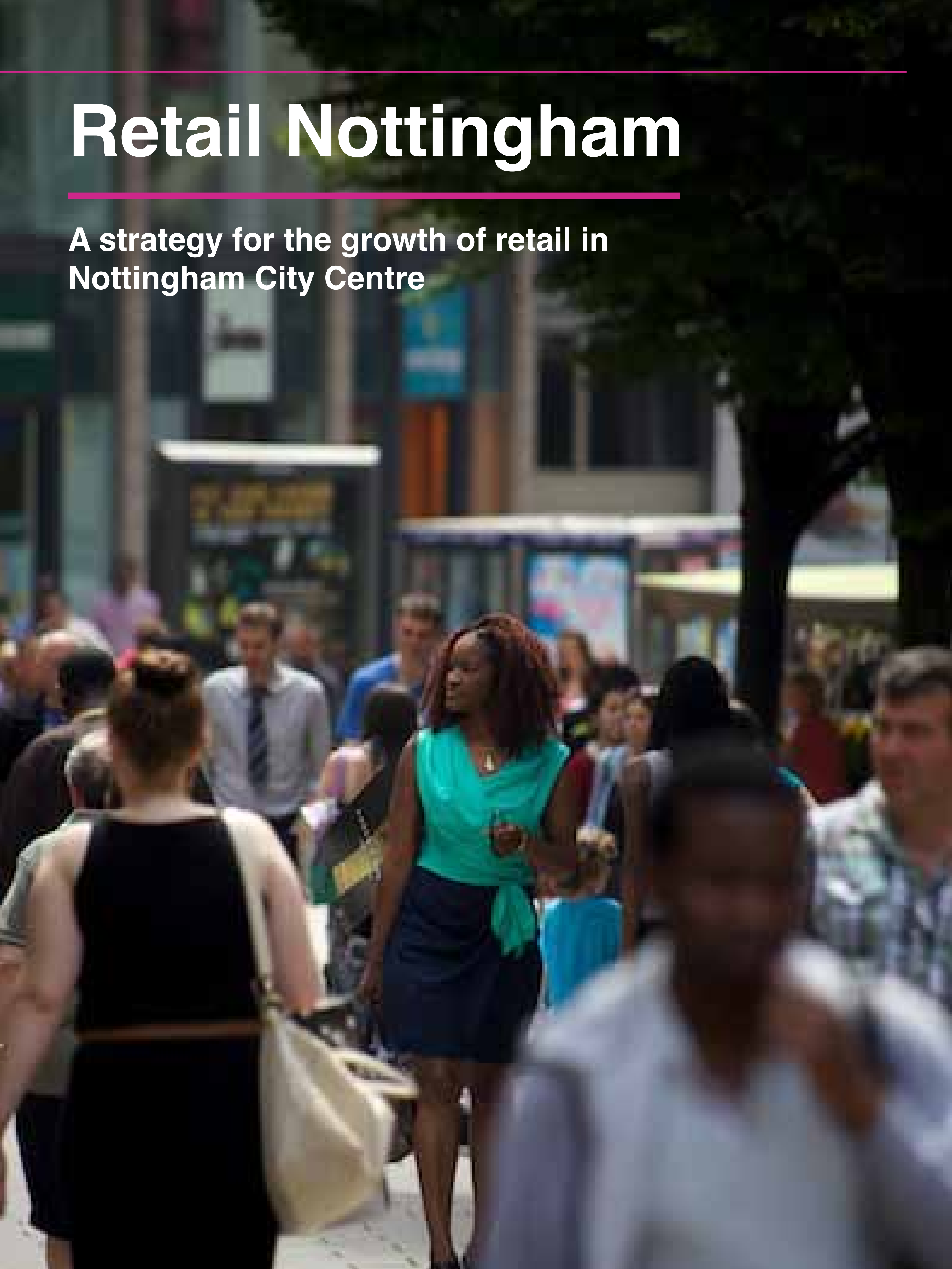
Retail Nottingham

A strategy for the growth of retail in Nottingham City Centre



Executive Summary

City Centres act as the "shop window" to the city for investors, visitors and new residents and the Nottingham Growth Plan identifies that a continued strong economic performance is fundamental to the future economic growth of the city as a whole.

For an ambitious core city such as Nottingham, a vibrant City Centre with a quality retail and leisure offer is crucial to its economic prosperity. Creating an environment in which the retail and leisure sectors are able to flourish will be vital to the future prosperity of the Nottingham economy and the city as a whole.

Nottingham has enjoyed a traditionally strong retail offer, regularly placed between 4th and 6th nationally. In recent years, largely due to the delayed development of the Broadmarsh Centre, this has slipped to 8th as other cities have strengthened their offer.

We know, though, that there are significant opportunities that will enable Nottingham to regain its position. Experian data states that Nottingham's full retail catchment area could extend to over 3.8million people, but only 37% of that catchment area actually shop in the city as their primary shopping location. Whilst there is significant leakage (63%) to other shopping destinations, Nottingham has by far the largest market share and no clear close competitors.

With an improved offer, Nottingham could quickly recover its position and, in fact, grow in terms of the retail and leisure sectors. There is also progress with Intu Properties on the development of the Broadmarsh and the revitalisation of the Victoria Centre, coupled with extensive infrastructure investments around the railway station, the extension of the tram and the development of the Creative Quarter. All of which will provide a very strong platform from which to build.

Increasing the retail ranking of the city and growing the retail and leisure sectors to their full potential is at the core of this strategy. There are two key aspects to this – attracting more shoppers to the City Centre and encouraging them to spend more while they are here.

To that end, this strategy has three clear priorities:-

1. **Strengthening** Nottingham's retail and leisure offer in the City Centre, by growing the size and variety of both the multiple and independent sectors, and in doing so increase the number of visitors from the catchment.

2. **Improving** the Nottingham visitor experience, offering variety, quality and a joined up approach to leisure and retail and therefore increasing dwell time and the level of spending within the City Centre.

3. **Developing** the physical environment and infrastructure within the City Centre, so that it meets the future needs of retailers and provides an attractive and welcoming place to visit.

