SLEAFORD TOWN CENTRE VISION

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kerching MAKING YOUR TILL RING
districtnk 100 flourishing communities North Kesteven District Council

Introduction & Objectives:

Kerching Retail Limited (Kerching) was commissioned by North Kesteven District Council (NKDC) in Aug 2013 to facilitate forming “a new vision for Sleaford town centre” – the vision/project consists of six discrete phases:

1. Review
- The review and consolidation of themes and key messages from existing work commissioned by NKDC and/or Central Lincolnshire Joint Planning Committee.
- Review existing Sleaford master-plan and adjacent town/city plans.
- Consider trends of changing Sleaford demographics, populations, lifestyles.
- Review the offering of key leakage towns.

2. Benchmark
- Provide a coherent current picture of Sleaford town centre.
- Benchmark current performance (SRLPI) - Sleaford Retail & Leisure Performance Indicator (a series of business performance measures that can be used to monitor impact over time).

3. Best Practice
- Identify needs and wants of local residents (range of survey approaches to hit broad demographic).
- Review ingredients of successful towns/city centres.
- Site visits to UK locations.
- Identify and publish retail and leisure formats - min/max unit size, parking requirements, demographic national brands seek.

4. Testing
- Presentation to SRG - Including results from :
    - Surveys.
    - Town/City visits.
    - Retail and leisure format report.

5. Creation of a Vision Document:
- Formulate vision document considering all aspects that make for a vibrant town centre, applicable to Sleaford.
- Address objectives set out by NKDC:
    - Reverse leakage from town
    - Improve retail mix
    - Support retail start-ups
    - Improve skills of retail businesses and evening trade
    - Review opportunity and relevance of the market
    - Clarify what Sleaford should “look like”
    - Publish a clear picture of what people want from Sleaford
    - How best to compete with Lincoln and other leakage towns
    - Sleaford’s leisure offering
    - Need to develop links between daytime and evening economies
    - Address store vacancies
    - Improve retail performance.
    - Address local perceptions

6. Present Findings
- Present findings at 1. Public consultation, 2. SRG meeting, 3. Select NKDC officers meeting.

This document forms part of phases 2,3,5.

Clarification of the Goal
Through discussion with NKDC and Kerching Retail we have defined success as the reduction of retail and leisure spend leakage to neighbouring towns.

A target of 10% would generate £27,000,000 additional income to town centre businesses, which would be expected to grow in line with regional economic multipliers. This is an arbitrary target and does not account for population growth, but a worthy and ambitious goal mid-term.

10% reduction in leakage, generates £27,000,000 additional town centre revenue[1]

A Re-positioning of 'Doing Business in Sleaford'
Sleaford town centre is a multi-stakeholder location where commerce, recreation, work, living and study takes place. It is not owned by local authority, or by its various landlords. Its past, current and future success will be dictated ultimately by the consumer.

We must be careful not to see consumers in pure consumption terms, defined by the products and services they acquire in the town. Consumers exert enormous influence in a cultural and social sense, shaping a town centre's atmosphere, perceived safety, appeal and vitality.

It is through a drive for convenience that has resulted in consumers complimenting shopping trips to the High Streets with out-of-town, supermarket and online shopping. Which poses a question, should market forces be allowed to evolve and drive the retail landscape, rather than intervention from those, often with invested interests in town centres?

[1] Source: Sleaford Town Centre Shopper Report, June 2014.

For example:
- Local authority
- Town council
- Town Teams
- BID's
- Landlords
- Business Owners

There is evidence that edge of town developments do impact commercially on the centre and typical recovery time (to a new normal) is 5 years.

This moral debate has been settled temporarily by the National Policy and Planning Framework. Government has set out a clear plan to prioritise 'town centres first':

"Local planning authorities should plan positively, to support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive, diverse places where people want to live, visit and work."

We must be mindful that consumers are central to all development and decision-making connected to the future success of Sleaford town centre. These very same consumers may or may not comply with intentions of national and local planning guidelines, and can vote with their feet!

To engage local people in this visionary process, a survey of 1000+ current and potential town centre consumers was undertaken, including their views on the current experience and required actions to increase patronage. We are mindful that what people say and what they subsequently do are often very different, however we have attempted to test predictions where possible.

Current Retail Trends

The retail landscape is continually evolving, and as such, the need to develop policies and strategies that are flexible over time is essential.

The shape of retail across key channels in terms of sales 2014[2]:

£120bn	Town/City Centres
£95bn	Out of Town
£50bn	Convenience
£35bn	Non-Store (internet)

Average spend per visit in town centres is similar to online and out of town shopping. The dwell time is much greater in town centres[3].

Where does comparison shopping happen?

The national trends for comparison shopping are[2]:

36% High Street & Uncovered Shopping Centres
19% Covered Secondary Shopping Centres
39% Large Purpose Built Shopping Centres

[2] Andrew Godfrey, Corporate Affairs, Boots

[3] Cathy Hart, Loughborough University

The way we shop is changing.
John Lewis recently reported on the behaviour of their customers (Christmas 2014):

50% research in-store, buy in-store
23% research online, buy in-store
12% research in-store, buy online
14% research online, buy online

Boots have also seen a shift in consumer behaviour
45% of Boots' customers order online and collect in-store

Divergence and Polarisation
The National picture is that of retail centres polarising. Larger retail centres becoming stronger thus more attractive to shoppers and investors, whilst smaller retail centres become weaker. [4]

This trend represents a risk for Sleaford town centre, in terms of protecting its current multiple retailer tenants and attracting more.

This polarisation is unlikely to manifest itself as increased leakage to Newark or Grantham, instead shoppers will look to Nottingham and Lincoln for larger scale comparison spend.

The Local Data Company sell insights on UK retail locations to retail property and acquisition teams. As an indicator of how new retail brands, entering into the UK, see retail in terms of UK coverage; "A new brand would typically look for 15x sites, of which only 5x would be located on High Streets."
Matthew Hopkinson: Director, Local Data Company.

Saviours of the High Street
Are there any rays of light, to contrast this bleak picture of UK town centres?

Whilst some of the attractive national retail brands review their long-term position on town centre High Streets, many others have expanded.

- Convenience stores
- Value retailers
- Independents
- Leisure traders

This has resulted in a net drop in the number of vacant units in the UK, from 14.6% in 2012 to 13% 2015.

Sleaford occupancy currently performs above the national average with a vacancy rate of 9.8%.

'Click and Collect' has been seen as an olive branch for High Streets and town centres. With increasing numbers of retailers integrating online browsing and shopping with convenient in-store collection, customers have a new reason to come into town.

One might consider the high levels of uptake from consumers acting as a fresh incentive for national retail brands to maintain extensive portfolios of branches, ensuring 10 miles access across the UK. Whilst this certainly should form part of promoting Sleaford as a new destination for retail brands, it may not remain a long term incentive for property acquisition teams.

- Click and collect customers do not tend to browse for other products on impulse.
- The introduction of general (all brand) click and collection points are being adopted. Shopping centres such as Westfield Stratford & Intu have introduced central click and collect customer lounges - with concierge, changing rooms and internet access.
- Improvements in next day, same day and timed home deliveries may prove more convenient longer term.

Dr Jonathan Reynolds, Oxford University.

[4] Matthew Hopkinson: Director, Local Data Company.

Growth in Convenience
A somewhat unexpected silver lining to recent High Street challenges, has been the growth in convenience spend. Consumers have altered their buying patterns from large monthly shops in large supermarkets, to more frequent shops in smaller supermarkets, discounters and convenience stores. That has driven some traffic back to High Streets.

In actual terms, shopping trips for food in 2014 = 155, compared to 106 in 2004 - a 46% increase.

Quality of Competition
In addition to examining competition from leakage towns to Sleaford, purpose built large shopping centres have also helped form recommendations for Sleaford.

Purpose built shopping centres do not have the same constraints town and city centres have to work around (road networks, multiple landlords, conservation areas). As such they can reflect the immediate needs of customers, consumer trends and needs and wishes of its tenants.

- 40% of UK shopping malls are refurbishing at present, or have announced refurbishment. This is a clear indication that continual investment, improvement and adoption is required to maintain and grow attraction to UK shopping centres.
- The top 30 UK Shopping Centres/Malls have a minimum of 17% devoted to leisure.

This is a clear indicator that shopping trips must include significant leisure offers. **Town centres are no longer 'Retail Only'.**

Sleaford Vision: Best Practice:

Seeking to better understand what we were trying to achieve and learn from locations deemed ‘a success’, either qualitatively through experience or quantitatively through vacancy rates, leakage and/or BID re-election.

Specific elements studied under ‘Best Practice’:
- Site visits to UK locations.
- Review ingredients of successful towns/city centres.
- Identify and publish retail and leisure formats - min/max unit size, parking requirements, demographics sought by national retail/leisure brands.
- Identify needs and wants of local residents.

Site Visits, Benchmark Towns/Cities Review
7 locations were studied in order to:
- Better understand how and why leakage may occur to this location
- Learn best practice from location.

Location	Miles from Sleaford	Population	Outlets (A1-A5)	Population per store
Lincoln	18	100,160	693	145
Boston	14	41,340	397	104
Grantham	15	41,998	420	100
Newark-on-Trent	19	37,084	432	86
Spalding	26	31,588	287	110
Nottingham	40	289,301	1631	177
Market Harborough	60	22,911	291	79

Store To Population Ratio
Sleaford with a population of 17,671 is home to 210 stores (Type A1-A5). A ratio of 1x store per 84 residents (1:84).

Market Harborough has the highest store to population ratio. 1:79
Newark with 1:86 and other comparison towns over 1:100
One might surmise from this that Sleaford has a sufficiently high store count for its population, compared to other locations in the review. The projected population growth in Sleaford to 26,000 would adjust this ratio to 1:123, amongst the lowest of the comparison towns/cities.

The question as to whether Sleaford’s stores are the **right type** and/or of a **suitable size** for local demand has been the focus of this study. Results were published in relation to square footage of retail space and category in the recent WYG report, Central Lincolnshire City and Town Centre Study 2012.

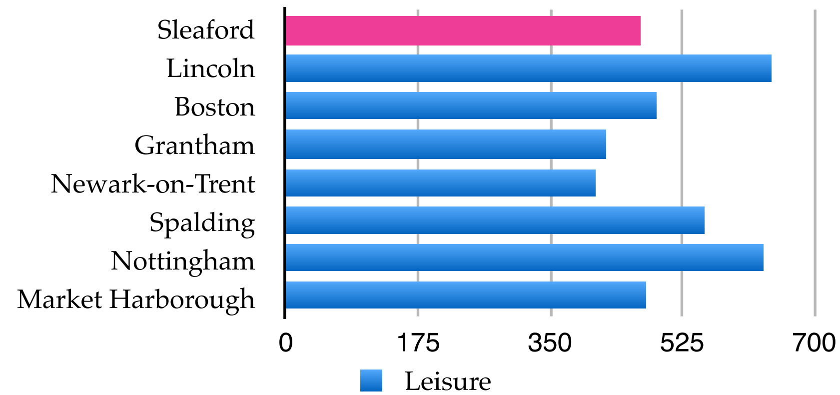
Based on data from WYG & Local Data Company, this illustrated a comparable ratio of convenience shopping and leisure offer - per capita to comparison towns.

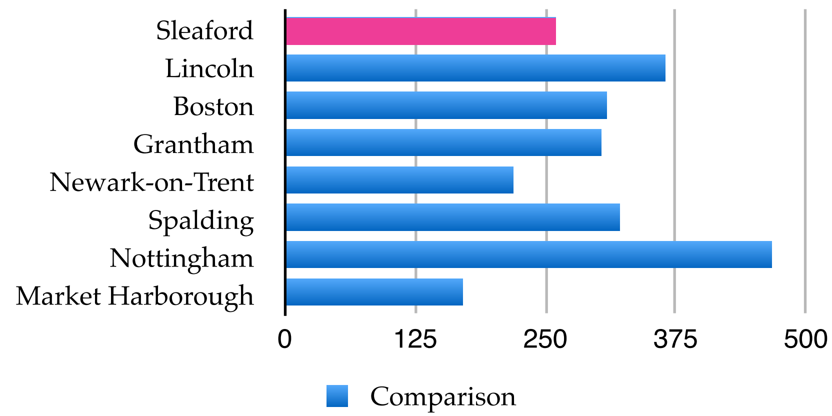
Convenience shopping and service outlets are very high, with more of these outlets per head in Sleaford than any other location surveyed. The table below shows local population numbers per outlet by category. The greater the value, the greater potential market and demand exists for this outlet.

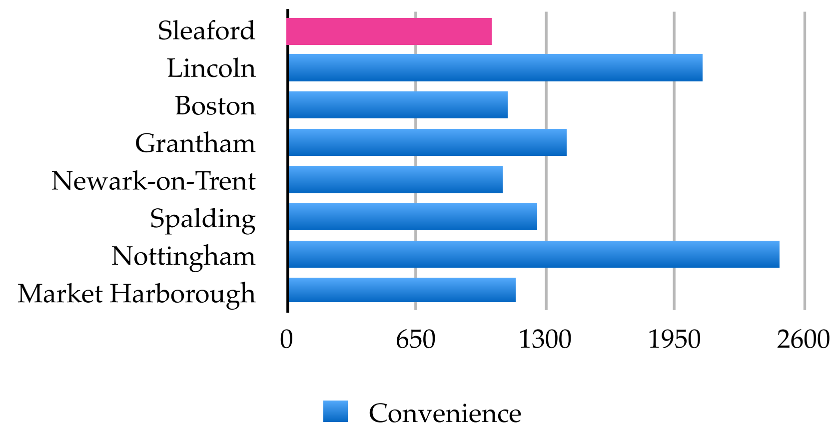
Location	Comparison	Convenience	Leisure	Service
Sleaford	1:259	1:1021	1:469	1:231
Lincoln	1:366	1:2087	1:642	1:586
Boston	1:309	1:1117	1:492	1:369
Grantham	1:304	1:1400	1:424	1:331
Newark-on-Trent	1:219	1:1091	1:408	1:309
Spalding	1:322	1:1264	1:554	1:351
Nottingham	1:466	1:2473	1:632	1:793
Market Harborough	1:171	1:1146	1:477	1:309

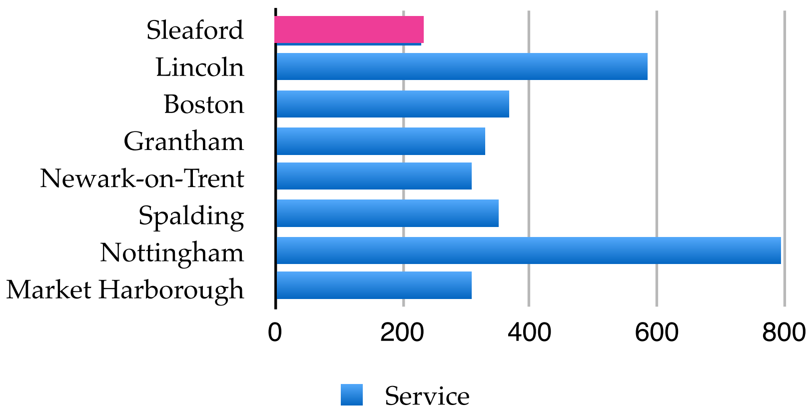
Following graphs show ratio by category. Larger value indicates there is a greater population (potential customer base) per outlet type.

