Northampton Borough Council
TOWN CENTRE HEALTHCHECK

Final Report
October 2009
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1 INTRODUCTION

The Brief

1.1 In April 2009, Roger Tym & Partners were commissioned to undertake a comprehensive healthcheck of Northampton town centre.

1.2 The objective of the study is to present a quantitative and qualitative assessment of the Northampton Central Area to inform the emerging Area Action Plan.

1.3 Three relevant studies have already been undertaken: Northampton’s Retail Strategy (CACI, May 2008), Northampton Market Square Study (PleydellSmithyman, July 2008) and West Northamptonshire Retail Study 2008-2026 (CACI, February 2008). However, none of these included a detailed town centre healthcheck of Northampton. So this study will provide this missing information to ensure a comprehensive and robust evidence base.

PPS6 and Healthchecks

1.4 Town centre healthchecks are required by Planning Policy Statement (PPS) 6: Planning for Town Centres (2005). Paragraph 4.4 sets out twelve key indicators of vitality and viability.

1.5 In this healthcheck, we cover all these indicators, albeit not in the same order. Where possible we compare key indicators with those for the surrounding (and competing) towns of Peterborough, Milton Keynes, Leicester, Oxford and Coventry.

1.6 The healthcheck is based on standard, published data sources as well as our own observations. To inform the work, we undertook an in-centre survey of visitors, a small telephone survey of households, pedestrian counts across the town and site visits during the day and evening.

1.7 The map below shows the Northampton Central Area and the smaller “town centre” area as defined by Experian Goad in their recently published floorspace plan. In this healthcheck, we focus on the smaller town centre area but take account of the wider area.
Figure 1.1 Study Area and Goad Area

© 2009 MapInfo Corporation
1.8 In addition, we were asked to consider five specific areas: Abington Street, Drapery, Gold Street, St Giles Street and Bridge Street (also marked on the map). We have commented specifically on these where possible.

**Structure of report**

1.9 In the next section we set out the history and context of Northampton, the findings of the previous studies and current development proposals. We discuss the town centre’s strengths, weaknesses, opportunities and threats.

1.10 The healthcheck work is detailed in Section 3. Finally in Section 4 we set out some key conclusions.
2 NORTHAMPTON TOWN CENTRE IN CONTEXT

Northampton today

2.1 Northampton’s Retail Strategy provides a detailed picture of Northampton today, its mix of retailing and potential catchment. It concludes that the town centre is weak and in urgent need of improvement.

2.2 Using a bespoke retail model the authors conclude that the town centre is failing the needs of its key consumer groups such as ‘wealthy executives, flourishing families and secure families’. They suggest that the Council needs to ‘improve its retail mix towards a quality led offer’.

2.3 The study’s findings will come as no surprise to the residents of Northampton. The town centre visibly underperforms compared to its competition.

2.4 However, the study does not explore how and why the retail centre has developed in the way that it has. Northampton’s heritage has shaped the urban form of both the Borough as a whole, and the town centre.

Northampton as a new town

2.5 Northampton has been a chosen location for growth for many years and this has brought with it successive rounds of public sector infrastructure funding designed to complement its growing population. But the New Town programme also contributed to a diffuse urban form with a weak town centre.

2.6 The new town era provided large greenfield developments; often as new communities with modern district centres and employment sites. Northampton was provided with large, successful out of centre employment areas and today most of the Borough’s employment land provision is out of town; there are few town centre offices.

2.7 The new town provided out of town centre retail space including the Weston Favell District centre and a number of retail and leisure parks. Sixfields is perhaps the most noticeable because it directly competes with the town centre for leisure uses as well as retail; it accommodates restaurants, bars and cinemas.

2.8 It is also worth noting that a large part of Northampton’s rapid growth occurred prior to the PPS6 led focus on town centres, at a time when out of town retail parks were a more acceptable form of development and it was difficult for planning authorities to prevent their spread.

2.9 The weakness of the town centre is highlighted in the West Northamptonshire Retail Study which found that the town centre attracts just half of the Borough’s comparison goods spend. Much of the remaining expenditure is spent at out of town retail parks and district centres.

2.10 The Weston Favell district centre alone attracts nearly 12% of the Borough’s total comparison expenditure. It attracts one third of total comparison expenditure for the residents immediately around the centre.
2.11 Internal competition between the town centre and Northampton’s district centres and retail parks is one potential reason the town centre underperforms. But there is a common perception within Northampton that the town centre underperforms because of competition elsewhere, particularly from Milton Keynes.

2.12 However evidence suggests that while the Borough does lose some retail custom to competing centre the scale of this ‘leakage’ should not be exaggerated.

2.13 The recent Milton Keynes retail study (2008) found that residents in the northern half of Northampton Borough spent less than 5% of their comparison goods expenditure in Central Milton Keynes. Residents in the south of the Borough spent more - just under 12% of their comparison expenditure in Milton Keynes. This broadly concurs with the recent West Northamptonshire Retail Study which found that less than 7% of Northampton Borough’s expenditure ‘leaked’ to Milton Keynes.

2.14 So the scale of ‘leakage’ to Milton Keynes from the town centre is quite small compared to the scale of internal competition; competition between the town centre and the Boroughs own retail parks and district centres.

2.15 Table 2.1 shows the population within 15 minutes drive time of Northampton and the comparator towns. Northampton actually has more people living within 15 minutes drive time than Oxford, Milton Keynes or Peterborough.

2.16 The table also shows spend per capita. Convenience spend per capita is similar to the national average and above all the comparators except Milton Keynes. Comparison spend per capita is also similar to the national average and is below Milton Keynes and Oxford but above the other comparators. Spend on restaurants/cafes/bars is the highest amongst the comparators - similar to that of Milton Keynes and above the national average.

Table 2.1 Population and spend in 15 drivetime

<table>
<thead>
<tr>
<th></th>
<th>Northampton</th>
<th>Coventry</th>
<th>Leicester</th>
<th>Peterborough</th>
<th>Milton Keynes</th>
<th>Oxford</th>
<th>GB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>226,027</td>
<td>283,274</td>
<td>347,313</td>
<td>160,220</td>
<td>177,442</td>
<td>196,724</td>
<td>-</td>
</tr>
<tr>
<td>Conv. goods spend</td>
<td>1,681</td>
<td>1,644</td>
<td>1,466</td>
<td>1,525</td>
<td>1,767</td>
<td>1,694</td>
<td>1,675</td>
</tr>
<tr>
<td>per capita, per annum (£)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comp. goods spend</td>
<td>2,983</td>
<td>2,820</td>
<td>2,489</td>
<td>2,959</td>
<td>3,299</td>
<td>3,104</td>
<td>2,988</td>
</tr>
<tr>
<td>per capita, per annum (£)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant, café,</td>
<td>1,346</td>
<td>1,183</td>
<td>1,102</td>
<td>1,120</td>
<td>1,343</td>
<td>1,248</td>
<td>1,302</td>
</tr>
<tr>
<td>bar spend per capita, per annum (£)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: MapInfo
2.17 The structure of Northamptonshire makes simple comparison difficult. Northampton does not fulfil the role of a dominant County town. Both Leicester and Nottingham accommodate around half of their County population. However in Northamptonshire, Northampton accommodates only one third of the population.

2.18 Still, as we noted above, Northampton's town centre attracts only around half of the Borough’s retail expenditure. Central Milton Keynes (also a New Town) attracts approaching 70% of Milton Keynes’ retail expenditure. So Northampton should be able to do better and attract more spend from its local population.

Proposed Growth

2.19 The fast rate of growth which has taken place in Northampton in past decades is planned to continue, because Northampton is part of the Milton Keynes South Midlands Growth Area. The East Midlands Regional Plan (March 2009) states that the local authorities in West Northamptonshire (ie Northampton Borough, and Daventry and South Northamptonshire Districts) should plan for 62,125 new homes between 2001 and 2021. It also sets a figure, to be used for monitoring and review, of an increase in 37,200 jobs between 2001 and 2021. This continued investment and growing population can be viewed as a strength for the town and its town centre.

2.20 The owners of the Grosvenor Centre, Legal & General, are proposing to redevelop and extend it to provide new and updated accommodation. Discussions are continuing between the Borough Council and L&G and it is anticipated that the redeveloped centre will add between 32,515 sq m and 37,160 sq m (350,000 sq ft and 400,000 sq ft) of additional retail and leisure gross internal floorspace to the gross internal floorspace of the existing Grosvenor Centre.

Need for Additional Comparison Floorspace

2.21 The Retail Strategy for Northampton Town Centre and the West Northamptonshire Retail Study both estimate limited need for additional comparison floorspace in Northampton Town Centre beyond the proposed extension to the Grosvenor Centre. The Retail Study concludes:

“The proposed extension to the Grosvenor Centre leaves little room for an increase in comparison floorspace”

2.22 However, CACI assumed an additional 42,700 sq m net of new comparison retail floorspace at the Grosvenor Centre. This would equate to around 61,000 sq m gross. As discussed at para. 2.20 above, the redevelopment will actually add only around 32,000-37,000 sq m gross to the Grosvenor Centre. Therefore there could be an

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1 Policy 13b
2 Policy MKSM SRS Northamptonshire 2
3 West Northamptonshire Retail Study, CACI February 2008, Figure 7.1
4 Using the standard assumption that net = 70% of gross.
additional need for 19,000-23,000 sq m gross comparison floorspace in Northampton by 2026\(^5\).

2.23 The Retail Strategy highlights a risk that if additional floorspace is permitted outside of the centre, or if the proposed housing developments are not accommodated as urban extensions to the town but are built in other locations which do not relate directly to the town centre, then the town centre could have an overprovision of retail floorspace. However, it is clearly the Council’s intention both to restrict new out of centre retail floorspace and to bring forward the housing developments as sustainable urban extensions.

2.24 The redevelopment of the Grosvenor Centre is expected to start before 2021. It is currently included in the emerging strategy as having ongoing redevelopment from 2016. The best estimate so far for works and completion is between 2014 and 2018.

2.25 When this redevelopment goes ahead, it will undoubtedly be a welcome upgrade of the town centre and provide much needed high quality retail floorspace. However, it is not guaranteed to come forward.

2.26 To increase the options for a retail led development coming forward in the town centre, the Council has identified two additional site options this will give investors a greater choice.

2.27 The sites are identified in the Central Area Emerging Strategy which went out to formal consultation between 6\(^{th}\) August and 18\(^{th}\) September 2009. The sites are both in the vicinity of the Primary Shopping Area and are as follows:

- North of Abington Street (2.77 ha)
- Land in between College Street and Horsemarket (2.65 ha)

2.28 The Council owns some of the land on both sites and has the potential to deliver the same amount of floorspace, or more, as the Grosvenor Centre redevelopment, although some constraints, particularly on the latter site, would need to be overcome.

*Need for Additional Convenience Floorspace*

2.29 The retail evidence base for Northampton has indicated that the growth in Northampton’s population may merit the provision of an additional food store.

