Retail Strategy for
Northampton Town Centre

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Prepared by

CACI Ltd

for

Northampton Borough Council (NBC)

in partnership with:

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1.0 Executive Summary

A Retail Strategy for Northampton Town Centre

1.1 Northampton’s current retail ranking is 76th – a good position inside of the top 100. However, the centre is dominated by nearby Milton Keynes, which ranks at 13th in country, benefiting from a larger retail offer and good accessibility by car.

1.2 Analysing the socio-demographic make-up of Northampton’s catchment (using ACORN) Northampton’s current mass-market retail mix is failing to fully meet the consumer needs of key consumer groups - which the catchment has high indices of: Wealthy Executives, Flourishing Families and Secure Families.

1.3 Therefore, we have concluded that the town is currently in poor retail health, and urgently needs to improve its offering to avoid further decline.

1.4 However, we have identified an outstanding opportunity to develop the retail economy of Northampton, through improving the retail mix towards a ‘quality’-led offer that will match the consumer needs of the more affluent residents, workers and visitors.

1.5 Testing three key strategic scenarios of “Do Nothing”, “Maintain Status” and “Grow to City Status” has highlighted a number of strategic imperatives:

- Out of town development presents an unsustainable threat to the future fortunes of the town centre.
- The extension of Grosvenor Centre is a “must” to avoid further decline.
- To maximise trading opportunities in the town as a whole, the Grosvenor Centre and the other areas of retail pitch need to develop in a complimentary way, and evolve a stronger town centre retail circuit.
- With the extension of the Grosvenor Centre secured, there is an outstanding opportunity to grow Northampton’s catchment area and market shares by developing a cohesive town centre plan to drive a quality-led retail offer and visitor experience.

1.6 To achieve a stronger overall retail pitch, we have identified from our analysis and stakeholder consultation, the three following priority opportunities for the town.

- To invest in the public realm of Abington Street, alongside fostering of an improved tenant mix of upper-middle clothing retailers in this area.
- Establish stronger shopper circulation between Abington Street and St Giles Street, in particular through Fish Street and the Riding Arcade.
- To improve retailing and catering in both Market Square and All Saints Square – establishing a retailing “heart of the town”.
- The All Saints Church area could benefit, subject to feasibility assessment, from a stronger retail anchor on the corner of Abington Street and Market Square and/or a stronger cluster of catering units, to establish a central dwelling point for visitors.
-Retail Strategy for Northampton Town Centre-

- To foster a stronger premium-led cluster of homeware/lifestyle stores along Gold Street, and create a more convincing retail link with St Peters Area.
- A new supermarket store on the eastern end of Abington Street, with new parking facilities, would however provide a suitable ‘anchor’ to drive improved footfall to the existing areas of retail pitch, complimenting rather than diluting the current shopping pitch.

1.7 To implement the required step-change in Northampton’s performance, we have recommended that the Town Centre Partnership adopt this strategy, and that the partnership is strengthened and becomes focused on the delivery of this strategy.

1.8 To achieve the strategy, we would anticipate that funding will be required for the following areas:
- Urban Design Proposals
- Roadworks and materials
- Site management of town centre in terms of co-ordination of works and minimising disruption to existing trade.
- Shop front improvements
- Site development briefs and planning support
- Marketing material to retailers and investors
- Market research and consultation activity

1.9 In considering the timing and priority of funding for various schemes and initiatives identified throughout this report, the following key factors need to be considered:
- The town centre requires urgent action to avoid decline, so inaction is not an option.
- What is the level of support from affected stakeholders?
- What is the relative priority of this scheme/initiative in relation to the retail strategy - which is to improve the town centre tenant mix?
2.0 Introduction

Study Background

2.1 Northampton is largest town in the country with population of 200,000 and sits at the heart of the biggest growth area outside London, with population projected to expand up to 300,000 by 2021.

2.2 Whilst housing growth and major investment in schooling are currently leading the transformation of Northampton, to evolve into a successful city, Northampton will need a stronger, city economy, focussed on a vibrant city centre.

2.3 A vibrant city centre provides a focus for both investment and innovation. It is a place for businesses to agglomerate and an environment for entrepreneurs to thrive. The city centre should also provide a focus for the arts, sports and culture for all residents in the county – in doing so creating a strong cohesive society to enjoy.

2.4 Therefore, critical to the regeneration of Northampton and its surrounds is development of Northampton Town Centre into a high performing city centre.

2.5 Retailing is an essential ingredient to the economy of a city centre – providing important “gateway” jobs (i.e. the first steps on the career ladder for many), a leisure activity for residents and a strong anchor to encourage resident’s participation with the city centre as a whole.

2.6 A city centre also provides trading opportunities for a much wider range of retailers that can be supported at lower order centres and out-of-town locations, such as niche and premium retailing. As such it can be seen that a healthy city retail economy is essential to maximising economic opportunities in the region.

2.7 Northampton city centre’s historical fabric also provides a great asset in terms of creating a highly desirable environment for people to visit and enjoy spending time in. If capitalised on, this environment can create trading opportunities for businesses that would otherwise not exist.

Objectives and Approach to Study

2.8 Whilst from a strategic perspective, niche and premium shopping has been identified as an important ingredient to the development of Northampton as a vibrant city centre – a study has been required to qualify the opportunities for this strand of the regeneration strategy and ascertain, tactically, how action can be brought about to implement this strategic strand.

2.9 By analysing the opportunities for retail in Northampton Town Centre from a consumer/marketing perspective, CACI have proposed a study that will lead to actionable results by providing the research that retailers and property investors require informing their investment in the retail sector of Northampton Town Centre and proving the intended strategy against what will work with consumers.

2.10 Furthermore, in CACI’s experience, it is essential that in order to successfully develop the fortunes of a town centre, a coherent development plan for the whole of the town centre is required, that provides a strong vision for each area of retail pitch, whether this relates to niche and premium shopping or not.

2.11 In particular this study has the following objectives:
-Retail Strategy for Northampton Town Centre-

- Identify a retail development and infrastructure strategy for the town centre as a whole, working alongside plans to:
  - Develop creative/cultural offers in the St Johns area,
  - Development of Market Square as a main focus for spontaneous activity in the centre, and the expansion of retailing floorspace, through the extension of the Grosvenor Centre.
- Qualify the opportunity for retailers in a revitalised city centre:
  - In particular establishing demand for retail themes and providing business case material for retailers, as well as identifying which locations within the centre would be most appropriate for each type of retailer.
  - This includes the role of the independent retail sector as well as regional and national chains.
- Provide specific advice on the future of Abington Street and Gold Street.
- Identify realistic phasing of improvements and opportunities for public sector intervention.

2.12 Our study has:

- Examined the shopping catchment area of Northampton Town Centre and the shopping centres in which it competes for trade.
- Identified the varying socio-demographic groups within the catchment, linking this to lifestyles and consumer needs via our classification tool ACORN.
- Tested Northampton’s current retail offer against the consumer needs of the catchment population.
- Tested the opportunities and threats of further retail development within and outside the town centre.
- Identified the strongest realistic opportunity for Northampton Town Centre to improve on its current performance.
- Assessed the level of demand from national and regional chain retailers.
- Examined the current configuration of Northampton Town Centre’s retail pitches – identifying strengths and weaknesses.
- Analysed visitor paths, based upon entry points (car parks, bus station and rail station) and key retail anchors.
- Assessed the current performance of different areas of pitch and identified where areas need to be strengthened, and opportunity sites that could play a role in delivering an improved offer.
- Forecast the impact of the Grosvenor Extension on the balance of retailing within the town centre and highlighted options for maintaining a healthy balance of shopper footfall throughout the town.
- Developed a retail zoning for the town, to help develop stronger themed retail clusters.
• Brought together the conclusions to provide a Town Centre Management Action Plan – mapping out key actions required and their relative importance.

Methodology

2.13 CACI’s approach to the study was to combine a series of consultations with key stakeholders with insightful baseline data-analysis and impact modelling of future scenarios.

2.14 CACI’s analysis and modelling has been assisted by their framework of analytical and modelling tools – which include:

• ACORN lifestyle classification system
• Retail Footprint shopper catchment model
• Spatial Modeller retail development impact system
• Town Centre Retail Pitch micro-model

2.15 In engaging with stakeholders in this way CACI was better able to understand the retailing history of Northampton Town Centre and future opportunities and threats. This has helped contextualise the analysis and modelling, enabling CACI to deliver a detailed action plan for town centre retailing. Over the course of the study CACI have consulted with the following stakeholders:

• NBC portfolio holder for Regeneration and Growth
• Regeneration and Growth, Northampton Council
• Northampton Enterprises Limited
• West Northamptonshire Development Corporation
• Northampton Town Centre Partnership Group

Study Structure

2.16 This study is structured by differentiating between retail baseline data versus future modelled forecasts and between Macro Analysis of supply and demand versus Micro- Analysis of individual areas of Northampton’s Retail Pitch. The study is subsequently separated into 4 main sections:

• Baseline Macro-Analysis of Northampton
  ➢ Retail Catchment and Competition
  ➢ Consumer Needs Analysis
  ➢ Town Centre Benchmarks
  ➢ Retail Mix & Market Positioning

• Future Macro-Performance of Northampton
  ➢ Population Growth
  ➢ Development Pipeline
  ➢ Scenario Tests

• Retail Pitch Analysis
  ➢ Operator Configuration
  ➢ Pitch Analysis
  ➢ Pitch Performance Modelling

• Implementation Strategy
  ➢ Issues and Opportunities
  ➢ Recommended Intervention
3.0 Baseline Macro-Analysis of Northampton

Introduction

3.1 CACI have used their UK Retail Footprint model to estimate the current market potential for Northampton Town Centre and its relationship with other retail centres. The model includes more than 3,000 retail centres across the country, with each centre’s attractiveness built from the retailers present and the strength of its retail offer.

3.2 CACI have then analysed the lifestyles of the shoppers within its catchment and used this to understand the needs for the town.

Summary

3.3 According to CACI’s Retail Footprint model Northampton Town Centre has an annual comparison goods market potential of £348m – similar potential to towns such as Chelmsford and Crawley, translating to a UK retail ranking of 76th.

3.4 The demographic make-up of Northampton’s shoppers consists of a strong presence of Wealthy Executives, Flourishing Families, Settled Suburbia and Post-Industrial Families. There is a lower indices of Affluent Greys, linked to the overall more youthful demographic of Northampton residents.

3.5 Comparing the current overall ‘mass’ market-positioning of the town against the high level affluent demographic groups living in the shopper catchment, we have identified an outstanding opportunity to evolve Northampton into a ‘Quality’ positioned town, supported by a stronger overall retail offer, that will have a significant impact on the achievable market shares from its shopping catchment.

3.6 By comparing current retail sector mix against the mix of benchmark towns, competitor towns, and examining the consumer needs of the shopping catchment CACI have identified:

- A strong need for additional retail floorspace to accommodate contemporary requirements from larger store operators.
- An under-provision of Health & Beauty retailers.
- A gap in market for ‘Upper’ and ‘Upper Middle’ premium clothing retailers.
- A strong need for an improved catering offer.
- An opportunity for premium home ‘lifestyle’ retailers – including specialist electrical and furnishing offers.
Catchment Analysis

**Figure 3.1 Northampton Town Centre Catchment Market Potential and Market Share**

<table>
<thead>
<tr>
<th>Catchment</th>
<th>Total Population</th>
<th>Total Households</th>
<th>Total Comparison Goods Expenditure (£million)</th>
<th>Northampton’s Market Share of Population (%)</th>
<th>Comparison Goods Market Potential (£million)</th>
<th>Origin of Northampton Town Centre Shoppers (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>129,348</td>
<td>57,728</td>
<td>£283.5</td>
<td>61.8%</td>
<td>£175.3</td>
<td>50%</td>
</tr>
<tr>
<td>Secondary</td>
<td>80,343</td>
<td>33,330</td>
<td>£191.8</td>
<td>44.6%</td>
<td>£85.5</td>
<td>25%</td>
</tr>
<tr>
<td>Tertiary</td>
<td>86,127</td>
<td>36,004</td>
<td>£197.2</td>
<td>26.0%</td>
<td>£51.3</td>
<td>15%</td>
</tr>
<tr>
<td>Quaternary</td>
<td>637,615</td>
<td>266,275</td>
<td>£1,603.4</td>
<td>2.2%</td>
<td>£36.0</td>
<td>10%</td>
</tr>
<tr>
<td>Major</td>
<td>295,818</td>
<td>127,062</td>
<td>£672.4</td>
<td>46.4%</td>
<td>£312.1</td>
<td>90%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>933,433</strong></td>
<td><strong>393,337</strong></td>
<td><strong>£2,275.9</strong></td>
<td><strong>15.3%</strong></td>
<td><strong>£348.0</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Sources: Census, EFES, CACI Retail Footprint

3.7 The table above shows the modelled retail catchment for Northampton Town Centre broken down into four catchment areas. The Primary Catchment area is defined by where the first 50% of Northampton’s shoppers come from. The Secondary Catchment is defined by where the next 25% of Northampton’s shoppers come from. Tertiary and Quaternary catchments are similarly defined, representing where the next 15% and final 10% of shoppers come from.

**Figure 3.2 2008 Retail Footprint Catchment Map of Northampton Town Centre**

Source: CACI Retail Footprint
3.8 Northampton’s Major Catchment (Primary + Secondary + Tertiary) is roughly bounded north by the A14, west by the A5 and east by the A509. The southern limits of the catchment area are defined by a distinct ‘battleground’ due to the draw of Milton Keynes, connected with Northampton by the M1 and A508.

3.9 The cities of Coventry, Leicester and towns of Peterborough and Milton Keynes are located on the periphery of Northampton’s catchment area, whilst the towns of Wellingborough and Kettering sit on the edge of its major catchment area.

3.10 The M1 presents Northampton with both threats and opportunities, since on one hand it makes Northampton accessible; whilst on the other-hand it means that stronger centres, such as Birmingham and London (which are also highly accessible by rail) can exert a draw from Northampton’s resident market.

3.11 The M1 also acts as a barrier to market penetration to the west, where connectivity by road directly westwards from Northampton is particularly poor. This barrier effect means that both Rugby and Daventry operate with little conflict with Northampton.