In January 2012 a Steering Group was formed comprising of Nottingham City Council, the Nottingham BID and the Invest in Nottingham Retail Forum, with the aim of developing a strategy to drive retail and leisure growth in the City Centre and to better coordinate development activity. The strategy is one of a number of actions included within the Nottingham Growth Plan.

The members of the Steering Group are committed to the three clear priorities outlined above and will be working collaboratively across a range of activities to reverse the ranking decline and realise the growth potential in the City Centre.

The Importance of our Retail and Leisure Offer

The Nottingham Growth Plan launched in July 2012 identifies that for an ambitious core city like Nottingham, a vibrant City Centre with a quality retail offer is crucial. The City Centre provides many local jobs, and the retail and leisure sector is therefore an important source of (often entry level) employment for local residents. A good City Centre offer also helps attract people to live and work in the city, as well as enticing visitors.

Furthermore, the City Centre acts as the 'shop window' to the city for investors, visitors and new residents and its continued strong economic performance is therefore fundamental to the future economic growth of the city as a whole.

Finally, it acts as a barometer for local residents, and the media, in judging how successful Nottingham is, and whether the city is moving in the right direction. Creating an environment in which our retail and leisure sectors are able to flourish and grow will therefore be vital to the future prosperity of the Nottingham economy and the city as a whole.

The Current Picture

Nottingham has benefited from a traditionally strong retail offer where it has been regularly placed between 4th to 6th nationally. In recent years this has slipped to 8th outside of London.

Therefore, it is important we recognise that Nottingham is no longer one of the best retail destinations in the UK (certainly not in the top five), and the direction of travel is not a positive one. The issue is not simply about the effect of the recession, because Nottingham has fallen behind other cities. Nor is it a recent phenomenon – the issue has been building for a number of years.

This needs to be recognised, addressed, and reversed. Of course, there are structural causes common to all cities. The growth of alternative methods of shopping has impacted significantly on the traditional high street (see Appendix 2).

Actions need to be undertaken to understand future trends and remodel the retail and leisure offer to take advantage accordingly.

Our Initial Response

In January 2012, a Steering Group was formed comprising Nottingham City Council, the Nottingham BID and the Invest in Nottingham Retail Forum, with the aim to develop a strategy to drive retail and leisure growth in the City Centre and to better co-ordinate development activity.

Over recent months the group has worked to understand the current issues facing the sectors, to identify barriers to their growth, and to consider how these issues can be addressed (see Appendix 3).

The Opportunity

Experian data suggests that Nottingham's full retail catchment area extends to over 3.8 million people covering a geographic area as far as Sheffield in the north and Coventry in the south - with 37% of the catchment actually shopping in Nottingham as their primary shopping location.

While there is significant leakage (63%) to other shopping destinations, Nottingham has the largest market share and doesn't have a clear close competitor. Derby attracts 7.2% of the catchment while other destinations such as Leicester and Sheffield Meadowhall only attract 1.6% and 0.3% respectively.

What this means is that with a better offer, Nottingham could recover its position. With 63% of the population shopping elsewhere this suggests significant potential for future growth within the retail and leisure sectors.

The data therefore supports the proposition that with the right strategy, our target to return Nottingham to a top five destination could be achieved within a fairly short time frame.

Progress on the development of Broadmarsh and a revitalisation for the Victoria Centre, coupled with work starting on the extension to the tram, the redevelopment of the railway station, the development of the Creative Quarter and the agreement with Government on the City Deal provides a strong platform from which to build.

"Nottingham city centre acts as a 'shop window' for potential investors and as such it is vital that it thrives. We are a brilliant city with superb infrastructure, and a dynamic business community. We have a commitment to driving growth by working together to deliver tangible results. It is all about enacting an inclusive strategy that future proofs and develops Nottingham as a prime retail destination"
Stuart Senior, Chair, City Centre Retail Strategy Steering Group

Our Vision for City Centre Retail

To create a dynamic and successful retail and leisure sector which re-positions and keeps Nottingham within the top five retail destinations nationally.

Our Strategy to Achieve the Target

For Nottingham to increase its retail ranking and for the retail and leisure sectors in the City Centre to reach their full potential, there are two key fundamentals we need to meet. We need to attract more shoppers to the City Centre and we need to encourage them to spend more while they are here.

Over the last few months the City Centre Retail Steering Group have worked to understand the challenges and opportunities faced by the retail sector by undertaking in depth trend and data analysis of the sector, holding workshops with retailers and other stakeholders and listening to the feedback from the sector.

This in turn has lead to the development of a framework for future growth with three clear priorities;

1. **Strengthening** Nottingham's retail and leisure offer in the City Centre, by growing the size and variety of both the comparison goods and independent sectors, and in doing so increase the number of visitors from the catchment.

2. **Improving** the Nottingham visitor experience, offering variety, quality and a joined up approach to leisure and retail and therefore increasing dwell time and the level of spending within the City Centre.

3. **Developing** the physical environment and infrastructure within the City Centre, so that it meets the future needs of retailers and provides an attractive and welcoming place to visit.

Within each strategic priority a number of detailed but deliverable objectives have been identified, that deal with the principal issues that Nottingham faces as a retail centre. This has resulted in 15 recommendations, 5 within each area of focus:

1. Strengthening Nottingham's retail and leisure offer in the City Centre

1.1) Improve the quality of our shopping centres so that they are commensurate with Nottingham's target as being a top 5 retail destination by 2017;

1.2) Ensure a thriving independent retail/leisure sector in the City Centre that is as strong as anywhere else in the UK within 2 years;

1.3) Reduce the number of vacant City Centre units in Nottingham by a third by September 2013 and by 60% by September 2014;

1.4) Retain all existing top brands and actively work to bring 20 new top brands (in bespoke stores) to Nottingham City Centre by 2017;

1.5) Better promote Nottingham's retail and leisure offer inside and outside of the City so that Nottingham is promoted effectively through joined up campaigns by stakeholder organisations.