2.30 The West Northamptonshire Retail Study states that the Borough Council should seek to accommodate a new 3,000 sq m net convenience store within the town centre by 2011 (para. 9.38) and a total of 4,500 sq m net of new convenience floorspace in the centre by 2026 (Figure 9.2c).

2.31 If the (approx) 1,800 sq m net Sainsbury’s store in the Grosvenor Centre is closed and not re-accommodated in the Grosvenor Centre extension then this will also need to be replaced.

\(^5\) Using the Retail Study’s Scenario A capacity calculations.
2.32 The Retail Study suggests that this floorspace (up to 4,800 sq m net in total) should be accommodated in a single large format store because the town centre lacks such a unit (they do not consider Morrisons to be town centre). The Council's two identified sites are potential locations for this but it is important to note that a foodstore operator would require some comparison goods floorspace as well as convenience goods in a foodstore of this size. This means that the gross floorspace could total up to 7,500-8,000 sq m, plus parking and landscaping.

2.33 In the healthcheck in the next section, the purpose is firstly to quantify the strengths and weaknesses as identified by previous studies and to establish whether Northampton is really performing as poorly (in comparison to national averages and its competitors) as other studies have suggested. Secondly, the healthcheck will enable us to advise on how the centre can be improved, growth accommodated and any negative perceptions changed.
3 HEALTHCHECK

Method

3.1 The healthcheck is based on standard, published data sources as well as our own observations. To inform the work, we undertook an in-centre survey of visitors, a small telephone survey of households, pedestrian counts across the town and site visits during the day and evening.

Key Areas

Abington Street

3.2 Abington Street is the main shopping street in the centre, running east-west from the Market Square to the eastern edge of the centre, the longest unbroken row of shops. It is wide and pedestrianised, and consists of the main concentration of large multiples in Northampton, overwhelmingly comparison retailers. As the ‘flagship’ shopping area, the poor standard of maintenance of fixtures and fittings, especially street furniture, is a concern.

Drapery

3.3 Drapery runs parallel to the western side of the Market Square, from the top of Bridge Street/the eastern end of Gold Street to the bus station at the northern end of the centre. As such, it enjoys the best bus connections of all the main areas. Debenhams is the only key retailer, and is the anchor store for Drapery.

Gold Street

3.4 Gold Street is the first shopping area one comes to when walking from the train station into the town centre (apart from Marefair, which has a high level of vacancy). It is characterised by downmarket shops and rundown, poorly-maintained buildings.

St Giles Street

3.5 St Giles Street runs east-west along the southern end of the town centre, from the Guildhall outwards. It is characterised by a diverse range of uses and an unusually large number of small shops and independents - possibly linked to this and to its peripheral nature, it has experienced a very high level of vacancies, especially in the last few months.

Bridge Street

3.6 Bridge Street runs south from the lower end of Drapery until it meets the A5123. The street is notable for consisting of mainly non-retail A-Class uses - such as bars, restaurants and professional services. It experiences a very low level of footfall (see pedestrian counts), due to its peripheral nature.
Findings

**Town centre diversity of use**

<table>
<thead>
<tr>
<th>Table 3.1 Diversity of use</th>
<th>Floorspace</th>
<th>% Floorspace</th>
<th>Units</th>
<th>% Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1 Comp</td>
<td>73,780</td>
<td>52</td>
<td>215</td>
<td>38</td>
</tr>
<tr>
<td>A1 Conv</td>
<td>10,054</td>
<td>7</td>
<td>42</td>
<td>7</td>
</tr>
<tr>
<td>Services</td>
<td>38,190</td>
<td>27</td>
<td>219</td>
<td>38</td>
</tr>
<tr>
<td>Vacant</td>
<td>20,910</td>
<td>15</td>
<td>97</td>
<td>17</td>
</tr>
<tr>
<td>Total</td>
<td>142,934</td>
<td>101*</td>
<td>573</td>
<td>100</td>
</tr>
</tbody>
</table>

*Figure does not add to 100 due to rounding

3.7 The comparison goods sector accounts for 52% of the retail and service floorspace in Northampton town centre which is fractionally above the GB average of 51%. Compared to the GB average, there is strong representation in the footwear and repairs sub-sector (see Appendix 1). Conversely, Northampton is under represented in the jewellers, clocks and repairs sector.

3.8 Convenience goods floorspace, at 7%, is significantly below the GB average of 17%. The town centre is under represented in the butchers, bakers and groceries and frozen food sub-sectors. The only large grocery store that is located within Northampton town centre is the Sainsbury’s supermarket (4,127 sq m gross) in the Grosvenor Centre.

3.9 The service sector in Northampton is over represented compared to the GB average for such uses, accounting for 38% of the town centres units (GB average 33%) and 27% of its floorspace (GB average 22%). Northampton is over-represented in the building society sub-category. However, the town centre is under-represented in the restaurants, café and fast-food sub category, although there are additional clusters of these units on Wellingborough Road (to the east of the town centre) and on the retail parks.

3.10 As discussed in the previous section, spend on restaurants, cafes and bars per capita of Northampton residents is above that of all the comparator towns - it is similar to the spend of Milton Keynes’ residents and above the national average. In addition, there are around 226,000 people living within 15 minutes drive of Northampton. Amongst the comparators, this is lower than only Leicester and Coventry.

3.11 It is therefore surprising that Northampton town centre does not have more restaurant, café and fast food outlets. This may be because poor perceptions of the town combined with a lack of suitable units has led to low demand from operators. In addition, the availability and attractiveness of out of town restaurants, such as those at Wellingborough Road and Sixfields, is likely to have contributed to low demand.

3.12 Despite the low level of provision, we noted on our evening site visit that people do visit the town in the early evening for drinks and meals, and they also visit the theatre, which is popular. However the (non late night) food and drink venues are dispersed around the town centre. A small cluster of restaurants is to be found around the Guildhall but these are too few and too dispersed to form a destination quarter. The addition of the Sol
Centre to the town centre appears to have dispersed ‘family’ type food and drink venues away from the traditional town centre and the Market Square.

3.13 We found in our evening visit that the Market Square and Abington Street, the focus of daytime activity, were both very quiet in the evening. The Market Square felt slightly unsafe because of its very large size, with very limited activity (all shops were shut and there are very few open bars / restaurants surrounding it). Two of the main daytime thoroughfares (into the shopping centres) are closed at night limiting permeability onto and off the square. In addition the market stalls are still erected creating a barrier to movement across the square, and the square is poorly lit. Abington Street is almost entirely closed at night.

3.14 Although the restaurant and early evening bar provision is limited there is a buoyant night time economy (from 10pm), with popular student nights on Mondays and Tuesdays and around 60,000 people coming into the town for nights out over the weekend. Unlike ‘family’ restaurants and non late night bars which are not concentrated there is a concentration of late night premises on Bridge Street. Bridge Street and connecting streets nearby are home to most of the town centre’s very late night premises (opening past 11pm) and at the time of our late night weekend survey Bridge Street was very busy with people moving between different venues and smoking on the street. This is in contrast to Bridge Street’s more sedate day time function.

3.15 This concentration of late night premises can appear threatening to the casual town centre visitor. We witnessed a large police presence which when combined with very visible venue security re-enforces the image that the town centre is not a safe place in the late evening.

3.16 Northampton town centre has the following key attractions: the Northampton Museum & Art Gallery, the Fishmarket Gallery, the Royal & Derngate Theatre, two health clubs and several nightclubs. Most of Northampton’s hotels are located out of town. There are two large hotels in the town centre; Park Inn and Ibis, both of which are three star. The 140 room Park Inn (just outside the Goad plan area) has recently been refurbished and provides hotel, leisure and conference facilities. Although refurbished to a high standard the internal refurbishment does not disguise the dated external image of the hotel (a large and isolated concrete block). The recently built 150 room Ibis (in the Sol Centre) provides a new and modern option. In addition there are two smaller hotels in the centre, the Grand Hotel on Gold Street and the Plough Hotel on Bridge Street.

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6 Town Centre Manager
3.17 Figure 3.3 shows the town centre mix of uses. A1 uses are mainly concentrated around Abington Street and Gold Street. Although vacant uses are spread fairly evenly throughout the centre there is a slightly higher proportion at the western end of Abington Street and the area around the Market Square, Wood Hill and Mercer’s Row. The majority of office uses in the town centre are concentrated in Angel Street and St Giles Square.

3.18 An open air market is held in the Market Square. It is open from Tuesday to Saturday (although a few stalls selling fruit, vegetables, flowers and plants are allowed to trade on Monday). The market is open from 8am until 4.30pm (5pm on Saturday)\(^7\).

3.19 The market sells a range of convenience and comparison goods. The range has changed over time; for example, the number of stalls selling fruit and vegetables has greatly decreased over the past decade, due to competition from supermarkets. Clothing stalls are struggling to compete with value retailers and supermarkets - traders do not have the negotiating power of large retailers and so often have to pay more for their goods. Unique products, however, can do well if there is a customer base for them - for example the specialist bread stall and haberdashery stall are very popular.

\(^7\) [www.marketsquareevents.com](http://www.marketsquareevents.com)
3.20 At the moment there are 83 traders and many of these have been trading at Northampton market for several years. 17 new casual traders have started so far this year. The Council is looking to increase the variety of goods sold, and in particular looking to welcome new traders with lines including tools/DIY, household goods/homeware, sportswear and equipment, toys, antiques and collectables, arts and crafts and specialist food.

3.21 Our comparator centres all have markets. Peterborough Market has 179 stalls and operates from Tuesday - Saturday and Central Milton Keynes market operates on Tuesday and then Thursday - Sunday. Both sell a range of convenience and comparison goods. Leicester Market is the largest covered market in Europe and has over 300 stalls. It runs from Monday - Saturday and sells a wide range of convenience goods which includes fresh fish, meat and cheese counters. The market also sells comparison goods. Oxford covered market has approximately 50 stalls and operates from Monday - Saturday. The market sells convenience goods in the form of a bakery, butchers and greengrocers and comparison goods such as clothing and fashion, shoes and leather goods. Coventry market operates from Monday - Saturday and has approximately 170 stalls. The market sells both convenience and comparison goods.

Figure 3.2 Northampton Market
Figure 3.3 Town centre mix of uses
### Presence of National Multiples and High Profile Retailers

3.22 There is a good mix of multiples and independents. Northampton town centre has a wide range of comparison retail multiples, including Waterstones, Argos, Boots The Chemist, Primark, H&M, Next, Debenhams, The Disney Store, Wilkinson, H Samuel, Top Shop, HMV, Marks & Spencer and BHS.

3.23 Experian Goad identify 31 ‘key multiples’. Within Northampton town centre, 26 of these are represented, including WHSmith, Sainsbury, New Look, Dorothy Perkins and Vodafone. Goad key multiples that are not represented in Northampton town centre are John Lewis, Tesco and Waitrose.

3.24 Abington Street and Gold Street have particularly high concentrations of multiples - Gold Street is notable for downmarket multiples such as 99p Stores.