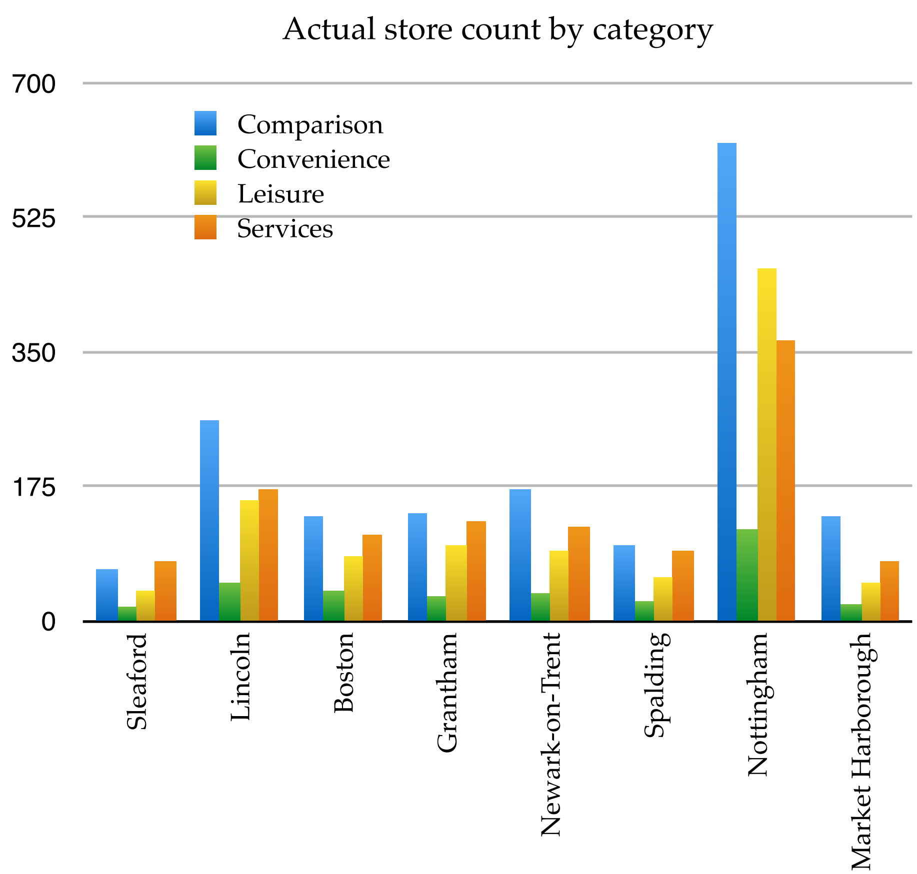
Comparatively we would surmise that Sleaford would benefit from increased comparison and leisure outlets, compared to benchmark towns.





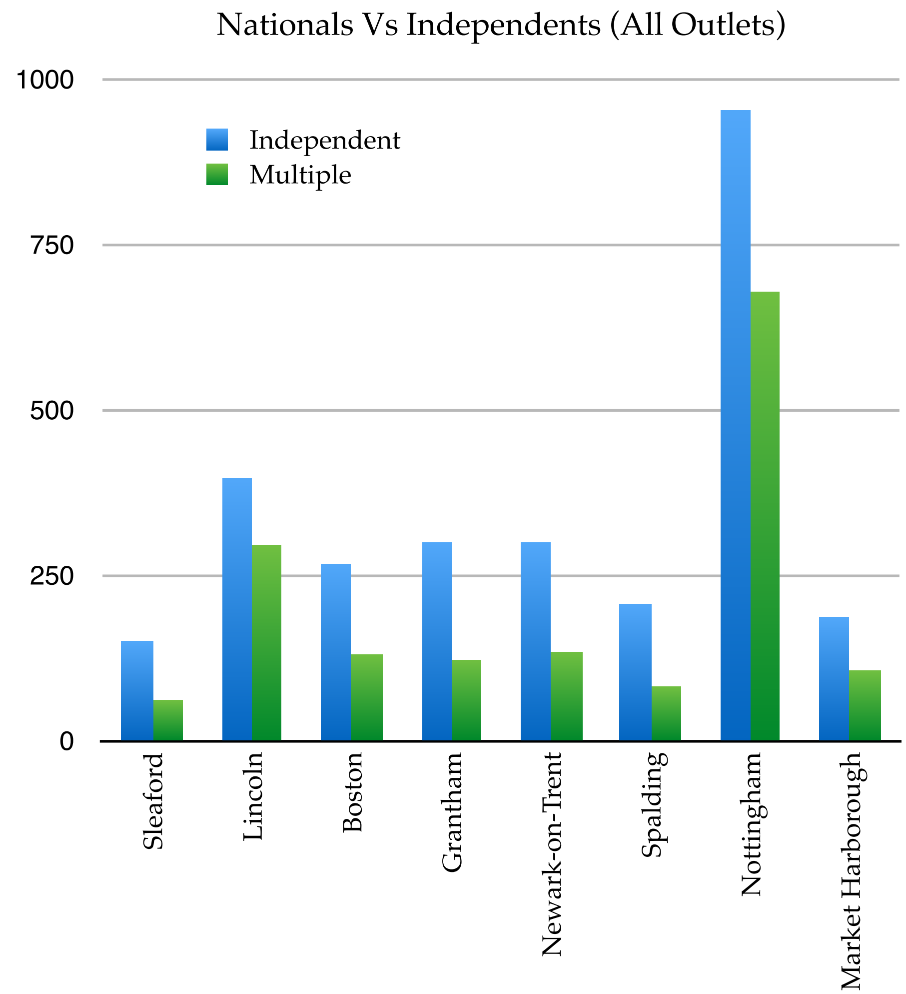


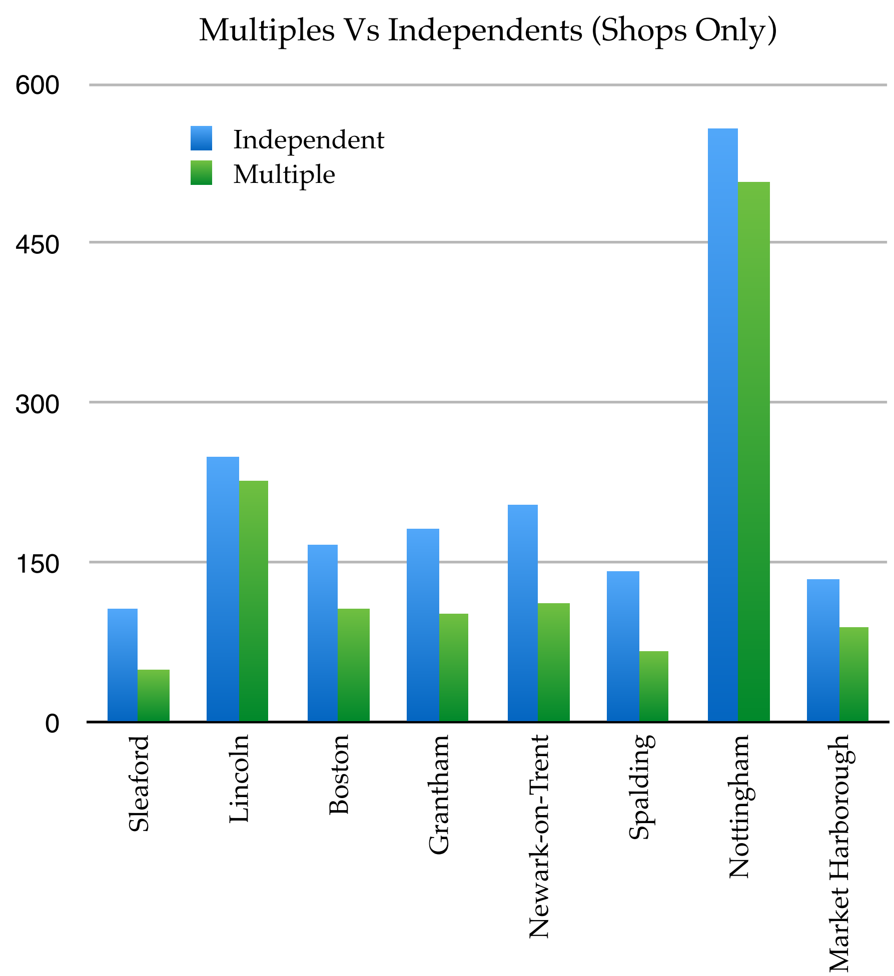




Multiples Vs Independents
The desire for increased Multiple retail brands, featured prominently in the wishes of local people in our survey.

The following graphs show percentage share of independent businesses to multiples.





Location	% Multiple Overall	% Multiples Shops
Sleaford	29%	38%
Lincoln	42%	53%
Boston	32%	46%
Grantham	29%	47%
Newark-on-Trent	31%	44%
Spalding	28%	39%
Nottingham	42%	57%
Market Harborough	36%	43%

Including leisure and service, Sleaford's multiple mix is comparable with benchmark towns. The mix of independent to multiple shops is a different story however, with Sleaford and Spalding having the lowest percentage of multiple stores, 20% lower than the average.

One conclusion from this data might be that leakage is occurring from Sleaford by customers seeking multiple retail brands, supported by low levels of leakage from Sleaford to Spalding.

Benchmark Towns/Cities Qualitative Review
Benchmark town/city visits were chosen to help understand why leakage may occur to the location. Through dialogue with local stakeholders, clarity of how the local authority or business improvement district proactively impacted on this, identifying cause and effect.

Summary of findings
Lincoln
Deemed to be the primary destination of leakage from Sleaford, Lincoln has a strong city centre offer and edge of city offer. It is ranked 49 in terms of consumer spend in UK retail centres.

Lincoln city centre is promoted by Lincoln BIG, business improvement district.

We interviewed Michael Armstrong, Lincoln BIG, as part of this study.

The city has seen much investment in its Cathedral quarter and Castle and is in preparation to receive the Magna Carta summer 2015. The city has a strong day visitor appeal.

Environment
The city centre has an upmarket feel and has avoided many of the value stores or discounters moving into the city centre.
The High Street is part pedestrianised, leading to squares and an indoor market.

Choice
The retail offer is pretty comprehensive, with big box retailers, independents, multiples and upmarket specialist independents clustered.


Lincoln independent quarter

Pedestrianised High Street Lincoln.

Attractors
M&S, Primark, House of Fraser, New Look, River Island, Next, H&M, Debenhams.

Travel links
Access by train is good. Bus links are good. Access by car is OK, with many car-parks surrounding the centre. Traffic can become congested by the level crossing. Lincoln BIG consider a city wide park and ride is needed to reduce traffic in the centre. Currently a 300 space park and ride from Whisby Garden Centre operates to the castle (a reasonable walk from the city centre).

The main pedestrianised shopping street is very long, yet strong anchor stores ensure visitors travel its full length.

What we learnt?
There is a clear and distinct difference between the shopping experience North/South of the level crossing. Pedestrianisation slows foot traffic, feels safer and makes for a more appealing place to dwell and enjoy the historic architecture. Clustering strong independents together in Bailgate, for example, make the walk through Steep Hill & The Strait worthwhile.

What they do well?

- Lincoln BIG manages Lincoln city centre spaces to facilitate the animation of the city centre with year round activity, variety and atmosphere. A strong annual programme of events, mostly from external groups - promoted and coordinated by the BIG - generate energy and dynamism throughout the year.
- Lincoln has a clear and distinct online presence for visitors: www.shoplincoln.co.uk and www.visitlincoln.com.

What doesn't work for them?

- The city centre is halved due to traffic and the level crossing. The junction between Winfield Way, High Street and Saint Mary’s Street is congested, dominated by traffic and often gridlocked when trains pass.
- The indoor market continually struggles to attract traders and shoppers.

Pedestrians are drawn towards the pedestrianised High Street away from retailers south of the crossing.
Attempts to link St Marks edge-of-town shopping and the High Street with Debenhams is sensible - but failed to attract much traffic on each of our visits.
The city centre is exposed to the elements. Without a large indoor shopping centre, Lincoln is not a good shopping location in poor weather.

Recommendations for Sleaford:

Make it easy for groups to hold events in Sleaford town centre. Its connectivity has hindered its ability to attract national/multiple retailers - but represents a huge opportunity to attract day visitors to events.
Manage the retail mix carefully. Discourage landlords to house ‘out of fashion’ retail tenants: Charity Shops, Pawnbrokers, Pay-day loan stores, Betting shops, Amusements, E-cigarette stores.
Maintain an upmarket retail offer.
Where a retail or leisure offer is on the fringes of the town centre, cluster similar stores.
Consider pedestrianisation.
Consider limiting congestion into the town centre, directing traffic away from level crossing and Southgate.

Nottingham
Nottingham ranks in the Top 10 of the UK's most popular and successful city centres. In addition to the streets of Nottingham, lined with branded shops and restaurants, its main shopping centre Victoria Centre, owned

by Intu, is the 26th largest in the UK. Close to 1,000,000 Sq Ft, the centre houses John Lewis, House of Fraser and over 100+ other outlets. Nottingham's second largest shopping centre is Broadmarsh, also managed by Intu close to 500,000 Sq Ft and housing 89 outlets. Broadmarsh is earmarked for a £150m investment in the Broadmarsh area, with improvements to travel links, leisure and retail offer.

Nottingham has a strong catchment area of 2.2m and available retail spend of £13Bn.

In a straw pole of students, in assemblies delivered by Kerching at Carre's and SKHS, a clear majority of students would prefer to spend £100 birthday money in Nottingham than Lincoln. No student wanted to spend it in Sleaford.

Nottingham takes 1hr 15mins to 1hr 30mins by car. Which will be a deterrent for mid-sized shopping trips. It is likely to attract larger shopping trips, particularly for fashion or known attractor stores - John Lewis for example.

Environment
The city centre of Nottingham is largely pedestrianised with access for trams.

