1. DRAFT RETAIL AND BUSINESS SURVEY

1.1 In February 2006, CB Richard Ellis carried out a postal survey of all retailers, service operators and other companies in Northampton town centre. This was a total of 510 businesses. A copy of the questionnaire and letter sent to each business, as well a full list of recipients, is shown in Appendix A.

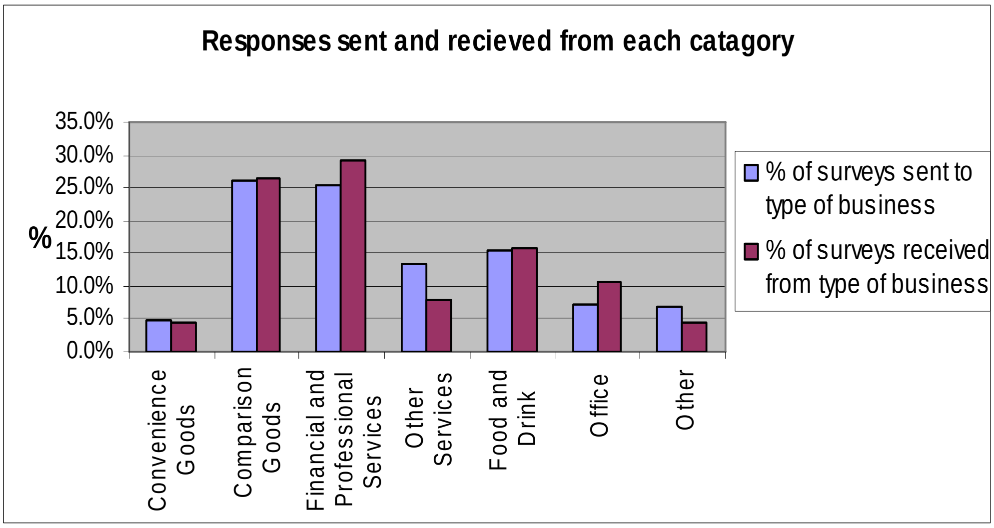
1.2 From the 510 businesses who received the survey, we received responses from 115. This equates to a 23% response rate, which in our experience is a strong rate of response for a survey of this kind. This high number of responses indicates that businesses in Northampton are keen to express their views on the town centre.

1.3 We have divided the responses received into the following categories:

- Retailer – convenience goods
- Retailer – comparison goods
- Financial and Professional Services
- Other services
- Food and Drink
- Office
- Other

1.4 From the responses received, 4% were from convenience goods retailers (5 responses), 27% were received from comparison goods retailers (31 responses), 29% were received from financial and professional services firms (33 responses), 8% were from companies in other services (9 responses), 16% were received from food and drink operators (18 responses), 11% were from firms categorised as ‘office’ (12 responses) and 5% were received from firms that fell in the ‘other’ category, including a library, theatre and a number of training centres (5 responses).

1.5 In order to fully gauge which of the business categories are most keen to express their views about the town centre, we have calculated the percentage of the total survey responses received in comparison to the percentage of the total surveys sent out to each business type. This is displayed in the graph below. For example, comparison goods operators received 26% of the surveys and provided 27% of the responses.



We can conclude that businesses in the Financial and Professional Services category are the most keen to express their views, as they have provided the highest response rate in comparison to the percentage of surveys these operators received; 29% of the responses were provided from this category compared to receiving 25.5% of the surveys.

1.6 In order to analyse the town centre through the responses we have received in this survey, we have broken down the town centre in a number of areas. These are as follows:

Area	Retail Mix
Gold Street/Marefair	Mostly independent retailers with a good representation of restaurants/take-aways and value retailers. A major leisure development (Sol Central) provides an anchor at the western end of Marefair.
Bridge Street	Strong representation of estate agents, bars and restaurants and take-aways. Typically small units.

