sundays.”*
- “I think tourists are often surprised / disappointed to find the market shut on Sundays.”*
- While members of the public commented;
- “I would really like the Indoor Market to be open later one day a week. It is extremely difficult to get to the market in the week as I don't work in the city centre and it is very difficult to park on a weekend. If the market was open one day a week later such as on a Thursday I would be more inclined to pop in and buy my goods after work.”*
- “Sunday opening and late night shopping (as I work full time office hours and I don't go into city centre on Saturdays)”*
- “I would visit the arcades on a Sunday but they are shut!!”*

81. As mentioned by the Market Manager, the byelaws outline the penalty that can be applied to traders who do not comply with the market rules and regulations. *“Any person who offends against any of the provision of these Byelaws shall be liable on summary conviction to a fine not exceeding Twenty Five pounds.”* Members were concerned that this level of fine is no longer sufficient to act as a disincentive to traders who break the rules, as demonstrated by those who do not comply with the ‘blue line’ regulations. As part of any revamp of the market or a promotional push, Members feel it is important that the byelaws that dictate the rules within the market are reviewed and amended where necessary.

Potential Improvements in the Market

i) Social Media

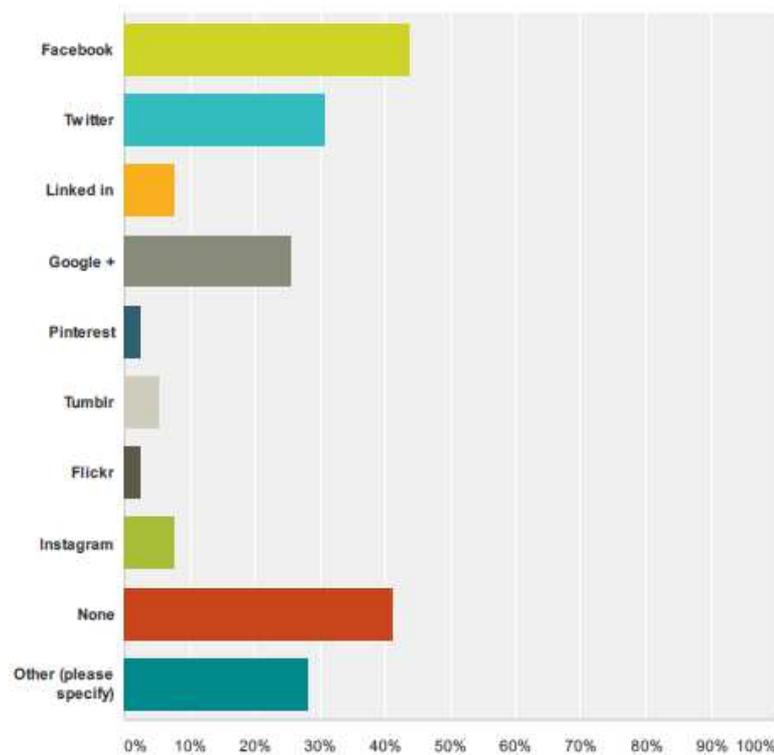
82. A number of further suggestions were made to Members throughout the course of Inquiry that could help improve the market and help attract more custom through its doors. A social media presence was highlighted as an important opportunity that many market traders are missing or have been slow to embrace. Research undertaken by the Scrutiny research team showed that 41% of respondents to the market survey have no presence on social media (see **Figure N**).

83. This is particularly concerning in light of statistics shared with Members by the academic from Cardiff University. Figures from an Experian study *Town Centre Futures 2020* show that there have been significant increases in m-commerce and use of social media while shopping, and this is something retailers and traders must embrace. The figures given are as follows;

- 73% of connected smart phone users use their phone while shopping
- 45% of mobile users in the UK aged 16 and above use a Smartphone
- 69% of Smartphone users regularly surf the internet
- 71% of Smartphone users search to find information about goods and services after seeing an advert.¹⁵

¹⁵ Town Centre Futures 2020: An Experian Marketing Services White Paper (Sept 2012)

Figure N – Market trader survey: Which of the following social networking websites do you use?