The heart of the city centre is flanked by the two Intu shopping centres. Despite the route being pedestrianised, Clumber Street is less appealing, with non-premium retailers and a less upmarket feel. Bridlesmith Gate is exceptional with high-end fashion meeting Jamie Oliver's restaurant. Nottingham Council House and Old Market Square are a focal point for events and activity in the city's shopping district. Winter Wonderland - incl. Ice Rink, Fun Fairs and Summer Events plus Speciality Markets. Smaller arcades and hidden shopping streets make a trip to Nottingham an experience.

Image: Broadmarsh proposed development. Courtesy of Intu

Choice
Attractors: John Lewis, House of Fraser, Debenhams, M&S, Paul Smith, Vivienne Westwood and Cath Kidston

Travel links
Tram links to neighbouring districts and university. Bus and Train links into city. Parking limited at busy times.

What we learnt?
Nottingham City Council have invested on infrastructure for the city centre. Access by tram and managing/co-funding the development of shopping centres. (Nottingham City Council would not give planning permission for Intu Victoria Centre expansion until Intu Broadmarsh Shopping Centre was improved).

What they do well?
Extensive tram links are making Nottingham city centre easily accessible from across its fringes.

Parts of the city are being branded into zones: Royal zone, Castle zone, Victoria zone, Lace Market zone, Broadmarsh zone. This is part of their

'Park Smart' initiative. But is also finding brands clustering to reflect the demographic it attracts.

What doesn't work for them?

The city centre is large and sprawling. Although accessible, it would be challenging for a visitor with mobility issues.
A number of the shopping streets have a strong anchor and little else. The city centre could be more compact.
Nottingham is promoted online as part of Nottinghamshire. Nottingham city needs a clear segregated 'Visit Nottingham' presence.

Recommendations for Sleaford:

Keep the town centre compact. Consider minimising sprawling streets with only a few retailers (Westgate and Northgate for example).
Consider pedestrianised areas within the town.
Create a focal point for events and activities in the town: Market Place for example.
Manage the number of 'unfashionable' retailers.
Sleaford needs a clear "Visit Sleaford" online presence.

Nottingham old market

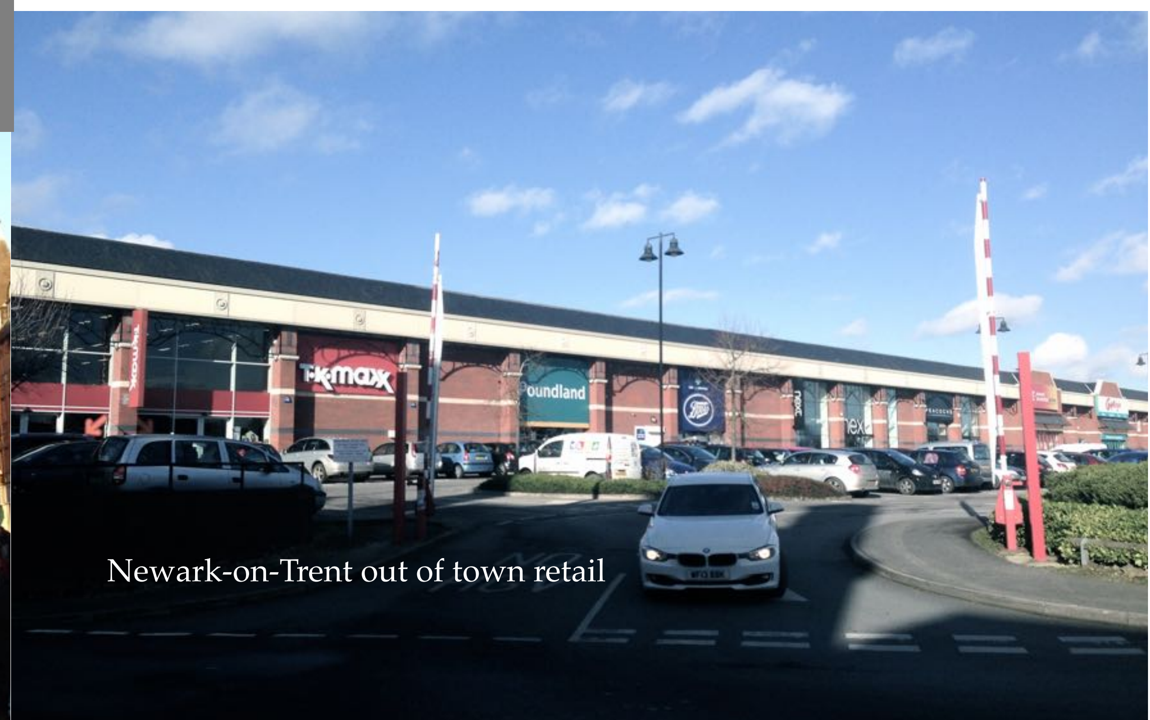
Newark-on-Trent

We interviewed Julie Reader-Sullivan, Business Manager - Economic Growth at Newark & Sherwood District Council.

Newark on Trent is a town build with a capacity to handle larger traffic/ footfall than at present.

Attractive to Sleaford residents for its Marks and Spencer and strong markets - the town has a reasonably strong offering, shadowed only by Lincoln and Nottingham.

Newark has an edge of town development 'Northgate' housing a 400 space free car park and nationals: Homebase, Pets at Home, Curry's PC World, Carpet right, Pound Stretcher Extra, Peacocks, Next, Boots, Poundland and TK Maxx. It is a very convenient place to shop and might negate the reason to visit the town centre in many instances.



Newark-on-Trent out of town retail

Newark's grand market place,
the heart of the town.

Environment
On first impressions, the town centre has a real 'wow' factor, magnificent market place (with or without the market trading) enticing passageways and off-shooting shopping streets. The offer quickly fragments as you leave this hub, however. Adjacent streets suffer higher vacancies and poorer retail tenants - often settling for 'unfashionable' retailers. Shopping arcades clearly struggle to fill occupancy, which is disappointing for the renovated Buttermarket.

The town centre's historic architecture offers an excellent backdrop to shopping. Planning decisions appear sensible in the development of the town's heart (centred around the market place). All roads lead into the market and heart of the town.

Pedestrianisation plays a large part in the town's feel. Much of the town centre is pedestrianised.

Evening economy is relatively strong for a town, however there are opportunities to utilise the River Trent more.

Town centre attractors
M&S, Argos, Starbucks.

Travel links
It is relatively easy to get into Newark by car, bus or train.

What we learnt?
Capacity can impact on atmosphere and perceived vitality. Whilst Sleaford 'chokes' due to traffic, Newark felt barren in off-peak times. Linking assets such as the church and River Trent to the town centre enhances the experience for daytime and evening visitors.

What they do well?
Their is a natural heart to the town centre for events and specialist markets.
Markets are well attended by traders and shoppers. The town attracts different shoppers with different types of market.
The town centre is dominated by pedestrians, not traffic.

What doesn't work for them?
There is not sufficient demand for the available units, creating areas with high vacancy rates and 'unfashionable' tenants. Manage defined town centres could convert usage for residential or office on the fringes.
Too much of the town is pedestrianised for the amount of foot traffic. On quieter days the town feels barren.
Visit Newark website is poor.

Recommendations for Sleaford:

Create a heart of the town, be it the market or events space.
Pedestrianise key shopping areas.
Be careful not to over develop in boom periods. Manage how sprawling the town centre is, responding quickly and converting to alternative uses when retail or leisure declines.
Capitalise on natural features of the town - river for example.

Spalding
Spalding did not feature as a key leakage town for Sleaford, although Springfield's Outlet Shopping and Festival Gardens did.

Environment
The Springfield's Outlet Shopping is easily accessible, attractive and convenient. It has combined shopping and leisure, including entertainment for children.

Its offer is not complete, but in many respects demonstrates what a town centre should be like.

Springfield’s Outlet Shopping

Out of town developments may cannibalise local town centre trade, although this may be offset with increased day visitors from an extended catchment area - if the retail brands are attractive enough.

Town centre attractors
Hills Department Store, Beales Dept Store, Argos, New Look, Prezzo,

What we learnt?
This is a town centre requiring strong leadership, to compete with its Out of town development.

What they do well?
Town centre is pedestrianised, creating a people dominated environment. Market traders operate within the main High Street, bringing animation and vibrancy.

2x department stores, Hills and Beales are untypical for a town of this size.

The South Holland Centre, located at the foot of the High Street, offers tourist information and a wide range of arts events throughout the year, including theatre, dance, jazz, folk, comedy, children's shows and cinema.

What doesn't work for them?
The river is a dominating feature as you approach the town centre, but is under utilised, requiring significant investment to attract leisure use and operators.

The Spalding flower festival has ceased, due to falling interest/support. This is disappointing and investment or sponsorship should have been sought to reinvent rather than stop it.

There is no visit Spalding page, only a page within visit Lincolnshire. The town should take ownership of attracting visitors.

Spalding town centre, on non-market day

Recommendations for Sleaford:

Natural assets should be maximised, to create a unique place.
Pedestrianisation and inclusion of market stalls brings animation and vibrancy
Having a managed 'Visit Sleaford' page is important.
Purpose built retail developments (Springfield's for example) mix retail, catering, leisure and children's entertainment into a complete convenient package. Pedestrianised with easy parking and good transport links.

Boston Market Place

Part pedestrianised shopping in Boston

Boston
Interview performed with Economic Development officer Ian Martin.

Boston was a surprise for the working party. A shopping destination not featuring highly on suggested leakage lists, but second to Lincoln in Experian reports. An underestimated threat maybe.

Boston has a scale and presence of an important historic town. Although the port and wool trade have diminished in significance, much of the town's architecture remains protected and is imposing.

The River Witham, divides the town centre - both geographically and culturally, forming an East and West side of the town centre. The location of the train station and street names (High Street) may suggest the main

shopping streets were to the west of the river. Now, these streets are occupied by a range of independent traders from UK and Eastern Europe.

Whilst some larger value branded stores are housed here, Aldi and Dunelm, most branded stores are located on the East of the river. This creates the impression that a new purpose built town centre was created at some stage to house larger retail brands.

Environment
Boston have created a part pedestrianised main shopping street, Bargate, (access for buses only) in addition to a fully pedestrianised uncovered shopping centre, Pescod Centre, built 2004. Independent department store Oldrids acts as an anchor store to the Pescod Centre, whilst M&S anchors Market Place.

The public realm is excellent and most notably, the wide open spaces. Market Place for example, has no road markings and spans 60m at its widest point, without physical obstruction. Market area is approx. $300m^2$

Attractors
Next, M&S, Oldrids, New Look, Dorothy Perkins (TK Maxx on edge of town), Coneys independent fashion store.

Travel links
Access to the town is good by train, bus and car.

What we learnt?
Boston have created space with their public realm improvements. Natural and cultural assets play a key role in the mix of a town centre offer, in particular the grand church.

What they do well?
Public realm is of a very high standard.
The church is an exceptional feature of the town and the public realm has been built around it to support it.

The town centre (Bargate and Pescod) has a primary retail offer, relegating 'unfashionable' retail to the west of the town, and secondary shopping streets. This results in the primary shopping space feeling relatively upmarket.

What doesn't work for them?
Part pedestrianisation does give priority to foot traffic, but many of the potential benefits of introducing animation, entertainment and pop-ups is lost.

The river requires significant investment and development to maximise its potential.

Boston have some underlying issues as they adapt to high population of eastern European migrants. Understood to represent 25% of the population currently, schools are seeing migrant populations of up to 50% of students. The rate at which this change has occurred has made it difficult for the town to adapt. The town centre must adapt or it may develop a discrete east and west offer, inversely serving western and eastern European populations.

Recommendations for Sleaford:

Make natural or cultural assets a part of the town centre offer (St Denys Church, River Slea)
Create open public spaces - free of unnecessary features and furniture.
The primary shopping centre should not be tied to locations, but what is best for local communities moving forwards. Be prepared to explore all opportunities to house retail and leisure in Sleaford.
Part pedestrianisation improves the experience for shoppers, but loses the benefits of bringing animation and theatre to the High Street.

Grantham

Grantham
We interviewed David Mather, South Kesteven District Council as part of this study.

Grantham Town Population:	41,998
Catchment Population:	219,008
Shopper Population:	46,346 21.2% of available catchment
Shopper Spend:	£217m 20.2% of available spend

Environment
12% of Sleaford's catchment spend leaks to Grantham.

The town centre experience in Grantham is not great. The shopping area is flanked by two shopping centres. The Isaac Newton Shopping Centre and the George Centre. The Isaac Newton Shopping Centre is tidy, although a little dated and the retail offer is not premium. The George Centre by contrast is very upmarket in design, but lacks sufficient quality occupants. The George Centre was conceived as a premium retail and catering offer, with 41 units and a glass atrium. The centre currently has

27 occupants, 35% vacancy rate, despite broadening its mix to accommodate a tanning salon and an E-cigarette store.

Choice
Isaac Newton Shopping Centre featuring national retail brands CEX, Poundland, Brighthouse, Holland and Barrett, O2, EE, Greggs, Superdrug.

Other brands featured on the High Street include Argos.

The retail offer is stronger on the edge of town, with a number of small retail centres.

Attractors
Town centre: Argos, Dunelm, Pizza Express, Cinema.
Edge of Town: M&S Food, B&Q, Halfords, TK Maxx, Matalan, Currys/PC World, Next, Homebase, Sports Direct, Laura Ashley

Travel links
Transport links are good via car, bus or train.

What we learnt?
Grantham has successfully linked itself to Isaac Newton, who attended High School in the town. Shopping centre, statue and annual Gravity Fields Festival ensure the town's most celebrated figure remains an attraction.

The town has secured a multi-screen cinema, to replace the small cinema currently operating. This is likely to attract a number of restaurants and/or leisure operators. In our interviews with The Restaurant Group Plc (TRG) who own Frankie and Bennys, Chiquita, Coast to Coast, expressed a current interest in Grantham.

The George Centre

What they do well?
Grantham (South Kesteven District Council) focus their energies on a small number of projects, done well.

- Enterprise Week.
- Gravity Fields Festival.
- Championing a new cinema for the town.

All of these activities have been a success.

Similarly, they have picked a single headline and reference point for the town in Sir Isaac Newton.

They have attracted sufficient national retail to have a complete edge-of-town offer. It is likely that much of Sleaford's leakage to Grantham would be for this edge-of-town shopping, rather than town centre, however this is speculative.

What doesn't work for them?
The town centre retail offer is not strong. Despite a cluster of stores in each shopping centre, the High Street between houses a number of key vacant units. The environment between the two centres is not attractive and dominated by traffic.

Recommendations for Sleaford:

NKDC Champion a small number of high profile projects. Smaller activities and initiatives be managed by town council &/ or town team.

How to define a successful town centre and the interventions required to facilitate it?
Changes in the way we shop and spend our leisure time have been well documented over recent years.