"We have to not only develop, but also rethink our retail offer over the next few years. This strategy reflects the strong partnership between the Council and its business retail partners in Nottingham."
Councillor Nick McDonald, Portfolio Holder for Jobs and Growth, Nottingham City Council

2. Improving the Nottingham visitor experience

2.1) Improve the use of public spaces so that by 2014 there is a clear strategy for each public square in the City Centre, and ensure that by that time events in the City Centre better support retail and leisure;

2.2) Support the development of better visitor attractions, and ensure that all are well-promoted and form part of a coherent tourism offer within 3 years;

2.3) Create by 2015 an established late night shopping culture and ensure we achieve a seamless transition from retail into the late night economy in the City Centre;

2.4) Ensure that getting into and out of the City Centre is easy and inexpressive and remains so;

2.5) Improve the use of technology to support the City Centre and by 2014 develop mobile software that comprehensively sells and supports retail and leisure.

3. Developing the physical environment and infrastructure within the City Centre

3.1) Address the issue of where Nottingham's core retail areas are and support the introduction in 2013 of a clear spatial plan for the City Centre including, where necessary, changes of use in the City Centre;

3.2) Ensure a continued focus on good public order and cleansing to effectively support retail and leisure with crime falling and cleanliness improving in the City Centre in 2013, 2014 and 2015;

3.3) Review the regulatory framework in the City Centre and make recommendations as to how the regulatory environment can better support retail and leisure, discourage vacancy, and make it easier to trade in Nottingham City Centre;

3.4) Establish by May 2013 a plan, including identification of internal and external funding sources, to physically develop and regenerate certain key retail/leisure hot spots in the City Centre;

3.5) Conduct a property review in the City Centre and work with landlords and agents to address vacancy units in the City Centre by May 2014 - establish a Nottingham register of City Centre landlords, and promote clear and fair protocols for rent reviews, encourage the use of a standard service level agreement (SLA) between landlords and their tenants and encourage pop up shops in long term vacant units.

"The retail and leisure economy are major drivers of the City of Nottingham and it is essential that we have a coherent strategy to both protect and enhance Nottingham's position, both regionally and nationally."
David Hargreaves, Director, FHP

/01

Strengthening Nottingham's retail and leisure offer in the City Centre, by growing the size and variety of both the multiple and independent sectors, and in doing so increase the number of visitors from the catchment.

Having strong multiple and independent sectors within the City Centre is vital to the future growth of the city. These sectors traditionally sell the types of goods that people predominately come to the City Centre to shop for and in the case of the independent sector, it is what makes the city different from other competing shopping locations.

We need to increase the size of the comparison goods offer so it is more in line with our regional competitors and significantly larger than our local competitors.

We need to attract brands relevant to our target market that are currently absent from our high street and raise the profile of those that are hidden within the department stores.

The growth of out of town retail destinations continues to compete with and threaten the vitality of town and City Centres. Compared to many other towns and cities, Nottingham has been relatively successful in resisting out of town retail development within the city limits through the application of robust planning policies. However, out of town development continues to pose a threat, and Nottingham, with its tight administrative boundaries running close to the City Centre, is also potentially susceptible to competition from new out of town developments within neighbouring districts. We therefore need to maintain a sound evidence base to support the opposition of such developments and to continue to strengthen our defence through city planning activity.

a) Improve the quality of our shopping centres so that they are commensurate with Nottingham's target as being a top 5 retail destination by 2017.

Intu properties, the owners of both the Broadmarsh and Victoria Centres, have planned improvements for both centres and are anticipating bringing forward a planning application for the Broadmarsh Centre in 2013/14. Agreement of a definite and viable scheme and a subsequent start to works will certainly boost confidence in the short term and bring about fresh opportunities for the future. The Retail Steering Group will, through the Council, work to ensure that this plan is realised.

Key actions: Support Intu with their ambitions and plans to bring forward

improvements to both the Broadmarsh and Victoria shopping centres, ensuring such improvements result in centres that are physically attractive, have high quality tenants, are popular, substantially improve the total retail offer in the City Centre whilst not overly competing with the city's independent offer and are commensurate with Nottingham's status as a top 5 retail destination.

b) Ensure a thriving independent retail/leisure sector in the City Centre that is as strong as anywhere else in the UK within 2 years.

Traditionally the smaller retailers in the independent sector have struggled in recent years. While we have a stronger independent sector than other cities, we need to build upon this to sustain current levels and ideally grow the sector further. We need to build upon the recent work of the Nottingham BID to promote the local independent offer, work more closely with the universities to capture business start up opportunities from creative graduates, and provide a ladder of support and mentoring to new and existing businesses.

Key actions: Develop a retail incubation hub in the City Centre; develop opportunities for temporary lets to provide test space for start up businesses; regenerate and give better identity and signage to key independent areas and develop Derby Road and Hockley as key independent retail locations; develop an annual marketing campaign raising awareness of the independent offer in the City Centre; develop a view on the support for City Centre supermarkets where they do not harm the interests of independents, taking all necessary actions to prevent their further proliferation in the City Centre, as part of the development of a city wide supermarket strategy; and continue to develop/reinforce our evidence base on retail provision to support the development of the local plan.

c) Reduce the number of vacant City Centre units in Nottingham by a third by September 2013 and by 60% by September 2014.

A multi-faceted approach needs to be undertaken to address the issue of vacant shops. This should focus only on what can be done to the individual properties to improve the likelihood of them being filled but also to create the appropriate conditions to enable small retailers to take them on and to support new business to grow to a level where they are able to move into their own space. In some locations it may be appropriate to consider how footfall can be increased through the creation of more residential opportunities within the area.

Key actions: Establish a task force to reduce vacant units in the City Centre, by undertaking a survey of vacant properties and identifying priority hotspots, working with landlords and agents to fill units including by reducing rents, refurbishing properties, changing use, establishing pop up shops, or other appropriate actions to fill each property.

d) Retain all existing top brands and actively work to bring 20 new top brands (in bespoke stores) to Nottingham City Centre by 2017.

Key actions: Work with key stakeholders to develop a targeted inward investment campaign to identify and attract absent brands and work with local agents and shopping centres to understand the requirements of retailers; work with local partners to develop a package of business support for new and existing retailers to help them survive and grow.

e) Better promote Nottingham's retail and leisure offer inside and outside of the City, so that Nottingham is promoted effectively through joined up campaigns by stakeholder organisations.