3.25 Northampton town centre has reasonable representation from national convenience multiples, including Sainsbury’s and Iceland supermarkets. The town centre also contains Greggs, Thorntons, Millies Cookies, Julian Graves and Holland & Barratt.

3.26 Compared to nearby centres, the town is performing well - it has the same proportion of multiples as Leicester and Coventry. The following table shows this.

<table>
<thead>
<tr>
<th>Centre</th>
<th>Percentage of top 20 retailers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northampton</td>
<td>85</td>
</tr>
<tr>
<td>Oxford</td>
<td>75</td>
</tr>
<tr>
<td>Peterborough</td>
<td>80</td>
</tr>
<tr>
<td>Leicester</td>
<td>85</td>
</tr>
<tr>
<td>Coventry</td>
<td>85</td>
</tr>
<tr>
<td>Milton Keynes</td>
<td>70</td>
</tr>
</tbody>
</table>

Source: [www.focusnet.co.uk](http://www.focusnet.co.uk)

3.27 Northampton has very few ‘high-profile’ fashion multiples. Indeed, the ‘Fashion Count’ in the Management Horizons Europe (MHE) 2008 Shopping Index indicates that 44% of Northampton’s ‘fashion’ retailers can be described as ‘middle’ order, 20% are ‘lower-middle’, 7% represent ‘value’ fashion, whilst only 10% can be categorised as ‘upper-middle’ fashion outlets. Thus, Northampton attains a ‘middle’ rating for fashion in MHE’s Index.

3.28 In terms of mix, Northampton is most like Coventry. Milton Keynes has a relatively high proportion of its retail in upper-middle markets. Among these cities, only Oxford has a notable proportion of its retail offering in upper-market shops (5%).

3.29 Northampton would clearly benefit from the addition of further mid-end and higher-end fashion retailers, which would bolster the quality and variety of the town centre’s shopping offer, and enable the town to better compete with neighbouring town centres.

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3.30 MHE rank all town centres nationally in terms of their shopping offer (size of centre and mix of outlets). Overall, MHE’s Retail Rankings 2008 put Northampton’s ranking, nationally, at 43. The table below shows 2008 MHE retail rankings and change since 2003/4 for Northampton and comparator cities.

3.31 Northampton is tied with Peterborough. This is the same rank that Northampton held in 2003/4. Among the comparator cities only Leicester and Milton Keynes rank higher.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Northampton</td>
<td>43</td>
<td>43</td>
<td>0</td>
</tr>
<tr>
<td>Peterborough</td>
<td>46</td>
<td>43</td>
<td>-3</td>
</tr>
<tr>
<td>Milton Keynes</td>
<td>29</td>
<td>30</td>
<td>1</td>
</tr>
<tr>
<td>Leicester</td>
<td>10</td>
<td>14</td>
<td>4</td>
</tr>
<tr>
<td>Oxford</td>
<td>44</td>
<td>45</td>
<td>1</td>
</tr>
<tr>
<td>Coventry</td>
<td>41</td>
<td>60</td>
<td>19</td>
</tr>
</tbody>
</table>

Source: MHE

Proportion of Vacant Street Level Property

3.32 There were 97 vacant units in Northampton town centre at the time of the Goad survey (September 2008), which equates to a vacancy rate of 15% and is above the GB average vacancy rate of 12%. In terms of floorspace, 15% of town centre floorspace was vacant in September 2008, which is above the national average of 10%.

3.33 The vacant units are spread fairly evenly throughout the centre, as Figure 3.4 shows. There is a large difference in terms of the size of the vacant units in Northampton town centre. They range from 20 sq m up to 2,730 sq m in size.

3.34 The vast majority (80) of the vacant units are A1 Use Class. There are 2 vacant banks (A2), 8 vacant restaurants (A3) and 1 vacant public house (A4). The remaining 6 units were being redeveloped at the time of the Goad survey. There were no vacant office (B1) units, although it is important to note that Goad surveys only cover ground floor units, and offices are often upper floors.

3.35 A visit to the town centre in May 2009 showed changes to the vacancy rate. In addition to the 97 vacant units identified by the Goad survey, we counted a further 22, an increase of 23% over only seven months. It is likely that this high vacancy rate can be attributed to the state of the economy, as the date of the Goad survey coincides almost exactly with the start of the recession.

3.36 Earlier this year, Colliers CRE released their latest ‘National Retail Barometer’ report (Winter 2009), which assessed the level of vacancy in fifteen centres across the UK.

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9 The GOAD approach to vacant units does not distinguish by use class and bands them all together. We have taken the same approach, although in both cases the majority are A Class units.
chosen to be representative of a range of different sizes and types, of which Northampton was one. According to this study, in October 2008 (the most recent data) Northampton had a slightly worse vacancy rate than that shown by Goad, which put it twelfth out of fifteen, or one of the worst performers in the sample. However, the historical data going back to October 2006 shows that Northampton has always had a fairly high vacancy rate, and that in relative terms vacancy has stayed stable - in terms of percentage increase in vacant units over the previous 6 months, Northampton was one of the lowest (0.06%).

Table 3.4 Vacancy Rates - National Retail Barometer (Colliers CRE)

<table>
<thead>
<tr>
<th>City</th>
<th>Void Units (%)</th>
<th>Change Apr 08 to Oct 08</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Oct-06 Apr-07</td>
<td>Oct-07 Apr-08 Oct-08</td>
</tr>
<tr>
<td>Bournemouth</td>
<td>11.2 12.7</td>
<td>12 13.7 14.8</td>
</tr>
<tr>
<td>Cardiff</td>
<td>8.5 11.6</td>
<td>14.7 11.1 12.4</td>
</tr>
<tr>
<td>Chippenham</td>
<td>5.6 5.6</td>
<td>7.7 6.5 6.1</td>
</tr>
<tr>
<td>Dundee</td>
<td>13.3 14.9</td>
<td>16.3 12.9 14</td>
</tr>
<tr>
<td>High Wycombe</td>
<td>9.5 12.2</td>
<td>11 18.9 23.6</td>
</tr>
<tr>
<td>Ilford</td>
<td>10.6 12.8</td>
<td>8.5 10.3 14.4</td>
</tr>
<tr>
<td>Kensington High Street</td>
<td>8.1 10.5</td>
<td>8.1 8.2 2.3</td>
</tr>
<tr>
<td>Lisburn</td>
<td>15.6 16.6</td>
<td>14.5 16 14.9</td>
</tr>
<tr>
<td>Liverpool</td>
<td>11.8 13.8</td>
<td>13.8 14.1 21.7</td>
</tr>
<tr>
<td>Metrocentre</td>
<td>6.6 7.3</td>
<td>6.2 9.9 7.9</td>
</tr>
<tr>
<td>Northampton</td>
<td>13.2 13</td>
<td>12.1 16.4 17.4</td>
</tr>
<tr>
<td>Oxford Street</td>
<td>8.8 6.1</td>
<td>8.4 5.4 7.1</td>
</tr>
<tr>
<td>Plymouth</td>
<td>13 12.2</td>
<td>10 11.6 13.3</td>
</tr>
<tr>
<td>Rotherham</td>
<td>8.2 10.7</td>
<td>13.6 17.3 18.6</td>
</tr>
<tr>
<td>Worcester</td>
<td>9.7 9.6</td>
<td>11.2 11.4 8.3</td>
</tr>
</tbody>
</table>
Figure 3.4 Vacant units (all use classes)
3.37 The hypothesis that increased vacancy was caused by the recession is borne out by examination of the types of establishment to recently fail. Of the eleven retail (A1) uses, only one is convenience and ten comparison – this is not surprising as it would be expected that comparison retail would be hit worse than convenience (people always need to buy food but often cut back on, or delay, non food purchases when they have less money). On top of that, five of the recent vacancies are food and/or drink establishments - 1 restaurant (A3), 3 pubs (A4) and 1 takeaway (A5) - again, this is not surprising as the food and drink sector is likely to be hit hard by economic recession, when people are less able to afford to eat out. Additionally there have been four recruitment agencies vacating premises, probably as a result of the situation in the job market - rising unemployment, but fewer jobs available.

3.38 There is a noticeable concentration of seven newly vacant units on Abington Street - representing 27% of recent vacancies compared with 10% from the Goad data. Abington Street is the main shopping street in the town centre, containing a high concentration of multiples selling comparison goods - exactly the sort of outlets affected badly by recession. Among the 22 new vacancies there are several high-profile multiples, notably Woolworths and Zavvi.

3.39 There has also been a disproportionate level of vacancy on St Giles Street recently - 23% (five units) of all vacant units in the centre compared with 0.04% previously. This is probably due to location - St Giles Street is outside of and leading away from the town.
centre so does not enjoy a high footfall. All the new vacant outlets on St Giles Street bar one are independents.

**Operator Demand**

3.40 FOCUS data can assist in making broad demand comparisons between Northampton and other cities\(^\text{10}\).

3.41 FOCUS is a comprehensive database of commercial property information put together by a team of field and office-based researchers, who are in contact with property agents across the country.

3.42 The average entry in the database is more than 1 year old and thus likely over represents the number of operators intending to invest. However, according to FOCUS data, there are approximately 47 operators seeking space in Northampton. The type of space demanded varies; 14 are seeking A1 locations specifically, 3 are seeking A3 space, while the remaining 30 are seeking all types of space. Table 3.5 shows the FOCUS data outputs for Northampton and the comparators. Northampton has the least number of entries in the FOCUS database.

3.43 The average amount of space sought in Northampton is considerably larger than in the competing cities. Of the few descriptions provided with the entries (most are blank) 10 of the 22 specifically mention out-of-town locations as being desirable.

**Table 3.5 Comparison of FOCUS data**

<table>
<thead>
<tr>
<th>Number in Database</th>
<th>Average Minimum Sq m Sought</th>
<th>Average Maximum Sq m Sought</th>
<th>Median Minimum Sq m Sought</th>
<th>Median Maximum Sq m Sought</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northampton</td>
<td>47</td>
<td>390</td>
<td>1,050</td>
<td>190</td>
</tr>
<tr>
<td>Peterborough</td>
<td>58</td>
<td>330</td>
<td>840</td>
<td>140</td>
</tr>
<tr>
<td>Milton Keynes</td>
<td>63</td>
<td>250</td>
<td>690</td>
<td>140</td>
</tr>
<tr>
<td>Leicester</td>
<td>86</td>
<td>360</td>
<td>820</td>
<td>100</td>
</tr>
<tr>
<td>Oxford</td>
<td>116</td>
<td>260</td>
<td>610</td>
<td>140</td>
</tr>
<tr>
<td>Coventry</td>
<td>62</td>
<td>290</td>
<td>570</td>
<td>90</td>
</tr>
</tbody>
</table>

**Source: FOCUS**

3.44 The demand is in our view an over estimate. The retailer analysis table included at Appendix 2 considers the retailer demand for space by city.

3.45 Of the 47 operators looking for space in Northampton;

- Three are duplicate entries (these are operators that are seeking more than one store size (Greggs, Peacocks and Atlantis);
- 22 are operators seeking space in all of the cities,
- 18 are seeking space in Northampton and at least one other city.

