Grantham Town Centre Report December 2008

Contents

Executive Summary

This is the second town centre report completed for Grantham (2007 and 2008). With this and subsequent reports, year on year comparisons can be made to determine the town's strengths and weaknesses and to be able to identify areas of concern.

A set criteria of Key Performance Indicators (KPI's) are used which were pre-determined by the Market Town Benchmarking scheme.

Key and notable findings from the report are as follows:

- There are 463 businesses within the town centre. Over half of these are A1 retail.
- Of the A1 retail, there is a heavier emphasis on "convenience" than "comparison" stores. Shifting this balance to favour more "comparison" stores would help attract more visitors.
- Grantham has a high percentage of independent retail and other businesses within the town centre (59%).
- Over the last year 3 key attractors have been lost from the town centre – Adams, Evans and a Post Office (on Brook Street). No key attractors have replaced these and two of their vacated units are still empty.
- The total number of vacant units over the town centre is static on a like for like comparison with last year. It is worth noting that there have been some units which had been empty for some time in prime locations which are now filled – such as the old 'Arbon and Watts' store on Westgate, and the old 'Blockbuster' premises on Watergate.
- The markets situation for Grantham is relatively unchanged when compared to last year.
- Zone A rental values are in a slight decline from last year.
- Footfall counts for Grantham compared to the national averages are strong.
- Car park capacities are overall similar to last year. Despite concerns regarding lack of car parking space, Grantham does have spare capacity in the town centre – most notably in the Welham Street multi-storey.
- Business Confidence surveys are showing that 66% of respondents claim turnover has decreased (compared to 46% last year) and 70% claim profit to have decreased (compared to just 37% last year). Furthermore, almost half believed next year's turnover would decrease further.
- Prosperity of the town, car parking, road networks and rental values/premises costs were considered the biggest constraints on the town.
- Whilst theft numbers appear to have dropped, criminal damage has increased.
- Most common suggestions to improve the town's economic performance were: reduce business rates, better traffic management, cheaper car parking, free car parking, beautify the town and stop road works.
- Visitor perception surveys indicated the town is relatively good with 58% labelling the physical appearance excellent or acceptable, 57% felt cleanliness was excellent or acceptable (a better perception than in 2007) and 51% the felt range or variety of shops was excellent or acceptable.
- 95% of respondents felt very safe or safe in the town centre during the day with 75% feeling the same after 7pm.
- More common suggestions from the visitor perception survey in how to improve the town's economic performance were: reduce traffic/pedestrianise, better variety of shops and clean up the town.
- Data captured from the above survey indicated that 87% of those in town were local which indicates a relatively low catchment threshold.

INTRODUCTION

The aim of this report is to measure a set of economic key performance indicators (KPIs) for Grantham. KPI's can then be compared on a yearly basis in order to assess the town's performance, and understand its strengths and weakness. Once these are identified, the town centre partnership can incorporate this into their future strategies and action plan. This is the second year that this type of study has been carried out which allows for a like for like comparison on an annual basis.

The majority of data collected has been through the Town Centre Manager on behalf of Grantham Future Ltd and the District Council, and in addition some consultancy work including footfall counts, visitor satisfaction, postcode data and car parking usage was conducted externally.

It is worth noting that the town centre audit was complete at the end of November 2008. Therefore one noteworthy omission is the closure of another Key Attracter – Woolworths, which ceased trading in Grantham in January 2009. Therefore, this has not been acknowledged in the data contained within this report, although will be taken into consideration in the 2009 report.

The definitive list of KPI's is as follows:

KPI 1 – Total number of commercial units

KPI 2 – Retail units by classification (comparison / convenience)

KPI 3 – Key Attractors / multiple trader representation

KPI 4 – Number of vacant units

KPI 5 – Number of markets / traders

KPI 6 - Prime retail property yields

KPI 7 – Zone A rental values

KPI 8 – Footfall

KPI 9 – Car park usage

KPI 10 – Business confidence

KPI 11 –Visitor perception

DEFINING TOWN BOUNDARIES

Before any KPI data is collected, it is necessary to define the extent of the town for the purpose of the study and the various different elements that go to make it up. This includes the core shopping streets, secondary trading areas throughout the rest of the town and then more peripheral, designated sites where edge of town commercial or industrial activities take place.

Defining the core commercial area (town centre)

Following publication of a town centre shopping guide (inclusive of a map) in October 2007, it was decided that the general boundaries of the map would be used for consistency. This encompasses all streets within:

- Wharf Road
- Castlegate
- Brook Street
- St Augustin Way

It should be noted that some streets within these boundaries which were excluded last year have been included this year. These include: Finkin Street, Elmer Street North and Elmer Street South, an extension of Brook Street and Office Suites in the George centre. Therefore comparisons have taken these into account where applicable along side a like for like comparison.

KPI 1 – TOTAL NUMBER OF COMMERICAL UNITS

It is important to understand the scale and variety of the 'commercial offer' throughout the town as this will impact on its long term vitality and viability. A variety of shops and a wide range of services in a town are important to its ability to remain competitive and continue to attract customers. Sustaining a balance between the different aspects of buying and selling goods and services ensures that the local population (and visitors from outside) can spend time and money there, keeping the generated wealth of the town within the local economy. Importantly, it forms the employment base for a substantial proportion of the community too.