Although initiatives from BID's, Portas Pilots, ATCM and town teams have been positive and well intentioned, there is a lack of robust evidence to support lasting impact economically of specific activities to date. This does not mean that they do not work necessarily, but due to the fact that in many cases, a number of activities and initiatives have been undertaken simultaneously and not in a controlled testing or research environment.[5]

There lacks a published methodology on 'making' a town centre successful, despite examples of what 'is' successful.

Research practitioners, DTZ and Experian, profit from sharing insight for property acquisition. DTZ recently published a report predicting future success of retail centres - measured by how 'healthy' a retail location is/ would be.

Factors researchers DTZ attribute to healthy town/city centres include:

1. Population growth
2. Low unemployment
3. Consumer spending
4. Relative affluence of households
5. Vacancy rates
6. Volume and type of retail floorspace
7. Competitiveness - proportion of available retail spend attracted

Source: DTZ Insight GB Retail Property Health Index (RPHI)

One of the fastest growing stakeholders in UK retail, is the property firm Intu (previously Capital Shopping Centres PLC). Intu now owns 9 of the top 20 shopping centres in the UK. ½ of the UK's population visit an Intu Centre each year, with over 400 million customer visits.

Their approach is relatively straight forward: "we will create uniquely compelling experiences, surprising and delighting our customers." The customer is deemed to be the shopping public. More specifically "to provide the best places to meet, eat, drink and be sociable, and by continuing to offer access to every one of the UK's top 20 retailers and the global iconic brands they love."

Recognising the way in which we shop has changed, Intu have strived to future proof their business model - introducing the UK's first multichannel transactional shopping centre www.intu.co.uk.
Intu's ethos towards their retail, leisure and catering tenants is:
"We are here to help retailers flourish. How? Consistent footfall, world class service and a good retail mix."

The model is clear and applicable to Sleaford town centre:
Attract the consumer. If done successfully, tenants will flourish.

[5] High Street Performance and Evolution. A brief guide to the evidence. University of Southampton 2014

Intu also carefully manage the retail mix, which is straightforward if you are the primary landlord.

As the retail, leisure and catering mix is a critical factor in the appeal of a town centre, all stakeholders must take a proactive role in influencing the mix - given the limits around ‘direct control’.

How:
Communicate a vision for the retail mix.
Consistent message around vision (from town team, town council, NKDC).
Engage with landlords and their agents at ½ yearly meetings.
Continually review defined town centre: For example, is West Gate still the ‘town centre’ or could it be converted to alternative use - office and residential?

In Experian’s town centre futures 2020 white paper, future consumers were characterised by 5 key drivers. The aspects of retail most likely to attract them:

- Service
- Expectation of choice
- Technology use
- The pursuit of value
- The desire for experiences

Harper Dennis Hobbs, HDH, real estate consultancy practice developed a vitality ranking for the top 500 British retail centres. HDH have assessed a wide range of variables:

- The proportion of premium/luxury retail - the presence of up- market retail helps to attract affluent consumers and suggests that high quality retailers have faith in the retail centre in question.
- The proportion of value retail - a high proportion of value retail suggests that a retail centre is relatively deprived and is classified as a negative variable in their ranking.
- The presence of what could be considered to be ‘out-of-fashion’ retail tenants, including:
    - Charity Shops
    - Pawnbrokers
    - Pay-day loan stores
    - Betting shops
    - Bingo halls and amusements
    - E-cigarette stores
- The vacancy rate - a key indication of the vitality of a high street as rows of empty shops very quickly put off customers from visiting a retail centre.
- The suitability of retail to the local customer.
    - HDH has assessed the positioning of the retail supply in relation to the demands of the local customer, given their demographic makeup. A retail centre with high vitality has a retail mix that serves the needs of its local population, whether it is lower, mid or up-market retail.

This last point is particularly interesting. The retail and leisure mix should match the local demographic. Stores deemed ‘out-of-fashion’ can thrive in a low income area.

Based on this model, comparison centres within the top 500 rankings are:

Location	Vitality Ranking	Retail Spend Ranking
Nottingham	52	7
Market Harborough	80	285
Lincoln	135	49

Vitality does not necessarily mean it attracts the greatest spend, rather it would be deemed attractive to potential new tenants (attracting new retailers to the town).

Kerching Retail's measure of a healthy town centre:

1. Population growth
2. Low unemployment
3. Consumer spending
4. Proportion of premium, value and 'out-of-fashion' stores
5. Relevance of retail offer to local demographic
6. Vacancy rates
7. Volume and type of retail floor-space
8. Competitiveness - proportion of available retail spend attracted
9. Quality of public realm and urban spaces
10. Dominance of traffic

Kerching Health Index	Sleaford Measure
1. Population growth	Excellent
2. Low unemployment	Good
3. Consumer spending	Good
4. Proportion of premium, value and 'out-of-fashion' stores	Mid - retail mix could be managed better.
5. Relevance of retail offer to local demographic	Mid - local residents unsatisfied with offer.
6. Vacancy rates	Good
7. Volume and type of retail floor-space	Mid - More larger units required in town centre.
8. Competitiveness - proportion of available retail spend attracted	77% Leakage
9. Quality of public realm and urban spaces	Mid - Investment in trees, benches and places to dwell is required.
10. Dominance of traffic	Poor- the town centre is dominated by traffic

Dominance of traffic

There has been much debate locally regarding dominance of traffic in the town centre of Sleaford. During peak periods, pinch points north and south of the town centre become very congested. This is in part due to school traffic, but also those working in Sleaford.

A workshop ran with students at North Kesteven & Sleaford High School highlighted **great concern** on their part for the safety of students crossing busy town centre roads. The dominance of traffic and close proximity of passing vehicles, buses and lorries (South Gate and junction with East gate in particular) created an intimidating environment for pedestrians.

The future of Sleaford town centre cannot be funnelling more traffic into Southgate. We must be creative, bold and open to better ways or bringing consumers into the town centre.

Previous decisions to make South Gate single lane, from the Handley Monument, with some on-street loading bays have helped, particularly in stretches from Jermyn Street to Market Place.

Creating space in a town centre can be as simple as removing traffic. By removing the dominance of traffic from a town centre, the perception of greater space is created - slowing down pedestrians and increasing dwell time.

Shared space schemes
Shared space schemes remove clear demarcation between vehicle traffic and pedestrians. In the UK, it is often applied to High Streets to allow pedestrians to move more freely.

Since its introduction in the 1990's it has been adopted by many local authorities to reduce vehicle speed and increase perceived space for pedestrians.

The Dept. for Transport released a note LTN 1/11 in October 2011[6] with recommendations around introduction of Shared Space Schemes.

Its elements include:
• Introducing physical and psychological features that encourage lower vehicle speeds
• Removing any implied priority of vehicles over pedestrians in the carriageway
• Reducing demarcation between pedestrians and vehicular traffic
• Introducing features not necessarily limited to the sides of the street, such as seating, public art and cafes, which encourage pedestrians to use the space

Handley Monument

Short stretches of South Gate, from Jermyn St towards Market Place, have removed curbs, for improved mobility access, thus emulating aspects of a shared space environment. Unfortunately, consistent road markings, bollards and pavement materials encourage pedestrians to stick to the path, rather than occupy the road in this area.

A consideration on the appropriateness of a shared space scheme, centres around the volume of traffic potentially using it. 'The Manual for Street' (DfT, 2007) suggested that, above 100 motor vehicles per hour, pedestrians treat the general path taken by motor vehicles in a shared space as a road to be crossed rather than a space to occupy.

This defeats the objective in our opinion.

We would therefore recommend, *if* traffic calming measures be explored for South Gate and the Market Place, such as shared space schemes, this

6 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/3873/ltn-1-11.pdf

should be accompanied by alternative routes for traffic on approach - thus reducing volumes of traffic through the town centre.

Parking

The East of England and East Midlands has one of the higher vehicle ownership rates, per capita in the UK. Approx. 500x cars per 1,000 population, and 600x vehicles (incl. Cars, Vans, HGV, Motorcycles, Bus & Coach) per 1,000 population.

At the end of 2014, there were 35.6m vehicles licensed for use on the roads of GB, of which 30m were cars.[7] Annual growth in recent years has been driven by newly registered cars and vans. Close to 3m new vehicles were registered in 2014 alone, indicating buoyant growth in the sector, close to pre-recession quantities.

Our love affair with the car doesn't look likely to end soon.

There is a tendency to overestimate the importance of vehicle access in town centres. A study by Graz, Austria, repeated in Bristol, found that retailers overestimated the number of customers arriving by car by almost 100%.

There is a tendency for business owners to overstate the importance of access, vehicle visibility and parking for its customers; which are more or less important to different retailing sectors.

For example: Studies of shoppers in Canada and New Zealand revealed pedestrians spent up to six-times more than people arriving by car. Echoed by shoppers in London, who showed an average spend of £147 more, per month, arriving on foot, compared to arriving by car.

Further reading on parking:
Sleaford Parking Strategy, Jan 2010: Steer Davies Gleave
In-Town Parking, What Works? ATCM https://www.atcm.org/programmes/thought_leadership_research/carparkingwhatworks_

Are there commercial benefits to local traders, of pedestrianisation - or 'pedestrian-first' shopping environments?

Research by UK charity Living Streets, illustrated that improved places for walking increased footfall and trading by up to 40%.

- Good urban design raised retail rents by 20%.
- Landowners and retailers are willing to contribute towards the cost of improved streetscapes, in order to attract tenants and customers.
- Local residents are willing to pay for improved townscapes.

Further reading on pedestrians:
The Pedestrian Pound: The Business Case for Better Streets and Places (2013) Just Economics, Living Streets

[7] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/421337/vls-2014.pdf

Retailers overestimated the number of customers arriving by car by almost

100%

National Retailer Survey
In order to inform future developments, a survey of target retailer/leisure operators was performed. The following process was applied to identify targets:

- Current top performing operators in the UK.
- Trade in small to medium sized towns.
- Not currently represented in town.
- Do not compete with existing traders.

The goal was to interview 10x multiples/nationals from a short list of 20.

The objective of the surveys:

- Better understand how Nationals select store locations
- Ideal store format sizes
- Other influencers (parking, local BID activity)
- Raise the profile of Sleaford to property acquisition teams

A full listing of national chains approached is available.

Findings
Factors that influence decisions to acquire sites in towns like Sleaford:

- Experian demographic data is matched to the most successful UK branches in their portfolio, forming an '*ideal*' demographic.
- 'Chimney Pots' number and type of households - some brands were explicit as to the minimum number, many compared to their better and worst performing branches, to form an internal model.
- Representation of complimentary brands - none of the 10x interviewees expressed concern by any particular competitor being located in the town. The more recognisable brands the better. Some edge of town brands and out of town brands liked to be located close to a supermarket or on a small retail park, feeding one another. Restaurants prefer leisure complexes with cinema.
- Location of other branches/regional coverage/cannibalisation. This was a key factor for many of the leading brands interviewed.

Coverage in Grantham, Newark, Lincoln and in some cases Boston and Spalding was sufficient to meet their needs.

Factors which are important to National brands	Factors which are not important to National brands	Recommendation for Sleaford
Local population		The published population of Sleaford is too small for many of the leading National brands. Publishing projected populations is important.
Demographics (age group, profile, affluence)		Sleaford stacks up well here. Although it is about matching to a brand's top performing stores that matters most. An active leisure demographic is important for restaurants.
Terms and conditions of lease	Negotiation on rates with local authority	Encourage developers and landlords to be flexible with desirable tenants.
	BID's and local events	Nationals rely on their brand strength to attract footfall, not local events and marketing initiatives. BID's are seen by and large as a 'cost' to National's interviewed.
Complimentary brands for town centre stores	Competing brands	The limited choice of multiples currently in Sleaford will not work in its favour for premium brands. Value brands will see this as an opportunity however. Leveraging anchor stores in new developments (Riverside for example) is key. National restaurant brands feed from cinema and leisure complexes.
Unit sizes		Smaller format stores (Mobile phone, Accessories) required units in excess of 1,000 FT^2 Mid sized stores (Fashion) required stores, in excess of 2,000 FT^2. Large format (homewares, value) required in excess of 5,000 FT^2 forcing them edge of town or out of town. Many brands add a mezzanine floor where required.
Available units		The choice of vacant and available units make it a buyers' market. Brands showed little interest in discussing sites which were not complete and available.
Flexible planners		Planning departments can be seen as a barrier to business. Particularly for edge of town and out of town retailers. Restaurant brands like to trade inside and on the pavement.
Regional Coverage		Target brands that do not have stores in adjacent towns and cities.

Housing more national retail
Unit sizes on South Gate, West Gate, East Gate and Bristol Arcade have insufficient floor space, for many of the leading UK retail brands. Units occupied by Iceland, Boots and M&Co are suitable for many retail multiples.

The planned redevelopment of Riverside could create a small number of retail units suitable for larger national chains.

Expanding the retail offer with national retail and leisure brands will require new developments.

Development sites
There are thirteen potential development sites identified in Sleaford, which could house national retail:

1. Post Office - Trillum (RMF) Limited
2. Flicks Cinema (and free site to left).
3. Sleaford Legionnaires Club - Landlord Unknown
4. Interflora - Interflora British Unit
5. Navigation Yard - NKDC (not suitable for larger retail but an important link for town from east to west.

Larger potential development sites

6. 74, 76, 80, 82, 84, 86, 88, 90 South Gate - Melbourne Holdings Limited
7. Turnbull Building & Supplies - Turnbull & Company Ltd
8. Sainsbury's - Sainsbury
9. Car Park - Jermyn Street - NKDC
10. Car Park, 26 Southgate - Planning permission for retail and leisure exists
11. Advanta Seeds - Tesco

Developments in progress include

12. Heart of Sleaford Money's Yard, independent cinema, small retail
13. Bristol Arcade - Small retail units, suit independents.
14. Riverside - National retail, 1x large anchor store

See map on following page

Recommendations for Sleaford

- Target National brands through developers. Many large developers have relationships with retail property and acquisition teams.
- Be explicit with the retail mix you are looking for, work closely with the developers to ensure they deliver a compliment to the town, not simply fill their units.