3.12 Northampton has a good, but not dominant market command of its ‘major’ retail catchment, where it takes a 46.4% market share of shoppers (Figure 3.1). Northampton’s position is compromised to quite an extent by strong market penetration from Milton Keynes, and district centre (Weston Favell) and out-of-town shopping centre (Riverside, St James and Sixfields) Retail Parks provision closer to home, as shown in Figure 3.3.

**Figure 3.3 Share of Shoppers in Northampton’s Major Catchment**

![Pie chart showing the distribution of shoppers in Northampton’s Major Catchment](image)

Source: CACI Retail Footprint

3.13 Due to the ease of access by car into the town centre, and the generous supply of car parking, combined with a strong retailer offer, Milton Keynes
operates as an ‘in-town’ regional mall. This means that it commands a strong market share across a wider region, which impacts across Northampton’s Major Catchment and hems in Northampton’s influence to the south of the town.

3.14 Milton Keynes is Northampton’s main competitor with a comparable scale of retail offer and takes 11% of the market share from the major catchment.

3.15 Very good road connections between Northampton and Milton Keynes means that there is a high risk of leakage to Milton Keynes, especially amongst the most affluent of residents, who exercise the most choice and are willing to drive longer distances to shop.

**Figure 3.4 Interaction of Milton Keynes catchment with Northampton’s**

![Image of map showing interaction of Milton Keynes catchment with Northampton’s]

Source: CACI Retail Footprint

3.16 The above analysis of indicates that Northampton Town Centre is currently underperforming in terms of its role as the main town of Northamptonshire. Its catchment area and market position is clearly dwarfed by Milton Keynes, which is Northampton’s fiercer competitor, which benefiting from a stronger retail offer and excellent accessibility by road and good car parking.

3.17 The ACORN lifestyle profile of shoppers that fall within Northampton’s modelled catchment, weighted by their propensity to spend in Northampton, is shown in Figure 3.5.

3.18 Northampton has a higher particularly high representation of Wealthy Executives, Flourishing Families compared to the UK and higher levels of Starting Out, Settled Suburbia and Post-Industrial Families compared with averages with both the UK and Northamptonshire. The level of Wealthy Executives is high, but lower than the average across Northamptonshire.
3.19 There is currently a distinct lack of Prosperous Professionals and much lower indices of Affluent Greys and Educated Urbanites compared with the UK average, despite higher levels of Affluent Greys across Northamptonshire.

**Figure 3.5 Acorn Profile of Northampton’s Shoppers**

![Bar chart showing the percentage of households for various lifestyle groups in Northampton, Northamptonshire, and the United Kingdom.](image)

*Source: CACI ACORN*

**Needs of Northampton Town Centre’s Shoppers**

3.20 Northampton needs to be a place for everyone. However, to inform a retail strategy for the town, it is useful to focus upon the needs of lifestyle groupings particularly strong in the catchment. Northampton has a high propensity of **Wealthy Executives, Flourishing Families, Secure Families and Settled Suburbia**.

3.21 It is important to note that the common thread of demographic representation across the various shades of social grade of shoppers is the family unit. Families need good parking facilities (car ownership is high in these categories, balanced with a higher passenger occupancy rate) and a safe and secure environment to shop in. They are very valuable customers as they often visit the town for a whole day-out, and spend in a wide range of retail categories. The plans for an extension to the Grosvenor Centre provides an excellent opportunity to improve the attractiveness of Northampton to the family unit, helping to secure the on-going viability of Northampton by improving the available floorspace for larger store operators to sell their full product range.

3.22 It is understood that plans for the Grosvenor Centre are well-progressed, therefore this study has focussed its attention on understanding the opportunities for developing other parts of the town's retail circuit, that will complement this much needed scheme. For this reason, we have focussed on the other main opportunity identified from the shopper demographics of Northampton’s catchment – the needs of the more affluent residents. These residents appreciate shopping in towns with good quality, historic public realm and need to be drawn into the town with more premium retail and independent and specialist shops that create a point of difference. Again, parking is an important consideration for these highly car-borne shoppers, who have the highest propensity to drive longer distances to get the shopping experience they like.
3.23 Northampton Town Centre is currently an ‘average centre’ in the Retail Footprint hierarchy. By comparing the Northampton Shopper lifestyle profile to those of other centres across the country, and considering the current market potential of each centre, a set of ‘benchmark’ centres has been defined which are close to Northampton in terms of shopper demographics and market potential, and are also classified as an ‘average centre’ (Figures 3.6 and 3.7). The main difference in the ACORN profile and its benchmarks is that Northampton has lower levels of Affluent Greys, reflecting an overall younger market in Northampton.

**Figure 3.6 Benchmarking Northampton: Correlating ACORN Profiles**

- Retail Strategy for Northampton Town Centre -

**Figure 3.7 Benchmarking Northampton: Summary of Similarities**

Sources: EFES, CACI ACORN, CACI Retail Footprint

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A fit between the shopper profiles of retail centres of 0.70 and above shows a strong relationship between the two centres. This provides benchmark centres, with similar shopper profiles and annual comparison goods spend.

The towns identified as suitable benchmarks for Northampton as it operates today have one strong theme in common – they are all planning major extensions or new shopping centres within their town centres. This reflects the current trend in retail investment to capitalise on the opportunity to strengthen towns like Northampton, where ‘headroom’ has been identified to improve upon current centre performance through a revitalised retail offer. Furthermore, this trend also relates to the increasing need to bring new floorplates into towns such as Northampton, that are suitable for contemporary large store operator requirements, so that these centres can effectively remain competitive to retailers, compared to the retail space made available in out-of-town retail parks. The schemes planned for the benchmark towns are listed below:

- Swindon: Brunel Shopping Centre: 33,000 sqm gla extension, opening 2010
- Gloucester: Blackfriars Priory: 17,652 sqm gla new build, opening 2015
- Chelmsford: Waterside: 50,000 sqm gla new build, opening 2015
- Worcester: Lowesmoor: 8,411 sqm gla new build, opening 2008
- Derby: Westfield Derby: 36,897 sqm gla extension, just opened
- Crawley: The Boulevard: 88,257 sqm gla extension, opening 2013

This means that the main message drawn from this benchmarking exercise is that Northampton also needs to evolve its retail offer, and is likely to also benefit from a major extension to the retail offer in its town.

**Figure 3.8 Market Positioning of Northampton v competing centres**

The high indices of Wealthy Executives and Flourishing Families that Northampton enjoys in its shopping catchment would indicate an opportunity for a upper and upper-middle retailers in the town. However, examining the profile market positioning of the town’s clothing retailers
against Milton Keynes and Weston Favell (Figure 3.8) highlights that Northampton’s mass-dominated offer, and although of greater relevance to the more affluent shopper groups than the value-dominated Weston Favell, is not as relevant to these shoppers as it could be, especially when considering the more quality oriented offer at Milton Keynes.

3.28 This analysis highlights a problem with Northampton’s current market positioning, especially with respect to retaining custom from the wealthier lifestyle groups, since its main competitor has a better market positioning in terms of appealing to these groups.

**Figure 3.9 Comparing market positioning against benchmarks**

![Comparison chart](chart)

3.29 Comparing the market positioning profile of Northampton’s clothing retailers against the average across its benchmarks (Figure 3.9) confirms that Northampton’s retail offer is as to be expected for a mass-dominated regional town operating within the size of market that Northampton’s has access to.

3.30 However, the current benchmarks do not qualify what opportunities there are for changing Northampton’s market positioning. Therefore, a new set of ‘aspirational’ benchmarks have been identified, on the same principal as the current benchmarks, but based upon what the market potential we believe is achievable for Northampton if it improved upon its retail offer, and by selecting centres with defined as ‘quality centres’ in the Retail Footprint hierarchy.

3.31 This method of identifying ‘aspirational’ benchmarks provides a realistic basis on which to understand the extent to which Northampton’s retail offer could be improved.

3.32 Northampton’s ACORN profile fits closely with its aspirational benchmarks (Figure 3.10), with exception of the lower levels of Affluent Greys and the lack of Prosperous Professionals in the Northampton catchment.

3.33 The lower levels of Affluent Greys emphasise the opportunity for a younger affluent market in Northampton, with a greater propensity to shop, and is particularly different to the high levels found in the catchments of Colchester and Canterbury.

3.34 The lack of Prosperous Professionals is an issue shared with Peterborough and Maidstone, and reflects the current economic and lifestyle differences of Northampton with some of the other towns. Increased representation...
amongst this group (and Educated Urbanites) can be expected with growth in the business sector in Northampton.

**Figure 3.10 Aspirational Benchmarking: Correlating ACORN Profiles**

3.35 Whilst Peterborough, Leamington Spa, Canterbury and Harrogate have similar market potential to what Northampton attains currently, Maidstone, Solihull and Colchester have higher market potentials, which as will be seen later in the report, are achievable for Northampton if it transforms its retail into a quality-led offer.

**Figure 3.11 Aspirational Benchmarking: Summary of Similarities**
3.36 Figure 3.12 shows the provision of national store fascias (‘multiples’) of each town centre goods category compared with its benchmarks.

3.37 Overall, Northampton has a higher relative provision of multiple Clothing & Accessories compared with its aspirational benchmarks, which is generally related to under-provision in other sectors. Within this category, Northampton could improve upon its offering for children, maternity and babywear.

**Figure 3.12 Multiple Fascia’s by Retail Centre Goods Category**

<table>
<thead>
<tr>
<th>Retail Category</th>
<th>Northampton</th>
<th>Benchmark Centre Average</th>
<th>Index (Bmrk Centres = 100)</th>
</tr>
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<tbody>
<tr>
<td>Womenswear</td>
<td>21.0%</td>
<td>20.8%</td>
<td>101</td>
</tr>
<tr>
<td>Menswear</td>
<td>3.7%</td>
<td>3.2%</td>
<td>117</td>
</tr>
<tr>
<td>Childrens/Maternity/Babywear</td>
<td>1.2%</td>
<td>2.2%</td>
<td>57</td>
</tr>
<tr>
<td>Mixed Clothing</td>
<td>9.3%</td>
<td>8.1%</td>
<td>114</td>
</tr>
<tr>
<td>Footwear</td>
<td>9.3%</td>
<td>7.1%</td>
<td>131</td>
</tr>
<tr>
<td>Jewellers</td>
<td>3.7%</td>
<td>3.2%</td>
<td>115</td>
</tr>
<tr>
<td>Fashion Accessories</td>
<td>2.5%</td>
<td>2.5%</td>
<td>97</td>
</tr>
<tr>
<td><strong>Clothing &amp; Accessories Sub-Total</strong></td>
<td><strong>50.6%</strong></td>
<td><strong>47.1%</strong></td>
<td><strong>107</strong></td>
</tr>
<tr>
<td>Chemists</td>
<td>2.5%</td>
<td>3.8%</td>
<td>65</td>
</tr>
<tr>
<td>Health Foods</td>
<td>1.2%</td>
<td>1.7%</td>
<td>73</td>
</tr>
<tr>
<td><strong>Health &amp; Beauty Sub-Total</strong></td>
<td><strong>3.7%</strong></td>
<td><strong>5.5%</strong></td>
<td><strong>68</strong></td>
</tr>
<tr>
<td>Toys</td>
<td>1.2%</td>
<td>2.2%</td>
<td>56</td>
</tr>
<tr>
<td>Music &amp; Video</td>
<td>1.2%</td>
<td>0.8%</td>
<td>150</td>
</tr>
<tr>
<td>Computer Software &amp; Accessories</td>
<td>2.5%</td>
<td>1.1%</td>
<td>228</td>
</tr>
<tr>
<td>Stationary</td>
<td>0.0%</td>
<td>0.6%</td>
<td>0</td>
</tr>
<tr>
<td>Sportswear &amp; Equipment</td>
<td>3.7%</td>
<td>4.2%</td>
<td>87</td>
</tr>
<tr>
<td>Books</td>
<td>1.2%</td>
<td>2.2%</td>
<td>56</td>
</tr>
<tr>
<td>Gifts and Greetings Cards</td>
<td>3.7%</td>
<td>3.1%</td>
<td>120</td>
</tr>
<tr>
<td><strong>Leisure Goods Sub-Total</strong></td>
<td><strong>13.6%</strong></td>
<td><strong>14.2%</strong></td>
<td><strong>95</strong></td>
</tr>
<tr>
<td>Household Durables</td>
<td>0.6%</td>
<td>1.9%</td>
<td>32</td>
</tr>
<tr>
<td>Drapery / Soft Furnishings</td>
<td>0.6%</td>
<td>0.8%</td>
<td>74</td>
</tr>
<tr>
<td>Variety Stores</td>
<td>5.6%</td>
<td>3.6%</td>
<td>155</td>
</tr>
<tr>
<td>Department Stores</td>
<td>1.9%</td>
<td>1.1%</td>
<td>170</td>
</tr>
<tr>
<td><strong>Household Goods Sub-Total</strong></td>
<td><strong>8.6%</strong></td>
<td><strong>7.4%</strong></td>
<td><strong>117</strong></td>
</tr>
<tr>
<td>Electrical</td>
<td>1.2%</td>
<td>2.5%</td>
<td>49</td>
</tr>
<tr>
<td>Camera</td>
<td>0.6%</td>
<td>1.1%</td>
<td>56</td>
</tr>
<tr>
<td><strong>Electrical Goods Sub-Total</strong></td>
<td><strong>1.9%</strong></td>
<td><strong>3.6%</strong></td>
<td><strong>52</strong></td>
</tr>
<tr>
<td>Mobile Phones</td>
<td>4.9%</td>
<td>3.7%</td>
<td>133</td>
</tr>
<tr>
<td>Opticians</td>
<td>2.5%</td>
<td>3.2%</td>
<td>77</td>
</tr>
<tr>
<td><strong>Opticians and Mobile Phones Sub-Total</strong></td>
<td><strong>7.4%</strong></td>
<td><strong>6.9%</strong></td>
<td><strong>107</strong></td>
</tr>
<tr>
<td>DIY High Street</td>
<td>0.6%</td>
<td>1.2%</td>
<td>52</td>
</tr>
<tr>
<td>Catalogue Showrooms</td>
<td>1.2%</td>
<td>0.6%</td>
<td>212</td>
</tr>
<tr>
<td>General Furniture</td>
<td>1.2%</td>
<td>1.2%</td>
<td>101</td>
</tr>
<tr>
<td><strong>Other Non-Food High Street Retailers Sub-Total</strong></td>
<td><strong>1.9%</strong></td>
<td><strong>1.8%</strong></td>
<td><strong>105</strong></td>
</tr>
<tr>
<td>Coffee Shops</td>
<td>1.2%</td>
<td>2.7%</td>
<td>46</td>
</tr>
<tr>
<td>Takeaways</td>
<td>7.4%</td>
<td>3.6%</td>
<td>205</td>
</tr>
<tr>
<td>Restaurants</td>
<td>1.9%</td>
<td>5.1%</td>
<td>37</td>
</tr>
<tr>
<td>C-Stores</td>
<td>0.0%</td>
<td>0.5%</td>
<td>0</td>
</tr>
<tr>
<td>Grocery</td>
<td>1.9%</td>
<td>1.6%</td>
<td>115</td>
</tr>
<tr>
<td><strong>Food Total</strong></td>
<td><strong>12.3%</strong></td>
<td><strong>13.5%</strong></td>
<td><strong>92</strong></td>
</tr>
</tbody>
</table>

<sup>1 % of Multiple retail fascias only</sup>

Source: CACI Retail Locations

3.38 Across the sectors, this analysis has identified a general deficiency of Health & Beauty (for Chemists and Health Foods) and Electrical Goods (both electrical and camera) retailers. It is also worth noting that national electrical goods chains will continue to decline due to the strong impacts of the Internet on this sector. There is however opportunity for niche specialist electrical goods retailers for high-end audio and home-cinema goods.
3.39 Within each retail sector, other gaps in the retail category coverage can be identified; providing indicative opportunities for further retailer representation amongst the following categories:

- Toys
- Stationary
- Books
- Household Durables
- DIY High Street
- Coffee Shops
- Restaurants

3.40 Therefore, the main opportunities for addressing the overall balance in retail mix for the town centre relate to improving the catering offer and improve the durables market. As well, as addressing a clear deficit in the overall retail offering of the town, there is clearly an opportunity to attract retailers in the above categories with an improved market positioning, to act towards improving the market positioning of Northampton to a ‘quality centre’.