Measuring the total number of units will indicate the baseline stock of units in the town, against which future expansions / contractions can be monitored.

Use Class	2007		2008 Like for Like		YOY change on Like for Like 2007 vs 2008		2008 including new additional streets		YOY change 2007 vs 2008 (additional streets included)	
	Quantity	%	Quantity	%	Quantity	%	Quantity	%	Quantity	%
A1	235	54.9%	234	54.7%	-1	-0.2%	238	51.4%	3	-3.5%
A2	59	13.8%	58	13.6%	-1	-0.2%	80	17.3%	21	3.5%
A3	69	16.1%	67	15.7%	-2	-0.5%	67	14.5%	-2	-1.7%
B1	3	0.7%	3	0.7%	0	0.0%	4	0.9%	1	0.2%
Other Units	26	6.1%	30	7.0%	4	0.9%	34	7.3%	8	1.3%
Vacant Units	36	8.4%	36	8.4%	0	0.0%	40	8.6%	4	0.2%
Total Units	428	100.0%	428	100.0%	0	0.0%	463	100.0%	35	0.0%

Results accurate as of late November 2008

Please note due to the inclusion of additional streets not included in 2007 (namely Elmer Street North, Elmer Street South, Finkin Street, an extension of Brook Street and the suites of the George centre) two comparisons are made here.

According to the www.townbenchmarking.org, this split is in line with national averages and has been for the last two consecutive years – presumably indicating an optimum divide.

For further information on the business classes applied here, see the Use Class Order in **Appendix 1 on page 20**. The % figures in all the tables relate to the number of each category compared with the total number of commercial units reported.

KPI 2 – RETAIL UNITS BY CLASSIFICATION (COMPARISON / CONVENIENCE)

A1 Retail units selling goods can be split into two different types – Comparison and Convenience (see **Appendix 2 on page 21** for definitions). The presence of a variety of shops in a shopping centre is important to its ability to remain competitive and continue to attract customers. A balance of both comparison and convenience retail units is therefore ideal in terms of encouraging visitors / potential customers. The optimum balance will differ from town to town depending on a number of factors such as its size of catchment area, its historic background and the social class of local residents.

Grantham predominately serves local visitors (see KPI 12 for further details) meaning a requirement for a high number of convenience units. However, more convenience stores will inevitably lead to more local visitors – a Catch 22 scenario. Therefore without an attractive balance of comparison units, local share will be lost to competitive areas such as Nottingham and Peterborough – a trend that is already occurring. This concludes that the balance is not quite right yet for Grantham with perhaps more scope required for comparison units especially with the further shift towards a larger convenience ratio this year. The White Young Green South Kesteven Retail Needs Study 2006 also identified an oversupply of convenience shopping and an undersupply of comparison shopping in Grantham.

Melton Mowbray (a similar sized town) has a split of 43%/57% convenience/comparison – more similar to Grantham's statistics last year. The proposed Greyfriars retail scheme for Grantham would address the need for more comparison units in the town by providing an exciting new retail destination with floor plates more suitable to retailers in clothing and electrical goods and with minimal focus on convenience units.

Classification	**2007**		**2008 Like for Like**		**YOY change on Like for Like 2007 vs 2008**		**2008 including new additional streets**		**YOY change 2007 vs 2008 (additional streets included)**	
	Quantity	%	Quantity	%	Quantity	%	Quantity	%	Quantity	%
Convenience	96	40.90%	134	57.3%	38	0.2%	135	57%	39	-16.10%
Comparison	139	59.10%	100	42.7%	-39	-16.4%	103	43%	-36	16.10%
Total A1 Retail	235	100%	234	100.0%	-1		238	100%	3	

Results accurate as of late November 2008

KPI 3 – KEY ATTRACTORS / MULTIPLE TRADER REPRESENTATION

The vitality of a town centre depends on the quality and variety of retailers represented. National retail businesses are considered key attractors and are particularly important in terms of attracting visitors and shoppers to a town. However, the character and profile of a town often also depends on the variety and mix of independent shops that can give a town a 'unique selling point' and help distinguish it from other competing centres. A sustainable balance of key attractors and multiple names alongside local independent shops is therefore likely to have the greatest positive impact on the vitality and viability of a town.

Representation	**2007**		**2008 Like for Like**		**YOY change on Like for Like 2007 vs 2008**		**2008 including new additional streets**		**YOY change 2007 vs 2008 (additional streets included)**	
	Quantity	%	Quantity	%	Quantity	%	Quantity	%	Quantity	%
Key Attractor	16	6.80%	13	5.56%	-3	-1.24%	13	5.50%	-3	-1.30%
Multiple Trader	70	29.80%	68	29.06%	-2	-0.74%	69	29.00%	-1	-0.80%
Regional Retailer	14	5.60%	16	6.84%	2	1.24%	16	6.70%	2	1.10%
Independent Retailer	135	57.40%	137	58.55%	2	1.15%	140	58.80%	5	1.40%
Total A1 Retail	235		234				238			

Results accurate as of late November 2008

Grantham has a majority percentage of independent retailers. This is good to add uniqueness to the town centre and to avoid a clone town image.

Three key attractors have been lost over the last year – Evans, Adams and a Post Office on Brook Street*. Of importance is that two of these three units are still vacant.

However, independents remain at a strong percentage level and have increased slightly over the year.

For further information in the definition of business representation, see **Appendix 3 on page 22**.