1. Post Office - Trillum (RMF) Limited
2. Flicks Cinema (and free site to left)
3. Sleaford Legionnaires Club - Landlord Unknown
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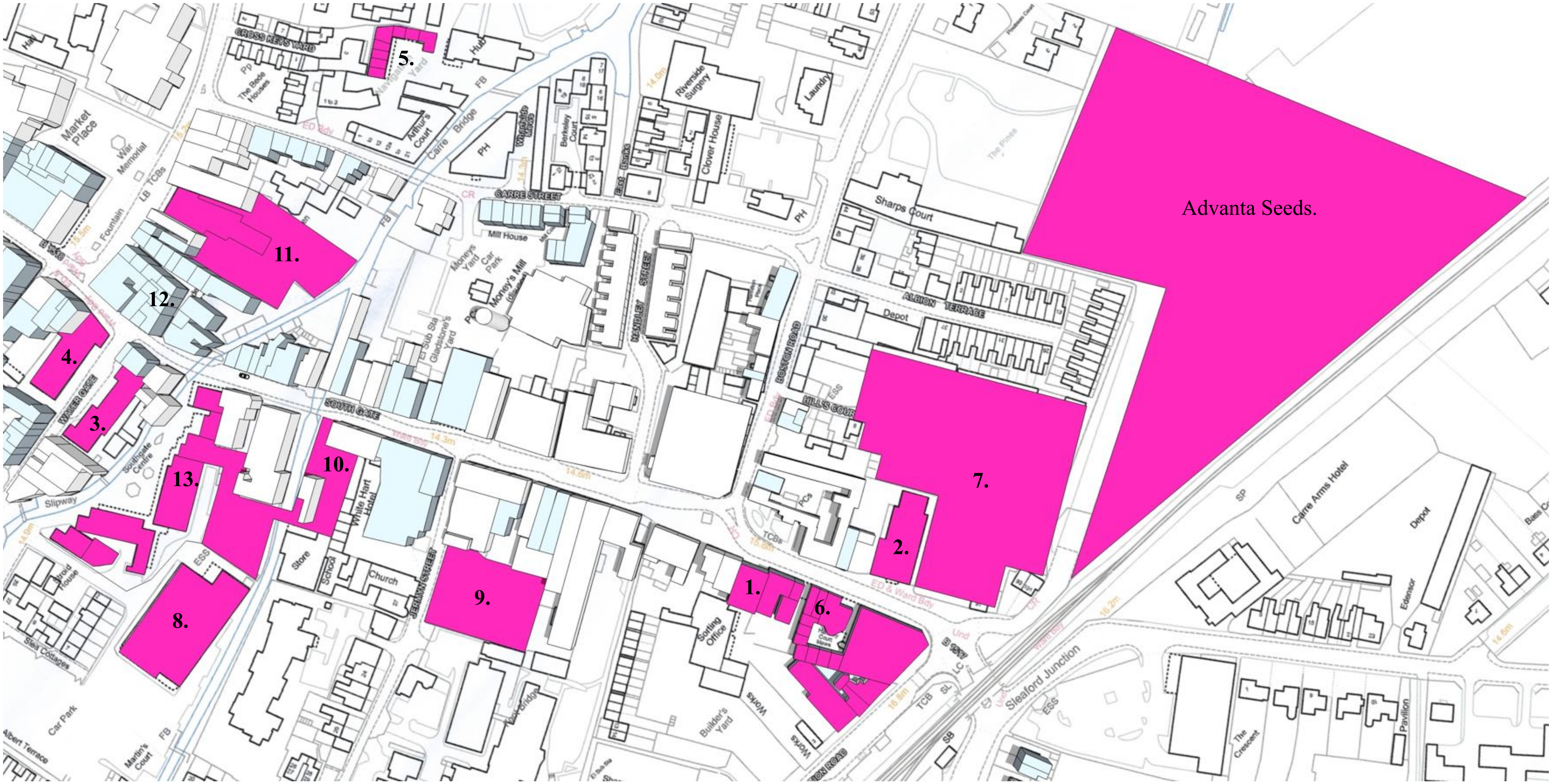
9. Car Park - Jermyn Street - NKDC
10. Car Park, 26 Southgate - Planning permission for retail and leisure exists

Current Development Project::

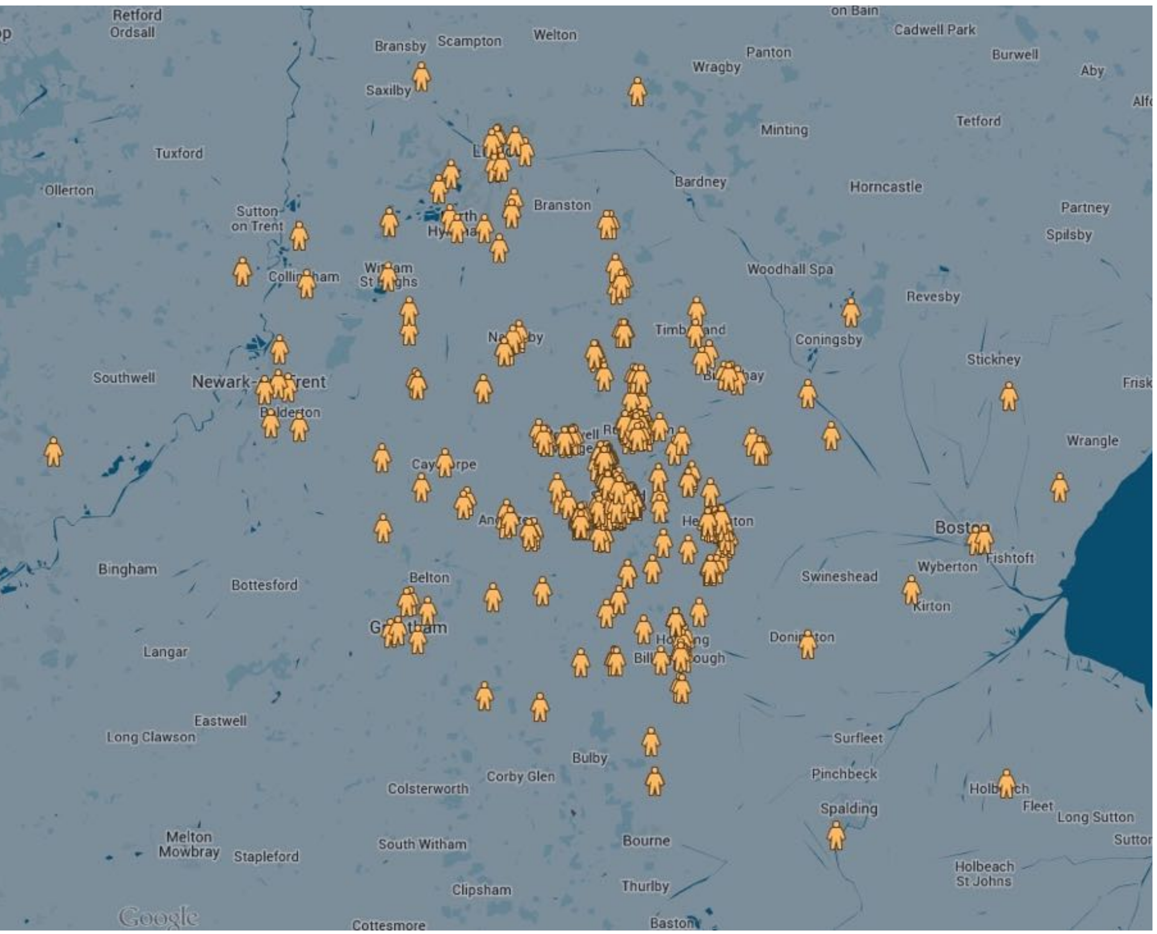
11. Heart of Sleaford Money's Yard, independent cinema, small retail
12. Bristol Arcade - Small retail units, suit independents.
13. Riverside - National retail, 1x larger anchor store,



Residents Survey

A survey of people who live, work or study in Sleaford was performed in Autumn 2014.

Visual representation of participants. The majority lived in Sleaford.



We have summarised responses from 1000+ participants.

1. What is your connection to Sleaford?

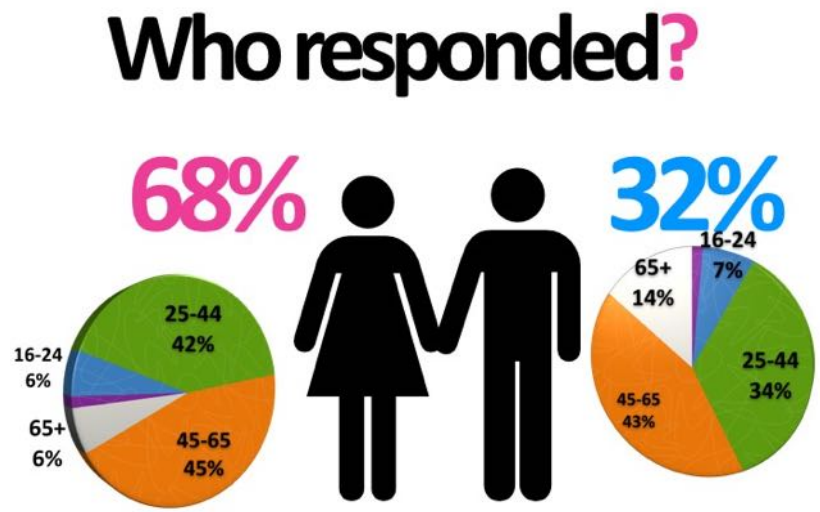
Results show percentage of recipients that selected each connection (NB: candidates may have selected multiple choices Work + Live for example)

Live: 68% (35% respondents live only, do not work or study in Sleaford)
Work: 52%
Study: 6%
Other: 11%

Highest combinations: Live & Work = 30%

Popular responses to 'Other':

- Used to live here or have family here.
- Shopping, banking and leisure activities.
- Live in surrounding villages.
- Child at school here.



2. How often do you undertake the following activities? We can see how the connection to the town impacts on how frequently services are used?

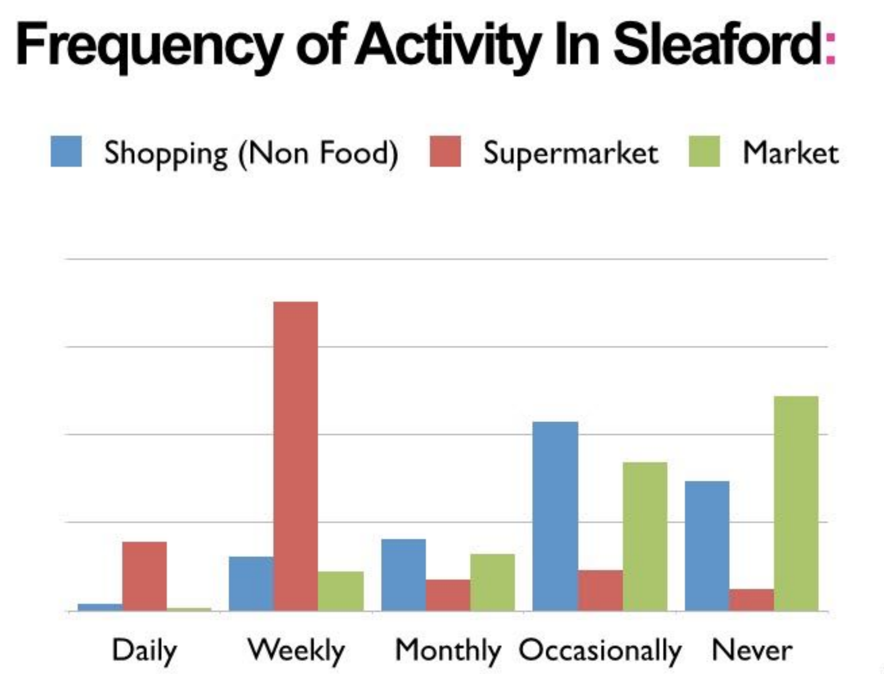
Supermarket Shopping	Daily	Weekly	Monthly	Occasionally (less than monthly)	Never
All respondents	15%	66%	6%	9%	5%
Live	18%	71%	4%	4%	3%
Work	15%	66%	6%	9%	4%
Study	11%	62%	8%	9%	11%
Comparison Shopping	**Daily**	**Weekly**	**Monthly**	**Occasionally (less than monthly)**	**Never**
All respondents	2%	12%	16%	42%	29%
Live	2%	13%	17%	41%	28%
Work	2%	11%	16%	46%	25%
Study	2%	8%	18%	35%	37%
Visit the Market	**Daily**	**Weekly**	**Monthly**	**Occasionally (less than monthly)**	**Never**
All respondents	1%	8%	12%	32%	47%
Live	1%	11%	13%	33%	42%
Work	1%	6%	12%	32%	50%
Study	3%	10%	8%	27%	52%

Note some respondents selected multiple entries, Live and Work for example.

It would appear, from the data, that by and large those studying in Sleaford are the least frequent in terms of shopping locally.

This was increasingly prevalent with respondents that selected "Studying" as their primary connection to Sleaford, with only 7% shopping daily or weekly for comparison goods.

Predictably those that live in Sleaford appear to support local trade the most, visiting supermarkets, comparison stores and local markets more often than people who work or study in the town.



Go out for meal in evening	Daily	Weekly	Monthly	Occasionally (less than monthly)	Never
All respondents	0%	8%	24%	48%	20%
Live	0%	11%	29%	46%	15%
Work	1%	8%	26%	49%	16%
Study	2%	8%	20%	40%	30%
Go Pub	**Daily**	**Weekly**	**Monthly**	**Occasionally (less than monthly)**	**Never**
All respondents	1%	13%	17%	38%	31%
Live	1%	16%	19%	40%	24%
Work	1%	14%	18%	43%	25%
Study	2%	10%	13%	28%	48%

Respondents living in Sleaford utilised evening economy establishments the most.

Use leisure facilities	Daily	Weekly	Monthly	Occasionally (less than monthly)	Never
All respondents	5%	22%	10%	26%	38%
Live	6%	23%	11%	28%	32%
Work	5%	20%	10%	25%	40%
Study	8%	21%	13%	28%	30%

Approximately 60% of the respondents visit leisure facilities occasionally or never - including respondents living in Sleaford.

Respondents studying used leisure facilities more frequently.

3. Which of these words would you use to describe Sleaford town centre?

Words to describe Sleaford	Yes	No
Safe	89%	11%
Friendly	84%	16%
Reasonable prices	74%	26%
Good place to meet friends	52%	48%
Variety of shops	12%	88%
Easy to walk around	83%	17%
Attractive facilities	22%	78%
Affordable parking	40%	60%

We can summarise these responses:

Sleaford is perceived to be a safe, friendly town, that is easy to walk around. Prices are reasonable, but the town lacks variety of stores and its facilities are not attractive.

<u>This is what Sleaford consumers think!</u>

In relation to affordable parking and the town being a good place to meet friends, responses were quite balanced positive and negative.

Duration of typical visit to Sleaford town centre.

Length of time spent in a town centre is proportional to the amount of money typically spent.

When asked reasons for visit duration: "available time", "having purchased everything they needed" and "parking tariffs" were the strongest responses.