3.41 Examples of premium durables retailers would be suitable for Northampton include Fired Earth, Futon Company, Aga Shop and Habitat. Examples of higher quality caterers that would suit Northampton include Café Rouge, Zizzi, Tootsies and Prezzo. There is also a need for catering to be relevant to family shoppers, in which case, example retailers who would trade well in Northampton include Nando’s and Pizza Hut.

3.42 Whilst the overall sector representation of clothing & accessories is in balance, an opportunity for improving the market positioning of the town’s retailers has been highlighted. The table below (Figure 3.13) compares Northampton’s current mix of clothing & accessories retailers, by market positioning, against each of the Aspirational benchmark towns, and the average across all benchmarks.

**Figure 3.13 Multiple Clothing Fascias by Market Position**

<table>
<thead>
<tr>
<th>Market Positioning</th>
<th>Northampton</th>
<th>Peterborough</th>
<th>Maidstone</th>
<th>Leamington Spa</th>
<th>Solihull</th>
<th>Colchester</th>
<th>Canterbury</th>
<th>Harrogate</th>
<th>Benchmark Centre Average (%) Fascias</th>
<th>Index (Bmkr Centres = 100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upper</td>
<td>0.0%</td>
<td>0.0%</td>
<td>2.0%</td>
<td>2.6%</td>
<td>4.0%</td>
<td>5.0%</td>
<td>0.0%</td>
<td>10.0%</td>
<td>2.9%</td>
<td>0</td>
</tr>
<tr>
<td>Upper Middle</td>
<td>12.5%</td>
<td>14.3%</td>
<td>21.6%</td>
<td>20.5%</td>
<td>34.0%</td>
<td>15.0%</td>
<td>26.7%</td>
<td>25.0%</td>
<td>21.2%</td>
<td>59</td>
</tr>
<tr>
<td>Upper Sub-Total</td>
<td>12.5%</td>
<td>14.3%</td>
<td>23.5%</td>
<td>23.1%</td>
<td>38.0%</td>
<td>20.0%</td>
<td>26.7%</td>
<td>35.0%</td>
<td>24.1%</td>
<td>52</td>
</tr>
<tr>
<td>Middle</td>
<td>52.1%</td>
<td>53.1%</td>
<td>49.0%</td>
<td>53.8%</td>
<td>48.0%</td>
<td>52.5%</td>
<td>55.6%</td>
<td>42.5%</td>
<td>50.8%</td>
<td>102</td>
</tr>
<tr>
<td>Lower Middle</td>
<td>27.1%</td>
<td>24.5%</td>
<td>15.7%</td>
<td>17.9%</td>
<td>10.0%</td>
<td>15.0%</td>
<td>15.6%</td>
<td>20.0%</td>
<td>18.2%</td>
<td>149</td>
</tr>
<tr>
<td>Lower</td>
<td>8.3%</td>
<td>8.2%</td>
<td>11.8%</td>
<td>5.1%</td>
<td>4.0%</td>
<td>12.5%</td>
<td>2.2%</td>
<td>2.5%</td>
<td>6.8%</td>
<td>122</td>
</tr>
<tr>
<td>Lower Sub-Total</td>
<td>35.4%</td>
<td>32.7%</td>
<td>27.5%</td>
<td>23.1%</td>
<td>14.0%</td>
<td>27.5%</td>
<td>17.8%</td>
<td>22.5%</td>
<td>25.0%</td>
<td>141</td>
</tr>
</tbody>
</table>

Source: CACI Retail Locations

3.43 Northampton has current has no upper market retailers compared to its aspirational benchmarks, providing an opportunity to achieve at least 3% representation of these retailers within the clothing & accessories sector. Similarly, Northampton is currently underperforming in the representation amongst upper-middle retailers, where it would be realistic to almost double the current representation of these retailers from 12% to 21%.  

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4.0 Future Macro-Performance for Northampton

Introduction

4.1 In order to assess and shape understanding of the future market potential in Northampton, three key future scenarios have modelled using CACI’s Spatial Modelling system, an enhanced version of Retail Footprint capable of modelling the impacts of economic growth and the retail development pipeline.

4.2 The three scenario’s are all run to the forecast year 2017, and represent the following development situations:

- **[A]** – “Do Nothing” – Grosvenor Centre does not extend, whilst out of town retail provision increases by 10,000 sqm.
- **[B]** – “Maintain Status” – Grosvenor Centre extends and out of town retail is not increased.
- **[C]** – “Grow to City Status” – As with Scenario B, but other areas of pitch are developed to provide a much stronger overall quality retail offer in the town.

4.3 2017 has been selected as a suitable future forecast date it encapsulates the likely timescales for the Grosvenor Centre to complete all phases of its extension, and provides sufficient time to realistically incorporate the economic benefits that the planned growth in residential population will bring.

4.4 The Grosvenor Centre extension is a major new development led by Legal & General of circa 40,000 sqm additional floorspace for the town centre. We estimate the final proposed scheme will be open by 2017, with earlier phases possibly opening prior to this. The scheme will provide much needed additional large floorplates for major space users and a revitalised shopping centre environment. This development is absolutely crucial to secure the future of retailing in Northampton, and in particular to avoid investment from retailers being diverted to decentralised locations.

4.5 However, floorspace alone will not enable to capitalise on Northampton’s full market potential. The town’s retail needs to develop into a quality centre, with a strong retail circuit, providing opportunities for premium retail niches, specialists and independents alongside exceptional public realm and heritage that will provide Northampton’s shoppers an outstanding retail experience throughout the town.

Summary of Scenarios (% Impacts on Market Potential (£m’s))

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenario A (2017) Do Nothing</td>
<td>-27.6%</td>
<td>18.5%</td>
<td>17.8%</td>
<td>-13.8%</td>
</tr>
<tr>
<td>Scenario B (2017) Maintain Status</td>
<td>+6.5%</td>
<td>25.2%</td>
<td>17.5%</td>
<td>25.2%</td>
</tr>
<tr>
<td>Scenario C (2017) Grow to City Status</td>
<td>+37.0%</td>
<td>31.1%</td>
<td>16.5%</td>
<td>59.7%</td>
</tr>
</tbody>
</table>
Residential Growth for Northampton

4.6 The figures below summarise the planning study area used in the CBRE report.

Figure 4.1a Map of CBRE Planning Study Catchment Areas

4.7 The planning catchment area covers the current major catchment area identified in this study, extending further southwest (zones 10, 12 and 13) and northeast (Zones 15 and 16). This highlights a current problem with Northampton’s current performance, since from a planning perspective, it ought to have greater influence on these areas than it does currently.

4.8 To assess the economic benefits to the town of the substantial planned residential growth for Northampton, we have used population growth estimates from CBRE’s “alternative growth” scenario in their 2006 leisure and capacity assessment. We have rolled forward the projected population growth estimates for the period 2006 and 2016 to a growth estimate for the period 2007 and 2017, working from a baseline of 2007 residential expenditure.

4.9 The figure below summarises the population assumptions used in CBRE’s planning work. The overall population growth in the area is predicted to be 109,434, which includes natural population growth as well as growth stimulated by additional housing stock. This figure happens to closely relate to Northampton’s housing infrastructure targets to accommodate an additional 100,000 people by 2021, and hence is a useful scenario to work with.
Figure 4.1b CBRE ‘Alternative’ Population Growth Assumptions

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Zone 01</td>
<td>64,143</td>
<td>69,393</td>
<td>75,729</td>
<td>11,586</td>
<td>18.1%</td>
</tr>
<tr>
<td>Planning Zone 02</td>
<td>73,904</td>
<td>79,952</td>
<td>87,252</td>
<td>13,348</td>
<td>18.1%</td>
</tr>
<tr>
<td>Planning Zone 03</td>
<td>39,692</td>
<td>42,939</td>
<td>46,859</td>
<td>7,167</td>
<td>18.1%</td>
</tr>
<tr>
<td>Planning Zone 04</td>
<td>33,985</td>
<td>36,767</td>
<td>40,124</td>
<td>6,139</td>
<td>18.1%</td>
</tr>
<tr>
<td>Planning Zone 05</td>
<td>17,331</td>
<td>18,095</td>
<td>18,822</td>
<td>1,491</td>
<td>8.6%</td>
</tr>
<tr>
<td>Planning Zone 06</td>
<td>16,547</td>
<td>17,562</td>
<td>18,471</td>
<td>1,924</td>
<td>11.6%</td>
</tr>
<tr>
<td>Planning Zone 07</td>
<td>17,170</td>
<td>18,731</td>
<td>19,804</td>
<td>2,634</td>
<td>15.3%</td>
</tr>
<tr>
<td>Planning Zone 08</td>
<td>40,316</td>
<td>46,769</td>
<td>53,222</td>
<td>12,906</td>
<td>32.0%</td>
</tr>
<tr>
<td>Planning Zone 09</td>
<td>23,831</td>
<td>25,153</td>
<td>26,062</td>
<td>2,231</td>
<td>9.4%</td>
</tr>
<tr>
<td>Planning Zone 10</td>
<td>28,205</td>
<td>29,878</td>
<td>31,473</td>
<td>3,268</td>
<td>11.6%</td>
</tr>
<tr>
<td>Planning Zone 11</td>
<td>12,749</td>
<td>13,925</td>
<td>14,734</td>
<td>1,985</td>
<td>15.6%</td>
</tr>
<tr>
<td>Planning Zone 12</td>
<td>11,954</td>
<td>12,520</td>
<td>13,072</td>
<td>1,118</td>
<td>9.4%</td>
</tr>
<tr>
<td>Planning Zone 13</td>
<td>58,053</td>
<td>61,327</td>
<td>63,972</td>
<td>5,919</td>
<td>10.2%</td>
</tr>
<tr>
<td>Planning Zone 14</td>
<td>67,489</td>
<td>74,600</td>
<td>82,785</td>
<td>15,296</td>
<td>22.7%</td>
</tr>
<tr>
<td>Planning Zone 15</td>
<td>101,401</td>
<td>112,110</td>
<td>120,470</td>
<td>19,069</td>
<td>18.8%</td>
</tr>
<tr>
<td>Planning Zone 16</td>
<td>33,053</td>
<td>34,786</td>
<td>36,406</td>
<td>3,353</td>
<td>10.1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>639,823</strong></td>
<td><strong>694,507</strong></td>
<td><strong>749,257</strong></td>
<td><strong>109,434</strong></td>
<td><strong>17.1%</strong></td>
</tr>
</tbody>
</table>

4.10 In the growth scenario above, population growth is relatively evenly distributed across the planning area, with particularly strong growth in zones 8 (Daventry), 14 (Wellingborough) and 15 (Kettering), with lower rates of growth in zones 5 (Brixworth), 9 (Towcester) and 12 (Oakley).

Development Pipeline

4.11 In order to model the future market potential for Northampton, CACI have used their Retail Futures database of planned UK retail developments and programmed these (sources include EGI), using their Spatial Modeller system to create a future year (2017) version of Retail Footprint.

4.12 Figure 4.2 shows the major planned developments until 2017 that will have some impact upon shopper flows to Northampton.

4.13 Major competing developments include the opening of Highcross Leicester in Leicester this year, which will add 60,000 sq m of retail space to the centre, the Grand Arcade in Cambridge (41,806 sq m – also this year) and the proposals in Milton Keynes for an extension to The Centre:MK (24,019 sq m).