*Please note that Woolworths was still trading at the time of the town centre audit (see page 4).

KPI 4 – NUMBER OF VACANT UNITS

Vacant units are an important indicator of the vitality and viability of a town centre. Whilst low vacancy rates do not necessarily indicate a healthy economy, the presence of vacant units over a period of time can identify potential weaknesses in a town centre, whether due to location or size criteria, high rent levels or strong competition from other centres. Understanding the reasons behind the closures can therefore also provide some very valuable pointers.

Representation	**2007**		**2008 Like for Like**		**YOY change on Like for Like 2007 vs 2008**		**2008 including new additional streets**		**YOY change 2007 vs 2008 (additional streets included)**	
	Quantity	%	Quantity	%	Quantity	%	Quantity	%	Quantity	%
Vacant Units	36	8.41%	36	8.35%	0	0%	40	8.64%	4	0.23%

Results accurate as of late November 2008

There has been a slight rise in the number empty units this year when including a broader area. With a poorer national economic climate this rise is relatively small. When looking at a like for like basis, the figures are static.

SKDC are supporting 'Project Pretty' (a Grantham Business Club initiative) where shop 'wraps' will soon be in place at a number of empty units around the town centre. The aim will be to create a better image of empty units in conjunction with the landlords and Grantham Future.

KPI 5 – NUMBER OF MARKETS / TRADERS

Good quality markets provide competition and choice for consumers. A busy and well-used street market can therefore be a good indicator of the vitality of a town centre. Conversely, if a market is in decline (e.g. empty pitches/ declining numbers), it can be an indication of potential weaknesses in the town centre, e.g. a lack of footfall or customers due to an inappropriate retail mix or increased competitor activity.

Street markets can generate substantial benefits for the local economy. Markets can also provide a local mechanism for a diverse range of local enterprises to start, flourish and grow, adding to the sustainable mix of services on offer throughout the town.

Representation	**2007**	**2008**	**YOY Change**
Number of weekly markets	1	1	0%
Average number or traders per market	64	60	-4

A study has been commissioned by South Kesteven District Council regarding markets in the District. Grantham market has been experiencing a slow decline over a number of years. The report's recommendations are currently being considered.

As part of the Event's Groups activities two additional annual events incorporate larger scale markets including farmers and craft. The Grantham Christmas Market and the St George's Celebrations fill the town with visitors and offer a larger market experience complemented by street entertainment and other activities.

KPI 6 - PRIME RETAIL PROPERTY YIELDS
KPI 7 – ZONE A RENTAL VALUES

The values for prime retail property yield and Zone A rentals are the "industry" benchmarks for the relative appeal of a location with its occupiers and with owners of or investors in property. All real estate has a value and this value is based on the rental return and capital growth. As these indicators rise and fall, they provide a barometer of success or failure and, because the same property dimensions are assessed to determine them, they can be used as an indicator of improving or declining fortunes for towns.

In particular retail rents can provide a useful indication of a town's performance and highlight how attractive it is to businesses. Whilst rising rental values are not good news for most tenants occupying a unit, the broader implications of high and increasing values make sound sense to external investors and will likely indicate a demand for floor space. Conversely, where rents are falling, it can be an indicator of decline – Grantham is experiencing this slight downturn with difficulty in achieving the same level of last year's Zone A rental value.

However, according to Colliers Cre, prime retail rents nationally have been indicating a weakening market, with growth slowing in recent years. They suggest that small market towns near larger cities (such as Grantham) tend to be affected worse in terms of a decline in the retail economy, which appears to be the case.

Representation	2007	2008
Prime pitch property yield %	7%	8%
Prime pitch Zone A rental value (per sq ft)	£60	£55-£60

For more information on property yields and rental values, see **Appendix 4 on page 23**.

*Above statistics from Humberts

KPI 8 – FOOTFALL COUNTS

The arrival and movement of people, whether as residents, workers, visitors or shoppers, is vital to the success of the majority of businesses within the town centre. The more people that are attracted to the town, the better it trades and the more prosperous the businesses in it become, provided there is ample available disposable income in that audience. Measuring passing people in a consistent manner in the same place, at the same time builds up a picture of the town, its traders and their relative success over the weeks and months. Grantham's counts take place on the High Street, Westgate, Wide Westgate, Isaac Newton Centre and more recently St Peters Hill. Only like for like comparisons are made, so whilst St Peters Hill count began in April 07, it is not included in comparison figures until April 08.

Grantham has three footfall counts per year, and it is possible to make year on year comparisons to show a gentle yearly increase as follows:

Comparison	% Change
Dec 06 v Dec 05	+2.95%
April 07 v April 06	+4.46%
Aug 07 v Aug 06	+3.33%
Dec 07 v Dec 06	-9.68%
May 08 v May 07	+2.32%
Aug 08 v Aug 07	+1.44%

Notable comments from the counts are that compared with historical information, all areas of the town are showing increases in footfall with the exception of the High Street. December 2007 showed a decline for the first time. However, this was in line with a national high street decline of 8.6% with the British Retail Consortium reporting the worst ever December for retail sales since 2004. Following this period whilst the growth has been small, it should be noted that the national figure showed a decline of 0.1% and -8.5% for May 08 and August 08 respectively. Grantham's footfall for August 2008 then was especially good when compared with troubled economic times.

The Isaac Newton Centre still remains the busiest area.