84. As discussed with regards to the historic arcades, Members felt there may be a place for the Council to promote the market more via social media and to highlight the individual traders or products available within. A social media presence will also be particularly important in line with the potential rebranding of the market in order to attract a new demographic of customers.
85. A further suggestion related to the growth of m-commerce is to provide free wi-fi coverage within Cardiff Central Market. Members are aware that the city centre already has a number of free wi-fi hotspots, and feel it is important for the market to be covered by any future plans to expand coverage. It is felt that individuals will be more likely to stop by the cafes within the market if they were guaranteed to be able to connect their laptops or phones to free hi-speed wi-fi.

ii) Love Your Local Market

86. Following a recommendation made in the September 2013 Cabinet paper titled *Cardiff Central Market: Management Review*, Cardiff has joined the

National Association of British Market Authorities (NABMA). This has given Cardiff Council access a range of services offered by NABMA, including the market 'health check' discussed previously. Council officers informed Members that Cardiff was exploring the possibility of participating in the NABMA *Love Your Local Market* campaign (LYLM).

87. As stated on the NABMA website, *“Love Your Local Market is a fortnight’s celebration of our market scene and culture that takes place in May. In 2013 we witnessed 700 markets participate throughout the UK, giving thousands of new businesses a chance to test trade. Thousands more educational establishments, charities and social enterprises also participated, re-establishing markets at the heart of community life.”*¹⁶
88. While members recognise that a significant number of the markets involved are on street markets or markets with unoccupied stalls, they felt that participation in the 2015 campaign is something Cardiff Central Market should be involved in as a means to create new interest and awareness in what’s on offer within Cardiff market. This is recognised within the LYLM Guide for Market Managers, which gives the example of Ludlow market which has participated in LYLM in previous years.
- “The focus on New Traders didn’t suit all markets. In Ludlow, for example, there is a waiting list for pitches. The need there is more about driving footfall into the market, and the LYLM promotions gave a welcome boost.”*¹⁷

iii) Work Experience

89. The Good Practice review undertaken by the Scrutiny Research Team highlighted the opportunity for work experience placements to be undertaken with traders within the market. Nottingham’s Victoria Centre market was identified as a market that provides young people and job seekers with work experience. The NMTF has also launched a scheme aimed at tackling youth unemployment by providing work placements within markets.

¹⁶ <http://loveyourlocalmarket.org.uk/what-is-love-your-local-market/>

¹⁷ Making the Best of Love Your Local Market 2013 – Practical Guide for Market Managers, NABMA

90. Members feel that this opportunity to provide young people and job seekers experience of working in a small business and market environment could help inspire a new generation of entrepreneurs and business owners in Cardiff, which could help boost the independent section in the city. Members also felt there could be an opportunity to dedicate vacant stalls within the market exclusively to new traders or start up businesses, providing them with the opportunity to gain retail experience before establishing their business elsewhere

Local Currency

91. The idea of the development of a local currency in Cardiff has been explored previously by the Economy and Culture Scrutiny Committee in its *Small Business Inquiry* completed as part of the 2013/13 work programme. This resulted in the following recommendation;

[The Committee recommends that the Council's Cabinet] Considers the feasibility of introducing to Cardiff a scheme similar to the Bristol Pound.¹⁸

92. In summary, the Bristol Pound is designed to encourage money to be spent and retained within the local economy, with £B1 equal in value to £1 sterling. The Bristol Pound is a complementary currency, designed to work alongside sterling, not replace it. It is run as a partnership between the Bristol Pound Community Interest Company and Bristol Credit Union, and is a not-for-profit social enterprise. The public can spend Bristol Pounds at every participating business using either paper Bristol Pounds or from a Bristol Pound account with any mobile phone by a TXT2PAY SMS payment system, or over the Internet. A similar local currency is in place in Brixton, London and Totnes, Devon.