Mercers Row/George Row	Predominantly high street multiple retailers along Mercers Row with George Row characterised by professional service outlets.
Bradshaw Street/Sheep Street	A broad mix of independent retailers. Reasonable representation of comparison outlets and restaurants/takeaways. Small retail units.
The Drapery	Strong representation of high street multiples, including Debenhams department store.
Market Square	Dominance of high street multiple retailers with some professional service and banking outlets. This Square also accommodates a daily market.
Peacock Place	Small covered shopping centre on two levels. Accommodates national multiples retailers.
Grosvenor Centre	Prime shopping area and Northampton's largest covered mall. Dominated by national multiples. Generally large units.
St Peter's Square, St Peter's Walk	A small retail park with large units occupied by national multiples. Smaller units located along St Peter's Walk. Predominantly comparison goods retailers.
Abington Street	Mostly national comparison goods retailers in the west, and a growing number of professional services/offices moving east.
Abington Square/Kettering Road/ Wellingborough Road/York Road	Broad mix of independent retailers, specialist outlets and restaurants/bars. Small retail outlets.
Fish Street/Ridings Arcade/St Giles Street/St Giles Square	Predominantly smaller independent retailers offering luxury comparison goods. Small units.
Derngate Street/Castilian Street/Guildhall Road/Hazelwood Road	Mixture of independent restaurants, professional services/offices and a few bars/restaurants. Small units.

We have used the same areas as used in the Town Health Check to ensure consistency.

Analysis of Results

1.7 The majority of the respondents have small to medium sized workforces, with between 2 and 20 employees (55%). A large number of respondents also had 0-2 employees and 20-30 employees (both 15% of respondents). The majority of respondents have also seen stable workforce numbers, with 58% having experienced no change in workforce numbers. A higher number of respondents had seen a decline in workforce numbers (26%), than who had increased the number of employees (16%). This does not reflect positively on the local economy in Northampton. Specific areas of the town have seen trends in workforce changes. Mercers Row, George Row, St Peter's Square and St Peter's Walk have both had more businesses with declining workforces, whereas the area's around St Giles Square, St Giles Street and Derngate Street areas have seen a particularly high number of respondents with increasing workforce numbers.

1.8 A further indication of the strength of the economy in Northampton is the respondents' perspective of whether their business is growing, declining or remaining steady. The greatest number of respondents felt that their business was 'steady' (48%), however more respondent felt their business was declining (29% of respondents) than growing (24% of respondents). This reinforces the message given from the workforce changes; that Northampton does not currently have a buoyant economy. When analysing these responses by area, a number of areas are seeing a particularly declining trend, with more businesses in decline than growing. These are Bradshaw Street/Sheep Street (for which 100% of respondents were experiencing decline in business), Gold Street/Marefair, The Drapery and St Giles Street and St Giles Square areas. Areas of the town that are doing particularly well, in other words with a greater number of businesses who are experiencing growth than decline, are Derngate Street, Abington Street and Abington Square areas.

1.9 The greatest number of respondents have stayed in their current business location for between 2 and 10 years (39% of respondents). There were a larger number of respondents who has stayed in their current premises for over 10 years than for less than 2, with the next highest percentage being respondents who had stayed at their premises for 30 years or over (17%). This highlights the longevity of businesses in the town, with continuity being important to firms here.

NORTHAMPTON CITY CENTRE – TRADING ADVANTAGES

1.10 The respondents have provided a range or responses in regards to their particular location and the trading advantages this brings to them. These are attached in Appendix B, on a street by street basis.

1.11 The areas with the strongest advantages are the Fish Street/St Giles Street area and Derngate/Castillion Street. These area's are not the 'retail core' of the town, but on the fringes of this area and therefore still see good footfall levels but have more specialist and upmarket retailers and uses, for example the Derngate Theatre.

NORTHAMPTON CITY CENTRE – TRADING DISADVANTAGES

1.12 In terms of trading weaknesses for the businesses in the different areas, again a range of responses were provided. These are attached in appendix C. The most common problem cited was the lack of available parking, particularly highlighted by those businesses located in areas with on-street parking. This has lead to problems with traffic, traffic wardens and loading, as well as these retailers expecting this parking to be solely provided for their staff and customers. Two further common problems cited are the number of vacant units and the disorderly behaviour in the town, both caused by youths in the day time (particularly on Abington Street) and the bars/pubs and clubs in the evening.