KPI 9 – CAR PARK USAGE

These days a significant proportion of spending customers in a town centre come by car (63% according to the Visitor Survey within this report). In the rural setting, the car tends to be an essential tool, used by both those who come to spend and those who come to work. The provision of adequate and convenient car parking facilities is therefore a key element of town centre vitality. An acceptable number of available spaces with a regular, quick turnover is the ideal.

	Mid Week		Saturday	
	Number	**%**	**Number**	**%**
Recorded number of short stay spaces	1523	72%	1579	73%
Recorded number of long stay spaces	328	15%	418	19%
Number of on Street spaces	270	13%	162	8%
Total spaces available	2121	100%	2159	100%

	2007				2008			
	Mid Week		**Saturday**		**Mid Week**		**Saturday**	
Representation	**Number**	**%**	**Number**	**%**	**Number**	**%**	**Number**	**%**
Average occupancy 9am	43%		66%		**62%**		**66%**	
Average occupancy 11am	69%		83%		**81%**		**81%**	
Average occupancy 1pm	65%		78%		**74%**		**72%**	
Average occupancy 3pm	58%		68%		**64%**		**64%**	

On the weekdays, none of the car parks reached full capacity.

On Saturdays, the more centrally located car parks fill quickly and attract waiting cars. Meanwhile, other car parks are not being fully utilized – the new Welham Street multi storey in particular – although its usage has picked up year on year.

To summarise, although 64% of business respondents believe quantity of car parking is an issue (see KPI 10, below), this is certainly not the case in any car park midweek. On Saturdays, there is undoubtedly higher use of car parking use in the majority of car parks. However, there is only full capacity in the most central car parks such as Watergate, Conduit Lane and Greenwoods Row but these only account for 12% of total car park spaces in Grantham.

There is a large amount of competition from free and often unregulated parking at the Dysart Road retail parks including Matalan and Next and also Sainsburys on London Road. These locations inevitably attract car park users seeking to avoid car parking fees and some users outstay permitted allowances. As these are privately owned, enforcement would be at the discretion of the owners.

A review of Welham Street multi-storey car park is imminent which will address the long / short stay strategy. Longer term plans will also investigate the possibility of introducing a ‘pay on exit’ scheme to a car park in Grantham.

In addition, SKDC and Grantham Future have funded SKDC car parking promotions over the last year – namely over Christmas 2007 and Christmas 2008 which have led to better capacity figures.

Finally, it is expected that decriminalisation of car parking (expected within the next couple of years) will bring stricter control to parking enforcement and will hopefully create a shift from illegal car parking to increased car park usage. Civil Parking Enforcement (CPE) transfers parking enforcement from the police to the Council. This should result in offenders being more likely to receive a Penalty Charge Notice, thus acting as a better deterrent for parking offences.

See **appendix 5 on pages 24-27** for full results.

KPI 10 – BUSINESS CONFIDENCE

Please refer to appendix 6 on page 28 for a sample of the questionnaire

	2007	2008
What type of business are you?		
Retail		81%
Service		2%
Commercial/Professional		4%
Hospitality		6%
Other		4%
Didn't answer		2%
Would you consider yourself to be?		
Independent		60%
Part of small chain		13%
Part of larger organisation		28%
How long has your business been in the Town?		
Less than 1 year		0%
1-5 years		30%
5-10 years		26%
Over 10 years		43%
Didn't answer		2%
Has your turnover this year?		
Stayed the same	17%	13%
Increased	31%	17%
Decreased	46%	66%
Didn't answer	6%	4%
Has your profitability this year:		
Stayed the same	20%	13%
Increased	31%	13%
Decreased	37%	70%
Didn't answer	11%	4%
What is your expectation of Turnover in the next 12 months		
Stay the same	23%	23%
Increase moderately	49%	17%
Increase significantly	14%	4%
Decrease	9%	47%
Didn't answer	6%	9%
What attracted you to this town?		
Prosperity of the town	17%	11%
Labour pool	3%	0%
Attractiveness of the environment	0%	2%
Geographical location	29%	23%
Mix of retail offer including markets	11%	15%
Potential tourist customers	3%	2%

Other	46%	57%*
Didn't answer	0%	2%

*Was largely unspecified, although 2 stated Grantham was their home town, one stated low rate at time and one cited 'business'.

What constraints are there on overall business Performance here?		
Prosperity of the town	57%	64%
Labour pool	9%	11%
Affordable Housing	20%	9%
Availability of business premises/land	3%	11%
Car Parking	66%	64%
Road network	80%	64%
Rental values/premises costs	43%	68%
Local business competition	11%	28%
Competition from other places	23%	30%
Competition from the internet	37%	34%
Other	6%	6%

Has your business suffered from any crime In the last year?		
Theft including shoplifting	69%	45%
Abuse	11%	11%
Criminal damage	17%	26%

Suggestions to improve the town's performance

2008

- Reduce business rates (11)
- Traffic Management (7)
- Cheaper car parking (6)
- Free car parking (6)
- Aesthetically improve town (5)
- No more road works (5)
- High street pedestrianisation (3)
- Improve parking (3)
- Have a ring road / by-pass (3)
- More policing of shopping area (2)
- Shops full not empty (2)
- Promotional activity (2)
- More car parking (1)
- Central car parking (1)
- Easy access to car parks (1)
- Need big public car park (1)
- Attract more 'high end' retailers (1)
- More well known brands (1)
- Too many charity shops (1)
- Re-do free map of local businesses (1)
- Online cameras of key traffic locations (1)
- Free legal advice for moving premises to obtain lower rents (1)
- Free support for prospective businesses to find locations for best rents (1)