---

\(^\text{10}\) FOCUS data defines towns based on postal codes, unfortunately this means there is little consistency between the town definitions used in FOCUS and other data sets focused on prime plots presented above.
Only 4 of the 47 operators included in the FOCUS dataset are seeking space exclusively in Northampton. This is similar to the position in Milton Keynes and Coventry but 43 operators are seeking space exclusively in Oxford, suggesting that Oxford is a desirable location with a specific “brand” perception.

**Table 3.6 Operators seeking space exclusively in each city**

<table>
<thead>
<tr>
<th>City</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oxford</td>
<td>43</td>
</tr>
<tr>
<td>Leicester</td>
<td>10</td>
</tr>
<tr>
<td>Milton Keynes</td>
<td>5</td>
</tr>
<tr>
<td>Northampton</td>
<td>4</td>
</tr>
<tr>
<td>Coventry</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: FOCUS

The list of operators seeking space in the comparator cities but not Northampton includes relatively up-market retailers such as coffee shops, restaurants, and clothing stores. These retailers seem to seek spaces in clusters, suitable to their image. Research of up-market store location decisions could yield insights about the significance that the physical environment plays relative to other store location decisions.

There is little demand from A3/A4/A5 multiples compared to demand for space in surrounding cities. Of the 47 requirements registered on the FOCUS database, only 5 are restaurants/cafes: Chiquitos, East, Frankie & Bennie’s, Starbucks & Subway.

Several A3/A4/A5 operators are looking for space in the surrounding cities but not in Northampton, these include Strada, Café Rouge and Gourmet Burger Kitchen.

The available retail property offer in Northampton is characterised by a wide range of unit sizes. The average size of the 97 vacant units identified by Experian Goad is 216 sq m gross, which translates into an ‘average’ net sales area of approximately 150 sq m. Units of this size are significantly below the floorspace requirements of most comparison goods multiple operators. The town contains few large units of more than one storey, but a good mix of medium and small units.

**Prime Zone A Shopping Rents**

Figure 3.6, shows prime pitch rents for Northampton and the comparator cities. According to Colliers CRE 2007, Zone A rents in Northampton averaged £1,507 per sq m in 2007. This rent is lower than in all comparator centres; Oxford and Milton Keynes rents are approximately twice that of Northampton’s.

In terms of growth, prime pitch rents in Northampton has been positive between 2000 and 2007. This rate of average annual growth has been relatively good at approximately 1.63% per year. This exceeds Milton Keynes (1.37% pa), but is significantly behind rates of growth in Oxford and Coventry.

---

11 Colliers CRE Zone A rent relates to a hypothetical shop unit of optimum size and configuration in the most popular location (or prime pitch).
3.53 In terms of absolute change, Northampton ranks 4th among the comparators. By this measure of growth, Milton Keynes outperformed Northampton: £269 sq m compared to £161 over the period 2000-2007.

**Figure 3.6 Prime pitch rents 2000-2007**

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2007</th>
<th>2000-2007</th>
<th>Average Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northampton</td>
<td>1,346</td>
<td>1,507</td>
<td>161</td>
<td>1.63%</td>
</tr>
<tr>
<td>Peterborough</td>
<td>2,153</td>
<td>2,260</td>
<td>107</td>
<td>0.70%</td>
</tr>
<tr>
<td>Milton Keynes</td>
<td>2,691</td>
<td>2,960</td>
<td>269</td>
<td>1.37%</td>
</tr>
<tr>
<td>Leicester</td>
<td>2,153</td>
<td>2,260</td>
<td>107</td>
<td>0.70%</td>
</tr>
<tr>
<td>Oxford</td>
<td>2,422</td>
<td>3,068</td>
<td>646</td>
<td>3.44%</td>
</tr>
<tr>
<td>Coventry</td>
<td>1,615</td>
<td>1,884</td>
<td>269</td>
<td>2.23%</td>
</tr>
</tbody>
</table>

Source: Colliers CRE 2007

3.54 Rents for market pitches are as follows:

**Table 3.8 Market Pitch Rents 2009**

<table>
<thead>
<tr>
<th>Day</th>
<th>Min. charge (£)</th>
<th>Max. charge (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tues &amp; Weds</td>
<td>12</td>
<td>18</td>
</tr>
<tr>
<td>Thurs</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Fri</td>
<td>18</td>
<td>24</td>
</tr>
<tr>
<td>Sat</td>
<td>30</td>
<td>36</td>
</tr>
</tbody>
</table>

3.55 There is also a charity stall for £6 per day, on a Saturday.
**Retail yields**

3.56 Figure 3.7 shows 2008 Valuation Office Agency (VOA) retail yields for Northampton and comparator cities. The yields are calculated by dividing the annual rent by the capital value or sale price of the property. Yields indicate a town centre’s attractiveness to investors, with lower yields being stronger.

3.57 The VOA data is based on the evidence from transactions where individual properties are bought and sold; the data is adjusted to reflect an estimate of yield for the highest rented position in the town centre (the prime yield).

3.58 According to the VOA yield data, Northampton’s retail market is on par with Milton Keynes Central. At 4.75, the yield was significantly stronger than that of Coventry, but considerably weaker than that of Oxford (the leader).

3.59 Between 2000 and 2008 Northampton’s yield has strengthened considerably. Northampton’s improvement in average annual yield over this time leads all comparator areas. In 10/2000, Northampton’s yield was the strongest of all the comparators, although it now ranks third.

3.60 We understand that more recently, yields in Northampton have weakened due to the recession, and currently stand at 7.25\(^{12}\)

![Figure 3.7 VOA yield in select cities 01/07/2008](image)

**Table 3.9 VOA yield in select cities 01/07/2008**

<table>
<thead>
<tr>
<th></th>
<th>01/10/00</th>
<th>01/07/08</th>
<th>Change</th>
<th>Average Annual Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northampton</td>
<td>6.00</td>
<td>4.75</td>
<td>-1.3</td>
<td>-2.88%</td>
</tr>
<tr>
<td>Peterborough</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Milton Keynes - Central</td>
<td>4.75</td>
<td>4.75</td>
<td>0.00%</td>
<td></td>
</tr>
</tbody>
</table>

\(^{12}\) Cushman & Wakefield LLP
### Safety and Crime

3.61 Crime and perceptions of crime influence the attractiveness of an area for investment. High rates of crime can influence retailers directly for example; through increased inventory shrinkage, and a need for greater security, as well as indirectly, for example; through the loss of customers as people choose alternative centres due to fear of crime.

3.62 The centre feels safe. There is no evidence of crime, shopkeepers do not appear to take special security methods, police presence seems to be low (although high in the evening) and there are few visible CCTV cameras. The streets are generally wide and well-populated and there are very few “dark alleys”. County level studies have found that crime is a relatively important issue, although this is a typical UK response and not unique to Northampton.

3.63 In 2007, the Audit Commission produced a report on crime in Northamptonshire, which found that:

> Crime, fear of crime and perceptions relating to anti-social behaviour in the County remain comparatively high... historically, crime levels in Northamptonshire have been relatively high and in key categories still compare poorly against areas of similar demographic characteristics\(^{13}\).

3.64 According to the 2008 British Crime Survey, 43% of Northamptonshire residents surveyed felt that the Criminal Justice System was effective in line with Regional and National averages. However, the same survey found that confidence in the local police was relatively low.

#### Table 3.10 British crime survey findings 2007/2008

<table>
<thead>
<tr>
<th></th>
<th>Is The Criminal Justice System effective</th>
<th>Confidence in Local Police</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northamptonshire</td>
<td>43</td>
<td>43</td>
</tr>
<tr>
<td>East Midlands</td>
<td>43</td>
<td>48</td>
</tr>
<tr>
<td>England</td>
<td>44</td>
<td>53</td>
</tr>
</tbody>
</table>

Source: British Crime Survey 2008

3.65 However, crime in Northampton town is recognised as an important issue for retailers. The Northampton Retail Crime Initiative (NRCI) was created in July 2001 to tackle the problems of retail crime in the centre of Northampton Town. This is a large organisation with more than 140 members. Its actions include targeting a small group of persistent offenders through Exclusion Orders, running training courses for retailers and providing a

\(^{13}\) Audit Commission 2007 Northamptonshire community safety report
dedicated Police Liaison Officer. It is chaired by the Northampton Town Centre Partnership, which is a partnership between the Council, retailers and other organisations.

3.66 Police wardens and Police Community Support Officers (PCSOs) patrol the town centre, and the town centre manager meets the police regularly to discuss any problems that come up and any changes required, eg to lighting.

**State of Town Centre Environmental Quality**

3.67 Although maintained to an acceptable standard, Northampton town centre looks tired. The shopfronts and façades throughout the town are slightly run down, with the notable exceptions of the Morrisons area, Fish Street and Marefair. The Grosvenor Centre mall is dated. The Peacock Place mall is noticeably more modern but many of the shops have closed down and not been reoccupied. The centre’s recent change of ownership, combined with the regeneration of the Market Square adding to the area’s attractiveness, may improve the situation.

**Figure 3.8 Grosvenor Centre**

![Grosvenor Centre Image](image-url)
There is adequate signage within the centre but only one small sign directing people to the town centre from the railway station. There is a decent amount of street furniture (benches and bins), but most of the furniture is damaged to some degree - superficial rather than functional damage, but nevertheless this does contribute substantially to the impression of a tatty environment. Abington Street has particularly good street furniture, with two sculptures and plenty of circular benches with overhangs to provide shelter, however although in good working order these benches are also noticeably damaged aesthetically. Gold Street has no street furniture whatsoever.
Marefair has evidently had money spent on it in recent years. It has a newly-refurbished feel, with brand new buildings and street furniture, and is noticeably less shabby than most of Northampton. It is also much better for accessibility, being the first shopping street you come across when walking from the train station into town and having bus stops at
each end, as well as a car park immediately adjacent. However, despite all these advantages it is empty. There is next to no pedestrian footfall along the street, and the brand new retail units stand empty - there are more empty than occupied retail units on Marefair.

3.70 Cleaning services for both the town centre and the market are run by the Council, although both the Grosvenor Centre and Peacock Place have their own privately run services. However, the Northampton Town Centre Partnership, which includes the town centre manager, managers of the Grosvenor Centre and Peacock Place, a town centre major retailers group and the St. Giles Trading Group, meets regularly and discuss management issues.

3.71 The Council is currently working on a business plan for a Business Improvement District (BID) for Northampton town centre. A BID is an area where local businesses agree that they want to contribute a percentage of their business rates in order to benefit from enhanced services to improve their trading environment. The BID will be subject to a ballot and if successful, will be established as a legal company.

Accessibility

3.72 Much of the town centre including Abington Street, Gold Street, Market Square and Fish Street is pedestrianised, which cuts down on congestion - the only congested location is Gold Street, however this can be attributed to roadworks taking up over half the walkable area at the time of the study. The downside to pedestrianisation is that much of the centre has poor accessibility both by car and public transport. The train station is a poorly-signposted ten minute walk from the centre, and although buses stop frequently and regularly on Drapery, Greyfriars Bus Station is on the outskirts of the centre, behind the Grosvenor Centre (although the station is to be demolished and rebuilt with a more accessible design).