SUGGESTED TRADING SOLUTIONS

1.13 In order to combat the disadvantages to areas of the town highlighted above, businesses offered a number of solutions specific to the areas in which they operate. These are summarised below:

AREA	SUGGESTION
Gold Street/Marefair	Cheaper parking charges Local businesses being allowed to advertise using signage through the centre to attract higher footfall Increased policing Improved maintenance and upkeep by council
Bridge Street	Pedestrianise area Improve traffic flows to reduce congestion Longer on-street parking allowance

	Change emphasis from bars to quality retail outlets
Mercers Row/George Row	Improve refuse collection services and employ street cleaners Allow short stay parking on the street, and provide parking for businesses Find tenants for vacant outlets Reduce control on individual businesses making improvements
Bradshaw Street/Sheep Street	Pedestrianise street
The Drapery	Re-pave the street Increase number of retailers in comparison to evening economy uses Encourage Sunday opening hours Zero tolerance from police on disorderly behaviour
Market Square	Introduce specialist markets and theme days, for example at Christmas Open market place for parking after 4pm Introduce CCTV Improve public transport facilities
Peacock Place	No respondents
Grosvenor Centre	No respondents
St Peter's Square, St Peter's Walk	Modernise the shop frontages Allocate space for deliveries and introduce staff parking
Abington Street	Introduce a central tramway system Introduce a park and ride scheme Allow buses and taxi's to drop off in the street Raise standard of public realm Eliminate transient trading More selective planning applications Increased policing and increased police presence Increase levels of street lighting and CCTV to increase safety Encourage high profile and independent retailers Grant licenses to street performers to increase control

Abington Square/Kettering Road/ Wellingborough Road/York Road	Reduce traffic flows on York Road Force businesses to maintain properties Try to establish a 'café culture'
Fish Street/Ridings Arcade/St Giles Street/St Giles Square	Improve public transport systems or introduce a park and ride scheme Encourage further retail and hotel development Reduce road-side parking Improve public realm to improve attractiveness of town Increased policing and CCTV Street cleaning and pigeon control Control the beggars in the area
Derngate Street/Castilian Street/Guildhall Road/Hazelwood Road	Improve public transport Increased police presence in the evening Increased cultural uses and restaurants/café's in this area Encourage specialist retailers to the area Increased refuse collection

1.14 Many of the individual areas have specific problems which could potentially benefit from individual development strategies. However some improvements at a town centre level would be welcomed by many of the businesses. The most obvious of these is parking – mentioned by a particularly high number of respondents. Most respondents requested increasing parking levels in the town centre, particularly on the road side for ease of shoppers. However the complaints regarding congestion and access in the centre suggest public transport improvements or even a park and ride scheme, as suggested by some businesses, may be more appropriate. Secondly, increased police presence and CCTV throughout the town was widely requested, with the problems of unsociable behaviour both the day and night time highlighted by many respondents. Another common suggestion is cleaning up the streets to improve the attractiveness of the town, and encourage a better retail offering to draw shoppers into the centre and prevent leakage to the surrounding out-of-town retail parks.

Appendix A: Letter and Survey Sent and List of Respondents

Appendix B: Northampton – Key Trading Advantages

AREA	COMMENT
Gold Street/Marefair	On the route from the train station to the town centre College Street Mews in this area is a pleasant environment The Vue centre provides customers for the high number of takeaways in this area Cheaper rents than in most areas of the town centre
Bridge Street	Good location for transport facilities Easy access to local services Concentration of estate agents in this area which increases customer numbers for these businesses
Mercers Row/George Row	Relatively cheap rent for proximity to central area Reasonably central location, particular number of businesses in this area
Bradshaw Street/Sheep Street	Easy access to bus station and multi-story car park
The Drapery	Good footfall levels due to central location On a bus route into the town Good mix of businesses (good tenant mix)
Market Square	High levels of footfall and easy accessibility due to central location
Peacock Place	No respondents
Grosvenor Centre	No respondents
St Peter's Square, St Peter's Walk	High levels of footfall and easy accessibility due to central location
Abington Street	Pedestrianised shopping area Highest footfall levels in the town Close to Grosvenor Shopping Centre Prime shopping location with good surrounding tenants, eg Marks and Spencers