- Make it easier to cross main road (1)
- Plant some trees in the market square (1)
- Encourage conversion of large shops into smaller more affordable units (1)
- Encourage arts projects (1)
- Promote Saturday market (1)
- More Saturday market to a pedestrianised High Street (1)
- Tax benefits in current economic climate (1)
- Pedestrian areas (1)
- Traffic wardens (1)
- Free advertising for local businesses (1)
- Encourage small businesses over larger chains (1)
- Encourage more large shops (2)
- Encourage new businesses to improve retail offer and provide more jobs (1)
- Financial incentives for small shops (1)
- Council to source goods and services locally where possible (1)
- Better more reliable bus service (1)
- Better signage to car parks (1)
- Better selection of shops (1)

Turnover, profit and future expectation of turnover are significantly worse than this time last year. The economic climate nationally will no doubt have impacted on these opinions which appear to have outweighed a number of new local initiatives which were introduced over the last year including provision of free car parking days, promotional campaigns including radio, media and bus advertising, free shopper's guides and new events (St George's Day and Grantham Independent's Day). With footfall holding strong against national comparisons, an explanation is that these people simply have less money to spend than last year.

Business rates and premises costs are also more of a concern this year – especially when profits are reported are decreasing. The most common suggestion for improving the town's economic performance was to reduce business rates.

With a number of major road works now complete in the town 16% less respondents cited road works as a constraint. However, this is still high at 64%.

Local competition is an increasing concern which is another indication perhaps of residents spreading less money in the town which local businesses need to compete for a share of.

Whilst theft figures have fallen, criminal damage has increased.

KPI 11 – VISITOR PERCEPTION

A customer satisfaction survey aims to establish how the town is seen by those people who use it. By asking visitors, of all types, detailed picture can be obtained.

RESULTS

	2007	2008
1. How do you rate the physical appearance of the town centre?		
Excellent	3%	3%
Acceptable	50%	55%
Some aspects unsatisfactory	32%	27%
Poor	15%	15%
2. How do you rate the cleanliness of the town centre?		
Excellent	2%	4%
Acceptable	44%	53%
Some aspects unsatisfactory	37%	30%
Poor	17%	13%
3. How do you rate the range/variety of shops?		
Excellent	12%	8%
Acceptable	38%	43%
Some aspects unsatisfactory	26%	26%
Poor	24%	23%
4. How safe do you feel when you are in the town centre during the day?		
Very safe	20%	34%
Safe	74%	61%
Unsafe	5%	5%
Very unsafe	1%	0%
5. Do you visit the town centre after 7.00pm?		
Yes	34%	38%
No	66%	62%
If so how safe do you feel?		
Very safe	11%	9%
Safe	50%	66%
Unsafe	38%	22%
Very unsafe	1%	3%

6. What form of transport did you use to come into town today?

Car	61%	63%
Walk	29%	24%
Public transport	6%	8%
Cycle	2%	4%
Motor cycle	1%	0%
Mobility scooter	1%	1%

7. What is the main purpose of your Visit to town today?

Shopping	87%	78%
Leisure	4%	12%
Work	3%	6%
Business	2%	2%
Other	4%	2%

8. Personal information:

Male	37%	42%
Female	63%	58%
Employed	54%	49%
Retired	25%	26%
Unemployed	8%	8%
Self employed	7%	9%
Student	6%	8%
Under 25	14%	17%
25-44	31%	29%
45-64	36%	39%
65+	19%	15%

The final open ended question – **What suggestions do you have to improve the town's economic performance**? resulted in the following:

Reduce traffic/pedestrianise	48
Better variety of shops	23
Clean up the town	19
More small specialist shops	12
Improve the appearance of the town	12
More police presence	10
Larger, better market	9
More good quality shops	8
Reduce business rates	7
Too many charity shops	6
Less road works	6
More shops for young people	5
Build a bypass	4
More green spaces, gardens	4
Improve road surfaces	4

Better/cheaper parking	3
More shops for women	3
Improve condition of pavements	3
Too many fast food outlets	3
Bigger Marks and Spencer's	3
Fill the empty shops	3
Stop drinking of alcohol in town	3
Provide better access for disabled	3
Too many pubs	3
More shops for men	2
More sports shops	2
Control indiscriminate parking	2
Provide artistic displays, features	2
More children's shops	2
Too many undesirables	2
Clean up the bus station	1
Provide more litter bins	1
Improve street lighting	1

See appendix 7 on page 29 for sample survey

Year on year results are very similar. Safety perceptions of the town centre are excellent with 95% of respondents feeling safe or very safe when in the town centre during the day and 75% feeling safe or very safe in the town centre after 7pm.

KPI 12 – POST CODE DATA

When the visitor perception data was collected, post cost information was also obtained. The purpose is to determine the town's catchment area and its visitor appeal.

With only 13% outside the local area the 'pulling power' of the town is not particularly strong. However, Grantham is historically a rural market town, and has limited tourist offerings. Realistically, increasing the visitor rather than tourist market is more likely. One possible method would be to encourage more comparison stores to the town as discussed on page 7 (KPI 2).