3.73 Car parking provision is good. There is a large car park associated with the Grosvenor Centre; a multi-storey at the top of Drapery; two with ample space just north of Marefair; one to the south of St Peters Square; one at St. John’s Street and one to the east of the centre at St. Michael’s Road.

3.74 The table below (derived from the websites of the relevant local authorities) shows that although Northampton has less parking than the comparator centres of Leicester and Milton Keynes, it has more than Oxford, Peterborough and Coventry. Parking charges are cheaper than in many of the competing centres.
Table 3.11 Car parking spaces and charge

<table>
<thead>
<tr>
<th>Centre</th>
<th>Spaces</th>
<th>Cost (1 hour)</th>
<th>Cost (all day)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northampton</td>
<td>5,011</td>
<td>60p - 80p</td>
<td>£5 - £7</td>
</tr>
<tr>
<td>Oxford</td>
<td>2,475</td>
<td>£2.30 - £3.80</td>
<td>£21.90 - £30.30</td>
</tr>
<tr>
<td>Peterborough</td>
<td>2,976</td>
<td>£1</td>
<td>£5 - £10</td>
</tr>
<tr>
<td>Leicester</td>
<td>7,500</td>
<td>£1 - £2.50</td>
<td>£3.80 - £12.50</td>
</tr>
<tr>
<td>Coventry</td>
<td>4,826</td>
<td>30p - £3</td>
<td>£9 - £10</td>
</tr>
<tr>
<td>Milton Keynes</td>
<td>7,000</td>
<td>30p - £1.20</td>
<td>£7</td>
</tr>
</tbody>
</table>

3.75 Provision for cyclists is poor. There are few cycle paths and cycle parking at only a few locations - the rail station, Abington Street, Fish Street, Mercers Row and Commercial Street.

Figure 3.12 Cycle parking

Pedestrian Flows

3.76 We undertook a simple survey of pedestrian flows at key points around the town centre. This is not a full scientific survey but instead illustrative to gauge how busy different parts of the centre are compared to each other.

3.77 The survey points were:

- Gold Street - outside St Peters Square
- St Peters Square - outside the mall
- Abington Street West - outside M&S
- Abington Street East - outside Primark
- St Giles Street - outside Post Office
- Morrisons - pedestrians crossing Victoria Promenade at any point between junction with Cattle Market Road and Swan Street
- Bridge Street - southern part of pedestrianised area
- Drapery - outside Debenhams

3.78 Each location was surveyed a minimum of four times during the course of a day (a Tuesday in May); twice for pedestrian flows in each direction. Three locations (two on Abington Street and Gold Street) were surveyed a third time around lunchtime.

3.79 The map below shows our results; numbers of pedestrians passing each survey point per hour (in either direction).
Figure 3.13 Pedestrian flows
Unsurprisingly the highest footfall was recorded at Abington Street West. Marks and Spencers is commonly regarded as the central point of any retail street and this part of Abington Street also includes an entrance to the Grosvenor Centre. We recorded an average of 1,600 people passing the survey point in this location.

The next highest pedestrian footfall was recorded further east along Abington Street. Our survey point outside Primark recorded an average of 1,400 pedestrians per hour. From this we conclude that most shoppers visit the full length of Abington Street from the Grosvenor Centre up to Primark. However we noted that at either side of the Abington Street entrance to the Grosvenor Centre and near Primark footfall is lower. This is because in these locations shoppers are presented with multiple directions to move in with no dominant path to follow.

In addition, although the Abington Street (Primark) location was the second busiest overall and during the daytime, in the evening it was the busiest, with the Abington Street West location being the second busiest. This is likely to due to people walking to and from Wellingborough Road, just outside the town centre to the east, where there is a restaurant cluster.

Compared to Abington Street all the other pedestrian counts were much lower. No other point recorded more than 50% of the footfall on Abington Street.

We counted an average of 750 pedestrians passing Debenhams on the Drapery and a similar number on Gold Street. St Peters and St Giles both had around 450 pedestrians per hour, and Bridge Street had 250.

We also counted pedestrians at the edge-of-centre Morrisons. This was to ascertain the level of linked trips between the store and the town centre. The fact that linked trips can occur between edge-of-centre sites and a core retail centre is a key reason why such locations are supported in planning policy.

However we observed very little movement between Morrisons and the town centre. We noted an average of less than 50 pedestrians per hour crossing Victoria Promenade. Although our survey is very limited it does imply that this retail development does not integrate with the town centre and operates more as a destination in its own right. We noted that the linkage between the store and the core town centre (Abington Street) is poor (mostly uphill and few other retail units) which may dissuade people from making linked trips. The large, well-occupied car park suggests that most people arrive and leave by car.

By and large footfall was higher in the afternoon, although St Peters Square, Drapery and Morrisons showed no significant difference. In each case there is a likely explanation – St Peters Square is a pedestrian through-route between the town centre and a large car park; Drapery is a hub for the town’s bus routes; and the sample collected at Morrisons is too small to realistically infer anything from it. Bridge Street in particular enjoyed a higher afternoon footfall - from 33 in the morning to 80 in the afternoon, an increase of 142%, possibly due to the restaurants, cafes and pubs located there.
Customer survey results

Introduction

3.88 NEMS Market Research were instructed to conduct face-to-face surveys with a random sample of visitors to Northampton in May 2009. In total, NEMS completed 204 successful interviews. The surveys were undertaken on different days of the week and at different times of the day to ensure a representative sample of pedestrians. The map below shows the survey locations - around 50 surveys were completed at each.

Figure 3.14 Locations of survey points

3.89 The main objective of the pedestrian survey was to establish the respondents’ reasons for visiting the centre and to ascertain views/attitudes in relation to a number of key issues. We also asked respondents for their postcode in order to establish where visitors to Northampton come from and how far people are willing to travel.

3.90 The survey data is weighted depending on how frequently a respondent visits Northampton. The weighting is inversely proportional to visiting frequency. This is done so that the data is effectively representative of visits rather than visitors - otherwise the responses by those people who come in to Northampton daily, for example, would feature more heavily than occasional visitors. We have chosen to use the weighted data for our analysis to better represent both frequent and occasional visitors, however this may mean that sometimes the statistics do not tally neatly, especially when taken as a percentage. This approach to weighting follows the advice in the Unit for Retail Planning Information's (URPI's) Information Brief 91/2, which states:
‘Since people who shop more frequently are more likely to be interviewed than those who shop less frequently, they will be over-represented in a sample of shopping trips. To correct this over-representation, each respondent's data should be weighted, using a weight less than one for frequent shoppers, and a weight greater than one for infrequent shoppers.’

3.91 The headline findings from the results are presented below and the questionnaires and detailed tabulated results are included at Appendices 4 and 5.

Postcode Origin of Respondents - Defining the catchment

3.92 Of the 204 interviewees, 196 supplied their home postal sector. This information enabled us to identify where visitors to Northampton town centre were coming from.

Figure 3.15 Estimated catchment

The map shows that visitors come overwhelmingly from close by, and in particular very few come from areas close to other major centres. This suggests that Northampton does
not attract those who have a roughly even choice between different centres, only those for whom it is the most convenient. It is especially noticeable that no visitors came from Milton Keynes and the surrounding area, usually considered the dominant centre in the region.

**Travel Mode**

3.94 The majority of visitors to Northampton (54%) travelled by car or van either as driver or passenger, with 41% driving themselves - suggesting a large proportion come in a vehicle alone. Interestingly, despite (or perhaps because of) the high percentage of car drivers, public perception of parking provision is very low, in terms of both cost and ease.

3.95 The next most common mode of transport is by bus (35%). This is inconsistent with the public perception which rates both public transport (which does not just refer to buses) and location of bus stops poorly. This suggests that which mode of transport people choose is informed more by personal reasons than by what the town offers, and possibly that the perceived difficulty of access to Northampton is keeping people away (see ‘Frequency of Visit’, below).

3.96 It is striking from the survey how few people travel in by cycle - however, it is not surprising. Our observations from site visits indicated that cycle lanes/paths are extremely limited and provision for cyclists generally, particularly parking, is poor, both in qualitative and quantitative terms.

**Figure 3.16 Modes of transport**

*How did you travel to Northampton today?*
**Frequency of Visit**

3.97 In a healthy town centre, one would expect a large portion of visitors to visit the town weekly. In the NEMS survey, 41% of respondents stated that they visited Northampton only once a month, and a further 18% once a fortnight, suggesting that the town is not perceived as offering enough to be many people’s primary destination for everyday shopping. This is consistent with the public perceptions, which rated the town significantly higher for services and non-food shopping than for food shopping (discussed later). Out of 204 people surveyed, only one was a first time visitor to Northampton, suggesting that the town does not attract people and bearing up the assertion that the best reason to visit Northampton is because you live nearby.

**Primary Reason for Visit**

3.98 The most common primary reason by some distance is buying non-food items (39%), which squares with our impressions from the healthchecks that Northampton has much better comparison provision than convenience. Both services (19%) and public services (12%) were also common primary reasons for visiting, however, both sectors which require less frequent visits.

3.99 Eating/drinking (0.7%) and using leisure facilities (2%) were both surprisingly uncommon primary reasons for visiting, suggesting Northampton is not a popular destination for entertainment. This is partly explained by poor provision of leisure facilities, including pubs/bars and restaurants.

3.100 One feature of the restaurant provision in the centre is, as discussed, the haphazard nature of locations - many towns have a known area where the eateries are concentrated and locals know to go there when they wish to go for a meal. Northampton town centre does not have such an area, which may be a reason why people do not identify it as a town for eating out.

3.101 Not one of the 204 respondents was in Northampton as either a day visitor or a staying visitor. This suggests the town does not attract tourists, or indeed that it does not have a strong identity - towns which people or groups decide to visit for a day or longer, rather than for one specific purpose, tend to do so by having a strong identity and a positive image associated with them.
3.102 Buying non-food items is by far the most common secondary as well as primary reason (31%), which strengthens our assertion in the previous section that Northampton has much better comparison provision than convenience. However, buying food items is a much more common secondary than primary reason, suggesting there is reasonable convenience provision for top-up shopping.

3.103 Eating and drinking also saw an increase in popularity as a secondary rather than primary reason; the second most common reason with 11%. This ties in with our observations about the nature of restaurant provision - although some people like to eat in the town when they are visiting anyway, Northampton does not seem to have a strong attraction as an eating out place.

3.104 Those who did not intend to visit an eating establishment (111 of them) were asked why not, and their responses again seem to support our assertions. 8% cited ‘poor selection’ and 3% ‘lack of family establishments’ as the reason, a total of only 11%, whereas the rest of the respondents gave a variety of circumstantial reasons. This suggests that people just do not associate the town centre with eating and drinking.
As detailed above, the survey results suggest Northampton is more popular for comparison than for convenience shopping. Given this, one would expect visitors to stay
for several hours and spend a lot, however this does not appear to be the case. The modal average stay of respondents is 1 - 2 hours, and the mean spend £32.10.