4.14 The proposed Grosvenor Centre extension of 42,734 sqm is therefore set within this context of strong retail development activity in surrounding town and city centres.
Figure 4.2 Major developments of relevance to Northampton

<table>
<thead>
<tr>
<th>Scheme Name</th>
<th>Town</th>
<th>Development</th>
<th>Planning Status</th>
<th>Opening Date</th>
<th>Retail Space Uplift (sq m gross)</th>
</tr>
</thead>
<tbody>
<tr>
<td>St James Retail Park</td>
<td>Out-of-town, Northampton</td>
<td>Refurbishment</td>
<td>Completed</td>
<td>2007</td>
<td>3,892</td>
</tr>
<tr>
<td>Highcross</td>
<td>Leicester</td>
<td>Extension</td>
<td>Under Construction</td>
<td>2008</td>
<td>60,000</td>
</tr>
<tr>
<td>Grand Arcade</td>
<td>Cambridge</td>
<td>New Build</td>
<td>Under Construction</td>
<td>2008</td>
<td>41,806</td>
</tr>
<tr>
<td>Leisure Plaza</td>
<td>Milton Keynes</td>
<td>New Build</td>
<td>Permission</td>
<td>2009</td>
<td>5,000</td>
</tr>
<tr>
<td>Willow Place</td>
<td>Corby</td>
<td>Extension</td>
<td>Permission</td>
<td>2011</td>
<td>27,871</td>
</tr>
<tr>
<td>Grosvenor Centre</td>
<td>Northampton</td>
<td>Extension</td>
<td>Proposal</td>
<td>2012 (?)</td>
<td>42,734</td>
</tr>
<tr>
<td>Thecentre:MK</td>
<td>Milton Keynes</td>
<td>Extension</td>
<td>Outline Permission</td>
<td>2012</td>
<td>24,019</td>
</tr>
<tr>
<td>Allhallows</td>
<td>Bedford</td>
<td>New Build</td>
<td>Permission</td>
<td>2012</td>
<td>35,767</td>
</tr>
<tr>
<td>Crown Walk</td>
<td>Bicester</td>
<td>Extension</td>
<td>Permission</td>
<td>2012</td>
<td>23,226</td>
</tr>
<tr>
<td>North Westgate</td>
<td>Peterborough</td>
<td>New Build</td>
<td>Proposal</td>
<td>2013 (?)</td>
<td>60,015</td>
</tr>
</tbody>
</table>

Sources: CACI Retail Futures, EGI

Scenario Tests

4.15 To determine the future performance of Northampton Town Centre CACI have performed the following assessment:

- By use of spatial modeller, determined the gain or loss in market coverage in 2017 due to the development pipeline and changes in the market positioning of Northampton Town Centre.
- By use of council forecasts of population growth, determined the increase in underlying market potential due to this growth.
- Combined the above to derive a future market potential (2017).

4.16 All results are reported at current prices and expenditure per capita levels. We have not factored any forecast changes in the expenditure per capita of residents, as such between 2008 and 2017, as any such forecasts would introduce additional uncertainty into the analysis, and detract from the strategic intent of this assessment, which is to assess opportunities to gain increased market shares and take advantage of significant increases in the resident population.

4.17 Three scenario’s have been analysed to the forecast year 2017, and represent the following development situations:

- [A] – "Do Nothing“ – Grosvenor Centre does not extend, whilst out of town retail increases by 10,000 sqm
- [B] – “Maintain Status” – Grosvenor Centre extends and out of town retail is not increased.
- [C] – “Grow to City Status” – As with Scenario B, but other areas of pitch are developed to provide a much stronger overall quality retail offer in the town.

4.18 The scenarios have been tested against the baseline year (2008) to assess changes in market potential due to economic and competitive effects. Figure 4.3 summarises the outcomes of these tests.
Figure 4.3– Scenario Testing Summary

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Do Nothing Scenario A (2017)</td>
<td>£348m</td>
<td>18.5%</td>
<td>17.8%</td>
<td>-27.6%</td>
<td>£300m</td>
<td>-13.8%</td>
</tr>
<tr>
<td>Maintain Status Scenario B (2017)</td>
<td>£348m</td>
<td>25.2%</td>
<td>17.5%</td>
<td>6.5%</td>
<td>£436m</td>
<td>25.2%</td>
</tr>
<tr>
<td>Grow to City Status Scenario C (2017)</td>
<td>£348m</td>
<td>31.1%</td>
<td>16.5%</td>
<td>37.0%</td>
<td>£556m</td>
<td>59.7%</td>
</tr>
</tbody>
</table>

4.19 With no further major retail development in Northampton town centre (i.e. no extension to the Grosvenor Centre), the rising need for additional retail space from retailers with requirements for large floorplates, combined with the rising need generated by the planned residential growth in Northampton will provide a convincing planning context for out of town retail development. The initial impact on Northampton town centre’s catchment due to shifts in shopping patterns arising from an extension of the out of town retail offer will be 9.5%. However, there is a strong chance that such developments may significantly duplicate the anchor offers in the town (such as Marks & Spencer and New Look). This will cause these retailers at out of town locations to limit their product range in the town, preferring to concentrate their resources into sales out-of-town, and in some cases, potentially trigger complete vacation from the town centre. It is these secondary impacts that will do the most harm to Northampton, triggering a decline from a centre already showing signs of falling from its ‘average’ status, to a ‘value’ centre, such that by 2017 its catchment would actually shrink by -27.6%. Even with the forecast population growth, this would still mean that Northampton’s market potential is forecast to shrink by 13.8% by 2017 in the “Do Nothing” scenario (A).

4.20 The Scenario A test demonstrates that “Do Nothing” is simply not an option for Northampton, and that the Grosvenor Centre extension is needed to maintain Northampton’s position as a major shopping destination, and to create new opportunities in the town centre to rejuvenate its retail offer, which is represented in Scenario B. By maintaining its current market position, the Grosvenor Centre will improve upon current market shares modestly (6.5%), but most crucially in doing so the centre is able to capitalise on the residential growth, such that by 2017 the market potential will have grown by 25.2%.

4.21 Northampton is currently at a crossroads, where the centre could see further decline or regenerated growth.

4.22 Decline will occur if out-of-town competition continues to expand and the retail offer in the town does not developed to become more relevant to its shopping catchment population.

4.23 Whilst an extended Grosvenor centre can be expected to help retain Northampton’s current position through the delivery of space for larger retail units, in reality the timing of this scheme will not be sufficient to halt a decline in the shorter term.
4.24 Similarly, the full benefits of residential growth are long term, with the rate of growth insufficient to avoid a decline in the short term.

4.25 The figure below presents the relationship between the market potential of Northampton and relative retail demand for the centre (red line). If a catchment shrinks (and hence market potential drops) then retailer demand drops and a negative circle of decline is triggered. Conversely, growth in the catchment, through an improved retail offering and centre environment will invigorate demand from the retail sector for space, and establish a virtuous cycle of economic growth.

**Figure 4.4 Crossroads for retail opportunities in Northampton**

![Graph showing the relationship between market potential and retailer demand for Northampton.](image)

Market Potential in figure above excludes residential growth to allow consistent comparison of relative future demand.

4.26 In order for the town and the Grosvenor Centre to maximise its trading opportunities from Northampton’s catchment, it is crucial that a strong retail circuit is established throughout the town. In particular we have identified strong opportunities to improve the quality of the retail offer in the town to appeal to shopper demographics such as Wealthy Executives and Flourishing Families. This will necessitate a more comprehensive retail pitch strategy for the whole town centre, that integrates and complements plans for the Grosvenor Centre, but can begin to be implemented over a shorter timescale, to avoid the threat of a decline and start growing the overall economy of the town ahead of the Grosvenor Centre extension. It is under this final scenario, “Grow to City Status” (Scenario C), that the full potential for economic growth in the town centre has been assessed.

4.27 By making the retail and the shopping environment more relevant to wealthier groups, Northampton’s current market shares within its shopper catchment can be substantially improved, presenting an opportunity to increase the market potential of the town by 37.0%. Combining this with the planned residential growth in the area will increase the market potential of Northampton by 59.7% by 2017. This represents an outstanding opportunity, but one that can only be achieved through a
retail strategy that grows a much stronger retail circuit for the town as a whole.

4.28 Figure 4.5 illustrates the fundamental change in the extent of Northampton’s future catchment that could achieve under the “Grow to City Status” scenario (C). Under this scenario, Northampton would genuinely act, in retailing terms, as the dominant regional town for Northamptonshire. Under “Maintain Status” scenario (B), the catchment area does not change significantly from the current area.

**Figure 4.5 2017 “Grow to City Status” Catchment Map**

4.29 It is worth emphasising that the “Growing to City Status” scenario (C) would not be feasible without the Grosvenor Centre extension, without which the town would decline in the way described in the "Do Nothing" scenario (A). Therefore, for the remainder of this report, we have assumed the Grosvenor Centre as a given, working with Scenarios B & C (“Maintain Status” and “Grow to City Status”) to assess the future performance for the town.
5.0 Retail Pitch Analysis

Introduction

5.1 CACI have conducted a detailed retail floorspace audit of all retailers currently trading in Northampton Town Centre’s main areas of retail pitch to determine the following:

- The current Operator Configuration (Department Stores, Variety Stores, MSU’s, Multiples and Independents)
- Northampton’s current retail provision by product category (Clothing, Health & Beauty, Leisure Goods etc.)
- Floorspace provision by Retail Pitch (for example, Grosvenor Centre, Abington Street and St Giles)
- Analysis of the function, retail mix and market positioning of each area of Retail Pitch
- Comparison of Retail Mix and overall clothing Market Positioning (Upper, Upper Middle, Middle, Lower Middle, Lower) of the town centre against CACI benchmarks.

5.2 This critical appraisal of current retail supply has enabled CACI to draw conclusions on under/over provision of product categories and retailers of varying market positioning. The analysis has also helped assess the relative strengths and weaknesses of competing areas of retail pitch.

5.3 CACI have then programmed the results of their retail audit, alongside macro-economic forecasts of current performance, into a bespoke micro-model of the town centre. This has enabled CACI to assess the current performance of the town centre, by retail pitch.

Summary

- Northampton Town Centre currently comprises of 7 distinguishable areas of main retail pitch, each performing a different retail role. Some areas are in need of improvement, whilst other areas need better connectivity to other retail areas, to improve the overall legibility of the retail circuit.
- There is a strong spatial bias in comparison goods floorspace provision to the northeast of the town– with Abington Street and the Grosvenor together representing just over 60% of the total available retail area. The main department/variety store anchors are split between Drapery, Grosvenor Centre and Abington Street. There are however additional value orientated anchor stores located in Gold Street and the St Peters Area.
- The zones have market-positioning bias. St Peters Area and Gold Street have a strong value bias whilst the St Giles area provides the town’s only premium shopping street – almost entirely based upon a cluster of strong independent retailers. Market Square is mass dominated and Grosvenor Centre is highly mass dominated, in effect anchoring the mass-market positioning of the town as a whole. Drapery and Abington Street have mass-value market positioning.
- The weaker market positioning of Abington Street is of most concern, with opportunities to strengthen the link between
Abington Street and the quality independent retailing on St Giles Street.

- Gold Street is a secondary retail pitch, which benefits from footfall from St Peters Area and the rail station. It also functions as the main link between St Peters Area and the rest of the town’s retail. St Peters Area currently operates as an edge-of-town value retail park.
- Performance analysis of each of the zones highlights an issue with respect to the central area of the town, where the Market Square area (including Peacocks Place, Mercers Row and the west end of Abington Street) is significantly underperforming. This underperformance at a location that should be a vibrant hub to the town centre is of major concern.

**Pitch Analysis**

5.4 CACI has split Northampton into nine distinct areas of pitch based upon geographical location and characteristics of each area, shown in Figure 5.1.

**Figure 5.1 Map of Northampton’s Retail Pitches**
5.5 A detailed retail floorspace audit was performed on all comparison goods retail floorspace areas within these defined zones, alongside a retail fascia survey of all active frontages, in January 2008.

5.6 Some key summary statistics on comparison goods floorspace for each of the 9 pitches are provided in figure 5.2 below. The proportion of floorspace taken by Department Stores, Variety Stores and Major Space Users (MSU’s) is shown as well as the proportion of independent trader fascias.

**Figure 5.2 Floorspace summary by retail pitch**

<table>
<thead>
<tr>
<th>Retail Pitch</th>
<th>Comparison Goods Floorspace (Net Sq. Ft)</th>
<th>Share of Total Floorspace</th>
<th>Proportion of Floorspace Dep Store / Variety MSU</th>
<th>Proportion of Independent retailers (% of retail fascias)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone A: Abington Street</td>
<td>203,823</td>
<td>31.0%</td>
<td>76%</td>
<td>16%</td>
</tr>
<tr>
<td>Zone B: Drapery</td>
<td>94,676</td>
<td>14.4%</td>
<td>84%</td>
<td>40%</td>
</tr>
<tr>
<td>Zone C: Grosvenor Centre</td>
<td>164,114</td>
<td>25.0%</td>
<td>64%</td>
<td>22%</td>
</tr>
<tr>
<td>Zone D: Gold Street</td>
<td>41,932</td>
<td>6.4%</td>
<td>47%</td>
<td>78%</td>
</tr>
<tr>
<td>Zone E: St Giles</td>
<td>26,658</td>
<td>4.1%</td>
<td>0%</td>
<td>87%</td>
</tr>
<tr>
<td>Zone F: Market Square</td>
<td>75,172</td>
<td>11.4%</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Zone G: St Peters Area</td>
<td>43,059</td>
<td>6.6%</td>
<td>89%</td>
<td>72%</td>
</tr>
<tr>
<td>Zone H: Bridge Street</td>
<td>7,441</td>
<td>1.1%</td>
<td>0%</td>
<td>94%</td>
</tr>
<tr>
<td>Zone I: Guildhall</td>
<td>800</td>
<td>0.1%</td>
<td>-</td>
<td>100%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>657,673</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>58%</strong></td>
<td><strong>48%</strong></td>
</tr>
</tbody>
</table>

5.7 Zone A (Abington Street) is the most dominant pitch, consisting of 31.0% of all comparison floorspace, with Zone C (Grosvenor Centre) very close behind consisting of the next 25.0%. These two zones together make-up 56% of Northampton’s comparison retail offer. Of the two, Abington Street is most dominated by the presence of larger store operators (department stores, variety stores and Major Space Users). The relatively poorer provision of larger floorplates in the Grosvenor Centre corresponds with the need to extend this centre to provide additional large floorplates. Both these zones are well served by nearby parking, and are accessible from the bus station located to the north of the Grosvenor Centre.

5.8 Zones B (Drapery) & F (Market Square) are the next most significant areas of retail pitch. Zone B includes the northern end of Market Square, whilst The Peacock Place shopping centre, Mercers Row and the western end of Abington Street is included in the definition of Zone F (as is the market itself). Whilst Zone B is dominated by the 56,000 sq ft Debenhams store, Zone F has remarkably low levels of large footplates for the central position it takes in the town. This may part explain the weaker retailing found in this area, since this zone provides little anchorage for retail circulation. The Drapery benefits from footfall from a large car park directly to the north of the street.