Which would encourage you to use Sleaford more?	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
Free parking for 2 hours	65%	23%	8%	2%	2%
More National Chains	64%	23%	7%	3%	3%
More Independent Stores	51%	37%	8%	2%	1%
Market was bigger	37%	37%	20%	5%	1%
The main shopping area pedestrianised	29%	21%	32%	12%	6%
There were more daytime events	18%	35%	35%	11%	1%
Improved accessibility	17%	24%	50%	6%	3%
More restaurants	11%	28%	34%	19%	7%
Town more compact	6%	12%	50%	27%	5%

From the responses Free Parking for 2 hours and the need for more National Retail Chains attracted the strongest feelings. Interestingly, 88% of responders want increased Independent Retail.

Only 18% of people indicated that a pedestrianised town centre would not increase their visits to the town centre.

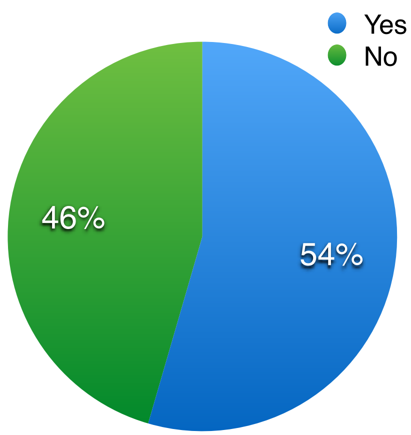
There does not appear to be a strong *appetite* for more restaurants.

4. Primary Retail Destinations for Non-Food Purchases. Respondents were permitted to select two destinations.

Location	Responses	% of Respondents	Experian Total Spend Leakage
Lincoln	873	42%	20%
Online Shopping	442	21%	-
Grantham	236	11%	12%
Sleaford	148	7%	23%
Nottingham	144	7%	3%
Boston	110	5%	18%
Newark-on-Trent	70	3%	6%
Spalding	53	3%	1%

The East Midlands has a high propensity for online shopping, however, if these results are reflective of actual behaviour, online sales in the region would exceed national trends. NB: Figures are for non-food sales.

5. Are you proud to say you live in Sleaford?
Yes: 398 (54%)
No: 334 (46%)



The reasons for negative responses were quite insightful. Common themes:

- "It could be so much more"
- "Perceived resistance to change by town council"
- "Fighting between town council and NKDC"
- "Pace of housing development not matched by facilities/retail offer"
- "Needs regeneration"
- "Lack of vision"
- "Lack of facilities"
- "Poor retail offer - no nationals"
- "Too many take-aways, charity shops and hair dressers"
- "Scruffy"
- "Excessive traffic"
- "The town is dying"
- "Has little to offer/nothing here"
- "Tesco Development, CPO and loss of playing fields - directed at NKDC"
- "Its reputation as a town"
- "Some of the people that live here"
- "Activities for kids and teenagers"

What is evident is a real passion for a better place to live, work and play. A place where they don't have to drive to Grantham, Boston or Lincoln for evening entertainment and shopping.

So many of the respondents wanted to be proud, but felt their home town was dying.

Some of the responses capture a potential direction for the town:
"I feel Sleaford is having an identity crisis, while I accept it needs to move on, I don't feel that encouraging a one stop shop like the proposed Tesco superstore will do anything for the character of this charming market town. Something needs to be done to encourage people to socialise more in Sleaford, like a cinema, bowling alley or something that keeps folk here at the weekend instead of taking their business to the larger surrounding towns."

(Female 35-44, 2x children, PT Employment, Household income £30k - £50K).

Does the town need private investment for such facilities, or could it consider an approach similar to funding leisure centres?

"I can see that in time I would be proud to live here if the regeneration goes through at the Maltings, and the station end of Sleaford is renovated. But at the moment the nickname "sleahole" sums it up. I live here because of easy access to A17 and A15 and with the right amenities offered in town I think this could be a good base for any young professional, however currently most of my leisure activities are in Lincoln."

(Female 25-34, no children, FT Employment, £20k-£30K household income).

"Feel like it's a town on its knees. But am proud of the people pulling together e.g Olympic flame visit & Sleaford Carnival revival."

(Female 45-54yrs, 1x child, PT Employment, £30k-£40k).

"It is a nothing town. It has no real draw as a retail, leisure or tourism destination. It functions as a place to commute from - be that for work or for non-food shopping or for entertainment. It has little infrastructure for the population and can't make sound decisions about its future. The years of squabbling over the Tesco / level-crossing is an example. The level-crossing routinely cripples the town yet no urgency to move the solution on is given, instead decisions are not made as the vocal No Campaign, although small, is allowed to destabilise the one planning event which could be the catalyst for the start of the regeneration of the town"

(Male 35-44, One child, FT, £50K+).

Sleaford Vision: Benchmark

- Provide a coherent current picture of Sleaford town centre
- Benchmark current performance (SRLPI) - Sleaford Retail & Leisure Performance Indicator
    - A series of business performance measures that can be used to monitor impact over time.

Confidence and perceptions are an important influence on consumer behaviour, and they can also impact on potential investors. At the time of Kerching's appointment, Aug 2013, we sensed a lack of confidence in Sleaford town centre. Although anecdotal, opinions expressed by local traders and shoppers did not portray a positive image of the town and its future prospects, reflected in the failed re-election of Sleaford BID.

> ***"Sleaford has been on the decline for quite a while now and it's about time we did something about it" local campaigner Stuart Couling, who set up "Don't let Sleaford die" Facebook page.***
>
> http://www.sleafordstandard.co.uk/news/local/campaign-group-says-don-t-let-sleaford-die-1-4971400

Statistically, Sleaford has continued to attract tenants above the national average, since the 2008 recession.

Sleaford Vacancy Rate Currently 9.8%

Backdrop
The proposed Tesco Extra development on the former Advanta Seeds Site, South of Southgate, divided opinion, and became a central issue for negative comments relating to the future of the town:
- "Closing the level-crossing would reduce much needed traffic to town centre businesses"
- "Town centre trade would leak to Tesco Extra"

Independent research by WYG, supported by Tesco's own consultants, demonstrated an overtrading within existing supermarkets in the town and the need for a larger supermarket to meet local demand. NKDC strive to follow a 'town centre first' policy for retail development, with a preference for the supermarket to be located in the town centre, rather than draw traffic to the edge or out of town.

For NKDC the Advanta Seeds site remains key to unlocking further development opportunities south of town centre, such as:

- Bass Maltings
- Central public transport interchange, at the railway station
- Improving the station approach
- Potential future development of Turnbulls and lower Southgate - *although no plans exist for this at present.*

Why? NKDC had been advised by the Highways Agency, that any development in the South of the town centre resulting in increased traffic through existing roads and junctions would not be supported.

NKDC subsequently proposed to:
- Close the level crossing on Southgate
- Create a new footbridge
- Build a new link road

Network Rail has also indicated any further traffic through the existing crossing will require changes. For example: new automated barrier or traffic redirection (new link road or alternative route through the town).

As part of the negotiations in approving planning for the new Superstore, Tesco had agreed to contribute towards a new footbridge and changes to the road system as part of the store development.

Having a strategy to deal with the volume of traffic entering the town from the level crossing, will be central to further retail and leisure development in Sleaford town centre.

This investment by Tesco is perhaps indicative of the confidence they had in increased trade from the new store.

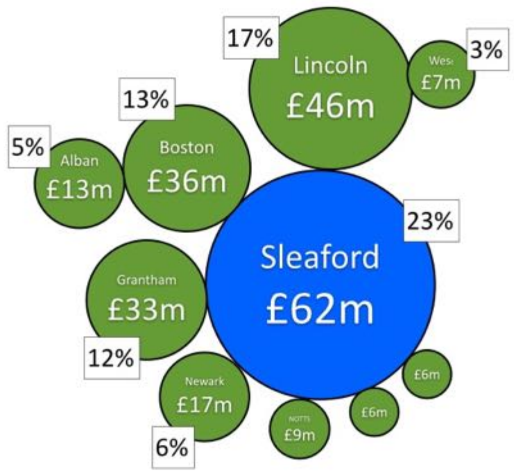
Following the announcement by Tesco not to open the new store, January 2015, as part of a nationwide cost reduction exercise, NKDC have been working with Tesco to seek alternative developers for the site, which we understand Tesco wish to sell. Whether a different development would be sufficiently lucrative to fund the footbridge and new link road is questionable. Without the link road, there is still some doubt whether Highways authority, Lincolnshire County Council, would permit developments resulting in increased traffic through existing town centre roads. We understand a review has been commissioned to reassess this, due Sept/Oct 2015.

Until this is resolved, significant development south of Handley Monument is doubtful.

Current Picture: Sleaford

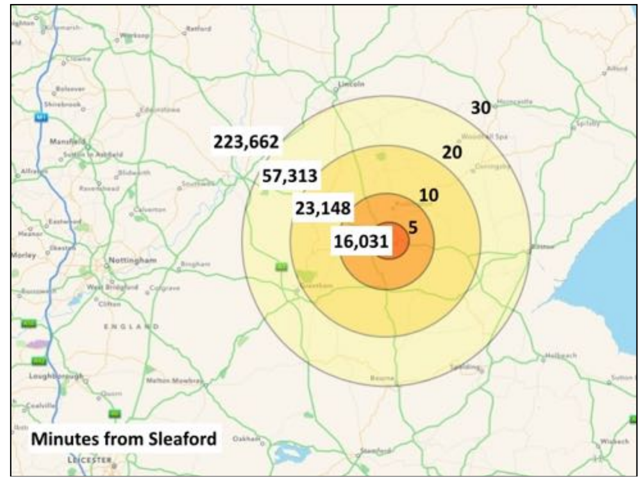
Sleaford Town Population:	17,671
Catchment Population:	57,601
Shopper Population:	13,235
Catchment Households:	24,300
Catchment adults aged 18+	45,812

Sleaford shopper population = 23%
Sleaford spend as a % of catchment spend = £62.5m 23%
Leakage of spend = 77%
As a retail destination, of comparison goods, Sleaford is ranked 715.
Diagram shows leakage from Sleaford.



Mile radius from Sleaford	Population	Minutes from Sleaford	Population
5	35,775	5	16,031
10	68,213	10	23,148
20	504,211	20	57,313
30	1,092,539	30	223,662

Primary shopper demographics
The following three Mosaic UK classifications are well above UK averages, and represent 71% of all classifications for Sleaford shoppers.



1. Rural Reality 41%
Defined as: Villages and outlying houses, agricultural employment, predominately home owners, affordable value homes, rural locations

2. Aspiring Homemakers 16%
Defined as: Younger households, FT employment, private suburbs, affordable housing cost, starter salaries, buy and sell on eBay.

3. Country Living 14%
Defined as: Rural locations, well-off homeowners, attractive detached homes, higher self-employed, high car ownership, high use of internet.

Source: Sleaford Town Centre Shopper Report, June 2014.

Vacancy Rates: 9.8% UK Average: 13% (1:7.7 stores are vacant)

A picture of retail mix is included within comparison analysis pg 9-11.

SRLPI: Sleaford Retail and Leisure Performance Indicator
Gravity models used by Experian, WYG, give an indication of how local demographics are expected to behave by the attractiveness of certain retail and leisure brands in a town centre, compared to leakage towns or the internet. These are validated with people surveys, and researchers periodically shape their models to suit.

It can take some time for changes in a town centre to filter through to a shift in trends visible in an Experian report. For example, a local event, new independent store, new popular lines stocked by a larger independent can all impact on footfall, spend and repeat visit to a town, but it would be difficult for a gravity model to pick this up until people surveys showed a significant shift in behaviour.

To give a more immediate picture of the impact, Kerching proposed a SRLPI performance indicator for Sleaford town centre, monitored by NKDC, the advantages of which are:

1. The model measures 'footfall' and 'business performance'.
2. Short-term they can be used to inform event and activity based decisions.
3. Longer-term to measure impact of interventions

Introduction of footfall cameras:
Footfall cameras are a valuable measurement tool for place managers. They give place managers insight into consumer behaviour and immediate feedback on the impact of changes to the town centre. They offer data by which a town centre can benchmark itself against others, for specific days, trading periods or trends over time.

3x footfall cameras in Sleaford will provide robust data to measure the impact of interventions.

On a local level, the data helps measure the impact of:

- New store openings
- Town centre events
- Improvements to the market offer
- Response to traffic-free days
- Extrapolate commercial impact of footfall

Kerching helped with the tendering process and subsequent appointment of Springboard to specify, install and manage three cameras in the town.

Kerching have also proposed appropriate town centres, within Springboard's portfolio, to track compatible footfall.

Locations proposed

From the current list of available towns and cities for comparison at Springboard, we proposed:

Market Harborough	Harborough District Council, town centre Co-ordinator. Helen Nicholls	A model/benchmark town for Sleaford to aspire to.
Bedford	Bedford BID, Christina Rowe	Similar mix of independent to multiples and similar mix of convenience to comparison
Huntingdon	Huntingdon BID, Sue Bradshaw	Similar number of stores by categories. Slightly higher population at 24k
Altrincham	Altrincham First, Tony Fitzgerald	Higher count in terms of stores, but similar in terms of leakage into larger city, Manchester.
Loughborough	Loughborough BID, Jonathan Hale	A model BID in terms of activity and business involvement. Interesting to monitor activity and specific events - subsequent spikes in footfall.
Wellingborough	Wellingborough BID, John Cable	A strong BID, with strong management. Strong events calendar, interesting to monitor activity and specific events - subsequent spikes in footfall.
Pontypridd	Rhondda Cynon Taf Council, Laura Thomas	Close to strong city centre offering in Swansea and Cardiff - similar store count. Slightly higher population

Recommendations for Sleaford:

We would encourage dialogue on a regular basis with comparison towns. Better understanding spikes in their footfall, events that generate them, will help build links between cause and effect.