St. Peter’s Square

3.106 Those people surveyed in St. Peter’s Square were asked whether they would be visiting other areas of the town to shop, eat or drink. The responses showed that just over half (54%) would be, a small proportion considering the close proximity to the town centre. This suggests that, while there are some linked trips, many people simply go there (probably parking there) and do not use the rest of the town centre.

Market Square and surrounding shops and services

3.107 The results of the survey suggest that the Market Square is popular with visitors - 43% of respondents said they would be visiting the market stalls as part of their visit to Northampton. Of these, 63% said they would be visiting the shops and services around the Market Square. These results suggest that the market attracts customers to Northampton town centre and to the Market Square area in particular.

3.108 However, of those who said they wouldn’t visit the surrounding shops and services, fully 83% cited the quality of the shops as a reason. This may signify that the high proportion of market shoppers who do frequent the surrounding shops do so out of convenience rather than anything in particular they have to offer.

3.109 In order to get an impression of how positively various aspects of the market are viewed, we took the results from the two questions regarding what the respondents like and dislike and combined them into an aggregate score by scoring one point for a positive response and -1 point for a negative response. This approach meant that not all factors were included for various reasons - some factors mentioned in response to one question had no equivalent for the other (eg ‘good quality place’); and sometimes multiple factors had to be combined (eg, ‘stalls in general’) to be equivalent. The overall results of this can be seen in Figure 3.20.

3.110 Overall, the results were positive, with a total of 132 positive responses against only 69 negative. Interestingly, based on the same exercise for the town as a whole (Figure 3.21) the market scored exactly zero - 15 positive responses and 15 negative, which seems to suggest a neutral attitude to it overall. This discrepancy is probably explained at least partly by the fact that only those choosing to visit the market were asked to comment on its pros and cons.

3.111 The highest aggregate score by some distance is for independent stalls, with 52 positive references and no negatives. However choice of stalls (although not mentioned in the ‘likes’ responses) was cited 27 times as a ‘dislike’ and ‘stalls in general’ achieved aggregate score of -1. Prices achieved a good aggregate score of 15.

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14 Prefer to use the shops and services in other parts of town’: 32.6%; ‘Poor selection/don’t like any of the shops’: 50.0%
Regarding environmental issues, shoppers seemed to be split - on the one hand, ‘character/atmosphere’ (11) and ‘crowdedness’ (3) both achieved good aggregate scores, but ‘cleanliness’ (-2) and ‘other environmental factor’ (-19) were in the negative.

Good and Bad Points of Northampton

In order to get an impression of how positively various aspects of Northampton are viewed we repeated the exercise performed for the market to establish aggregate scores, as described above. The results for this can be seen in Figure 3.21.

The responses to the likes and dislikes questions suggest Northampton is generally perceived very poorly - in total the respondents identified 309 ‘likes’ against 470 ‘dislikes’, and the category ‘everything’ received an aggregate score of -7. This impression is reinforced by the fact that the single most common ‘like’ is convenience, suggesting that people do not go out of their way to visit Northampton over other places, merely favouring it because they live close by.

There were several categories covering different aspects of the shops, and overall they scored poorly. One exception is that ‘selection/choice of non-food multiples’ was the second highest scorer for the ‘likes’ question with 43 - however, it is difficult to draw conclusions from this since there was no exact equivalent on the dislikes side. ‘Lack of choice of national multiples’ was cited 41 times as a dislike, but since this does not distinguish non-food from food multiples it is difficult to compare; it is possible that food multiples are viewed poorly while non-food multiples are less so. Conversely, the selection of independent shops also scored poorly - an aggregate score of -25.

Environmental factors also scored poorly on aggregate. Cleanliness was overwhelmingly scored worst with -58, and ‘feeling of safety’ (-19), ‘character/atmosphere’ (-13), ‘police presence/security measures’ (-12) and ‘street furniture etc’ (-10) also scored negatively. However, ‘pedestrianised streets’ (25), ‘crowdedness’ (10) and ‘other environmental factor’ (3) achieved overall positive scores - although one might argue that the strongest environmental factor being a lack of people does not reflect well on a centre.

As well as the pedestrianised streets, the ‘eating and drinking’ category scored a high positive aggregate score. This is interesting when compared with the responses on primary and secondary reasons for visiting - these responses suggested that although few people came to Northampton specifically to eat and drink this did not necessarily mean that people thought poorly of the restaurant and bar provision, and the high score reflects that.
Figure 3.20 Perceived positives and negatives of the market

Likes and Dislikes - The Market

- Prices
- Character/Atmosphere
- Crowdedness
- Bus stops/Bus station
- Busy feel
- Wheelchair/pushchair access
- Other access/transport factor
- Stall is general
- Cleanliness
- Other environmental factor

Independent stalls
Figure 3.21 Perceived positives and negatives of Northampton

Likes and dislikes - Northampton
Residents’ survey results

Introduction

3.118 To obtain some information on the views of Northampton residents (who may or may not visit Northampton town centre), NEMS Market Research undertook a telephone survey of 400 households in May 2009. 200 households from each of two zones were surveyed. The zones are based on postcode sectors and are shown on the map below.

Figure 3.22 Household Survey Zones

3.119 The results are weighted by the number of respondents in each postcode sector. We discuss the results of the household survey in detail below.

Convenience Shopping

3.120 For households in Zone 1 the most popular shop for food and grocery shopping over the previous 6 months was Tesco Extra, Mereway (26%). This was followed by Sainsbury, Sixfields (20%). In Zone 2, Morrison’s, Kettering Road, Spinney Hill was the most popular (29%) closely followed by Tesco Extra, Weston Favell (28%). The tables below show the results in more detail.
### Table 3.12 Main Food Shopping Destinations, Zone 1

<table>
<thead>
<tr>
<th>Shop</th>
<th>Responses</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morrisons - Kettering Road, Spinney Hill</td>
<td>12</td>
<td>6</td>
</tr>
<tr>
<td>Morrisons - South of Northampton Town Centre</td>
<td>27</td>
<td>13</td>
</tr>
<tr>
<td>Sainsbury - Northampton Town Centre</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Sainsbury – Sixfields</td>
<td>42</td>
<td>20</td>
</tr>
<tr>
<td>Tesco Extra – Mereway</td>
<td>55</td>
<td>26</td>
</tr>
<tr>
<td>Tesco Extra - Weston Favell</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>43</td>
<td>22</td>
</tr>
<tr>
<td>(Don’t know / varies)</td>
<td>9</td>
<td>5</td>
</tr>
</tbody>
</table>

### Table 3.13 Main Food Shopping Destinations, Zone 2

<table>
<thead>
<tr>
<th>Shop</th>
<th>Zone 2 Responses</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asda – Kingsthorpe</td>
<td>19</td>
<td>10</td>
</tr>
<tr>
<td>Morrisons - Kettering Road, Spinney Hill</td>
<td>54</td>
<td>29</td>
</tr>
<tr>
<td>Morrisons - South of Northampton Town Centre</td>
<td>12</td>
<td>7</td>
</tr>
<tr>
<td>Tesco Extra – Mereway</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Tesco Extra - Weston Favell</td>
<td>52</td>
<td>28</td>
</tr>
<tr>
<td>Waitrose – Kingsthorpe</td>
<td>12</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>28</td>
<td>14</td>
</tr>
<tr>
<td>(Don’t know / varies)</td>
<td>4</td>
<td>2</td>
</tr>
</tbody>
</table>

3.121 Households were then asked whether, on their main food and grocery shopping trip, they also visit other shops, leisure facilities or other facilities. The majority of respondents in Zone 1, 87 (43%) said that they never do this. This was followed by 54 respondents (27%) who said that they sometimes do. In Zone 2, the highest response was again ‘never’ with 67 responses (36%) but was more closely followed by ‘sometimes’ which received 65 responses (35%).

3.122 When asked whether, as well as a main food shop, the household normally does top up shopping for food and grocery items, over three quarters of respondents said yes (80% in Zone 1 and 76% in Zone 2).

3.123 For households in both zones the most popular destination for undertaking food and grocery top up shopping was ‘other’ (28% in Zone 1 and 30% in Zone 2). These ‘other’ shops are likely to be small shops, either independents or franchises such as Spar or Costcutter. Some of these will be in the town centre but others will be on local shopping parades in residential areas. In Zone 1, the second most popular destination for top up shopping was Tesco Extra, Mereway, which received 10% of responses and in Zone 2, the second most popular was Tesco Extra, Weston Favell with 16% of responses.

3.124 Those households who did not name a Northampton town centre store in response to either the main shopping or top up shopping question were then asked why not. The most popular response was that it is ‘easier to get to supermarkets outside the town centre’
(36%), this was followed by ‘easier to park at supermarkets outside the town centre’ (25%).

**Comparison Shopping**

3.125 When asked in which centre has the household spent most money on clothes and shoes in the past six months, nearly half of respondents in Zone 1 said Northampton (49%), this was followed by Milton Keynes with 22% of responses. In Zone 2, the most popular centre was also Northampton with 45% of responses and this was again followed by Milton Keynes with 16% of responses. This corresponds with the findings of previous studies.

3.126 Those households who do not spend most money on clothes and shoes in Northampton town centre were asked why they chose to shop for these goods elsewhere. In Zone 1 half the responses were that Northampton has a poor range / selection of shops (50%). Difficulty in parking was the next highest reason (21%). In Zone 2 the pattern of responses was similar with 40% of respondents saying that there is a poor range / selection of shops and 21% saying that it is difficult to park.

3.127 When asked in which centre has the household spent most money on furniture and electrical appliances in the past six months, the most popular response for Zone 1 households was that they do not buy these goods (30%). After this the next highest responses were Northampton (22%), St James Retail Park (21%), Riverside Retail Park (8%) and then Milton Keynes and Internet / mail order / catalogue (both with 6%). In Zone 2 the same pattern emerged with 35% saying they do not buy these goods and then 19% stating Northampton. Following this the next highest responses were Riverside Retail Park (18%), Milton Keynes (7%) and internet / mail order / catalogue (7%).

3.128 Those households who do not spend most money on furniture and electrical goods in Northampton town centre were asked why they chose to shop for these goods elsewhere. Nearly half of the households surveyed in Zone 1 (46%) stated their reason as being the poor range / selection of shops and then a further 17% said it was because it was difficult to park. In Zone 2, 37% of households said that it was because of the poor range / selection of shops and then 21% that stated a lack of department stores as their reason.

**Market Square**

3.129 Market Square, although popular with people visiting the town centre, is not very well used by Northampton residents overall. Over three quarters of respondents said that they do not buy food goods from the market stalls (77% in Zone 1 and 75% in Zone 2). The proportion of respondents who said they do not buy non food goods from the market stalls was even higher at 86% for Zone 1 and 83% for Zone 2.