5.9 Zones D (Gold Street) and G (St Peters Area) have similar levels of retail floorspace, and represent the 5th and 6th next most significant areas of comparison goods retail (when assessed by floorspace). St Peters Area is more dominated by large floorplates (70%). Gold Street retail pitch is clearly secondary to the primary areas of Zones A, B, C and F, whilst St Peters Area operates as an edge of town retail park, connected to the rest of the town centre retail via St Peters Walk arcade (included in Zone G definition) and Gold Street. Whether St Peters Area can be viewed as part
of the same retail area as the rest of the town centre is currently ambiguous. However, considering the car parking made available in the square, it is conceivable to view the square as part of a wider retail circuit via Gold Street. Gold Street benefits from footfall from the rail station situated 10 minutes walk away from the west.

5.10 The independent sector is strongest in Zone E (St Giles Street with 87% of operators independent), while weakest in Abington Street (16% independent).

5.11 Zones H (Bridge Street) and I (Guildhall) together make an up an insignificant share of floorspace (1.2%) and cannot currently be defined a formal area of Northampton’s (Comparison) Retail Pitch. It is worth noting that George Row, on All Saints Square, is on an important connector between Gold Street and St Giles Street. However, currently this street has no strong retailing function. Also worthy of note is Guildhall Road, which benefits from footfall from the St Johns car park. Whilst not a strong retail pitch, a couple of smaller boutique clothing shops have set up trade on this street, benefiting from this footfall. It is also understood that a separate study on business start-up opportunities in the St Johns area has identified strong opportunities for high-end art retailing along Guildhall Road.

5.12 Each pitch is broken down in Figure 5.3a by the percentage of each broad category of fascia it contains.

**Figure 5.3a Fascias by Retail Pitch (%) / number**

<table>
<thead>
<tr>
<th>Retail Pitch</th>
<th>Clothing</th>
<th>Non-Clothing Retail</th>
<th>Catering</th>
<th>Leisure</th>
<th>Convenience</th>
<th>Services</th>
<th>Charity</th>
<th>Vacant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone A: Abington Street</td>
<td>21.2%</td>
<td>34.8%</td>
<td>9.1%</td>
<td>3.0%</td>
<td>4.5%</td>
<td>19.7%</td>
<td>1.5%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Zone B: Drapery</td>
<td>12.9%</td>
<td>21.0%</td>
<td>25.8%</td>
<td>1.6%</td>
<td>8.1%</td>
<td>27.4%</td>
<td>3.2%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Zone C: Grosvenor Centre</td>
<td>30.2%</td>
<td>55.6%</td>
<td>3.2%</td>
<td>0.0%</td>
<td>6.3%</td>
<td>4.8%</td>
<td>0.0%</td>
<td>12.7%</td>
</tr>
<tr>
<td>Zone D: Gold Street</td>
<td>11.5%</td>
<td>25.0%</td>
<td>25.0%</td>
<td>1.9%</td>
<td>3.8%</td>
<td>25.0%</td>
<td>7.7%</td>
<td>23.1%</td>
</tr>
<tr>
<td>Zone E: St Giles</td>
<td>16.0%</td>
<td>19.1%</td>
<td>28.7%</td>
<td>4.3%</td>
<td>4.3%</td>
<td>25.5%</td>
<td>2.1%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Zone F: Market Square</td>
<td>35.4%</td>
<td>14.6%</td>
<td>10.4%</td>
<td>2.1%</td>
<td>0.0%</td>
<td>37.5%</td>
<td>0.0%</td>
<td>37.5%</td>
</tr>
<tr>
<td>Zone G: St Peters Area</td>
<td>18.2%</td>
<td>45.5%</td>
<td>9.1%</td>
<td>4.5%</td>
<td>9.1%</td>
<td>13.6%</td>
<td>0.0%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Zone H: Bridge Street</td>
<td>2.5%</td>
<td>7.5%</td>
<td>40.0%</td>
<td>2.5%</td>
<td>0.0%</td>
<td>47.5%</td>
<td>0.0%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Zone I: Guildhall</td>
<td>0.0%</td>
<td>9.1%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>9.1%</td>
<td>81.8%</td>
<td>0.0%</td>
<td>9.1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>18.5%</td>
<td>27.1%</td>
<td>19.2%</td>
<td>2.4%</td>
<td>4.6%</td>
<td>26.2%</td>
<td>2.0%</td>
<td>13.4%</td>
</tr>
</tbody>
</table>

Source: CACI Town Centre Audit

5.13 The Grosvenor Centre provides the most concentrated shopping offer (85% non-food retail), compared with Abington Street (56% non-food retail), which contains a higher level of services (20%), due to a petering out of primary retail at the eastern end of this street.
5.14 The highest concentration of catering uses can be found along Bridge Street, which plays a strong part of the evening economy, with a large number of pubs, clubs and bars operating in this street. Other areas with relatively strong (daytime) catering facilities include Drapery, Gold Street and St Giles.

5.15 On the main retail pitches (Zones A-G) high levels of Services are found in Drapery, Gold Street and St Giles, with particularly high levels (37.5%) in Market Square, where there is a strong cluster of banks and building societies.

5.16 Vacancy levels are worst in Market Square (37.5% - predominantly due a vacancy in Peacock Place) and poor letting is also found along Gold Street (23% vacancies, 8% charity shops).

5.17 Figure 5.3b summarises the same information as figure 4.3a in diagrammatic form, mapping the data onto the retail pitch zone map.

**Figure 5.3b Fascias by Retail Pitch**

Source: Ordnance Survey @Crown Copyright: Northampton Council 100019655.2008

5.18 Figures 4.4a and 4.4b summarise (in tabular and diagrammatic form) the net floorspace and relative proportion of space by type of retail store operator for Zones A-G, representing the retail area that we have determined to be Northampton Town Centre’s retail pitch, consisting of 650,000 sq ft net comparison goods floorspace. Note that in the table below the proportion of independents is by floorspace, rather than by fascia reported in figure 5.3.
5.19 Zones A, B and C are host to the town’s department stores, BHS in Abington Street, House of Fraser’s Beatties in the Grosvenor Centre and Debenhams in the Drapery.

5.20 The most significant presence of variety stores is found in Abington Street (Marks & Spencer, Woolworths, Argos), followed by the edge of town offer in St Peters Area (Argos, TK Maxx), then Poundstretcher and Wilkinsons in Gold Street. It is the presence of these variety store anchors in Gold Street and St Peters Area which, if value-orientated, mean these areas of pitch are important in terms of the overall retail circuit of Northampton. The Grosvenor Centre accommodates Boots.

**Figure 5.4a Pitch Comparison Goods Floorspace by Operator**

<table>
<thead>
<tr>
<th>Comparison Goods Floorspace (Net sq ft)</th>
<th>Multiples</th>
<th>Independents</th>
<th>Dept Store</th>
<th>Major Space Users</th>
<th>Variety Store</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone A: Abington Street</td>
<td>40,994</td>
<td>4,361</td>
<td>34,885</td>
<td>70,921</td>
<td>40,994</td>
<td>203,823</td>
</tr>
<tr>
<td>Zone B: Drapery</td>
<td>11,962</td>
<td>3,594</td>
<td>56,161</td>
<td>22,959</td>
<td>0</td>
<td>94,676</td>
</tr>
<tr>
<td>Zone C: Grosvenor Centre</td>
<td>50,837</td>
<td>8,678</td>
<td>58,650</td>
<td>31,611</td>
<td>14,337</td>
<td>164,114</td>
</tr>
<tr>
<td>Zone D: Gold Street</td>
<td>0</td>
<td>22,033</td>
<td>0</td>
<td>0</td>
<td>19,899</td>
<td>41,932</td>
</tr>
<tr>
<td>Zone E: St Giles</td>
<td>2,509</td>
<td>24,149</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>26,658</td>
</tr>
<tr>
<td>Zone F: Market Square</td>
<td>41,297</td>
<td>23,329</td>
<td>0</td>
<td>10,547</td>
<td>0</td>
<td>75,172</td>
</tr>
<tr>
<td>Zone G: St Peters Square</td>
<td>0</td>
<td>4,554</td>
<td>0</td>
<td>8,160</td>
<td>30,345</td>
<td>43,059</td>
</tr>
<tr>
<td>Total</td>
<td>176,168</td>
<td>97,118</td>
<td>149,696</td>
<td>127,296</td>
<td>105,575</td>
<td>649,432</td>
</tr>
</tbody>
</table>

5.21 Abington Street is host to the strongest cluster of Major Space Users (occupying more than 8,000 sq ft) with George, H&M, Primark, Sports World and Watts’s independent furnishings. The Grosvenor Centre currently accommodates WH Smith, Superdrug and Zavvi (recently taken over Virgin Megastores). JJB Sports is located on the Drapery, New Look on the northern side of Market Square, just outside the entrance of the Grosvenor Centre (with entrances within the centre) whilst Next is located in the Peacock Place shopping centre and Peacocks is located in St Peters Area.
5.22 Figure 5.5 shows the proportion of comparison goods floorspace by retail goods category within each pitch. This analysis takes into account the mix of floorspace allocated to different retail goods within department stores, variety stores and the market.

### Figure 5.5 Pitch Comparison Goods Floorspace by Category

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone A: Abington Street</td>
<td>149,588</td>
<td>3,162</td>
<td>23,075</td>
<td>11,086</td>
<td>1,612</td>
<td>15,300</td>
<td>203,823</td>
</tr>
<tr>
<td>Zone B: Drapery</td>
<td>63,714</td>
<td>1,050</td>
<td>15,948</td>
<td>13,964</td>
<td>0</td>
<td>0</td>
<td>94,676</td>
</tr>
<tr>
<td>Zone C: Grosvenor Centre</td>
<td>81,051</td>
<td>27,162</td>
<td>38,583</td>
<td>11,242</td>
<td>6,076</td>
<td>0</td>
<td>164,114</td>
</tr>
<tr>
<td>Zone D: Gold Street</td>
<td>11,855</td>
<td>3,782</td>
<td>3,705</td>
<td>14,266</td>
<td>621</td>
<td>7,702</td>
<td>41,932</td>
</tr>
<tr>
<td>Zone E: St Giles</td>
<td>11,200</td>
<td>0</td>
<td>8,089</td>
<td>6,064</td>
<td>979</td>
<td>326</td>
<td>26,658</td>
</tr>
<tr>
<td>Zone F: Market Square</td>
<td>64,208</td>
<td>0</td>
<td>7,788</td>
<td>2,497</td>
<td>680</td>
<td>0</td>
<td>75,172</td>
</tr>
<tr>
<td>Zone G: St Peters Square</td>
<td>37,454</td>
<td>0</td>
<td>250</td>
<td>5,355</td>
<td>0</td>
<td>0</td>
<td>43,059</td>
</tr>
<tr>
<td>Total</td>
<td>419,069</td>
<td>35,156</td>
<td>97,437</td>
<td>64,474</td>
<td>9,967</td>
<td>23,328</td>
<td>649,432</td>
</tr>
</tbody>
</table>

Source: CACI Town Centre Audit, Jan 2008
5.23 Examining the relative levels of Clothing & Accessories floorspace amongst the comparison goods floorspace in each zone reveals that Abington Street, Market Square and St Peters Area have the highest bias towards this dominant sector (64.5% of all comparison goods). Just 50% of The Grosvenor Centre is dedicated to Clothing & Accessories, mainly due to the presence of a number of Leisure operators taking large units (WH Smith, Zavvi, HMV) and the Boots store, compared to the lack of clothing & accessories retailers taking large units (with exception of New Look – which has been included as part of the Drapery zone). This configuration is not ideal for the Grosvenor Centre, and provides the context for the extension of this mall.

5.24 The vast majority of Health & Beauty goods are currently sold in the Grosvenor Centre, in the main due to the large Boots and Superdrug, and the product ranges on offer in Beatties.

5.25 Gold Street (Zone D) has a stronger emphasis on Household goods (34%) and Furniture (18%), and reflect the secondary, non-clothing nature of the retailing along this street.

5.26 St Peters Area (Zone G) operates with a strong clothing & accessories dominance, almost entirely compromising of the offer provided by Peacocks (8,000 sq ft net) and TK Maxx (30,000 sq ft net of which 25,000 clothing & accessories).

5.27 The market positions of fascias in each area of pitch were determined by their branding (Figure 5.6). With independent stores, where market position of stores cannot be tracked nationally, we assessed their market positioning based on own view from auditing the stores. Zone E (including St Giles Street) is most dominated by premium independent retail (i.e. assessed as premium based on our own audit) and on the whole provides an “alternative” retail offer that more affluent, “sophisticated” life-style groups find attractive. The market positioning has been overlaid with an analysis of shopper desire lines and paths, based upon links between the major entry points into the town (car parks, the rail station, bus station) and key retail ‘anchors’ in town (Figure 4.6a)

### Figure 5.6a Market Positioning of Fascias by Retail Pitch

<table>
<thead>
<tr>
<th>Retail Pitch</th>
<th>Value</th>
<th>Mass</th>
<th>Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone A: Abington Street</td>
<td>50%</td>
<td>41%</td>
<td>9%</td>
</tr>
<tr>
<td>Zone B: Drapery</td>
<td>54%</td>
<td>38%</td>
<td>8%</td>
</tr>
<tr>
<td>Zone C: Grosvenor Centre</td>
<td>12%</td>
<td>78%</td>
<td>10%</td>
</tr>
<tr>
<td>Zone D: Gold Street</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Zone E: St Giles</td>
<td>8%</td>
<td>48%</td>
<td>44%</td>
</tr>
<tr>
<td>Zone F: Market Square</td>
<td>23%</td>
<td>65%</td>
<td>12%</td>
</tr>
<tr>
<td>Zone G: St Peters Area</td>
<td>75%</td>
<td>25%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>33%</strong></td>
<td><strong>52%</strong></td>
<td><strong>15%</strong></td>
</tr>
</tbody>
</table>
5.28 Gold Street (Zone D) is entirely composed from the value end, including a number of discount stores, anchored by Wilkinsons and Poundstretcher. St Peters Area is also heavily value-dominated (75%).

5.29 Both Abington Street and Drapery are also dominated by a value offer (just over 50% in both cases), whilst the Grosvenor Centre and Market Square provide a mass-dominated retail offer (78% mass for GC, 65% for Market Square).

5.30 This means that currently Northampton only has a clear area of premium retail brought about by a highly successful cluster of independent stores, but no equivalent strong cluster of premium nationals.

5.31 Legibility of Northampton’s retail area is of utmost importance to a large town centre, since the retail economy depends not only on locals who know Northampton well, but to less frequent visitors to the town, whose spend is critical to attain. Furthermore, poor legibility makes the town a poorer proposition for retailers to identify the best pitch for them. For this reason it is important for the town to establish a more coherent retail circuit and retail zoning plan, which can be used to foster the evolution of a stronger overall retail offer.