With approximately one third of its catchment shopping in the City Centre, there is considerable opportunity to increase the number of shoppers using Nottingham as their primary shopping destination.

By understanding the demographic segmentation of the catchment, and what percentage of each segment already shops here, we should be enabled to develop a targeted marketing and promotion plan that aims to increase the overall percentage. While the BID plays the main role with regards to marketing the city as a shopping destination there are a number of organisations both public (such as events and leisure promotion) and private sector (such as shopping centres or retailers) which could play a role in this agenda. By working together greater impact and more effective use of resources will be achieved.

Key actions: Develop a better understanding of the demographics of the Nottingham shopping catchment; undertake an annual shoppers survey to understand how consumers use the City Centre to shop; develop an annual marketing campaign raising awareness of the independent offer in the city; work with all stakeholders to raise consumer awareness of brands on offer within the city.

Summary of Key Actions

- Support Intu with their ambitions and plans to bring forward improvements to both the Broadmarsh and Victoria shopping centres.
- Develop a retail incubation hub in the City Centre.
- Encourage temporary use opportunities in long term vacant properties to encourage new business starts.
- Regenerate and give better identity and signage to key independent areas and develop Derby Road and Hockley as key independent retail locations.
- Develop a view on the support for City Centre supermarkets where they do not harm the interests of independents, taking all necessary actions to prevent their further proliferation in the City Centre, as part of the development of a city wide supermarket strategy.
- Develop an annual marketing campaign raising awareness of the independent offer in the city.
- Establish a task force to reduce vacant units in the City Centre, by undertaking a survey of vacant properties, identifying priority hotspots and working proactively to bring vacant units back into use.
- Work with key stakeholders to develop a targeted inward investment campaign to identify and attract absent brands.
- Work with local agents and shopping centres to understand the requirements of retailers.
- Work with local partners to develop a package of business support for new and existing retailers.
- Develop a joined up approach to raising consumer awareness of brands on offer within the city.
- Undertake an annual shoppers survey to understand how consumers use the city to shop.
- Continue to develop/reinforce our evidence base on retail provision to support the development of the local plan.

/02

Improving the Nottingham visitor experience, offering variety, quality and a joined up approach to leisure and retail and therefore increasing dwell time and the level of spending within the City Centre.

With the changing expectations of today's consumer, the experience of the overall destination becomes more important. We need a high quality and wide ranging offer which not only makes it easy for people to shop but to also dine, or visit the cultural attractions, ideally staying overnight to do so.

a) Improve the use of public spaces so that by 2014 there is a clear strategy for each public square in the City Centre, in terms of management, activity and public realm character/quality, and ensure that by that events in the City Centre better support retail and leisure.

Nottingham is rich in terms of its many public spaces and squares, but it is poor at using them and making them as lively and attractive as they could be. There are opportunities to hold/encourage more events, establish a café culture and encourage markets, amongst other activities. A better strategy needs to be created for each such public space.

Key actions: Develop a clear strategy for the public realm and usage of each major public space in the City Centre; develop an overarching markets strategy for the city, creating opportunities for new and niche markets, in alternative locations; to develop an events strategy for the Old Market Square and wider City Centre.

b) Support the development of better visitor attractions, support existing attractions and ensure that all are well-promoted and form part of a coherent tourism offer within 3 years.

Nottingham is rich in history, famous in terms of its brands and legends, and is a large and diverse enough city to support overnight visitors. However, despite this, and despite having some excellent attractions, its whole tourism offer is not strong enough, and this is being addressed in part by Experience Nottinghamshire. This strategy should support the efforts that are being made on a number of fronts to do that, including the redevelopment of the Castle as an attraction and a conference bidding unit. It should also seek to encourage a more coherent and joined up promotion of all of the events and attractions on offer.

Key actions: Support efforts being made to improve the Castle; support efforts being made to create a conference bidding unit; encourage joint promotion of attractions; work with the retail and leisure sectors to develop targeted special offers/marketing packages.

c) Create by 2015 an established late night shopping culture and ensure we achieve a seamless transition from retail into the late night economy in the City Centre.

Part of the strategy for encouraging more people to stay longer in the City Centre has to consider the integration of the day and evening economy, encouraging shoppers to stay on to access leisure facilities such as watching a film or show, or dining. Over recent years considerable work has been undertaken to address the reputation of the City Centre and to enhance the evening economy. This has had some success but more needs to be done to create an overlap between the day and night offer and improve the perception of the city from both the customer and retailers perspectives.

Nottingham does not currently have a clear late night shopping offer, whereas

"The Strategy has at its heart the sole intention of creating the right background to increasing the attraction of Nottingham to its customers, both shoppers and retailers to ensure our reputation as the "Queen of the East Midlands" is reflected in a dynamic, aspirational, and vibrant City Centre."
Matthew Hannah, Innes England

other regional cities have a general offer of one day per week. The Nottingham BID will assess the benefit of extending opening hours within the City Centre to both customers and retailers.

Extended opening hours for shops, special offers, promotions and joint events between leisure and retail will do more to bring the two together as one experience for the consumer.

Key actions: Work with the BID and retailers to review the potential to extend opening hours for shops and work with partners to develop an action plan to extend opening hours in the City Centre; promote joint events between leisure and retail; establish evening deals including for parking; make recommendations as to how the emerging spatial plan and the planning and licensing framework could better support that transition from day to night.

d) Ensure that it is and remains easy and inexpensive to get into and out of the City Centre.

If we are to attract a larger catchment from a wider area and therefore compete with wider out of town shopping destinations, we need to ensure that shopping by car is a positive experience.

Building upon the amendments that have already been made following the review undertaken by the BID as outlined earlier, the Nottingham BID will continue to work with Nottingham City Council and other private car park operators to further implement the 24 recommendations contained within their report.

We must also balance this with a recognition that Nottingham's excellent public transport system is a major asset for the City, and should be supported.

Key actions: Maintain the current approach to parking under the new parking policy; implement further recommendations from the car parking review; encourage Community Protection Officers (CPOs) to take a more customer focused approach to enforcement; support investment in public transport initiatives; develop more bespoke offers for parking and public transport with retailers.

e) Improve the use of technology to support the City Centre and by 2014 develop mobile software that comprehensively sells and supports retail and leisure.