3.130 The survey did not include questions on why people do not visit the market. However, respondents to the Council’s Market Square public consultation, undertaken in February
2009, said that improved shopping, specialist markets, exhibitions and events would encourage them to visit more often.

Leisure

3.131 When asked which of a selection of leisure activities the members of the household take part in, in Zone 1, 'restaurants, cafes and pubs' was the most popular response with 161 households (77%) saying this, followed by 125 households (60%) who said 'hairdressing salons and personal grooming'. Other popular responses for Zone 1 residents were the cinema (111 households / 53%) and 'theatre and concerts' (104 households / 45%). In Zone 2, 'restaurants, cafes and bars' was the most popular response with 139 households (73%) stating this. After this, 'hairdressing salons and personal grooming' and 'theatre and concerts' are visited by 97 households (51%).

3.132 When asked where their household spent most money on the cinema, the majority of respondents in Zone 1 (88 responses / 79%) stated 'Northampton / Sixfields, Cineworld'. A further 18 households (16%) said 'Northampton Town Centre - UCI (Sol Centre). In Zone 2 the pattern was the same with 52 households (65%) stating 'Northampton / Sixfields, Cineworld' and 18 households (23%) stating 'Northampton Town Centre - UCI (Sol Centre)'. This shows that Northampton has good cinema provision.

3.133 The highest response for both zones to the question of where households spend most money on theatres and concerts was Northampton (Royal & Derngate Theatre). This had 63% of responses in Zone 1 and 68% in Zone 2. This shows that in Northampton the theatre is popular. Following this, the most popular destination is London, which is to be expected considering the wide range of theatres there and the relatively easy access from Northampton.

3.134 The highest response in Zone 1 and 2 for where households go out to eat most often is 'Northampton - other location not in the town centre'. This is likely to be small local restaurants, predominantly independent outlets. 44 households (27%) in Zone 1 and 53 households (38%) in Zone 2 stated this as their answer. The table below shows the results in more detail.

Table 3.14 Most popular locations for eating out

<table>
<thead>
<tr>
<th>Location</th>
<th>Zone 1</th>
<th>Zone 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northampton - town centre</td>
<td>38</td>
<td>42</td>
</tr>
<tr>
<td>Northampton - Wellingborough Road</td>
<td>18</td>
<td>10</td>
</tr>
<tr>
<td>Northampton - retail park (e.g. Sixfields)</td>
<td>28</td>
<td>12</td>
</tr>
<tr>
<td>Northampton - other location NOT in the town centre</td>
<td>44</td>
<td>53</td>
</tr>
<tr>
<td>Other</td>
<td>8</td>
<td>15</td>
</tr>
<tr>
<td>(Don't know / varies)</td>
<td>25</td>
<td>8</td>
</tr>
</tbody>
</table>

3.135 When asked where else (other than the response given above) does the household eat out the most popular response was ‘nowhere else’. This was the case for households in Zone 1 (48%) and also Zone 2 (34%). The next most popular destination was ‘Northampton - other location not in the town centre’ for both Zone 1 (17%) and Zone 2 (24%).

3.136 Respondents that do not eat out in Northampton town centre stated that the main reason for this is safety (23% of responses in Zone 1 and 24% in Zone 2). Respondents also said that it is difficult to park (20% in both zones). In Zone 2, 14% stated that there was a lack of a specific restaurant, café or pub and 14% that other centres are more pleasant to visit.

3.137 Only 7 households (8%) in total said that they do not eat out in Northampton town centre because of a lack of family restaurants and only 3 households (5%) stated their reason as ‘not much to choose from’. This correlates with the results of the visitor survey.

3.138 Households in Zone 1 and 2 were asked what two things the Council could do to persuade them to visit the town centre more regularly. A wide range of answers were given and the results are presented in the table below.

Table 3.15 What would persuade you to visit the town centre more regularly?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Zone 1 Responses</th>
<th>Percentage</th>
<th>Zone 2 Responses</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better range of independent / specialist shops</td>
<td>18</td>
<td>9</td>
<td>31</td>
<td>16</td>
</tr>
<tr>
<td>Better range of multiple shops</td>
<td>47</td>
<td>23</td>
<td>35</td>
<td>19</td>
</tr>
<tr>
<td>Bus / train service improvements</td>
<td>3</td>
<td>6</td>
<td>15</td>
<td>8</td>
</tr>
<tr>
<td>Cleaner streets / pavements</td>
<td>42</td>
<td>20</td>
<td>29</td>
<td>15</td>
</tr>
<tr>
<td>More / better parking</td>
<td>47</td>
<td>23</td>
<td>42</td>
<td>22</td>
</tr>
<tr>
<td>Road improvements</td>
<td>12</td>
<td>6</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Cheaper parking</td>
<td>30</td>
<td>15</td>
<td>28</td>
<td>15</td>
</tr>
<tr>
<td>Better security</td>
<td>14</td>
<td>7</td>
<td>15</td>
<td>8</td>
</tr>
<tr>
<td>Nothing</td>
<td>40</td>
<td>19</td>
<td>38</td>
<td>20</td>
</tr>
<tr>
<td>Other</td>
<td>44</td>
<td>22</td>
<td>38</td>
<td>20</td>
</tr>
</tbody>
</table>

3.139 Even though households in Northampton believe that the town should have a better range of multiple shops, as discussed the town is performing well compared to competing centres - on a par with Leicester and Coventry. Although it does lack higher quality outlets.

3.140 The results of the survey also show that respondents believe that there should be more and cheaper car parking in the town. As discussed under accessibility, although Northampton has less parking than the comparator centres of Leicester and Milton Keynes, it has more than Oxford, Peterborough and Coventry. Parking charges are cheaper than in many of the competing centres.

Mode of transport

3.141 When asked how they normally travel to their main food and grocery shopping destination the overwhelming majority of respondents in Zone 1 replied car / van, as driver (69%) or
passenger (17%). A similar pattern was followed in Zone 2 with car / van, as driver getting 65% of responses and as passenger getting 16%. We would expect this because most people tend to use a car to carry out their “weekly shop”. Results are shown in the table below.

### Table 3.16 Mode of transport: main food and grocery shopping

<table>
<thead>
<tr>
<th>Mode of Transport</th>
<th>Zone 1</th>
<th></th>
<th>Zone 2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Percentage</td>
<td>Responses</td>
<td>Percentage</td>
</tr>
<tr>
<td>Car / Van (as driver)</td>
<td>140</td>
<td>69</td>
<td>121</td>
<td>65</td>
</tr>
<tr>
<td>Car / Van (as passenger)</td>
<td>33</td>
<td>17</td>
<td>31</td>
<td>16</td>
</tr>
<tr>
<td>Walk</td>
<td>21</td>
<td>10</td>
<td>22</td>
<td>12</td>
</tr>
<tr>
<td>Other</td>
<td>8</td>
<td>4</td>
<td>14</td>
<td>8</td>
</tr>
</tbody>
</table>

3.142 The most popular way of travelling to the centre where households spend most money on clothes and shoes is again by car / van, as driver (55% for Zone 1 and 33% for Zone 2). After this it is by bus (17% for Zone 1 and 24% for Zone 2). The following table shows this in more detail.

### Table 3.17 Mode of transport: clothes and shoes shopping

<table>
<thead>
<tr>
<th>Mode of Transport</th>
<th>Zone 1</th>
<th></th>
<th>Zone 2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Percentage</td>
<td>Responses</td>
<td>Percentage</td>
</tr>
<tr>
<td>Car / Van (as driver)</td>
<td>94</td>
<td>55</td>
<td>87</td>
<td>58</td>
</tr>
<tr>
<td>Car / Van (as passenger)</td>
<td>14</td>
<td>8</td>
<td>17</td>
<td>12</td>
</tr>
<tr>
<td>Bus</td>
<td>29</td>
<td>17</td>
<td>36</td>
<td>24</td>
</tr>
<tr>
<td>Walk</td>
<td>29</td>
<td>17</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
<td>4</td>
<td>6</td>
<td>4</td>
</tr>
</tbody>
</table>

3.143 The most popular way of travelling to the centre where households spend most money on furniture and electrical appliances by car / van, as driver (74% for Zone 1 and 67% for Zone 2). After this, for Zone 1 it is by car / van, as passenger and for Zone 2 it is by bus (both 14%). The following table shows this in more detail.

### Table 3.18 Mode of transport: furniture and electrical items

<table>
<thead>
<tr>
<th>Mode of Transport</th>
<th>Zone 1</th>
<th></th>
<th>Zone 2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Percentage</td>
<td>Responses</td>
<td>Percentage</td>
</tr>
<tr>
<td>Car / Van (as driver)</td>
<td>93</td>
<td>74</td>
<td>74</td>
<td>67</td>
</tr>
<tr>
<td>Car / Van (as passenger)</td>
<td>18</td>
<td>14</td>
<td>14</td>
<td>13</td>
</tr>
<tr>
<td>Bus</td>
<td>2</td>
<td>2</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>Walk</td>
<td>9</td>
<td>7.5</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>5</td>
</tr>
</tbody>
</table>
4 SUMMARY

- The town centre has an average proportion of comparison floorspace but a below average proportion of convenience floorspace, with Sainsbury’s at the Grosvenor Centre being the only large foodstore.
- Services as a whole are over represented, but restaurants, cafes and fast food are under represented. This is despite high per capita spend compared to nearby city/town centres and a high population within 15 minutes drive time.
- The town centre has 26 of the 31 Goad key multiples, on a par with Leicester and Coventry. It has a “middle” fashion ranking from Management Horizons Europe and is ranked below Milton Keynes and Leicester but at a similar level to the other comparator centres.
- However, occupier demand is low compared to the other centres, where high quality comparison and restaurant operators are seeking space. This is perhaps because of poor perceptions of the town and the lack of clusters of particular types of outlet (eg premium retailers or family restaurants).
- Vacancy is very high and as would be expected, this has worsened since the start of the recession. But, because vacancy has always been high compared to other centres, the losses suffered have not been as severe as in other areas.
- Prime Zone A retail rents are low in Northampton, presenting an opportunity for new retailers. Retail yields are strong - on a par with Milton Keynes - and have strengthened over the past decade, perhaps due to improvements to the public realm.
- Crime is recognised as an issue and there are schemes in place to target crime and improve perceptions of safety.
- The public realm is pleasant if somewhat tatty, for example with damaged street furniture. Much of the town centre is pedestrianised. There is generally good signage, although minimal signage from the station. Investment in the public realm has already taken place along Black Lion Hill and further work along Gold Street is due to be completed at the end of July.
- Pedestrian access to and through the centre is good, although the centre is spread out so it takes time to walk from one end to the other. Abington Street is the busiest location, with Drapery and Gold Street also busy. Only around half of people visiting St. Peters Square, and hardly anyone visiting Morrisons, walk to the rest of the centre.
- Access by car is reasonable. There is less parking than in Leicester and Milton Keynes, but parking is cheaper than in the comparator centres.
- Train and bus links are good but the stations are peripheral and in poor condition. The visitor survey found that most people travel in by either car or bus.
- The town centre has a fairly local catchment - if another centre is either closer or the same distance away, it seems that people will visit that instead.
- Most people visit Northampton only once per month or fortnight, suggesting that they shop in other centres as well.
- Non food shopping is the most popular reason for visiting the centre, which accords with the fact that over half the floorspace is comparison goods. Eating out is a secondary reason for some visitors, although people do not seem to see the town centre as a restaurant destination.
• The market is popular with visitors and they like the independent stalls although feel that there is a lack of choice.