¹⁸ Small Business: Cardiff Economy & Culture Scrutiny Committee Inquiry Report (recommendation 13)

93. In speaking with independent business owners and managers of the respective arcades, it is clear that support still exists for the development of a local currency in Cardiff. The owner of Rules of Play (Castle Arcade) can be seen as the driving force behind the local currency in Cardiff. She informed Members that she truly believes it could work in the city, and in July 2014 the BBC reported that she is launching a feasibility study into the ‘Cardiff Pound’ (Figure O).
94. The facility manager of the Morgan Quarter indicated that he would be supportive of the introduction of a local currency, and felt that a number of traders would need to be convinced of its benefit before they committed to it. Members of the Inquiry who had also been part of the previous *Small Business Inquiry* were keen to stress that such an initiative must be driven by the independent sector itself, with the Council playing a supportive role. It was highlighted that an important factor to the Bristol Pound was that the Council accepts it in payment of business rates and Council Tax. Additionally, the Bristol Credit Union acts as the ‘bank’ for Bristol Pounds, and it was commented that this Credit Union was more established than that in Cardiff, and the Council might well be required to take on this role in Cardiff.

Figure O – BBC coverage of ‘Cardiff Pound’ feasibility study¹⁹



¹⁹ <http://www.bbc.co.uk/news/uk-wales-south-east-wales-28539490>

Good Practice and previous Committee work

Good Practice - Wrexham

95. In scoping this Inquiry, Members were made aware of a similar inquiry undertaken by Wrexham Council's Employment, Business & Investment Scrutiny Committee. Recommendations made as part of the Wrexham Inquiry included;

- to commission a specialist market development company to undertake a fully costed feasibility study to consider options for the long term future development of the town centre markets in Wrexham
- to ensure that the Market Manager's role includes supporting applicants through the application process, actively promoting links with the Council's Business Support Officers and introducing tenants to the market environment via an 'induction' and information pack.
- To undertake a survey of market traders and market shoppers in order to establish a 'benchmark' against which the outcomes of the planned improvements can be measured annually.
- For the Committee to schedule monitoring reports that include performance data on the market.

96. Cardiff Scrutiny officers made contact with officers and Members from Wrexham seeking advice on lessons learned during the inquiry, any 'quick wins' that were identified during their work and any improvements they developed that do not have financial implications for the Council. The advice received included the following points;

- Consider the vision for the markets before day to day running issues,
- Maintain open and honest dialogue with market traders throughout the period of the review and involve them in meetings where they can

- Establish clear measures to evaluate the success of outcomes desired outcomes and recommendations, such as measures of footfall, measures of income and market occupancy levels.
- Review the management of the market in areas such as cleaning arrangements, staffing structure and the stall letting process
- Address any issues relating to the appearance and 'ambience' of the market, including the signage and branding used and the promotion of historical importance.

Members would like to express their gratitude to colleagues from Wrexham Borough Council. They welcomed this advice and could see that these areas of advice were applicable to the issues within Cardiff Central Market.

97. The submission received from Wrexham also stressed the importance of identifying quick wins within their Inquiry, where small changes can demonstrate the commitment of the Council in making improvements and investment that will enhance the experience within the market. Members in Cardiff felt that this advice will be particularly applicable to Cardiff market in terms of making a clear statement to traders and customers that the future of the market and addressing the issues that exist there are being taken seriously.

Previous Scrutiny Inquiry

98. As mentioned previously, the Economy & Culture Scrutiny Committee undertook a *Small Business* Inquiry, which was received by to the Cabinet in June 2014. Members recognise that there are potential overlaps in the terms of reference of their current inquiry and the one previously completed. As a result, there are some issues that Members did not wish to raise again as part of this inquiry, but rather wish to endorse the recommendations the Committee has previously made, as these have not yet received a formal response from the Cabinet.

99. The first recommendation the Members wish to endorse, as previously touched on in this report is in relation to the development of a local currency for Cardiff.