Catchment	2007 Percentage	2008 Percentage
Local	84%	87%
Visitor	13%	10%
Tourist	3%	3%

Please Note:

- Locals (i.e. in the post codes which cover the town)
- Visitors (i.e. in adjoining postcodes within an hour's journey)
- Tourists (all the rest)

APPENDIX 1 – THE USE CLASS ORDER DETAIL:

The following definitions come from the Town and Country Planning (Use Classes) Order 1987 and its subsequent amendments.

Class	Type of use	Class includes:
A1	Shops	Shops, retail warehouses, hairdressers, travel agents, post offices, newsagents, garages, opticians, sandwich bars, showrooms, domestic hire shows and funeral directors
A2	Financial and professional services	Banks, building societies, estate and employment agencies, professional and financial services and betting offices
A3 A4 A5	Food and drink Drinking establishments Hot food takeaways	Restaurants, pubs, cafés, wine bars (but not nightclubs), shops selling hot food for consumption off the premises
	Sui Generis ("unique" establishments)	Theatres, launderettes and dry cleaners, taxi operator, amusement centres, car showroom, petrol filling station, nightclubs and casinos
B1	Business	Offices not within Class A2, Research and development, studios, labs, high tech Light industrial
B2	General industry	General industry
B8	Storage and distribution	Warehouses
C1	Hotels and hostels	Hotels, boarding and guest houses, and hostels
C2	Residential institutions	Residential care homes, hospitals, nursing homes, boarding schools and residential colleges and training centres
C3	Dwelling houses	Dwellings
D1	Non residential institutions	Churches, Church halls, clinics, health centres and consulting rooms, museums, training centres, schools, libraries, art galleries, crèches and day nurseries, law courts
D2	Assembly and leisure	Cinemas, dance, sport and concert halls, bingo and other indoor and outdoor leisure uses, gymnasiums, skating rinks

APPENDIX 2 – DEFINITIONS OF COMPARISON AND CONVENIENCE RETAIL

- CONVENIENCE retail describes merchandise that is purchased on a very frequent basis, is of relatively low value, and is often consumable in nature.
  Examples:
  - Newsagents
  - Food
  - Chemist/ cosmetics/ toiletries
  - Off licence
  - Florist

- COMPARSION retail describes merchandise that is purchased infrequently and is often of a high unit value where shoppers make comparisons before purchase.
  Examples:
  - Clothing
  - Furniture
  - Electrical/ white goods (fridges and freezers etc)
  - DIY
  - Music/ records

APPENDIX 3 – DEFINITIONS OF BUSINESS REPRESENTATION

Key Attractors:

- Adams
- Alders
- BHS
- Boots
- Burger King
- Burton
- Clarks
- Clintons
- Debenhams
- Dixons
- Dorothy Perkins
- Evans
- House of Fraser
- John Lewis
- Marks and Spencer
- McDonalds
- Mothercare
- New Look
- Next
- Our Price
- Peacocks
- Post Office
- Principles
- River Island
- Superdrug
- Top Man
- TK Maxx
- Top Shop
- WH Smith
- Woolworths

National multiple traders:
Countrywide presence and are well known household names

Regional:
Stores / units in several towns throughout one geographical region only

Independent:
Specifically local to your town centre

APPENDIX 4 – PROPERTY YIELDS AND RENTAL VALUES

Retail Property yield is a function of the multiplier used on the rental income stream to produce a capital value. The lower the yield the more valuable the property is because it assumes that there will be greater capital growth in the future. These are regularly recalculated for large towns and cities where demand and supply of property can change quite rapidly.

Prime pitch defines the busiest footfall area in the town centre; a **prime retail property** is one that lies within this prime pitch. Often it is the "named" multiple retailers and strong independent retailers who occupy the space in 'prime' locations.

Retail rents are zoned, with 'Zone A' being the first 20 feet of depth from the shop front - this is the most valuable shop display area. Zone A rents are expressed as £ per sq.ft. Zone A values are measured this way to take into account the variation in rents that are created as a result of different sized and shaped units.

APPENDIX 5 – CAR PARKS

GRANTHAM PARKING SURVEY

WEDNESDAY 14 NOVEMBER 2007

	Capacity	0900		1100		1300		1500	
Car Parks		**Total**	**%**	**Total**	**%**	**Total**	**%**	**Total**	**%**
Asda	476	159	33%	310	65%	290	61%	248	52%
Lidl	88	18	20%	41	47%	40	45%	43	49%
Watergate	97	22	23%	91	94%	72	74%	57	59%
Conduit Lane	52	26	50%	44	85%	43	83%	27	52%
Welham Street	328	92	28%	118	36%	117	36%	117	36%
Elmer House (Sat)									
St Catherine’s Road (Sat)									
Conservative Club	71	37	52%	42	59%	36	51%	48	68%
Greenwoods Row	89	42	47%	82	92%	88	99%	76	85%
Wharf Road	257	88	31%	124	48%	98	38%	86	33%
Morrison’s	275	167	61%	259	94%	233	85%	188	68%
Augustine Retail Park	118	28	24%	106	90%	112	95%	93	79%
On Street Parking									
Market Place (not Sat)	55	52	95%	55	100%	52	95%	53	96%
Vine Street	5	4	80%	5	100%	3	60%	4	80%
Conduit Lane	10	5	50%	8	80%	8	80%	10	100%
Bluegate	8	6	75%	8	100%	7	87%	6	75%
Swinegate	17	17	100%	16	94%	17	100%	17	100%
Castlegate	52	49	94%	50	96%	47	90%	46	88%
Finkin Street	5	5	100%	5	100%	4	80%	5	100%
Avenue Road	18	18	100%	18	100%	16	89%	18	100%
St Catherine’s Road	10	7	70%	9	90%	8	80%	9	90%
St Peter’s Hill	25	19	76%	24	96%	21	84%	25	100%
Guildhall Street	8	6	75%	6	75%	7	87%	7	87%
Westgate (not Sat)	14	12	86%	11	79%	11	79%	11	79%
Wide Westgate (not Sat)	43	39	91%	41	95%	41	95%	35	81%
Totals	**2121**	**918**	**43%**	**1473**	**69%**	**1371**	**65%**	**1229**	**58%**