5.32 Examining the key shopper desire lines and paths identifies a main shopper circulation line linking St Peters Area, Gold Street, Drapery, the top of Market Square, the Grosvenor Centre and Abington Street. A secondary path from the St Johns car park can also be identified, that link...
Guildhall Road with St Giles Street, and onto Abington Street via Fish Street.

5.33 An issue identified from this analysis is the weak direct linkage between Gold Street and Abington Street, and the knock-on effect on footfall levels along Mercers Row, the west end of Abington Street and the eastern side of Market Square.

5.34 This creates a problem with respect to achieving a healthy shopper circulation around what is the centre of Northampton’s retail area (albeit understanding that the main weight of the retail is biased to the north and east of this area). To help improve the performance of the centre, it would be beneficial to create a stronger reason for dwelling in this area, which in turn would benefit all retail pitches feeding off this central location.

5.35 It is also worth noting that due to the two-level split layout of Peacock Place, the legibility of the link between the eastern side of Market Square and Abington Street provided by Peacock Place is very poor. However, even if this legibility were improved, this would not necessarily help the issue identified with creating a stronger, legible link between Gold Street and Abington Street, unless a stronger mini-circuit could be created through Peacock Place and back around the eastern side of Market Square and the west end of Abington Street.

5.36 Another issue relates to the legibility of the links between Abington Street and St Giles Street. The retail along Fish Street is very weak, and from Abington Street end of Fish Street, there are little visual clues to entice shoppers down it to access St Giles.

5.37 To help understand better the opportunities to zone the town’s retail, we have for each pitch identified retail categories with a high level of floorspace representation within that particular pitch, compared to the average level of floorspace representation across the whole town (Figure 5.7).
5.38 The analysis of retail category strengths highlights the emphasis on clothing in St Peters Area, Market Square and Abington Street, which are all areas identified as primary areas of retail, albeit that St Peters Area operates quite independently from the primary areas to the north-east. Of particular interest is the current emphasis within the Grosvenor Centre on non-clothing retail. In the case of the Grosvenor Centre, the extension will clearly change this emphasis to a stronger clothing offer, so this is one zone where we cannot assume to work with the current retail strengths of the area.

5.39 A number of retail pitches have been identified to have a stronger catering theme, including Gold Street, Drapery and Abington Street. In this case, we would interpret this result in the context of a weak overall catering offer, and suggest that the town would benefit from a more concentrated, centralised catering offer – for example in the Market Square area.

5.40 Both Gold Street and Drapery have a stronger household theme, with Drapery also having a sports theme whilst Gold Street also having a high street DIY theme.

5.41 The independent offer on St Giles street is distinguishable from its jewellery and gifts themes. If connected with the high street fashion theme of Abington Street, one could conceive a stronger link between these two streets, via Fish Street and the Riding Arcade.
Pitch Performance

5.42 Using the data from the audit, a micro-model of Northampton’s comparison retail performance has been built. The model is able to estimate the comparison retail performance of each area of pitch. The model is sensitive to the presence of good performing retailers, the relative provision of comparison goods floorspace within the town centre and the anchoring effect of Department Stores and Variety Stores. In this way the model reflects the underlying factors that drive consumer footfall within the town centre.

5.43 The model takes as input for each area of pitch:

- Retail Footprint score
- Comparison Goods Floorspace
- Floorspace of Department Stores and Variety Stores

5.44 Taking these inputs into account, the model outputs estimates of:

- Market Potential (£m’s as a share of Northampton’s total comparison goods market potential taken from macro-analysis).
- Sales Density (£’s per sq foot).
- Benchmark Sales Density (expected performance based upon national averages of retailer performance).

5.45 An index of pitch performance has been calculated using the ratio between estimated Sales Density and Benchmark Sales Density. Figures 5.7 and 5.8 summarise the inputs and outputs of this model.

**Figure 5.7 Modelled Market Potential of Retail Pitches**

<table>
<thead>
<tr>
<th>Retail Pitch</th>
<th>Total Comparison Goods Floorspace (net sq ft)</th>
<th>RF Score</th>
<th>Dep/ Variety Store Floorspace (net sq ft)</th>
<th>Market Potential (£million)</th>
<th>Market Share of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone A: Abington Street</td>
<td>203,823</td>
<td>138</td>
<td>75,879</td>
<td>£111</td>
<td>31.9%</td>
</tr>
<tr>
<td>Zone B: Drapery</td>
<td>94,676</td>
<td>53</td>
<td>56,161</td>
<td>£45</td>
<td>13.0%</td>
</tr>
<tr>
<td>Zone C: Grosvenor Centre</td>
<td>164,114</td>
<td>152</td>
<td>72,987</td>
<td>£107</td>
<td>30.7%</td>
</tr>
<tr>
<td>Zone D: Gold Street</td>
<td>41,932</td>
<td>19</td>
<td>19,899</td>
<td>£18</td>
<td>5.2%</td>
</tr>
<tr>
<td>Zone E: St Giles</td>
<td>26,658</td>
<td>21</td>
<td>0</td>
<td>£10</td>
<td>2.9%</td>
</tr>
<tr>
<td>Zone F: Market Square</td>
<td>75,172</td>
<td>61</td>
<td>0</td>
<td>£28</td>
<td>8.1%</td>
</tr>
<tr>
<td>Zone G: St Peters Area</td>
<td>43,059</td>
<td>23</td>
<td>30,345</td>
<td>£28</td>
<td>8.1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>649,432</strong></td>
<td><strong>467</strong></td>
<td><strong>255,271</strong></td>
<td><strong>£348.0</strong></td>
<td></td>
</tr>
</tbody>
</table>

Source: CACI Micro-Model of Northampton

5.46 The pattern of market potential that each retail pitch attracts broadly reflects the relative level of retail floorspace provision. Exceptions include the St Giles area, which despite its unique offering, currently takes a smaller share of overall spend (3%) compared to its share of floorspace (4%) due to a weak anchorage (Post Office) and its secondary location and current poor retail linkage with Abington Street. The disparity between the market potential of Abington Street (£111m) and St Giles (£10m) highlights an issue of how more spend could be permeated from Abington Street through to the St Giles Area.

5.47 The other exceptions are Market Square, which underperforms, taking only 8% of market potential compared with 12% of floorspace, despite its central prime location, and the Grosvenor Centre, which has stronger
anchorage compared to the overall provision of retail space (31% of market potential compared with 25% of floorspace).

5.48 Of particular note is how the two main zones of Abington Street and the Grosvenor Centre are in current balance in terms of the market potential for trading in each area. Between the Grosvenor Centre and Abington Street, these areas are estimated to attract just over 60% of all comparison goods retail spend in Northampton Town Centre.

**Figure 5.8 Modelled Performance of Retail Pitches**

<table>
<thead>
<tr>
<th>Retail Pitch</th>
<th>Estimated Turnover (£millions)</th>
<th>Estimated Sales Density (£ per sq ft)</th>
<th>Benchmark Sales Density (£ per sq ft)</th>
<th>Performance Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone A: Abington Street</td>
<td>£54.4</td>
<td>£550</td>
<td>£267</td>
<td>82</td>
</tr>
<tr>
<td>Zone B: Drapery</td>
<td>£22.5</td>
<td>£282</td>
<td>£237</td>
<td>73</td>
</tr>
<tr>
<td>Zone C: Grosvenor Centre</td>
<td>£52.2</td>
<td>£375</td>
<td>£318</td>
<td>98</td>
</tr>
<tr>
<td>Zone D: Gold Street</td>
<td>£9.3</td>
<td>£400</td>
<td>£223</td>
<td>68</td>
</tr>
<tr>
<td>Zone E: St Giles</td>
<td>£7.3</td>
<td>£568</td>
<td>£274</td>
<td>84</td>
</tr>
<tr>
<td>Zone F: Market Square</td>
<td>£14.0</td>
<td>£342</td>
<td>£186</td>
<td>57</td>
</tr>
<tr>
<td>Zone G: St Peters Area</td>
<td>£14.4</td>
<td>£186</td>
<td>£334</td>
<td>103</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>£174.0</strong></td>
<td><strong>£418</strong></td>
<td><strong>£268</strong></td>
<td><strong>82</strong></td>
</tr>
</tbody>
</table>

Source: CACI Micro-Model of Northampton

5.49 The estimated sales densities, benchmark densities and corresponding performance indices can be used to assess potential issues and opportunities for the zones.

5.50 A high performance index may imply either over-trading or a greater sales potential than realised turnover. A low performance index may imply under-trading or evidence of retailers working hard to perform at acceptable levels despite the less than satisfactory sales potential of the area.

5.51 High performance indices can be interpreted as demonstrating opportunities for expansion of retail offer. Low indices may indicate the need for retail consolidation or the need for intervention to improve conditions for trading - depending upon the individual circumstances for each zone.

5.52 Comparing Market Potential against available floorspace, it is possible to establish retail performance indices, based upon market potential densities.

5.53 These indices differ from assessments of store turnover based upon national performance estimates of national chain stores. Rather they help indicate where retail performance is better or worse than expectations, based upon the relative strengths and weaknesses of the retail pitch.

5.54 These indices tend to correlate well with relative demand for retail space, and hence rental levels for each area.

5.55 To maintain a vibrant town centre, it is essential to achieve a balance in performance. Only Zones C and G (Grosvenor Centre and St Peters Area) currently perform up to benchmark expectations. The rest of the town is either operating in just a satisfactory way (Abington Street, Drapery and St Giles) whilst Zones F and D (Gold Street and the Market Square area) are significantly underperforming, to the detriment of overall shopper circulation throughout the town, highlighting these areas as priority areas for improvement of the retail offer.
Future Centre Pitch Performance

5.56 In scenarios B & C described in chapter 4 ("Maintain Status" and "Grow to City Status"), Northampton’s overall provision of retail floorspace will significantly increase, by approximately 50%, due to the extension of the Grosvenor Centre. This substantial increase in provision, located within one area of the town, will naturally impact upon the other areas of retail pitch.

5.57 To help understand the overall impact, we have performed a 2017 turnover assessment for the centre as a whole, under the "Maintain Status" and "Grow to City Status" scenarios to qualify the probable impacts upon overall sales densities, providing an indication of the extent of retail space dilution that may occur. Figure 5.6 summarises our assessment.

Figure 5.6 Future Centre Pitch Performance Statistics

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Potential (£m’s per annum)</td>
<td>£348.01</td>
<td>£436.00</td>
<td>£556.00</td>
</tr>
<tr>
<td>Spend Attainment</td>
<td>50%</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Turnover (£m’s per annum)</td>
<td>£174.00</td>
<td>£239.80</td>
<td>£305.80</td>
</tr>
<tr>
<td>Change (%)</td>
<td>37.8%</td>
<td>75.7%</td>
<td></td>
</tr>
<tr>
<td>Floorspace (net sq ft)</td>
<td>649,432</td>
<td>971,903</td>
<td>971,903</td>
</tr>
<tr>
<td>Change (%)</td>
<td>49.7%</td>
<td>49.7%</td>
<td></td>
</tr>
<tr>
<td>Sales Density (£’s per net sq ft)</td>
<td>£267.93</td>
<td>£246.73</td>
<td>£314.64</td>
</tr>
<tr>
<td>Change (%)</td>
<td>-7.9%</td>
<td>17.4%</td>
<td></td>
</tr>
</tbody>
</table>

5.58 Estimates of centre turnover have been derived by applying a spend attainment factor to the market potential for the town. Spend attainment relates to fact that centres only achieve a proportion of the turnover achievable from the theoretical level of spend attainable from the shoppers that visit. In both future scenarios we assume that attainment is improved from 50% to 55%, due to the wider retail offer brought about by the addition of retail floorspace. The benefits of a quality-led offer in the “Grow to City Status” scenario (C) against maintaining a mass-led offer in the “Maintain Status” scenario (B) have already been captured in the improvement to market shares, and therefore is not double-counted by differentiating achievable spend attainment between the two scenarios.

5.59 This turnover assessment has qualified that Northampton Town Centre’s overall turnover could increase somewhere between 37.8% (“Maintain Status”) to 75.7% (“Grow to City Status”).

5.60 Under the “Maintain Status” scenario (B), this would mean increases in centre turnover would be proportionally less than the overall increase in floorspace (estimated at 322,471 net sq ft – 49.7% increase), translating to a 7.9% reduction on current sales densities.

5.61 Under the “Grow to City Status” scenario (C), proportional increases in centre turnover would exceed the proportional increase in floorspace, translating to a 17.4% increase on current sales densities.
5.62 This analysis highlights the potential threat posed by the Grosvenor Centre extension on other areas of pitch. Therefore, for this reason it will be essential for other areas to define a stronger role for themselves, in the context of the extended Grosvenor Centre that will complement the shopping centre and help drive up the quality market positioning of the town. If successful, then both the Grosvenor Centre and the other areas of retail pitch will benefit from the overall increases in footfall.

5.63 To enable strong retail performance across the whole town, it is important to establish a legible retail circuit throughout the town, which can be assisted through improved public realm along identified shopper routes, and clear zoning of the retail, such that each area clearly communicates to shoppers their role in the overall circuit. The following chapter examines the opportunities to achieve this in Northampton.
6.0 Conclusions and Implementation Strategy

The Case for Change in Northampton Town Centre

6.1 Northampton town centre operates in a competitive retail environment. It is currently dominated by the retail offer in Milton Keynes and faces out-of-town retail competition. This means that there is little room for complacency, but this competitive situation can also provide great opportunity to improve trading performance through taking back greater market shares.

Leakage of Spend from Northampton’s Major Catchment

![Pie chart showing the leakage of spend from Northampton's Major Catchment]

- Northampton: 46.2%
- Weston Favell Shopping Centre: 11.4%
- Milton Keynes: 11.0%
- Riverside Retail Park: 5.8%
- Wellingborough: 5.5%
- St James Retail Park: 2.4%
- Tesco: 2.0%
- Sixfields: 1.1%
- Other: 14.7%

6.2 Northampton’s Major Catchment (where 90% of its shoppers come from) is roughly bounded north by the A14, west by the A5 and east by the A509. The southern limits of the catchment area are defined by a distinct ‘battleground’ due to the draw of Milton Keynes, connected with Northampton by the M1 and A508.