With the growing use of mobile technology, it is becoming increasingly common for the consumer to use digital technology whilst shopping to compare prices, access special offers or to look for a specific shop, brand or place to visit. Building on work already started by the BID, dedicated apps and web-based promotional activity are a key opportunity that needs to be capitalised upon.

Increasing use of digital technology by both the consumer and the retailer will inevitably place increased pressure on the digital infrastructure. Some large corporate retailers are likely to make this investment into their stores and major internet operators are already responding to the market. The roll out of 4G by one of the major operators in Nottingham during 2013 will introduce much higher speed access for subscribers through smart phones and other devices. Other operators will follow quickly behind. Free wi-fi will also become more widely available as operators (such as Virgin) plan to make it available in areas of 'high footfall' with a focus upon the major shopping centres across the country.

There is potential however that gaps in connectivity could occur in public spaces and areas of lower footfall. We need to work proactively with the operators to ensure that the whole of the City Centre is covered by wi-fi connectivity and ensure that public assets such as ducting and street furniture (to site new wi-fi transmitters) are deployed most effectively.

Key actions: Develop a dedicated app for shopping and leisure in Nottingham; ensure free wi-fi access throughout the entire City Centre.

[1] Nottingham BID Parking Study, Atkins, May 2012

Summary of Key Actions

- Develop a clear strategy for each major public space in the City Centre, including Old Market Square.
- Develop an overarching markets strategy for the city, creating opportunities for new and niche markets in alternative locations.
- Support efforts being made to improve the Castle.
- Support efforts being made to create a conference bidding unit.
- Encourage joint promotion of attractions, including cross promotion and joint ticketing offers within and for each city venue.
- Promote joint events between leisure and retail.
- Work with the retail and leisure sectors to develop targeted special offers/marketing packages.
- Review the potential to extend opening hours for shops and work with partners to develop an action plan to extend opening hours in the City Centre.
- Establish evening deals, including for parking.
- Make recommendations as to how the emerging spatial plan and the planning and licensing framework could better support the transition from day to night.
- Maintain the current approach to parking under the new parking policy.
- Implement further recommendations from the car parking review.
- Ensure CPOs take a more customer focused approach to enforcement.
- Support investment in public transport initiatives.
- Develop more bespoke offers for parking and public transport with retailers.
- Develop a dedicated app for shopping and leisure in Nottingham.
- Ensure free wi-fi access throughout the entire City Centre.

/03

Improving the physical environment and infrastructure within the City Centre, so that it meets the future needs of retailers and provides an attractive and welcoming place to visit.

a) Address the issue of where Nottingham's core retail areas are and support the introduction in 2013 of a clear spatial plan for the City Centre, including where necessary through changes of use in the City Centre.

Recognising that the physical make up of the City Centre is an important factor in creating growth, Nottingham City Council has been working to develop a new City Centre place plan. This is intended to set the scene for new developments and other initiatives to ensure that the City Centre is a primary shopping, leisure and tourism destination. The plan, due to be completed early 2014, sets out a framework of key structural and connectivity elements and defined quarters, based on the distinctive offers within the City Centre. Whilst the plan is non-statutory, it will form part of the Nottingham Local Plan which is a statutory document, and forms part of the governing City Centre Strategy, into which this Retail Strategy also fits.

Key Actions: Support the development of a City Centre Spatial Strategy which will itself support the growth of the retail offer and increase residential opportunities within the City Centre.

b) Ensure a continued focus on good public order and cleansing to effectively support retail and leisure, with crime falling and cleanliness successively improving in the City Centre in 2013, 2014 and 2015.

How the City Centre looks and feels is important to enhancing the shopping experience and creating a welcoming environment. As England's cleanest big city, we already have some success in this area, and a neighbourhood management approach to the City Centre ensures a co-ordinated and swift response to addressing issues such as anti-social behaviour, crime and street drinking, all of which can otherwise give a negative impression of a city. We need to continue this focus, and use the spatial plan as a way to more effectively deploy resources.

Key actions: Continue efforts to stop antisocial behaviour/street drinking within the City Centre; engage with operational practitioners within the police to ensure that the new spatial plan and future developments design out crime and disorder; work with cleansing teams and retailers to identify and deal with 'grime' hotspots in the City Centre.

c) Review the regulatory framework in the City Centre and make recommendations as to how the regulatory environment can better support retail and leisure, discourage vacancy, and make it easier to trade in Nottingham City Centre.

The regulation of town and City Centres is rightly extensive. It is important that licensing, planning and other regulatory requirements ensure that town and City Centres are well-managed. However, it is undeniably the case that on occasion this regulation can work against, rather than for, successful City Centres. The Portas Review highlights this issue in some detail. In Nottingham, we cannot change primary legislation, but we can look at the regulatory regime and establish whether or not it can be adapted to better support retail and leisure in Nottingham, whilst ensuring that the city continues to be well-managed.

Key actions: Conduct a review of the regulatory framework in the City Centre, including in relation to licensing and planning, and establish what can be done at a city level to use that framework to best support retailers and encourage a thriving, and well-managed City Centre.

d) Establish by May 2013 a plan, including identification of internal and external funding sources, to physically develop and regenerate certain key retail/leisure hot spots in the City Centre.

There is no doubt that certain areas of the city require substantial physical regeneration. Some of that may happen as part of the development of major projects, such as Broadmarsh or the Creative Quarter. Some of it is already being looked at under the Spatial Plan for the city. Some of it is already being discussed with organisations like English Heritage. All of these areas for development need to be set out within the City Centre Strategy. However, the ones that most affect retailers should also be looked at as part of this review, so that there is a clear vision of how retail can develop over the next 10 years.

Key actions: Establish a list of retail hot spots that require physical development, together with a resourced action plan for delivery, as part of the City Centre Strategy.

f) Conduct a property review in the City Centre and work with landlords and agents to address vacant units in the City Centre by May 2014 - establish a Nottingham register of City Centre landlords, and promote clear and fair protocols for rent reviews, encourage the use of a standard SLA between landlords and their tenants and encourage pop up shops in long term vacant units.