GRANTHAM PARKING SURVEY

SATURDAY 17 NOVEMBER 2007

	Capacity	0900		1100		1300		1500	
Car Parks		**Total**	**%**	**Total**	**%**	**Total**	**%**	**Total**	**%**
Asda	476	435	91%	474	99%	469	98%	457	96%
Lidl	88	55	62%	82	93%	77	87%	76	86%
Watergate	97	68	70%	97	100%	94	97%	73	75%
Conduit Lane	52	46	88%	52	100%	50	96%	32	62%
Welham Street	328	16	5%	78	24%	98	30%	41	12%
Elmer House (Sat)	90	68	75%	90	100%	61	68%	48	53%
St Catherine's Road (Sat)	56	35	62%	46	82%	37	66%	33	59%
Conservative Club	71	17	24%	58	82%	23	32%	20	28%
Greenwoods Row	89	89	100%	89	100%	89	100%	81	91%
Wharf Road	257	90	35%	196	76%	158	61%	84	33%
Morrison's	275	262	95%	272	99%	273	99%	271	99%
Augustine Retail Park	118	108	92%	116	98%	115	97%	111	94%
On Street Parking									
Market Place (not Sat)									
Vine Street	5	5	100%	4	80%	5	100%	3	60%
Conduit Lane *									
Bluegate	8	8	100%	8	100%	8	100%	8	100%
Swinegate	17	16	94%	16	94%	17	100%	17	100%
Castlegate **	66	41	62%	54	82%	56	85%	50	76%
Finkin Street	5	5	100%	5	100%	5	100%	5	100%
Avenue Road	18	16	89%	17	94%	15	83%	15	83%
St Catherine's Road	10	10	100%	10	100%	9	90%	9	90%
St Peter's Hill	25	18	72%	23	92%	20	80%	20	80%
Guildhall Street	8	8	100%	8	100%	8	100%	8	100%
Westgate (not Sat)									
Wide Westgate (not Sat)									
Totals	**2159**	**1416**	**66%**	**1795**	**83%**	**1687**	**78%**	**1462**	**68%**

*   Continental market on Conduit Lane
** 14 additional spaces in school zone on Saturdays

GRANTHAM PARKING SURVEY

WEDNESDAY 12 NOVEMBER 2008

	Capacity	0900		1100		1300		1500		Average
Car Parks		**Total**	**%**	**Total**	**%**	**Total**	**%**	**Total**	**%**	
Asda	476	239	50%	371	78%	311	65%	248	52%	61%
Lidl	88	36	41%	64	73%	47	53%	62	70%	59%
Watergate	97	40	41%	79	81%	53	55%	41	42%	52%
Conduit Lane	52	39	75%	51	98%	52	100%	46	88%	86%
Welham Street	328	218	66%	262	80%	246	75%	216	66%	72%
Elm House (Sat)										
St Catherine's Rd (Sat)										
Conservative Club	71	34	48%	48	68%	51	72%	45	63%	63%
Greenwoods Row	89	83	93%	83	93%	78	88%	47	53%	82%
Wharf Road	257	69	27%	133	52%	103	40%	83	32%	38%
Morrison's	275	221	80%	275	100%	270	98%	231	84%	91%
Augustine Retail Park	118	72	61%	99	84%	101	86%	75	64%	74%
On Street Parking										
Market Place (not Sat)	55	55	100%	55	100%	54	98%	55	100%	99%
Vine Street	5	3	60%	5	100%	5	100%	4	80%	85%
Conduit Lane	10	8	80%	8	80%	9	90%	8	80%	82%
Bluegate	8	8	100%	8	100%	8	100%	8	100%	100%
Swinegate	17	17	100%	17	100%	16	94%	16	94%	97%
Castlegate	52	51	98%	52	100%	48	92%	50	96%	97%
Finkin Street	5	5	100%	4	80%	5	100%	5	100%	95%
Avenue Road	18	17	94%	17	94%	16	89%	17	94%	93%
St Catherine's Road	10	9	90%	7	70%	8	80%	8	80%	80%
St Peter's Hill	25	24	96%	25	100%	24	96%	23	92%	96%
Guildhall Street	7	6	85%	6	85%	6	85%	6	85%	85%
Westgate (not Sat)	14	14	100%	12	86%	13	93%	13	93%	93%
Wide Westgate (not Sat)	43	43	100%	43	100%	42	98%	41	95%	98%
Totals	2120	1311	62%	1724	81%	1566	74%	1348	64%	70%