6.3 Northampton’s catchment residents come from a wide range of socio-economic backgrounds, but of particular interest to the town centre with respect to niche and premium retail opportunities is the particularly high index of wealthy residents, including Wealthy Executives and Flourishing Families. In relation to the overall prospects for retailing in Northampton it is important to note the high levels of Secure Families and Settled Suburbia (indexing 2.5 times the Northamptonshire average) and the general strong bias towards families, who are the life-blood of a town centre retail economy. To secure the future success of retailing in Northampton, it is essential that the needs of families be addressed, alongside the more niche opportunities to address the needs of wealthier shoppers.
6.4 Northampton’s current mass-dominated, average retail positioning means that the centre is currently failing to capitalise on the spend from Northampton’s wealthiest catchment residents. These lifestyle groups exercise the greatest choice with respect to where they shop and therefore Northampton is missing out, due to, in particular the more up-scale offer in Milton Keynes.

**Comparison of Clothing Market Positioning**

6.5 Using the principal of benchmarking - looking at towns and cities such as Peterborough, Maidstone, Leamington Spa, Solihull, Colchester, Canterbury & Harrogate for inspiration - we have qualified a strong opportunity for Northampton to re-position itself as a ‘Quality’ centre – which in particular would be more attractive to Wealthy Achievers, by significantly increasing representation in the upper-middle clothing retailers and a niche representation amongst premium retailers.

6.6 Due to the ability to draw more trade from the current catchment population, in particular from wealthier groups within Northampton and
also from “battleground” outside areas, there is an immediate opportunity to start developing a stronger quality offer in the town.

**Achievable Positive impact on Northampton Market Shares**

![Map showing market shares impact](image)

**Achievable Change in Northampton’s National Retail Ranking**

![Bar chart showing market size and UK 2017 rankings](image)

6.7 Modelling results have identified an outstanding opportunity for Northampton to increase its current market potential of £348m (current UK ranking 76) to £476m (based on current spend), which would bring Northampton into the Top 50 of the UK retail rankings, by following a strategy of up-scaling its retail offer to a more premium bias, a scenario
which we have termed “Grow to a City Status”. This scenario includes the benefits that the Grosvenor Centre will bring in securing much needed additional large floorplates to the primary retail pitch of Northampton, which will in turn help anchor interest from premium retailers to locate into the town.

6.8 Increase in market potential (and centre turnover) would be achieved by increasing the market share of Northampton’s ‘major’ catchment area spend from 46% to 55% and also attracting custom from even further afield. This will have the virtuous cyclic effect of increasing retailer demand for floorspace in the centre, reduce demand for out-of-town locations, as well as establish Northampton as a stronger focus for residents in Northamptonshire, by increasing its relevance to their lives.

6.9 However, if further out of town development is permitted, there is a risk that key current retail anchors in the town will be displaced, triggering a near irreversible decline for the town centre, and seriously undermining the commercial viability of the Grosvenor Scheme. In this case Northampton would reduce market potential by £90m, sending its ranking from 78th to way outside the top 100, at 120th, and change the market positioning of the town from a mass to value-dominated centre— we have termed this undesirable scenario “Do Nothing”.

**Scenario Modelling: Impacts on Market Potential**

![Market Potential Diagram](image)

6.10 The threat of the “Do Nothing” scenario means that not extending the Grosvenor Centre is not an option, since providing new retail floorspace within the town is the only practical way of avoiding (in the long-term) the growing demand from retailers to locate in the area being accommodated at out-of-town retail parks. Therefore we have also identified a third future scenario called “Maintain Status” which involves the extension of the Grosvenor Centre, but maintaining the current mass-market positioning (rather than developing the quality market position, as encapsulated in the “Grow to City Status” Scenario).

6.11 To develop a coherent implementation strategy for the whole of the town centre, the following section summarises the opportunities and threats by each area of retail pitch. We then progress to identify ways with which the public sector can intervene.
**Issues & Opportunities for Northampton Town Centre’s pitches**

6.12 The town centre, as with most town centres in the UK, is formed by a number of distinct retail pitches, including a covered shopping mall (Grosvenor Centre) connected to a main high street (Abington Street) and off-centre, edge-of-town value-orientated retail park (St Peters Area).

6.13 The town also contains a number of other important shopping streets, including St Giles, Drapery and Gold Street. Bridge Street, although not a shopping street, has a strong evening economy role, with a large number of pubs, bars and nightclubs. Other retail areas located in the vicinity of the town centre cannot be seen as directly connected to this core retail area, and as such are viewed to operate independently and as such not the focus of the town centre strategy.

**Northampton Retail Pitch: Floorspace and Configuration**

![Retail Pitch Map]

Pie Charts (area proportional to net comparison retail floorspace) represent proportions of floorspace by configuration and occupier.

6.14 Retail floorspace is most concentrated to the northeast of the town, with St Peters Area providing relatively lower levels of floorspace, but in the form of larger floorplates – recently attracting retailer TK Maxx to the park. There is a risk that substantial increases in retail development activity at this location would weaken prospects for the town centre, therefore the preferred location for substantial increases remains with the Grosvenor Centre extension.

6.15 Assessing the current and potential retail ranking of the centre, we have identified indicative line-ups of premium market positioned retailers that would have a strong interest in Northampton.
6.16 Premium-led retailers, as well as their clientele, have particularly high requirements for an up-scale high street environment in which to trade in.

6.17 Compared to mass and value orientated retailers, top-end retailers have much lower floorspace requirements, and as such their presence in centres is more dependent upon a suitable street environment, “good” retailing neighbours – including a sufficient cluster of premium retail – and a wealthy demographic market to pull from.

6.18 In particular, there is a strong opportunity for premium retailers to cluster outside of the managed shopping centre environment of the Grosvenor Centre, and act to strengthen the outdoor retailing circuit of the other areas of retail pitch. Shopping centres aim to select tenants who can afford the highest rents, and conversely only retailers who benefit from the high footfall levels and managed environment that shopping centres promise choose to pay the premium to be located inside of them. Premium retailers generally do not depend so heavily on mass-market footfall to survive, and therefore have a lower demand for shopping centres.

6.19 This strategy may provide increased opportunities for a ‘pepper-potting’ of premium chains and independent fashion and specialist shops, in an attractive, open environment that would create a point of difference (in particular in relation to Milton Keynes) to attract wealthier groups in to shop in Northampton – providing additional trading opportunities for mass and value retailers, who still benefit from the spend from wealthier groups.

6.20 In considering the need to attract upper-middle clothing retailers to Northampton, parallels can be drawn to the recent opening of the extended Eagle Centre in Derby, where the shopping mall has established a strong mass-market retail offer, but the city is still in need of other high-street fashion operators, and in particular in the upper-middle range.

Pitch Market Positioning and Shopping Visitor Paths
6.21 It is in the interests of all stakeholders of the town centre, that a healthy retail circuit is created across the whole town. Whilst the Grosvenor Centre will naturally seek to maximise the trade attained from visitors to the town, their overall turnover and return on investment will be downwardly impacted if it operates in a town with a weak surrounding retail circuit. When large new floorspace is introduced to a town, shifts in retail pitch are inevitable, and therefore it is crucial that new roles and functions are created for areas which will be most impacted.

6.22 Our analysis of pitch market positioning and shopping visitor paths, and of the current retail themes evident within each area of town has informed our thinking on how to developing a strong retail circuit for the whole town, ready for the post-Grosvenor Extension scenario.

6.23 In the zone by zone summaries below, we draw upon our view of where we see the opportunities for these new retailers within Northampton Town Centre.

**Abington Street (Zone A)**

6.24 Abington Street currently represents the most dominant area of retail pitch in the town (although very closely followed by the Grosvenor Centre), benefiting from department store anchors BHS and Beatties (located within the Grosvenor Centre), Marks and Spencer and major space users (taking floorspace 8,000 sq ft or more) H&M and Primark. However, the retail pitch is value dominated, indicating that this high street is currently suffering from competitive effects of the Grosvenor Centre. There is an opportunity for Abington Street to sustain a better market positioning, in particular by the creation of an upper-middle clothing cluster for the town.

6.25 We have identified a number of strong ladieswear and footwear retailers, currently missing from Northampton, who would be highly suitable for the town. Their presence would strengthen the level of high street fashion. Considering the prime location of Abington Street, there is a strong opportunity to attract these retailers this part of the retail pitch.

6.26 Many of these retailers have a stronger preference for high street, rather than shopping centre presence. For this reason, it is essential that Abington Street continues to provide a strong retail pitch for such operators post-Grosvenor Centre extension.

6.27 To help achieve lettings of retail units to upper-middle retailers, Abington Street would benefit from improvements to its public realm, including improvements to the quality of the paving in the area. There is also an opportunity along Abington Street, due to its width, to accommodate temporary markets, such as farmers markets and French and German markets that can re-invigorate interest in the town centre from target affluent groups.

6.28 There are redevelopment opportunities for further retail anchor space at the far eastern end of Abington. However, in our view this would overstretch the main shopping circuit, if comparison goods retail were considered, as well as being a poor location in terms of letting opportunities for comparison goods tenants. Rather, a strategy needs to be pursued to improve the quality of the tenant mix of the existing retail units along Abington Street.

6.29 A new supermarket store, with new parking facilities, would however provide a suitable ‘anchor’ to drive improved footfall to the existing areas of retail pitch, complimenting rather than diluting the current shopping pitch.
The Drapery (Zone B)

6.30 The Drapery is currently anchored by 60,000 sq ft Debenhams department store, and benefits from footfall from a car park located immediately north of the shopping street.

6.31 The future of The Drapery will change in the advent of an extended Grosvenor Centre, when it is likely that Debenhams would want to move into this centre for an improved retail floorspace configuration.

6.32 We have identified a strong sports and leisure theme for the street, with a strong list of suitable occupiers, and an emphasis on linking the street with the Market Square, a space where leisure events may be held in the future.

6.33 To maintain shopping footfall along the Drapery in the future, it will become more important for a stronger, continuous shopping link to be achieved towards the Grosvenor Centre. Therefore, this presents a case for improving the primary retail function of the northern side of the Market Square (which was included in the definition of this zone in the retail pitch analysis chapter).

Grosvenor Centre (Zone C)

6.34 The Grosvenor Centre is a mass-dominated shopping mall, anchored by Beatties, Boots and Sainsbury’s. The centre’s lack of a strong presence of major space users compromises its current performance. An extension of this centre would benefit the town by securing better quality retail space for major space users, variety stores and department stores – essential to compete against pressures to develop out-of-town alternative locations for these retailers. Furthermore, a stronger mass-market shopping mall will help secure higher levels of footfall and spend attainment from family groups, who will be particularly attracted to a redeveloped, contemporary retailing environment that the extension would bring about.

6.35 Families in Northamptonshire are highly car-borne, and as such it will be essential that the Grosvenor Centre be provided sufficient levels of shopper car parking to secure its success as a popular destination for families, who will otherwise be drawn to other centres where accessibility by car is easier (including Milton Keynes and out-of-town retail parks).

6.36 The extension of the Grosvenor Centre will provide the necessary floorspace to secure Northampton’s core mass-market retail offer that, in tandem with suitable levels of car parking, will attract Northampton’s core shopper market of families to shop in the town centre. This major new investment in town centre retailing will also act to move shopping patterns and future retailer occupier demand away from out-of-town retail parks.

6.37 Testing the impact of extending the Grosvenor Centre on the balance of retailing within the town demonstrates that the extension will clearly place the Grosvenor Centre as the most dominant area for retailing in the town, and further secure the dominance of the northern area of the town for retailing. This presents issues for all other areas of pitch, which will need to secure a definitive role within this context. In particular, the current weak retail linkage between the northeast and the southwest of the retail pitch becomes even more important to address.

6.38 The Drapery, with its Debenhams anchor (that is likely to go into an extended Grosvenor Scheme) and Abington Street with its current mass-value retail offer are most under threat from the extension of the Grosvenor Centre. Whilst the reduced importance of The Drapery as a retail street does not pose a threat to the overall retail circuit, a weakened
Abington Street would certainly be an undesirable outcome. Therefore, Abington Street needs to re-invent itself and build stronger links to the recent successes of St Giles Street, and create a stronger upper-middle clothing offer that will draw footfall north to south between the Grosvenor Centre and St Giles Street.

6.39 For the town to maximise the attractiveness of Northampton, it is essential that the Grosvenor Centre and the rest of the town centre, and in particular Abington Street, support each other in a complimentary way.

**Gold Street (Zone D)**

6.40 Gold Street is currently an underperforming retail street that acts as both a link between St Peters Area and the rail station to the centre of town. The street is currently dominated by value-based “filler” units, indicative of the decline that this street has experienced due its relative remoteness from the Grosvenor and Abington Street, and a weak retail offer on All Saints Square.

6.41 In order to establish a high performing city centre retail circuit, this street needs to establish a stronger role.

6.42 Gold Street is an important visitor gateway into Northampton Town Centre from the rail station and as such would benefit from a better standard of retail occupation, taking advantage of the secondary nature of this retail pitch to attract “lifestyle” homewares and electrical retailers, alternative caterers and health & beauty salons.

6.43 There is an opportunity to, through partnership work with private landowner, foster a leasing strategy for this street to develop into a “Lifestyle” themed street, attracting higher quality kitchen and homeware and electrical specialist stores to the area.

6.44 These stores will enjoy the lower rental levels of Gold Street (ultimately a secondary area of pitch compared to Abington Street and Grosvenor Centre), but by being in their nature “destination” stores, they will improve footfall in this area from a wider range of shoppers, and support other lifestyle offerings from the health and beauty and catering sector (for example spa treatment and organic foods).

**St Giles Area (Zone E)**

6.45 St Giles Street is currently enjoying a buoyant independent and specialist retail offer, benefiting from its proximity to Abington Street the attractive environment around Guildhall. However, legibility of the connection between the two shopping streets is poor, and there is opportunity to establish a stronger shopping circuit between the two.

6.46 We would propose the creation of an Abington Street/ St Giles Street “outdoor retail circuit”, which should aim to improve the relationship between the strong independent (including ladieswear and footwear) retail offer on St Giles and a rejuvenated retail offer on Abington Street. This would depend upon improving the retail links along Fish Street and the Ridings Arcade.