In the end, the issue that will most affect, and be affected by, City Centre development is property. Therefore any retail strategy must take account of property, landlords, and agents. It is therefore recommended that an audit is undertaken of what property exists within the City Centre, who owns it, what each property is for and could be for, and on that basis produce a way forward to ensure property prices are maintained but not over-inflated, landlords are supported but not allowed to dictate or indeed prevent the growth of the City Centre, and retailers are given a good base upon which to build success.

Key actions: Conduct a property review in the City Centre to establish a Nottingham register of City Centre landlords; establish clear and fair protocols for rent reviews; encourage pop up shops; and establish a standard SLA between landlords and their tenants.

Summary of Key Actions

- Support the development of a City Centre Spatial Strategy which will itself support the growth of the retail offer and increase residential opportunities within the City Centre.
- Continue efforts to stop antisocial behaviour/street drinking within the City Centre.
- Engage with operational practitioners within the police to ensure that the new Spatial Plan and future developments design out crime and disorder.
- Work with cleansing teams and retailers to identify and deal with ‘grime’ hotspots in the City Centre.
- Conduct a review of the regulatory framework in the City Centre, including in relation to licensing and planning, and establish what can be done at a city level to use that framework to best support retailers and encourage a thriving and well-managed City Centre.
- Conduct a review of the regulatory framework in the City Centre.
- Establish a list of retail hot spots that require physical development, together with a resourced action plan for delivery.
- Conduct a property review in the City Centre, establish a Nottingham register of City Centre landlords and promote clear and fair protocols for rent reviews and encourage the use of a standard SLA between landlords and their tenants.

“With over 500 of our members being retailers based in the City Centre, and a mix of major chains and independents, it was important for us to be involved in shaping Nottingham’s future retail strategy and provide input about the real issues affecting these businesses. The strategy is a positive sign that this city is serious about doing business.”
Jeff Allen, Chairman of Nottingham BID

Delivery and Governance

Enabling and Monitoring Performance

The overall aim of this strategy is to enable retail to flourish in Nottingham, creating jobs and prosperity. This will be measured through the city improving its position in the national retail rankings. Within that general aim, there are a number of indicators that will also be monitored and benchmarked against regional competitors.

These include:

- Percentage of catchment shopping in Nottingham
- Level of expenditure on retail
- Number of retail and leisure jobs
- Number of vacant units
- Size of comparison goods offer
- Size of independent sector.

Whilst a significant number of the actions within the strategy will be delivered by a number of partners, additional capacity will be created within the City Council's Economic Development team to support this. Part of the remit of these posts will be to develop new initiatives focusing on the development of the City Centre and to programme manage the delivery of the strategy.

To enable us to monitor this plan effectively, a report on the health of the retail sector, gathering intelligence from across the partnership, will be complied and published on a quarterly basis.

Governance

Nottingham City Council and its partners will be responsible for the delivery of individual components of the action plan, while a City Centre Retail Growth Forum will continue to play a role in the monitoring of the plan for as long as is required.

In recognition of the importance of the City Centre to the future growth of the city, new governance arrangements have been implemented which consolidate the partnership approach that has been developed through this initial strategy. A new City Centre Forum comprising of local councillors and representatives from the Nottingham BID, the Invest in Nottingham Retail Forum and local business will be created, and will then have responsibility for reviewing the action plan on a half yearly basis.

"City Centres can have a continuing future as part of a new multi-channel world, but they will need to work hard to transform. Offering a consumer experience – combining shopping, recreation and culture – that keeps people coming back will require more co-ordination than ever before. This strategy has brought together local retailer expertise from many sources, and marks an important step in this transformation."
Sean Akins, Invest In Nottingham Retail Forum and Managing Director of Bildurn Properties

Appendix 1: City Centre Retail Strategy Action Plan

01/ Strategic Priority One

Strengthening Nottingham's retail and leisure offer in the City Centre, by growing the size and variety of both the comparison goods and independent sectors, and in doing so increase the number of visitors from the catchment.

Target: Improve the quality of our shopping centres so that they are commensurate with Nottingham's target as being a top 5 retail destination by 2017

Target	Lead Organisation	Milestones	Resources Required
To support Intu with their ambitions and plans to bring forward improvements to both the Broadmarsh and Victoria shopping centres	Intu Properties Nottingham City Council (NCC)	Scheme agreed Dec 2013	Intu NCC internal resources

Target: Ensure a thriving independent retail / leisure sector in the City Centre that is strong as anywhere else in the UK within 2 years

Target	Lead Organisation	Milestones	Resources Required
Develop a retail incubation hub in the City Centre	Nottingham City Council	Proposals developed by Dec 2013 Hub developed by March 2015	TBC
Encourage temporary use opportunities in long term vacant properties to encourage new business starts	Nottingham City Council	Potential locations for temp shops identified by Sept 2013 5 x temp opportunities supported per year	NCC Internal resources
Regenerate and give better identity and signage to key independent areas and develop Derby Road and Hockley as key independent retail locations	Nottingham City Council	Derby Rd pilot completed by March 2014 Hockley action plan developed by Sept 2013	£10,000 High St Innovation Fund, Heritage Lottery Funds
Provide preferential promotional opportunities for independent retailers and develop an annual marketing campaign raising awareness of the independent offer in the city	Nottingham BID	Campaign for 2013 agreed by end July 2013 and implemented September 2013	Nottingham BID initiative
Continue to develop/reinforce our evidence base on retail provision to support the development of the Local Plan	Nottingham City Council	Study commissioned March 2013	NCC Internal resources
Develop a view on the support for City Centre supermarkets where they do not harm the interests of independents, taking all necessary actions to prevent their further proliferation in the City Centre where they do, as part of the development `of a city wide supermarket strategy	Nottingham City Council	Interim position established Final plan to be produced by end 2013	NCC Internal resources

Target: Reduce the number of vacant City Centre units in Nottingham by a third by September 2013 and by 60% by September 2014