Business Performance

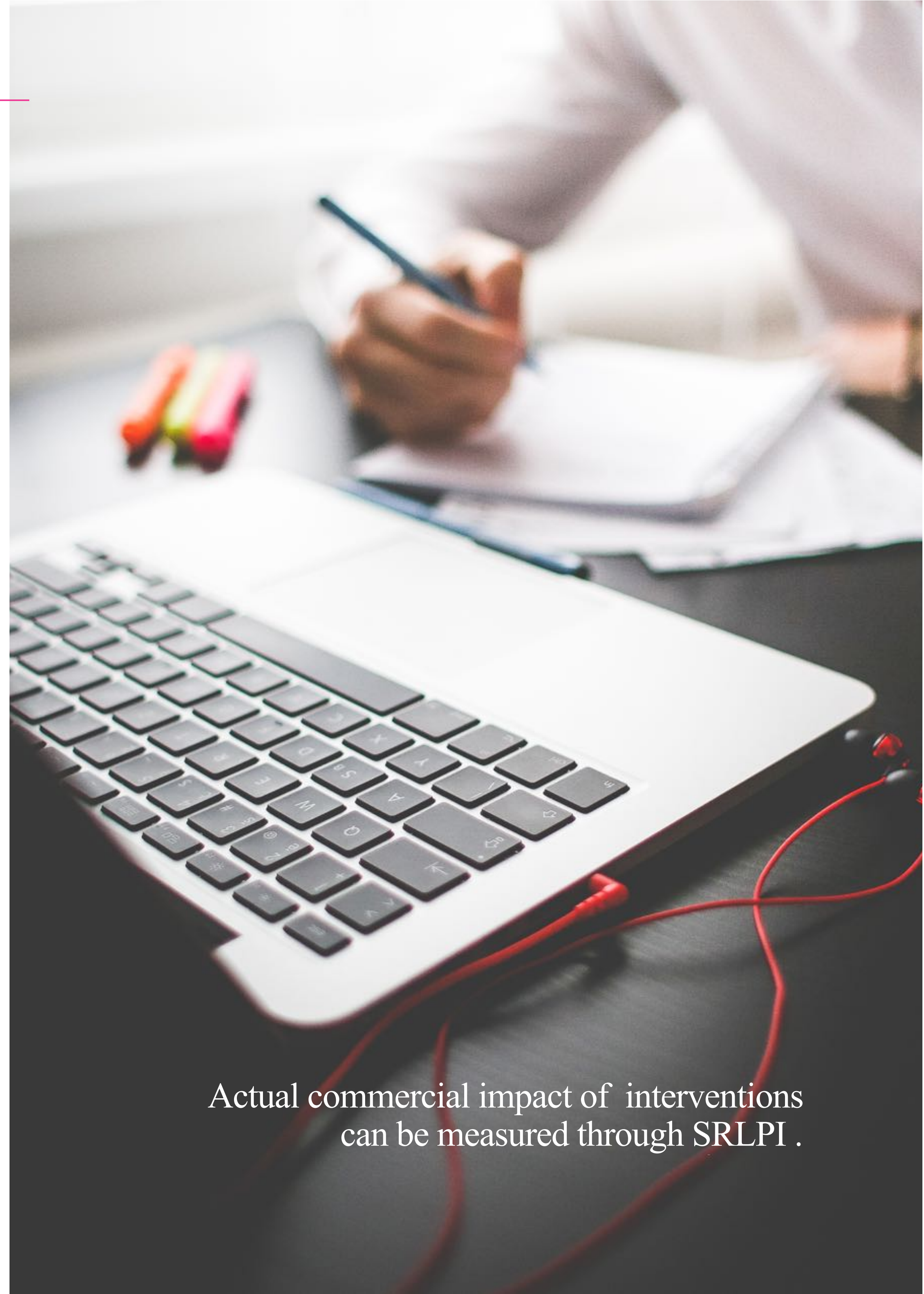
Attracting footfall to a town centre is a key ingredient in its attractiveness to current and potential tenants. The conversion of the traffic into shoppers is the responsibility of the business owners, but ultimately it is what will fund their continued support for a particular town. 25% footfall spikes of student traffic 8:30am and 3pm will be an indicator of a buoyant mid-week town centre, but may not convert into business for many traders.

The SRLPI was conceived to stimulate periodic measurement of retail and leisure operators' sales performance. From discussion with business owners, this was simplified to:

Turnover +/- on previous period.
Presented as a %+/-

Resources permitting, this should be measured weekly, showing a weekly increase or decrease in turnover on the previous week. We appreciate this will be subject to resources (chasing for weekly figures from store managers) or compliance by stores to submit data. The project would serve to:

- Build rapport and relationships between NKDC Economic Development and town centre businesses.
- Increase two-way communication between business owners and NKDC.
- Give NKDC a handle on current town centre performance, selling trends.
- Correlate direct influence of footfall and town centre business health. For example, did increased traffic to the market correlate into increased turnover for business rate-paying retailers and leisure operators, or did it only serve to support market traders?
- Identify trends or new opportunities for local businesses or entrepreneurs e.g. "We see significant spikes at 5pm when you close."



Actual commercial impact of interventions can be measured through SRLPI .

The incentive for business owners/managers to partake is the reciprocal sharing of town centre footfall data, serving as an indicator of performance to store/leisure operators.

Example: Town centre footfall was up 33% on previous week, store performance is 6% down on previous week - what are we doing wrong?

Twenty five businesses were approached to share data. Businesses covered a wide range of sectors, locations and the likelihood of collecting weekly sales data. The initial response from traders was positive, with many of the national retailers familiar with sharing data with shopping centres. Over time, the appetite to participate has waned a little, due to delay in installation of footfall cameras, however, we are confident once data for town centre footfall is being shared the benefits will be clear.

Initially the process is likely to require weekly phone calls to store management, we would hope this could develop into weekly emails.

In Summary:

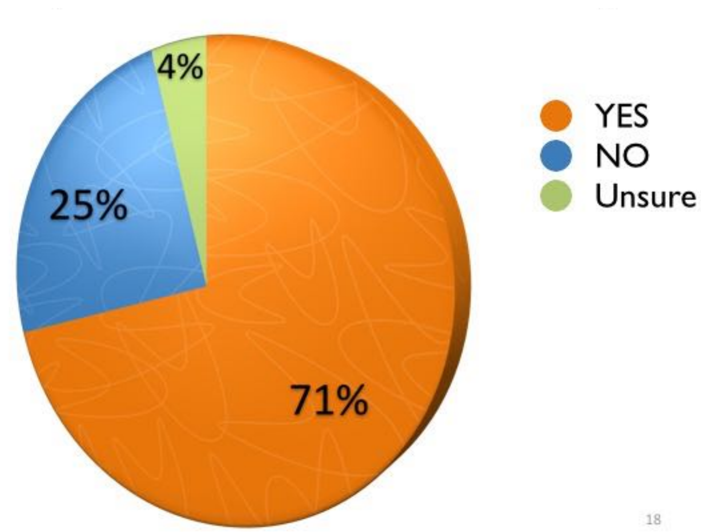
- Sleaford still has a need and capacity for a larger supermarket.
- Unlocking development opportunities south of the town centre requires significant investment and a solution to reducing traffic into the town.
- Sleaford leaks 77% of its catchment area spend.
- Footfall cameras have been installed.
- Business performance measures can commence collection.

Summary of business survey

50x local businesses were targeted, to better understand what aspects of trading in Sleaford could be improved.

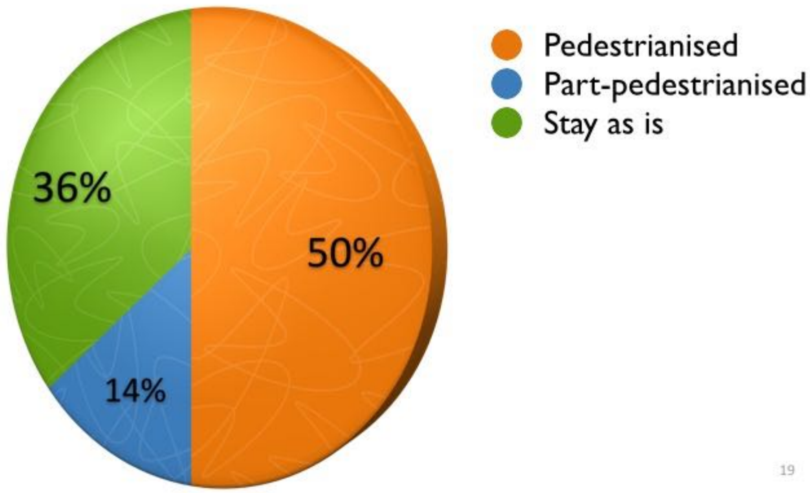
25x business took part in 121/telephone interviews, 25x were invited to respond by paper survey. Multiples, Independents and Restaurants were included.

1. Would you open a your business in Sleaford if you made the choice today?



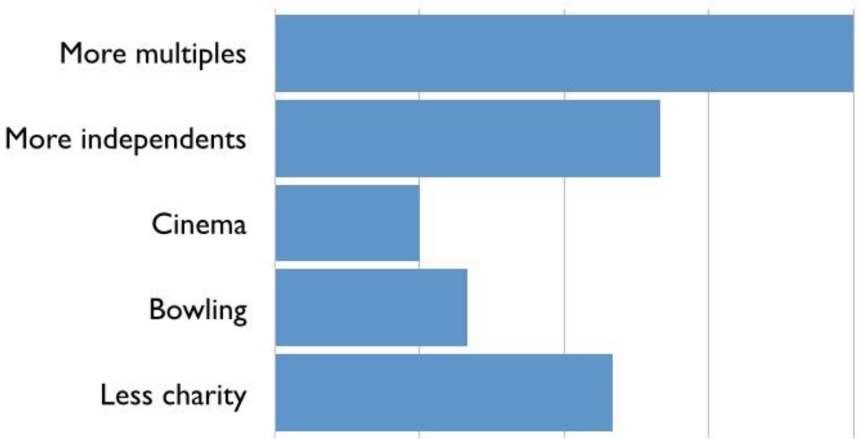
A clear picture that close to ¾ of traders surveyed would open their business in Sleaford today.

2. How would you change the management of traffic in Southgate?



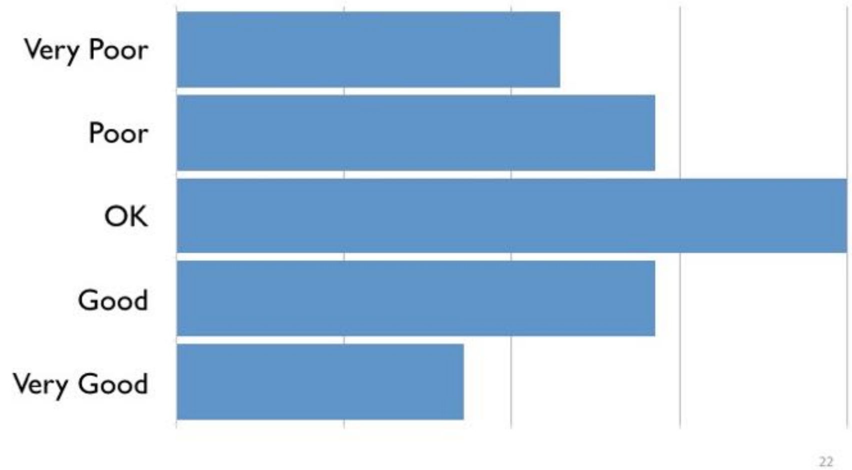
64% of respondents would introduce some form of pedestrianisation.

3. What do you think the town needs?



The needs of business owners are in sync with those of residents, workers and students.

4. How would you rate the parking offer and rates charged?



SLEAFORD
TOWN CENTRE
VISION

"THE VISION"

noun:
the ability to think
about or plan the
future with imagination
or wisdom.

Vision and Action:

NKDC set out clear objectives in the Town Centre Review. The Vision should look to address:

1. Publish a clear picture of what people want from Sleaford
2. Clarify what Sleaford should "look like"
3. Address local perceptions
4. Reverse leakage from the town
5. Improve the retail mix
6. Support retail start-ups
7. Improve skills of retail businesses and evening trade
8. Improve retail and leisure performance
9. Review opportunity and relevance of the market
10. Sleaford's leisure offering
11. Need to develop links between daytime and evening economies
12. Address store vacancies

1. Publish a clear picture of what people want from Sleaford

Words local people use to describe Sleaford:
Sleaford is a safe, friendly town, that is easy to walk around. Prices are reasonable, but the town lacks variety of stores and its facilities are not attractive.

What local people like the most about Sleaford:
- Friendly
- Shops
- Compact

What they like least about Sleaford:
- Shops
- Traffic
- Lack of variety
- Charity shops
- Market
- Parking

What does the town need:
- Shops
- Cinema
- Clothes shops
- Better market

Residents and business owners showed a preference for:
- 2 hours free parking
- More national chains
- More independents stores

There was less interest in evening economy.

Opinions were split on pedestrianisation - although only 18% were against it.

The local population has given a clear indication of what would change their current buying habits:

What would encourage you to use Sleaford more?	Strongly Agree	Agree	TOTAL
Free parking for 2 hours	65%	23%	88%
More National Chains	64%	23%	87%
More Independent Stores	51%	37%	88%
Market was bigger	37%	37%	74%
The main shopping area pedestrianised	29%	21%	50%
There were more daytime events	18%	35%	53%
Improved accessibility	17%	24%	41%
More restaurants	11%	28%	39%
Town more compact	6%	12%	18%

2. Clarify what Sleaford should "look like"
In simplistic terms, we can list what local people want as the goal for what Sleaford should "look like". However, it is worth considering known influencers of town centre behaviour, which may or may not be *conscious* attractors.

- Consumers seek physical experiences
- Experiences translate to spend
- Convenience is key
- Digital represents a threat and opportunity

Source Cathy Hart, Loughborough University

We could summarise these positive attributes, as a vision:
Sleaford: An attractive, compact and family friendly market town. Dominated by pedestrians, entertainment and natural/cultural sights. Home to popular national retail and restaurant brands, and high quality unique independents. Whether you seek daytime or evening entertainment, Sleaford has it all.

How might these descriptions be defined:
Attractive: Encouraging approach to the town centre from the North or East. (Not via the level crossing). Increased public space and urban design. Tress and greenery within the town centre.
Compact: Avoid retail expanding down Westgate and Northgate.
Family Friendly: Pedestrianised, places to dwell, easy parking.
Market Town: Strong and diverse market, managed by specialist operator.
Pedestrian: Full pedestrianisation on Southgate, shared space scheme on junction with Northgate, Eastgate.
Entertainment: Family rides, entertainers and temporary stands on Southgate pedestrianised area. Regular events bringing day visitors and diversity.
Natural Sights: Development of the River Slea - making it a key feature of the town centre.
Cultural Sights: Make church more welcoming and accessible to visitors.
National Retail: Increased multiple retailers within the new town centre developments.
Restaurant Brands: Restaurants clustered into leisure complex or cultural quarter (Market Place).
Independents: Strong, unique and high performing independents.
Evening Economy: Cinema feeding restaurants and bars on market place or combined retail and leisure complex (Turnbull's/Advanta Seeds).

3. **Address local perceptions**
Perception is a mental impression. Perceptions can be based on previous experiences or simply the views of others. Whilst improvements are needed to aspects of town centre, the existing offer is still worthy of increased promotional activity.

Many local residents and business owners have lost faith that regeneration will ever happen in Sleaford. Bass Maltings has good support locally as a project, Tesco Extra had mostly positive support - both have stalled after much excitement. As many local people will not understand the process of regeneration, planning consent and investment - the assumption is that the projects are failing at the hands of local authority. Further developments may therefore be seen as a hollow promise.