• Overall visitors rate the town centre poorly, in particular for environmental factors including cleanliness, safety and character (although pedestrianised streets are liked).

• Around half of residents surveyed stated that Northampton town centre is their main comparison shopping destination. This accords with the findings of previous studies but is low compared to the situation in, for example, Milton Keynes.

• A low proportion of residents use the Sainsbury store, stating that supermarkets outside the town centre are easier to get to and easier to park at.

• Reasons for not using Northampton are that it has a poor range of multiples and is difficult to park in. As discussed, there is actually quite a high proportion of multiples, although it is true that the centre lacks premium outlets. There is also reasonable parking provision as compared to surrounding centres.

• With regard to leisure, restaurants are a popular activity and the town centre is reasonably popular – although most people visit their local restaurants. Safety concerns was the most cited reason for not eating out in the town centre.

• Cinema and theatre are also popular – and town centre provision for both is good.
5 THE FUTURE

Overview

5.1 The surveys undertaken to inform this healthcheck have found some similar results to those of previous studies. They have confirmed that Northampton town centre attracts only around half of its comparison goods spend and that, although the Borough’s stores attract much of the residents’ convenience expenditure, most of this is spent at edge or out of centre foodstores because provision in the town centre is limited. The survey findings have also confirmed the need for new investment to be directed to the town centre.

5.2 The healthcheck work also confirms that Northampton town centre does have certain weaknesses as identified by previous studies. Its new town history has contributed to this; the town centre is spread out and lacks a core, and its large purpose built shopping mall (the Grosvenor Centre) is showing its age. Although access by public transport is good, the stations are peripheral and dated.

5.3 However, Northampton seems to be perceived (by occupiers) as a lower income centre when this is not the case. Northampton has a high population within 15 minutes drivetime and those people have a high level of per capita spend. So the centre should be able to attract more and better retail and restaurant operators. It is also perceived (by existing and potential customers) as having a poor selection of multiple outlets, when in fact the proportion of Goad “key attractors” is on a par with Leicester - although it is true that there is a lack of premium retailers.

Comparison Retailing

5.4 The town centre needs a broader range of comparison outlets, with some higher quality shops, in order to do better. These types of operators are usually looking for large modern units in central locations, so the provision of new comparison floorspace at one or more of the Council’s three identified sites (Grosvenor Centre, North of Abington Street, and Land in between College Street and Horsemarket) will be the key to attracting them. These will need to be well marketed. The Council should resist edge and out of centre applications for new comparison retail because this will weaken the centre’s offer.

Convenience Retailing

5.5 The Council needs to consider where a new foodstore should be located. As discussed in Section 2, the total need for new convenience is up to 4,800 sq m net, and if provided as one large foodstore, as recommended by the retail strategy, this could require up to 7,500-8,000 sq m gross floorspace, not including parking and landscaping.

5.6 Our preference would be that the Grosvenor Centre redevelopment re-provides a larger foodstore, providing a real town centre alternative to Northampton’s out-of-town convenience offer. The upper size limit will be subject to compromise and balance between the space available within the scheme.
5.7 The other two sites identified by the Council (North of Abington Street and Land in between College Street and Horsemarket) are alternative options. We understand that both these sites are of sufficient size to accommodate such a development.

5.8 The Council should require applicants for new convenience retail development to follow the sequential approach and should resist edge and out of centre applications, whilst bringing forward the town centre sites as quickly as possible.

5.9 In addition to seeking one large site the Council should also promote smaller, more deliverable options. The Council should be proactive in allowing the re-use of comparison units for convenience retailing. Of course both types of retailing are in the same Use Class Order (A1) but in some cases applicants may seek removal of conditions restricting the amount of floorspace that can be used for convenience goods, or may apply for changes to the design, access or opening hours of units. The Council should treat such applications favourably where possible. As discussed the vacancy rates in the town centre are high and the loss of some comparison floorspace would not be detrimental.

**Restaurants**

5.10 Restaurants are also under represented and in particular higher quality outlets. Again this does not make sense because of the spending power and population located around the centre. The survey results suggested that people do not perceive Northampton as an eating out destination, perhaps because of the dispersed nature of the offer. The Council could consider encouraging and marketing a restaurant “cluster” to address this, perhaps at Market Square. The Council should resist edge and out of centre applications for restaurants because this will weaken the centre’s offer further.

**Public Realm**

5.11 To attract the types of occupiers which are lacking - and the customers to visit them - the public realm needs to be upgraded. Continued work and investment is required, in particular to repair damaged street furniture and improve signage between the station and the town centre. The Borough is at an advantage because there is already a town centre manager in place and much joint working with retailers and public services - this is not the case in many towns and cities. If the BID proposal is taken up, this will provide extra funding for public realm improvements.

5.12 The Council, in partnership with retailers, has made progress on safety and improving perceptions of safety. The Council has also planned new public transport facilities. The bus station will be demolished and re-provided as part of the Grosvenor Centre redevelopment. The redevelopment of the train station is planned in two phases, with Phase 1 beginning in 2010. This will see a new station at an upper level visible from the road and a multi storey car park. These new facilities will be vital to attract more customers to Northampton town centre and to enable the centre to serve new communities and grow sustainably.

5.13 The Market Square Project, set up by the Council to redesign the Market Square, is helping to revitalise the town and encourage more shoppers and visitors. The redesign,
when complete, will include new food and drink outlets and new entrance areas (gateways); this, along with an events programme which is already underway, will do much to give the centre a focus.

**Retail Frontages**

5.14 In our opinion, the primary and secondary retail frontages as defined on the proposals map of the Northampton Local Plan 1997 should be updated to reflect changes in the town centre over the past decade and the Council’s aspirations.

5.15 PPS6 (March 2005) states at para. 2.17 that “Having regard to the need to encourage diversification in town centres as a whole, primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for flexibility and a diversity of uses”. This is reiterated in the new draft PPS4 (May 2009).


5.17 Para. 6.4 states that prime rental levels and pedestrian flows are factors to consider, as well as the presence of key anchor stores and other main town centre uses. Para. 6.9 states that primary shopping frontages should reinforce a compact, well defined retail area.

5.18 With this in mind, Figure 5.1 shows our suggested retail frontages. The Primary Retail Frontage should, in our opinion, include all of Abington Street up to St. Giles Terrace, because this is where the highest footfall was recorded and it also includes some key attractors, eg Primark.

5.19 It should include both the Grosvenor Centre and Peacock Place - these are two of the main concentrations of comparison retail - as well as the eastern side of Market Square. Additionally it should include the Drapery which mainly comprises comparison retail stores, including Debenhams, and has high footfall.

5.20 This suggested Primary Retail Frontage accords with the main visitor path identified in Figure 5.6b of the Retail Strategy for Northampton Town Centre (CACI, May 2008), although we have not included the area along Gold Street and St. Peter’s Square because we believe these areas are peripheral.

5.21 Including the Drapery, and Abington Street up to St. Giles Terrace, also means that the Council’s two identified redevelopment sites (North of Abington Street and Land in between College Street and Horsemarket) will be in close proximity to a Primary Retail Frontage.

5.22 The main Secondary Retail Frontages identified are Gold Street, St. Peter’s Square, St. Giles Street and Bridge Street.

5.23 St Giles Street is part of the Primary Retail Frontage in the existing Local Plan, but this does not seem appropriate because of its mix of uses and low footfall. St. Giles Street should be recognised as a unique area with a niche offer, and promoted as such.

5.24 Bridge Street is not included as a retail frontage in the existing Local Plan. We propose that it be added because it is an important area for the night time economy. We are not
sure how far the frontage should extend southwards - the Council will need to consider this in more detail.

5.25 Finally, we think that the area beyond Lower Mounts, to the east of the town centre, should no longer be identified as retail frontage.

Figure 5.1 Suggested Retail Frontages

Retail Core

5.26 In addition to primary and secondary retail frontages, the Council propose to define a Retail Core. This would fulfil the role of a Primary Shopping Area as per PPS6 (March 2005), Annex A:

“Primary Shopping Area: defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map”.

5.27 Planning for Town Centres, Good Practice Guide on Need, Impact and the Sequential Approach (GVA Grimley, Living Draft, 2009) states at para. 6.10 that “When preparing their LDFs, local planning authorities should identify what they regard as the Primary Shopping Area (PSA). This is important to provide clarity to applicants about the policy status of different sites.”
5.28 The Council’s proposed boundary is shown at Figure 5.2, below. The Council could consider using the term Primary Shopping Area rather than Retail Core, to accord with PPS6.

**Figure 5.2 Council's Proposed Retail Core**

5.29 In our view, identifying this area is a logical approach. The proposed area includes, as per PPS6, the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage.

5.30 St. Peter’s Square is outside the proposed boundary. There are a number of reasons for this.

5.31 Firstly the Square is not closely related to the primary shopping frontage - it is distinctly separated from it by at least 200 metres of mostly secondary retailing.

5.32 Also we do not consider that the Square functions very well as part of the Retail Core or Primary Shopping Area. Our survey showed that only just over half of the people surveyed in St Peter’s Square would be visiting other parts of the town to shop, eat or drink (see para. 3.106). The Northampton Retail Strategy (CACI) states that a healthy retail circuit should be developed in the town. St. Peter’s Square would not fit easily into such a circuit. In fact, as the Strategy points out at para. 6.64, due to its location, “any further retail development in this area would compromise rather than complement the town centre’s primary area of pitch”. In the future, if the Grosvenor Centre development succeeds, this will strengthen Abington Street and the Market Square and we may expect the St Peter’s Square development to become more remote.
5.33 In our opinion the mix of retailers at St Peters Square and its physical form reflects many of the characteristics found on retail parks. There is evidence that this is a view shared by some retailers; one of the main tenants (Argos) operates both in Abington Street and on St. Peter’s Square. The Square can almost be considered edge-of-centre using a strict PPS6 Annex A definition. The Strategy agrees with this view at para. 6.62.

5.34 Omitting the Square does not mean that the location will not continue to form an important part of the town centre’s offer. The Square’s continued provision of car parking and larger format modern retail units, which benefit from easy access to the Retail Core or Primary Shopping Area, will be a benefit to the health of the town centre. But in our opinion it should not be the focus of the town centre.

5.35 We understand that, apart from allocated sites within the proposed Central Area Action Plan, this is where new retail developments will be directed. This will benefit the town centre because, as noted earlier in this report, it is spread out and lacks focus. The town centre faces tough competition from both edge and out of centre provision. Defining a Retail Core or Primary Shopping Area will enable the Council to develop clear town centre first policies.