Total for the day: 5949

Total for 2007: 4991

Weather: Cool and dry (same as 2007)

GRANTHAM PARKING SURVEY

SATURDAY 15 NOVEMBER 2008

	Capacity	0900		1100		1300		1500		Average
Car Parks		**Total**	**%**	**Total**	**%**	**Total**	**%**	**Total**	**%**	
Asda	476	405	85%	474	99%	442	93%	428	90%	92%
Lidl	88	83	94%	86	98%	75	85%	83	94%	93%
Watergate	97	95	98%	97	100%	76	78%	56	58%	84%
Conduit Lane	52	43	83%	46	88%	37	71%	21	40%	71%
Welham Street	328	14	4%	90	27%	101	31%	60	18%	20%
Elm House (Sat)	90	70	78%	69	77%	47	52%	36	40%	62%
St Catherine's Rd (Sat)	56	28	50%	51	91%	36	64%	31	55%	65%
Conservative Club	71	34	48%	49	69%	38	54%	17	24%	49%
Greenwoods Row	89	62	70%	89	100%	81	91%	87	98%	90%
Wharf Road	257	76	30%	165	64%	113	44%	75	29%	42%
Morrison's	275	266	97%	273	99%	271	96%	262	95%	97%
Augustine Retail Park	118	108	92%	114	97%	105	89%	114	97%	93%
On Street Parking										
Market Place (not Sat)										
Vine Street	5	5	100%	5	100%	5	100%	4	80%	95%
Conduit Lane	5	5	100%	5	100%	5	100%	4	80%	95%
Bluegate	8	8	100%	8	100%	8	100%	7	87%	97%
Swinegate	17	16	94%	16	94%	15	88%	15	88%	91%
Castlegate	66	58	88%	60	91%	47	71%	43	65%	79%
Finkin Street	5	5	100%	5	100%	5	100%	5	100%	100%
Avenue Road	18	17	94%	17	94%	15	83%	15	83%	89%
St Catherine's Road	10	10	100%	9	90%	10	100%	7	70%	90%
St Peter's Hill	25	20	80%	24	96%	23	92%	18	72%	85%
Guildhall Street	7	7	100%	7	100%	7	100%	7	100%	100%
Westgate (not Sat)										
Wide Westgate (not Sat)										
Totals	2163	1435	66%	1759	81%	1562	72%	1395	64%	71%

Total for the day: 6151

Total for 2007: 6360

Weather: Cool and dry (same as for 2007)
*14 additional spaces in school zone on Saturdays

Business Survey for 2008

APPENDIX 6 - BUSINESS CONFIDENCE SURVEY

What type of business are you?	□ Retail
	□ Service/ public sector
	□ Commercial/ professional
	□ Hospitality
	□ Other
Would you consider yourself to be,	□ Independent
	□ Part of a small chain/ group
	□ Part of a larger national organisation
How many employees are there at these premises?	Full Time:
	Part time:
How long has your business been In the town?	□ less than one year
	□ one to five years
	□ five to ten years
	□ more than ten years
Has your turnover this year, (compared with the previous year),	□ Stayed the same
	□ increased
	□ decreased
Has your profitability this year, (compared with the previous year),	□ Stayed the same
	□ increased
	□ decreased
What is your expectation of turnover in the next twelve months?	□ Stay the same
	□ increase moderately
	□ increase significantly
	□ decrease
What attracted you to this town? (tick as many as you wish)	□ prosperity of the town
	□ labour pool
	□ attractiveness of the environment
	□ geographical location
	□ mix of retail offer including markets
	□ potential tourist customers
	□ other -
What constraints are there on overall future business performance here? (tick as many as you wish)	□ prosperity of the town
	□ labour pool
	□ affordable housing
	□ availability of business premises/land
	□ car parking
	□ road network
	□ rental values/ premises costs
	□ local business competition
	□ competition from other places
	□ competition from the internet
	□ other -
Has your business suffered from any crime in the last year?	□ theft including shoplifting
	□ abuse
	□ criminal damage
What two suggestions would you make to Improve the town's economic performance?	

APPENDIX 7 – SHOPPER SATISFACTION SURVEY

South Kesteven District Council

GRANTHAM SHOPPER SATISFACTION SURVEY

1. How do you rate the physical appearance of the town centre? *Excellent / Acceptable / Some aspects unsatisfactory / Poor*
2. How do you rate the cleanliness of the town centre? *Excellent / Acceptable / Some aspects unsatisfactory / Poor*
3. How do you rate the range / variety of shops? *Excellent / Acceptable / Some aspects unsatisfactory / Poor*
4. How safe do you feel when you are in the town centre during the day? *Very safe / Safe / Unsafe / Very unsafe*
5. Do you visit the town centre after 7.00pm? *Yes / No* If so how safe do you feel? *Very safe / Safe / Unsafe / Very unsafe*
6. What form of transport did you use to come into town today? *Walk / Cycle / Mobility Scooter / Car / Motor Cycle / Public Transport*
7. What is the main purpose of your visit to town today? *Shopping / Work / Business / Leisure / Other*
8. Personal information: *Male / Female* *Employed / Unemployed / Self employed / Retired / Student* *Age: Under 25 / 25-44 / 45-64 / 65+* *Post code:*
9. What suggestions do you have for improving the town centre? …………………………………………………………………………… ……………………………………………………………………………