Target	Lead Organisation	Milestones	Resources Required
To reduce vacant units in the City Centre, by undertaking a survey of vacant properties, identifying priority hotspots and working proactively to bring vacant units back into use	Nottingham City Council	Retail Growth Forum established June 2012 Survey completed twice yearly Action plan and funding agreed by June 2013	High St Innovation Funding In kind support from private sector

Target: Retain all existing top brands and actively work to bring 20 new top brands (in bespoke stores) to the Nottingham City Centre by 2017

Target	Lead Organisation	Milestones	Resources Required
Work with key stakeholders to develop a targeted inward investment campaign to identify and attract absent brands	Nottingham City Council/Intu Properties /Invest in Nottingham Club	Brands identified by Sept 2013 Bespoke packages and campaign developed Dec 2013 10 new brands attracted by March 2015	NCC Internal resources In kind support from private sector
To work with local partners to develop a package of business support for new and existing retailers	Nottingham City Council	Package scoped by Feb 2013 Launched by July 2013	Existing business support programmes
To work with local agents and shopping centres to understand the requirements of comparison goods retailers	Invest in Nottingham Club/Intu Properties/ Nottingham City Council	Quarterly review undertaken to commence Jan 2013	In kind support from private sector

Target: Better promote Nottingham's retail leisure offer inside and outside of the city so that Nottingham is promoted through joined up campaigns by stakeholder organisations

Target	Lead Organisation	Milestones	Resources Required
Develop a joined up approach to raising consumer awareness of brands on offer within the City	Nottingham BID	TBC	Nottingham BID initiative
Undertake an annual shoppers survey to understand how consumers use the City to shop	Nottingham City Council	To map what activity is already undertaken by key partners and to identify gaps by Sept 2013 To establish revised annual survey process by Dec 2013 .	TBC

02/ Strategic Priority Two

Improving the Nottingham visitor experience, offering variety, quality and a joined up approach to leisure and retail and therefore increasing dwell time and the level of spending within the City Centre.

Target: Improve the use of public spaces so that by 2014 there is clear strategy for each public square in the City Centre, and ensure that by that time events in the City Centre better support retail and leisure

Target	Lead Organisation	Milestones	Resources Required
Develop a clear strategy for each major public space in the City Centre, including Old Market Square	Nottingham City Council	Produce clear public space plans by December 2013	NCC Internal resources
Develop an overarching markets strategy for the city, creating opportunities for new and niche markets in alternative locations	Nottingham City Council	Completion of Strategy – Sept 2013	NCC Internal resources

Target: Support the development of better visitor attractions, support existing attractions, and ensure that all are well-promoted and form part of coherent tourism offer within 3 years

Target	Lead Organisation	Milestones	Resources Required
Support effort being made to improve the Castle	Nottingham City Council	HLF bid submitted April 2013	Heritage Lottery Fund
Support efforts being made to create a conference bidding unit	Experience Nottinghamshire (EN)	ERDF secured by April 2013 Unit established by August 2013	ERDF
Encourage joint promotion of attractions of city venues	Experience Nottinghamshire (EN)	3 x joint promotional campaigns per year	EN existing resources
To work with the retail and leisure sectors to develop targeted special offers/marketing packages	Nottingham BID	To grow BID's special offer scheme by 20% year on year for the next 3 years Deliver annual Christmas campaign	Nottingham BID initiative

Target: Create by 2015 an established late night shopping culture and ensure we achieve a seamless transition from retail into the late night economy in the City Centre

Target	Lead Organisation	Milestones	Resources Required
To review the potential to extend opening hours for shops and work with partners develop an action plan to extend opening hours in the City Centre	Nottingham BID	Feasibility study to be completed by Summer 2014 Implementation by end of current BID term (December 2015)	Nottingham BID initiative
Promote joint events between leisure and retail	Nottingham BID	All relevant events to be promoted on www.itsinnottingham.com (effective immediately)	Nottingham BID initiative
Establish evening deals including parking	Nottingham BID	Ambassadors to pursue special offers - ongoing	Nottingham BID initiative

Target: Ensure that it is and remains easy and inexpensive to get into and out of the City Centre

Target	Lead Organisation	Milestones	Resources Required
Maintain the current approach to parking under the new parking policy	Nottingham City Council	On street parking amendments implemented Nov 2012	NCC Internal resources
Implement further recommendations from the car parking review	Nottingham BID/ Nottingham City Council	Off-street parking charges discussed and reviewed with all providers by Autumn 2013 Zones and capacity of on street parking to be reviewed by end 2013	Nottingham BID initiative
Continue efforts to ensure that a more customer focused approach to on street parking enforcement is undertaken	Community Protection (Parking Enforcement)	To reduce the levels of complaints that are upheld through the Councils Have Your Say Procedure	NCC Internal resources
Support investment in public transport initiatives	Nottingham City Council	Secure funding for additional tram stop by end 2013 Secure funding for Turning Point South by Dec 2014 Station hub to be completed by 2014. Tram extension to be completed by 2015	ERDF
Develop more bespoke offers for parking and public transport with retailers	Nottingham City Council	Review parking tariffs and products to ensure competitive Development of retailer advertising by end 2013 To develop ongoing offers with the BID	NCC Internal resources

Target: Improve the use of technology to support the City Centre and by 2014 develop mobile software that comprehensively sells and supports retail and leisure

Target	Lead Organisation	Milestones	Resources Required
Develop a dedicated app for shopping and leisure in Nottingham	Nottingham BID	App launched by Easter 2013	Nottingham BID initiative
Ensure free wi-fi access throughout the entire City Centre	Nottingham City Council	Strategy agreed Feb 2013 Wi-fi in place Dec 2013	NCC Internal resources

03/ Strategic Priority Three

To improve the physical environment and infrastructure within the City Centre, so that it meets the future needs of retailers and provides an attractive and welcoming place to visit.