6.47 To support this concept, there may be opportunity, subject to further feasibility work, to develop an improved retail offer along Fish Street through redevelopment of the corner of buildings between Fish Street and the Guildhall, along St Giles Street. There may also be development opportunities for improvements to the shopping link between H&M and the Ridings Arcade.
The Heart of the Town (Zone F/I)

6.48 At the meeting point between Gold Street, Bridge Street and the Drapery, the weak retail offer along Mercers Row and All Saints Square means that shopping circulation is mainly concentrated along The Drapery, through the Grosvenor Centre and on Abington Street. Vacancies in this area, which includes Peacock Place, in what should be a lively shopping area of the town. This area should be acting as a vibrant interchange between all other areas of pitch. We have identified this area as the “heart” of the town, and recommended a target list of premium retailers and good quality caterers to enjoy what could be an exceptional active public space, that includes the south eastern corner of Market Square.

6.49 The All Saints Church area provides an opportunity for an intimate, “heart” of the city environment to encourage premium retail, quality caterers and specialist confectionary, with a revitalised public realm that would better connect together the retail pitches of Gold Street, Drapery, Market Square, Abington Street and Giles Street.

6.50 This area of the retail circuit could benefit, subject to feasibility assessment, from a stronger retail anchor on the corner of Abington Street and Market Square and/or a stronger cluster of catering units, to establish a central dwelling point for visitors.

6.51 Dependent upon further feasibility work, it may be possible to redevelop the ground floors of the buildings lining along the southern edge of Market Square to provide shop and catering units that front both Mercers Row and the Market Square, that would create improved shopper permeability around this area, and improve the connection between the Market Square and All Saints.

Market Square (Zone F)

6.52 Connecting the “heart” of the town with the Drapery and the Grosvenor Centre is the impressive market square. This square is unusually large for UK town standards, and is certainly a key asset to the town’s public realm, providing the opportunity for a focus for civic pride for all residents as Northampton evolves into a city.

6.53 The market stallholders add animation to the Square and bring it to life on Market days.

6.54 This square needs to function to connect the retail pitches together in a cohesive manner. The opportunity to hold major events in this square will not only create a stronger civic tie between this space and the residents of Northamptonshire, but benefit the surrounding retail circuit - through the additional tourist/visitor spend created through these events.

6.55 There is also opportunity for the square to act as a hub for increasing dwell-times within the central area, by providing a mass-market, family oriented catering offer, complementing the family-focused offer that the Grosvenor Centre provides, and will improve upon, in the future. A mass-market positioning of Market Square is most appropriate, to ensure an inclusive feel for all users of the town.

6.56 The Grosvenor Centre connects to the rest of the town through Market Square and Abington Street. The connection with Abington Street is the most important in terms of primary shopping, whilst, as recommended above, there is the opportunity for the scheme to connect with Market Square, which will be an important hub for shoppers, with very close connections to the “Heart of the Town”, which also has opportunities for catering.
6.57 An important issue to address with respect to Market Square is its sheer scale. This means that each side of the square does not necessarily need to play the same role as any other side. It is particularly worth noting that the western and southern sides do not benefit from as much shopper footfall as the northern and eastern sides. These sides of the square currently provide a service function for banks and travel agents. These services play an important role in the overall function of the town centre, and therefore should be supported. The more local function of these services also complements a civic theme for the square. The current condition of some of the fascias of these units could be improved.

6.58 Considering the suggestion of some catering in the “Heart of the Town” it would make most sense to place the catering for the square along the eastern side. This would provide an opportunity for Peacock Place to front the entrance centre with good catering units, in favour of the current value-oriented clothing stores currently operating in this location.

6.59 The northern side (defined as part of The Drapery zone in the retail pitch analysis chapter) currently benefits from footfall to access the Grosvenor Centre, including the identified shopper path from The Drapery area.

6.60 One of the difficulties for the Grosvenor Centre is that due to it being an “infill” scheme, it has a limited amount of available shopping frontage facing either Abington Street or Market Square. The northern side of Market Square actually represents the greatest amount of available frontage. However, the current frontages along this side of the square are not dedicated to primary shopping uses. Therefore, there would be an opportunity for the northern side to play a stronger primary retailing role in the future, and should link logically to the retail occupier strategy of the extended Grosvenor Centre.

6.61 Due to site constraints, the extension of the Grosvenor Centre is a complex task, which will most likely involve a number of development phases, to allow the scheme to continue to operate throughout the development. Therefore there is a strong opportunity for new retail units on the northern side of the square to play an important role in providing “temporary” accommodation for existing tenants of the Grosvenor Scheme, whilst development activity affecting other parts of the scheme take place, and finally, play an important “shop window” to the scheme, facing onto what needs to be an impressive looking Market Square.

**St Peters Area (Zone G)**

6.62 Whether St Peters Area can be viewed as part of the same retail area as the rest of the town centre is currently ambiguous. It operates as an edge-of-town retail park, far removed from the dominant primary shopping areas of the town centre in the north east (Grosvenor Centre and Abington Street). This disconnection is emphasised by the current weak retail offering along Gold Street.

6.63 The heavy-bias towards a value offering in this retail park means that the square, although disconnected, does not currently pose much threat to retailing in the primary areas of the town centre.

6.64 Compared with the opportunity to extend the Grosvenor Centre, the St Peters Area represents the 2nd most significant site opportunity for major additions to retail floorspace. However, due to its location, any further retail development in this area would compromise rather than complement the town centre’s primary area of pitch.

6.65 Therefore, we would not recommend major addition of new floorspace in St Peters Area. Rather, effort needs to be focused upon improving the
retail connection between this area and the rest of town, in particular through improving the retail offer along Gold Street.

6.66 There may be an opportunity for redevelopment of the shopping arcade area linking Gold Street to St Peters Area, providing additional retail floorspace fronting Gold Street.

**Bridge Street (Zone H)**

6.67 The analysis in this report has highlighted how Bridge Street is part of the evening economy circuit, but does not serve a shopping function, and therefore not part of the town’s shopping circuit. This is particularly important to note, since it supports a strategy of linking St Peters Area to the rest of the retail circuit via Gold Street, not via Bridge Street.

6.68 This street is performing well with respect to its evening economy function, and therefore should continue to be recognised and supported in this role. There could be opportunities to link an improved restaurant and café offer in the “Heart of the Town” to Bridge Street, extending the evening economy circuit and providing a “bridge” between daytime and nighttime catering functions. There may also be opportunities to improve the relationship of Bridge Street with the development of St Johns Cultural Quarter, which would also be contributing to the town’s night-time activities.

6.69 Bucking the overall theme of the street, White & Bishops outdoor clothing and equipment store is located half-way down Bridge Street. This is a strong independent trader, and although not located in an area considered to be part of Northampton’s main shopping circuit, this store is an important addition to the independent store presence in Northampton.

**All Saints Church / Guildhall Road (Zone I)**

6.70 The area around All Saints Church and Guildhall Road, with linkages to St Giles Street, is an attractive area that currently disappoints in terms of a coherent function or purpose. It also has very close connection with the described “Heart of the Town”.

6.71 The approach northwards along Guildhall Road is a particularly pleasant “gateway” to the town, due to the impressive architectural frontage of the Guildhall building.

6.72 A recent study into opportunities for creative businesses has identified Guildhall Road as an ideal location for retail units to sell top-end art from local artists. There would be a natural opportunity for such units to link to the strong independent retail offer of St Giles Street, but also to encourage other premium-led retail units in this area, including ladieswear, jewellery and beauty.

6.73 This area would be the most logical focus for tourists visiting Northampton, and therefore opportunities for independent gift shops and confectionary. The area should also provide a coherent link to the cultural theme of the St Johns Quarter to the south.

6.74 There may be an opportunity for redevelopment of land on the eastern side of All Saints Square to provide a new cultural/tourist facility that could include retail frontages for the types of operators as described above.

6.75 The western side of All Saints Square is another important “gateway” into the town, linking The Drapery, Gold Street and Bridge Street together. Some more premium orientated retailers have begun to cluster around this corner of the town – presenting opportunities to extend this premium theme westwards along Gold Street and eastwards along the southern side of All Saints Square towards Guildhall Road and St Giles Street.
Retail Strategy for Northampton Town Centre

6.76 The principle objective of the retail strategy for Northampton Town Centre is to achieve an improved tenant mix.

6.77 Assimilating all the issues and opportunities from each area of retail pitch (in the sections above) we have put together a proposed shopping strategy for the town centre, in the form of a zoning and shopping circulation plan.

6.78 The aim of the plan is to provide a common vision for all stakeholders and service providers involved in Northampton Town Centre to work towards.

Proposed Zoning and Shopper Circulation
Implementing the Retail Strategy

6.79 Because no single body or organisation has the power to implement the above proposed shopping strategy, implementation will necessitate a very strong partnership approach.

6.80 Implementing change through partnership working involves less top-down direction, but creating reward structure for positive participation. For this reason, the purpose of the plan is not to prescribe and enforce change, but to provide a basis and rationale for mutually beneficial action.

6.81 Achieving this shopping vision will primarily involve:

- Changes in the current tenancy of retail units in the town centre
- Redevelopment of existing sites
- Improvements to the public realm

6.82 Therefore, to implement this vision will require the participation of:

- Landowners
- Estate Agents
- Planning authorities
- Infrastructure providers
- Funding bodies

6.83 Fortunately, Northampton already benefits from an active Town Centre Partnership (TCP), which includes representation from Town Centre Management, Borough Council, County Council, West Northamptonshire Development Corporation, Northampton Enterprise Limited, Debenhams, House of Fraser, Legal & General and other major landholders. We would therefore recommend that this TCP is strengthened and focussed to:

- Take responsibility for the delivery of this proposed retail strategy.
- Market the town to new potential new retailers and investors.
- Communicate with agents the retail strategy for the town, and work on partnership agreements to bring forward the best leasing scenarios for the different areas of Northampton’s retail pitch.
- Co-ordinate all public realm activity to the direct benefit of landowners and retailers.
- Work with landowners on site development briefs to deliver smaller-scale retail-led (re)developments that will strengthen the retail throughout the town.

6.84 As noted, to achieve change through partnership work, a reward structure is required for positive participation. Furthermore, these changes will require funding streams to enable and accelerate action. In fact, the importance of appropriate funding streams for schemes cannot be understated in achieving desired change.

6.85 In this context, Northampton is fortunate, that due to its growth status, it has access to significant government funding streams. This report has highlighted the critical need for investment into Northampton Town Centre, to ensure it will adequately serve both the current and future populations of Northampton. Therefore, there exists a very strong argument for a proportion of this funding stream to be directed towards the town centre, and in particular towards improving the retail economy. However, there is a danger that funding is spent in a way that appears to
impose change on stakeholders, rather than be applied to schemes that stakeholders pro-actively support. For this reason, it will be important that funding is directed through the TCP, and awarded to schemes that have achieved either sufficient backing from affected stakeholders and/or been proposed by the relevant stakeholders themselves.

6.86 We would anticipate that funding will be required for the following areas:

- Urban Design Proposals
- Roadworks and materials
- Site management of town centre in terms of co-ordination of works and minimising disruption to existing trade.
- Shop front improvements
- Site development briefs and planning support
- Marketing material to retailers and investors
- Market research and consultation activity

6.87 In considering the timing and priority of funding for various schemes and initiatives identified throughout this report, the following key factors need to be considered:

- The town centre requires urgent action to avoid decline, so inaction is not an option.
- What is the level of support from affected stakeholders?
- What is the relative priority of this scheme/initiative in relation to the retail strategy - which is to improve the town centre tenant mix?

6.88 This means that procrastination over decisions is not a luxury for the town centre, and that efforts should be concentrated on the most popular changes that stand the best chance for positive implementation. Relating the value of any proposal back to the principle objective of improving the tenant mix in the town. In cases where proposals can only indirectly improve the chances of improved tenancy, they should demonstrate a joined-up approach to other actions that will achieve intended results.

6.89 Bearing in mind the intended delivery vehicle, types of areas requiring funding and method for assessing timings and priorities, we list below a list of desirable schemes and initiatives identified in this report:

- Extension of Grosvenor Shopping Centre linked to increasing appeal to family groups (including improved car parking arrangements) and fighting off external threats.
- Improvements to the public realm in Abington Street to support improvements to tenant mix in Abington Street, in particular creation of upper-middle clothing retail cluster.
- Temporary market events in Abington Street.
- Redevelopment opportunity at eastern end of Abington Street, for supermarket use.
- Strengthen retail circulation between Abington Street and St Giles Street – via Fish Street and Ridings Arcade.
- Redevelopment opportunity between Fish Street and Guildhall, along St Giles Street, for primary retail to improve shopper circulation.
• Opportunity for stronger catering presence on eastern side of Market Square to help improve dwell times.

• Potential to redevelop ground floors of buildings lining along southern edge of Market Square to provide shop and catering units fronting both Mercers Row and Market Square to improve permeability.

• Promote partnerships with small-business initiatives and Market Square management, to provide opportunities to incubate stronger independent traders on the Market Square.

• Strengthen primary retailing function of northern side of Market Square – linked with redevelopment of this part of the Grosvenor Centre and adjacent buildings to the west of the Grosvenor Centre. Strengthens link to The Drapery and provides “shop window” to Grosvenor Centre.

• Continued support of service uses on western and southern sides of Market Square, complementing a civic theme for square.

• Sports and Leisure tenant mix theme for The Drapery – secure future in case that Debenhams vacate.

• “Heart of the Town” established in area of Mercers Row, south-east corner of Market Square and western end of Abington Street. Opportunities for catering units in this more “intimate” public space.

• Redevelopment opportunity on eastern side of All Saints Square – for cultural/tourism/leisure use and creation of additional retail frontages for premium retailers.

• West side of All Saints Church addressed as important interchange between different areas of retail and evening economy pitch. Identify opportunities to extend premium and/or tourist related retail along southern side of All Saints Square and Guildhall Road (including upscale ladieswear, jewellery, beauty, gifts and confectionary).

• Improvements to tenant mix along Gold Street, along a premium lifestyle theme (inc. organic food/catering, salons and homewares).

• Potential redevelopment of arcade on Gold Street that acts as link with St Peters Area.

6.90 As noted, the purpose of our retail strategy is to establish a common vision and to engender action through partnership work. Therefore further detail prescribing the order and priority of the opportunities highlighted above would not be in the spirit of our advice. Implementation will be a dynamic process, which cannot be constrained by an over-prescriptive plan.

6.91 We would expect the TCP to adopt the retail strategy indicated in this report, and take advantage of our list of proposals as a starting point for engaging with action with relevant stakeholders.