Celebrating regeneration that is happening within the private sector - Millstream for example, will help to demonstrate that Sleaford is seen as a town worthy of private investment.

Positive promotion of the town's key assets is desperately needed. Poor perceptions of the town have been developed over time, often by those that do not frequent the town centre at all. Re-positioning is principally a marketing exercise. A short to mid-term strategy to re-position the town should be shared by:

- NKDC
- Town Council
- SRG
- Town Team

The same message with the same headlines, for example:

- Sick and tired of the same old brands - find something new in Sleaford's independents.
- We have X clothes shops in Sleaford.
- Only X% of Sleaford shops are charity stores.
- Sleaford: home of the UK's Craft and Design Centre.

Kerching have developed a programme called "Talk up your Town" with a series of initiatives to engage local people and businesses promoting the town's best assets. A programme such as this would channel energies within the various stakeholders.
The goal is to have local people thinking of Sleaford as "a great place to work, rest or play"

- Such a campaign would require various marketing elements, and a 'Net Promoter' score, to measure improvements (e.g. "would you recommend Sleaford to a friend?")
- An online presence for the town is required. The Town Team appear to have created "Visit Sleaford", is it not yet populated. As the public face of Sleaford, all stakeholders should influence the look, feel and message on this site.
- Highlighting what great stores, specific promotions, restaurants, leisure facilities exist in the town, repeatedly, helping to divert attention away from what stores the town does not have.
- Highlight any improvements, new tenants, in stores or market.

The approach into the town centre from Southgate is visually poor. Consider limiting congestion into the town centre, directing traffic away from level crossing and Southgate, instead encouraging approach from more attractive routes on Northgate or Eastgate sides.

4. **Reversing Leakage from the town**
The primary reasons for leakage from Sleaford to Lincoln, Newark, Boston and Grantham:

- Better national/multiple retail offer
- Better leisure offer: Cinema, Bingo and Bowling

Other factors that influence leakage:

- Perceptions (See previous comments)
- Town centre experience

Approx. 70% of respondents do not use the following facilities monthly:

- Town centre shops
- Market
- Leisure facilities
- Pubs
- Restaurants

This review has therefore focused on leakage, as opposed to attracting day visitors.

It would be unrealistic to expect Sleaford to compete with Lincoln as a retail and leisure destination. Instead, strive to reduce the frequency of visits there. The town should strive to challenge a residents' need to visit Newark, Boston and Grantham.

Short-term solutions:
Planned development of Riverside could improve the retail offer in the town. NKDC, Banks Long and Coop must work closely to secure the 'right' retail tenants, rather than simply filling the units. With so little suitably sized retail space in Sleaford, this is a key opportunity for the town.

Ideal anchor tenant: Sports Direct, New Look

NKDC are the key stakeholder with a vested interest in securing the 'right' tenants. Consider financial assistance to make the opportunity attractive to target retail brands. 2-3 strong national brands would start the process of redefining perceptions of local people.

Given the remaining unit sizes, smaller, ideal targets include: Claire's Accessories, Mobile phone brand, Game, Tiger, M&S Food.

The Heart of Sleaford development can address the local need and desire for a cinema. Ideally located close to the market, the development could trigger further evening economy nearby.

Long-term plans:
Create an environment that encourages private development, potential locations:

- Legionnaires Club - Retail
- Post Office - Retail
- Lower Southgate and Station Approach - Retail
- Turnbull's - Retail and Leisure Mix
- Advanta Seeds - Retail and Leisure Mix, some big box retail

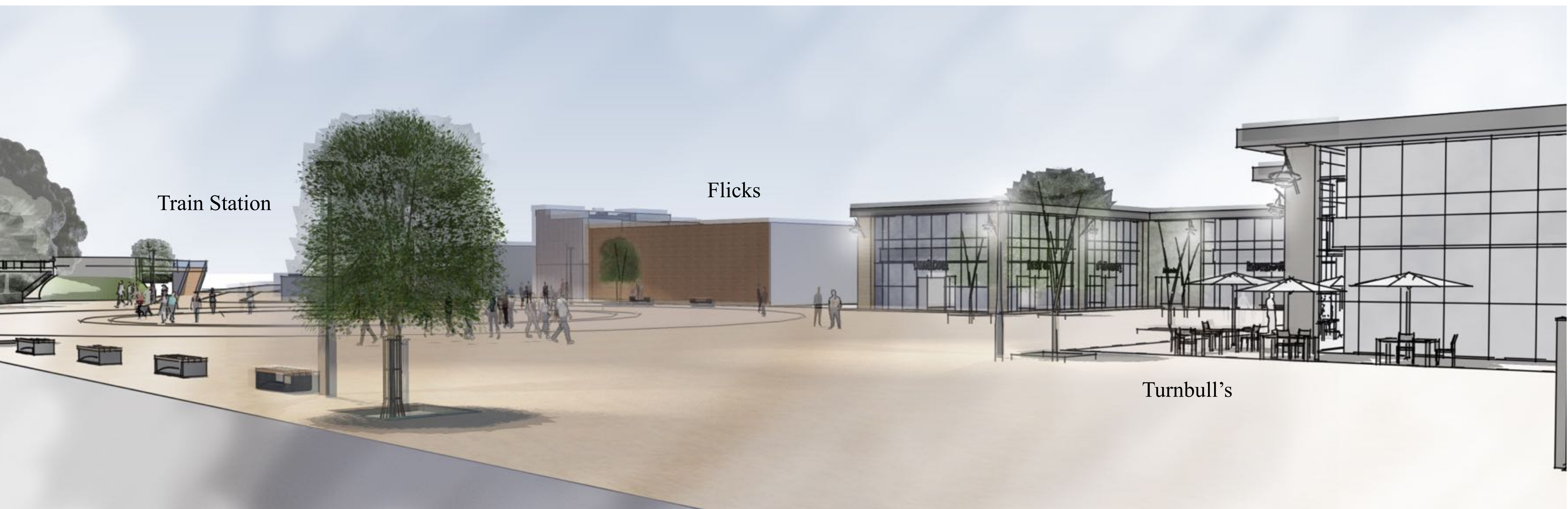
Also Interflora, although we should not remove workforce footfall from the town centre.

Town Centre Experience
The Town Centre is dominated by traffic. As more houses are built in Sleaford, this is likely to increase.

There is an inevitability that the town must seek alternative traffic routes around and through the town, whether triggered by new developments, Highways Agency, Network Rail or pedestrianisation. The controversy surrounding the link road and level-crossing closing will make this exercise challenging. Nonetheless, the town centre is gridlocked at key times in the day and unappealing to pedestrians.

If the town centre environment (townscape) is to be improved, putting the pedestrian first is a primary step.

Illustration of a potential shopping and leisure complex on Turnbull's.



We would advise the exploration of full pedestrianisation of South Gate from Handley Monument to Eastgate junction. Market place to become a shared space scheme, giving priority to pedestrians, at the Northgate and Eastgate junction.

With full pedestrianisation of Southgate, entertainment, animation, market stalls and al fresco dining can be introduced.

5. **Improve Retail Mix**
Feedback from residents highlighted a clear desire for more national retailers. Respondents also expressed desire for increased independent retail.

Comparison goods retail in particular, are under-represented in Sleaford. Convenience is catered for, not withstanding scope for a larger supermarket.

Use planning powers and use class, to influence the retail mix. Resist 'unfashionable' retailers. Offer 'rates holidays' or grants to entice attractive retailers to earmarked locations. An independent fashion store opening on Westgate could be enticed to open on Southgate for instance. Be explicit to landlords and agents. "This is our vision, these are the tenants we are looking for in the town centre. These are the tenants we do not want in the town centre".

Marylebone High Street transformed its retail mix over a number of years, by influencing, enticing and incentivising the right tenants off and on the main shopping stretch.

"Most of London's biggest land-owners take as their inspiration the Howard de Walden estate's transformation of Marylebone High Street. In 1995, a third of the street's shops were either vacant or occupied by charities. In went Waitrose, Conran and small, specialist shops, the Georgian buildings got a thorough jet-spray and now Marylebone is one of the most sought-after residential and commercial areas of central London".[8]

Manage the retail mix carefully. Discourage landlords to house 'out-of-fashion' retail tenants such as Charity Shops, Pawnbrokers, Pay-day loan stores, Betting shops, Amusements, E-cigarette stores.

Maintain an upmarket retail offer.

To entice new tenants, develop a programme "Retail Opportunities in Sleaford", consisting of:

- An online and paper brochure of benefits and support
- Support programme for startups
- Portal for available units.

Programme could target two discrete sectors:

1. Startups: "Calling all dreamers" programme to attract, engage and support startups
2. National retailers: Marketing materials could highlight the benefits and positive statistics for Sleaford, designed to influence property agents (pitch) and entice retail acquisition teams. Document could be combined with Hotel study brochure.

6. **Support retail start-ups**
Incorporating startups into the Retail Opportunities in Sleaford Programme can help inexperienced traders to set-up and stay open.

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[8] http://www.telegraph.co.uk/luxury/property-and-architecture/13463/the-revival-londons-great-estates.html

7. **Improve skills of retail businesses and evening trade**
It would be favourable to support and develop existing traders over bringing new businesses in to Sleaford.
Whilst there is demand for established retail brands to be represented in Sleaford, strong independents like Oldrids and Coney's Boston, can stock leading fashion brands and satisfy local needs.

Programme may include:

- Help finding premises.
- Financial and legal advice (banking partner).
- Training from retail experts and local national retailers (e.g. Boots).
- Mentoring.
- Business rate relief.
- Sign posting to other support and grant opportunities.

Developing retailer skills is designed to:

- Limit business failure and increased vacancy rates.
- Help business flourish.
- Help business identify gaps in local market - needs of local shoppers (e.g. premium fashion brands).
- Expand into additional units.

A business support programme including:
- Breakfast, daytime and/or evening workshops - specialist topics
- 1-2-1 reviews & mentoring.
- Shop front improvement grants.
- Incentives and competitions for window display, customer service and innovation.

Aspects of the Retail Opportunities in Sleaford Programme could be utilised to avoid duplication.

8. **Improve retail and leisure performance**
A vehicle for measurement, intervention and review of retail and leisure performance is required.

SRLPI - Sleaford Retail and Leisure Performance Indicator combined with footfall data will give NKDC a handle on retail and leisure performance at all times and any impact of interventions and events.

Improving performance may be considered a by-product of all actions proposed. Interventions that have not previously been covered:

1. Sleaford supermarkets attract a very high level of traffic, in many instances on a daily and weekly basis.

Efforts to draw traffic from Sleaford supermarkets into the town should be explored.
- Free extended parking - when ticket stamped in town.
- Special offers for town centre businesses promoted at supermarket exit.
- Signage drawing traffic post-supermarket visit on exit.

2. Keep employment and study in the town centre. It generates footfall, trade and vibrancy to a place. Interflora, local schools & NKDC all could relocate, this should be avoided.

Marketing is the key to reversing perceptions and performance

3. Approx. 70% of respondents do not use:
- Town centre shops
- Market
- Leisure facilities
- Pubs
- Restaurants

An online and offline marketing campaign, highlighting existing facilities should be targeted at shopper and leisure consumers that currently leak.

NB: This activity should feed into addressing perceptions.

9. Review opportunity and relevance of the market
Markets have become the focus of much attention in rejuvenating the High Street. They bring animation, urgency (come and buy today or it will be gone) and much needed diversity to the retail offer.

Whilst many markets have flourished from renewed focus and investment many have still declined.

Many of the respondents to the business and resident survey drew reference to the existing market and the lack of diversity. We understand the Sleaford Town Team are undertaking initiatives to revive the market, which is very positive.

Organisations specialise in developing markets within a location. They have strong databases of market traders who can be invited to trade. Whilst they have specialist knowledge and contacts, the latter less common in local authority, they make it clear that there is no guarantee a market will succeed, if there is not a good response and local appetite (measured in footfall not opinion).

We would encourage engaging with such an organisation or individual, to manage the market and profit if at all possible. This profiting, is what is required to ensure long-term commitment and focus from a market's manager/promoter.

We would like to see trials of the market running down Southgate, with temporary road closures. This would give an early indication to the possible benefits of relocating the market and full pedestrianisation. It would also give shoppers a very different experience in the town centre.

10. Sleaford's leisure offering
Pubs and restaurants did not attract the same level of desire and attention as retail stores in Sleaford. 24% of respondents use local restaurants once a month and 17% local pubs.

Overall, respondents appeared satisfied with the catering offer.

We would encourage ongoing dialogue with restaurant brands Nandos, and The Restaurant Group Plc, (Frankie and Bennys, Chiquita, Coast to Coast), particularly as the Heart of Sleaford project develops.

We do think there is an opportunity to cluster restaurants, including new operators, around the market place. This would be attractive with a cinema in the Heart of Sleaford development.

11. Develop links between daytime and evening economy
Initiatives to achieve this across towns and cities have been met with some apathy on the part of the consumer.

Shoppers on public transport burdened with bags are often keen to get home rather than commence an evening out.

The biggest opportunity is to attract the town centre workforce. Particular days (e.g. Friday's) could have retailers trade until 6:30/7pm and bars and restaurants introduce happy hour promotions and early bird offers. City centres with large working populations have some success with this approach.

We consider this to be a non-priority at present, and to be revisited once the daytime and evening economies are developed.

12. Address store vacancies
New store vacancies should be approached swiftly with the following action:
If an immediate tenant is unlikely, introduce vinyl wraps/virtual window - highlighting "Retail Opportunities in Sleaford" programme.
Use the Retail Opportunities in Sleaford Programme to find, support and train suitable new tenants.

Work with landlords to ensure tenants are 'suitable' to the retail mix.

NB: Sleaford has a low vacancy rate, but a number of longstanding and prominent, shabby vacant units - which attracted the attention of survey respondents.

Events:
In addition to the twelve outcomes set by NKDC, the opportunity for Sleaford to leverage its accessible location in Lincolnshire for hosting events is worthy of note.

We propose Sleaford as being 'The Place' to hold events. Eliminate red-tape for road closures (SouthGate) and help facilitate increased parking. Event organisers who experience the process managed brilliantly, are likely to repeat the event.

Create an extensive calendar of events held in Market Place:

- Camper vans
- Classic cars
- Classic bikes
- Steam rallies
- Continue with plans to hold your own signature event "Made in Sleaford"
- Support NCAC by offering greater scale to their existing events calendar.

"Sleaford the easiest place in Lincolnshire to hold an event."

Next Steps:

- ☑ Present vision to SRG 6th July
- ☑ Update vision document from feedback
- ☑ Working party formulate action plan and priorities

Report by:
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25.6.15

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