100. The second recommendation Members wish to endorse relates to educating small businesses about business rates. The recommendation states:

“[The Committee recommends that the Council’s Cabinet] Seeks to work with and educate the small business community about business rates. In particular: ask the Cardiff Business Council as part of its ongoing work with the small business sector to address concerns expressed by small businesses in key findings eight, nine and 10 above; and use various means (such as enclosures in annual rates bills and increasingly via online media such as the Council’s website and Twitter) to help businesses understand that whilst the Council is responsible for the collection of Business Rates it is not responsible for the allocation of the monies.”²⁰

101. Members felt it important to endorse this recommendation as it is clear there is still confusion relating to business rates amongst the small business community. In response to the surveys undertaken with arcade shop owners and market traders, numerous comments were received regarding rates being too high and the Council needing to reduce them to support businesses. However as the *Small Business Inquiry* found, Cardiff Council is responsible for collecting business rates from businesses across the city, but not for setting the level of business rates, or for spending the receipts.

102. The final recommendation of the *Small Business Inquiry* that Members wish to endorse relates to signposting, way finding and encouraging footfall through the market and arcades. The recommendation states;

“[The Committee recommends that the Council’s Cabinet] Recognising the unique contribution to Cardiff’s retail offer made by its Edwardian arcades, considers improvements to signposting and way finding from key transport

²⁰ Small Business: Cardiff Economy & Culture Scrutiny Committee Inquiry Report (recommendation 9)

*nodes, and how to better profile and encourage footfall through the arcades via Council publications, electronic and social media communications activity.*²¹

103. As mentioned previously, a perception exists amongst arcade traders that signposting and way finders in the city centre do not adequately advertise the arcades and their history. The same also applies to traders within Cardiff Central Market, with 83% of respondents to the market traders giving a negative response regarding the signposting of the market. This point of view is backed up by the findings of the public perception survey, where 67% of respondents gave a negative rating to the signposting of the market.

NABMA Health Check

104. The health check undertaken by NABMA in Cardiff Central Market identified a number of recommended improvements that can be made, with the Council able to access a range of good practice case studies and KPI data headings through its membership to NABMA. The recommendations made as part of the health check include;

- Investment in the building either directly or via European and Heritage Lottery. With immediate issues to address including the high level windows that will not close, investment in the fabric of the stalls, completion of previous improvement works and investment on back of house facilities.
- Developing a strategic view for the market, including a business plan and key performance indicators that link to the Council's corporate priorities. Examples include the number of coach visits to the market (tourism), the number of businesses supported (economy), the number of jobs in the market and the number of visits from school groups (education).
- Empowering market management to enforce the market rules, and to report tenant performance. This would give some shared accountability to

²¹ Small Business: Cardiff Economy & Culture Scrutiny Committee Inquiry Report (recommendation 14)

the tenants in terms of the reputation and forward momentum of the market.

City Centre Parking

105. An issue raised by traders and members of the public alike through the surveys undertaken by the Scrutiny Research Team was parking in Cardiff City Centre. While the public was positive about the accessibility, location and safety of parking in Cardiff, almost three quarters (71%) of respondents gave a negative opinion its affordability. This is particularly important given that more than half of respondents (55%) indicated that car parking impacts upon their choice of shops to visit.

106. This view was also raised by traders in the market and historic arcades, who associated the cost of car parking with a decrease in their level of customers, and felt that it is something the council could address in order to help increase footfall through the arcades. Comments included;

“Short term parking must be free! Money off parking close to arcades, it's too expensive and most customers will not pay to just visit my shop”

“Very high car park costs - even my suppliers have asked if they can visit me at my house out of hours due to high parking costs.”

107. This issue is not unique to Cardiff, with two of the recommendations within the report *The Grimsey Review – An alternative future for the High Street* being;

“Make it easier for motorists to shop by building in a two hour free high street and town centre car parking system to the overall business plan for the location”

“Local authorities to freeze car-parking charges for a minimum of 12 months.”