Abington Square/Kettering Road/ Wellingborough Road/York Road	Proximity to town centre Business employees in the area Good accessibility to public transport services Potential to become an area of more specialist shopping
Fish Street/Ridings Arcade/St Giles Street/St Giles Square	Central location generates passing trade Established retailers and businesses in this area A number of specialist/independent retailers inn this area St Giles Street one of the most attractive streets in the town Good accessibility to town centre services for office staff Close to the town hall On street parking
Derngate Street/Castilian Street/Guildhall Road/Hazelwood Road	On site parking for businesses on Cheyne Walk Cheaper rent and rates than the main retail streets Proximity to the theatre Although quieter than the retail core, there is still a good level of footfall A ‘cultural area’ of the town centre Close to St John’s car park and local bus routes

Appendix C: Northampton – Key Trading Disadvantages

AREA	COMMENT
Gold Street/Marefair	Poor maintenance on pavements and roads 'Scruffy' area with poor facades on many units Parking restrictions reduce visitor numbers and cause difficulties for loading Disorderly behaviour caused by increased 'evening economy' uses Lots of litter due to takeaways in the area Lack of passing trade, many visitors to the centre do not reach this area Lack of council strategy for the area, and no contact with the council
Bridge Street	Domination of bars/pubs/clubs causes problems for remaining retailers in the area Lots of litter generating from 'evening economy' Not enough quality retailers generating shoppers with a higher spend Parking restrictions and congestion reducing visitor numbers
Mercers Row/George Row	Empty units create bad appearance No staff parking, on street parking is expensive Refuse collection is inefficient and not frequent enough Groups of youths cause problems Lower footfall than pedestrianised area
Bradshaw Street/Sheep Street	Domination of pubs and clubs causing anti-social behaviour and drunkenness on street. Deterring customers Bust traffic on Sheep Street
The Drapery	No major multiples attracting shoppers to the area Area becoming more dominated by pubs and clubs. Creating some anti-social behaviour Litter, particularly from fast food outlets Parking problems – lack of parking
Market Square	Parking problems

	Attractiveness of area reducing Litter and vandalism
Peacock Place	No respondents
Grosvenor Centre	No respondents
St Peter's Square, St Peter's Walk	High rents and rates Levels of footfall are reducing
Abington Street	Groups of teenagers frighten and deter shoppers. Use of skateboards in pedestrian area. No rear access to some shops causes problems with deliveries etc High rents and rates Lack of specialist retailers, only multiples. This is not attracting shoppers who are visiting the same multiples at out of town retail parks Litter and vandalism Retailers closing down or relocating Homeless people also deter shoppers No 'evening economy' so no visitors to the street in the evening. This also encourages groups of teenagers behaving antisocially in evening
Abington Square/Kettering Road/ Wellingborough Road/York Road	Relocating businesses and retailers Parking problems and traffic congestion Rubbish and untidy streets
Fish Street/Ridings Arcade/St Giles Street/St Giles Square	Some retailers relocating from this area. There are empty units Too many public houses for a retail area Beggars in area intimidate shoppers Lack of parking and over zealous traffic wardens. On street parking provision causes more problems than if no parking was provided Narrow pavements reduce accessibility Less footfall than main pedestrianised retail area

	Attractiveness of area deteriorating
Derngate Street/Castilian Street/Guildhall Road/Hazelwood Road	Businesses moving away form this area to out-of-town business parks Some retail outlets are also closing or relocating to other areas of the town centre Reduced shopper numbers experienced Parking difficulties – no private parking provided for businesses and not enough provided for disabled customers. Traffic congestion and vehicle accessibility problems 'Drop in' centre causes undesirable members of the public to linger on the street. Also a number of homeless people in area. Noise created by traffic and access to car parks Dirty and untidy pavements Some places, in particular Swan Street, are poorly lit. Some spillover 'rowdiness' from bars in the area at the weekend Not enough footfall for retailers