The report states that *“It is not surprising that our towns are suffering when parking is viewed as an income generator and not part of an overall economic plan from a welcoming brand known as a town.”*²²

108. Having considered this information and through conversation with traders in the market and arcades Members of the Inquiry were concerned that the public is being discouraged from shopping in the city centre because the savings made by shopping in the market are offset by parking charges, or the public are not willing to incur extra cost for the market ‘experience’ rather than visit the supermarket where parking is free. It is felt that the offer of short term free parking would have a positive impact on customer in the market and arcades.
109. The ‘Current and Good Practice’ review undertaken by the Scrutiny Research Team identified a number of approaches taken by other local authorities in relation to car parking. Scunthorpe has introduced two free hours of parking in a number of locations and parking in a local authority multi-storey car park is free beyond 2.00pm. The effect of this has been considerable, with local retailers stating that their footfall has increased significantly as shoppers no longer need to make an initial investment through car parking charges just to look around. The review however does highlight that Cardiff, like many cities, contains a number of private sector companies parking whose pricing the Council cannot determine.

Business Improvement District

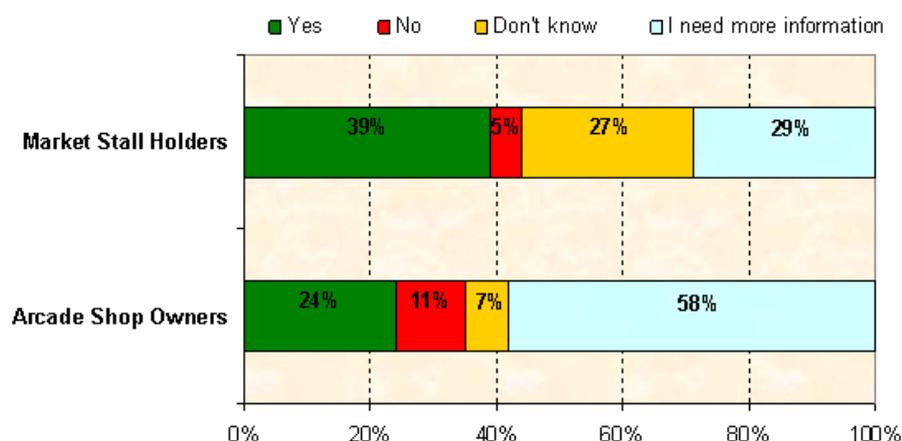
110. Prior to this Inquiry, Members received a Committee item in January 2014, outlining the intention to seek the Cabinet’s approval in principle for the creation of a city centre Business Improvement District (BID) for Cardiff. Members were keen to explore the views of stakeholders as part of this inquiry to determine whether support exists for such an initiative.
111. A Business Improvement District (BID) is a partnership between the local business community and a local authority to develop projects and services

²² The Grimsey Review – An alternative future for the High Street (page 33)

that will benefit the trading environment within the boundary of a commercial area. BIDs are funded in whole, or in part, by a levy which is additional to the nondomestic rates. The additional funding raised is ring-fenced for up to 5 years in the specified area to support activities identified by participating businesses.

112. Questions regarding a Cardiff BID were included within the surveys that were undertaken with arcade shop owners and market traders. The first questions asked individuals about their awareness of the proposals to implement a BID model in Cardiff. The overwhelming majority of traders indicated they did not know about these proposals, with 83% of market trader respondents and 93% of arcade shop owner respondents stating they did not know about these plans.
113. The second question explored whether individuals would support the introduction of a BID in Cardiff city centre. The response to this question can be seen in **Figure P**, where it can be seen that some traders would be willing to support a BID, but many stating that they need more information in order to make a decision.

Figure P - Would you support the implementation of a Business Improvement Districts (BIDs) model within Cardiff?



114. Members also took the opportunity to discuss the development of a city centre BID with the facility managers off the respective arcades. The representative of the Morgan Quarter arcades indicated that he can see how a BID would

work in Cardiff but felt it would be hard to get shop owners on board with it, particularly where it involves paying an additional fee on top of service charges, business rates and rent. The benefits to a BID would have to be sold and clearly defined to business owners before they are likely to agree. This was a view also given by the owner of Rules of Play, who stated that they could work in Cardiff, as they do in Swansea, but it would be a difficult concept to sell to traders, and it would need to be clear whether it was the individual trader or the landlord who would get decision making powers.

INQUIRY METHODOLOGY

115. This task group was set up following the *Small Business* Inquiry undertaken by the Committee in early 2014 and also sits alongside the *Higher Education Innovation in Cardiff* short scrutiny that was completed in 2013. It set out to explore the contribution that the Historic Arcades and Central Market make to the local economy as a shopping destination, a tourist attraction and a source of local employment.

116. Through the course of the inquiry Members received evidence from the following external witnesses:

Rebecca Smith	Cardiff Metropolitan University
Andy Lever	National Market Traders Federation
Rory Fleming	Ashdown Phillips
Tony Harding	Cardiff Central Market Traders Association
Michelle Davis	Rules of Play
Nick Griffiths	Curzon Real Estate

117. Members also received evidence from the following internal witnesses:

Charles Coats	Operational Manager, Strategic Estates
Paul Williams	Operational Manager, City Centre Management
Maddy Fabrizi	Central Market Manager
Gladys Hingco	Principal Research Officer, Scrutiny Services
Thomas Foreman	Research Officer, Scrutiny Services

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LEGAL IMPLICATIONS

118. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without modification. Any report with recommendations for decision that goes to Cabinet / Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal power of the Council; (b) comply with any procedural requirement imposed by law; (c) be within the powers of the body or person exercising powers on behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. standing orders and financial regulations; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

FINANCIAL IMPLICATIONS

119. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct financial implications at this stage in relation to any of the work programme. However, financial implications may arise if and when the matters under review are implemented with or without any modifications.

COMMITTEE TERMS OF REFERENCE

To scrutinise, measure and actively promote improvement in the Council's performance in the provision of services and compliance with Council policies, aims and objectives in the area of economic regeneration.

The Committee is responsible for looking at the following areas:

- Cardiff Business Partnership
- Cardiff & Co Marketing Initiative
- South East Wales Economic Forum
- Economic Strategy & Employment
- European Funding & Investment
- SME Support
- Cardiff Harbour Authority
- Lifelong Learning
- Leisure Centres
- Sports Development
- Parks & Green Spaces
- Libraries, Arts & Culture
- Civic Buildings
- Events & Tourism
- Strategic Projects
- Innovation & Technology Centres
- Local Training & Enterprise.

To assess the impact of external organisations including the Welsh Government, Welsh Government Sponsored Public Bodies and quasi-departmental non-governmental bodies on the effectiveness of Council service delivery.

To report to an appropriate Cabinet or Council meeting on its findings and to make recommendations on measures, which may enhance Council performance in this area.

ECONOMY & CULTURE SCRUTINY COMMITTEE MEMBERSHIP



Councillor Craig Williams
(Chairperson)



Councillor Dilwar Ali



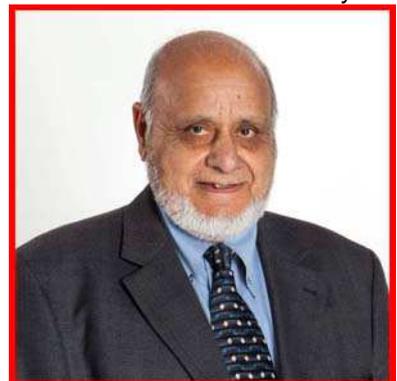
Councillor Gareth Aubrey



Councillor Ralph Cook



Councillor Nigel Howells



Councillor Mohammad Javed



Councillor Ed Stubbs



Councillor Christopher Weaver



Councillor Darren Williams

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