Target: Address the issue of where Nottingham's core retail areas are and support the introduction in 2013 of a clear spatial plan for the City Centre including where necessary through changes of use in the City Centre

Target	Lead Organisation	Milestones	Resources Required
Support the development of a City Centre Spatial Strategy which will itself support the growth of the retail offer and increase residential opportunities within the City Centre	Nottingham City Council	Launched by December 2013	NCC Internal resources

Target: Ensure a continued focus on good public order and cleansing to effectively support retail and leisure with crime falling and cleanliness successively improving in the City Centre in 2013, 2014 and 2015

Target	Lead Organisation	Milestones	Resources Required
Continue efforts to stop antisocial behaviour/street drinking within the City Centre	Nottinghamshire Police/ Community Protection	Achievement of existing city wide annual targets relating to reduction in antisocial behaviour (ASB) and street drinking Cut ASB calls to police by 50% from 2006-07 levels by 31 March 2014 (NCC Manifesto Pledge) Civil Court Orders Obtained (400 for 2013-14) 85% Patrol Target for CPOs 2800 Alcohol Confiscations	Existing partner resources
Engage with operational practitioners within the police and community protection to ensure that the new spatial plan and future developments design out crime and disorder	Nottingham City Council/ Nottinghamshire Police	Process for effective consultation to maximise opportunities for crime to be 'designed out' through new developments to be developed by October 2013	Existing partner resources
Work with cleansing teams and retailers to identify and deal with 'grime' hotspots in the City Centre	Nottingham City Council	Monthly monitoring and reporting on Cleanliness Index, and number of graffiti and fly-tipping incidents	NCC Internal resources

Target: Review the regulatory framework in the City Centre and make recommendations as to how the regulatory environment can better support retail and leisure, discourage vacancy, and make it easier to trade in Nottingham City Centre

Target	Lead Organisation	Milestones	Resources Required
Conduct a review of the regulatory framework in the City Centre to understand how it might be able to support the growth of retail and leisure in the future	Nottingham City Council	Review carried out by Dec 2014	NCC Internal resources

Target: Establish by May 2013 a plan, including identification in internal and external funding sources, to physically develop and regenerate certain key retail/leisure hot spots in the City Centre

Target	Lead Organisation	Milestones	Resources Required
Establish a list of retail hot spots that require physical development, together with a resourced action plan for delivery	Nottingham City Council	Hot spots identified by September 2013 Derby Rd pilot completed by March 2014	High St Innovation Fund Heritage Lottery Funds

Target: Conduct a property review in the City Centre and work with landlords and agents to address vacancy units in the City Centre by May 2014 - establish a Nottingham register of City Centre landlords, and promote clear and fair protocols for rent reviews, encourage the use of a standard SLA between landlords and their tenants and encourage pop up shops in long term vacant units

Target	Lead Organisation	Milestones	Resources Required
Conduct a property review in the City Centre to enable the establishment a Nottingham register of City Centre landlords, establish clear and fair protocols for rent reviews, encourage pop up shops, and establish a standard SLA between landlords and their tenants	Nottingham City Council	Property Review undertaken on twice yearly basis	NCC Internal resources High St Innovation Fund

Appendix 2: The Changing Nature of the Shopping Experience

Growth of Internet Shopping and the Use of Technology to Support Shopping

Internet shopping is a key growth area in retail and online sales, and as a proportion of total sales continues to grow year on year. Internet sales now represent more than 10% of UK retail sales, with an annual growth rate of around 14% to 16% per annum.

As a result of the increasing popularity of the internet for shopping purposes, larger retailers are continuing to push online sales as a means of increasing market share. While the British Council of Shopping Centres have suggested that e-tailing will never replace the shopping experience and the impetus is for retailers to create a comfortable environment to attract shoppers, many national retail chains are looking to trim their estate portfolios by as much as 20%, and/or have moved towards 'multi channel' retail, combining a physical presence with an online offer, operating a 'click and collect' model where you can buy online and pick up from the shop premises.

With an increasing number of people coming into retail outlets to pick up goods and potentially spending less, a balance needs to be struck between convenient car parking facilities to make this journey as easy as possible and encouraging shoppers to stay in the City Centre for longer periods of time accessing more of the facilities once they are here.

Retailers are also looking to embrace technology to support sales over the coming years. Marks and Spencer has a commitment to introduce free wi-fi for customers in 2013 and Quick Response codes - barcodes recognised by smartphones - will be dotted around stores for customers to scan and learn more about products. All staff will have access to iPads and further investment will be channelled into replacing their existing website and in the introduction of new 'in-store gadgets'. All of this investment by Marks and Spencer is expected to increase so-called 'multi-channel revenues' in their stores by between £300m and £500m by 2013/14.

The internet is rapidly being more integrated into the shopping experience rather than simply being seen as an alternative. Increasingly consumers are using technology to access special offers, price comparisons, and product information while they shop.

Trends in the Comparison Sector

There has been a concentration of national multiples in the larger centres in recent times. As this takes place, the comparison retailing element of smaller centres has declined, with their role becoming principally a destination for convenience goods. Retail parks continue to be popular with comparison goods retailers as these facilities allow large, purpose built units to be obtained. Often planning permissions permit the sale of a more diverse range of goods. Another effect of comparison traders increasingly seeking larger, more modern premises has been a trend for national multipliers to favour covered, purpose-built shopping malls within town centres. As a result the focus of retailing within town centres has shifted from the high street to the managed shopping centres.

Blending Retail and Leisure

The retail market has been the subject of some profound changes in the recent past. The mix of social and economic conditions which prevailed in the 1980s triggered the arrival of a much more discerning consumer, driven not just by value for money but also increased selectivity and a demand for higher quality shopping environments.

Increasingly, successful shopping facilities have to fulfil the role of a destination location. In large parts this means providing a wide range of shopping and leisure locations able to attract and retain the interest of the entire family. In return, such schemes benefit not only from much wider catchment areas, but also from substantially longer shopping trips.

[2] Centre for Retail Research, Retail Forecast 2012-13.

Appendix 3: The Nottingham Shopping Experience

Retail Rankings

Experian's Retail Centre Ranking assesses the vitality of over 3,000 retail centres within GB by combining a number of factors taken from the Experian Goad retail database. These factors are combined to generate a 'vitality score' for each centre, which is then indexed and ranked. Analysis undertaken in July 2012 placed Nottingham at 8th behind London West End, Glasgow, Birmingham, Manchester, Liverpool, Leeds, and Westfield Stratford. Since 2007, Nottingham has slipped from 5th with Birmingham, Liverpool and Leeds all jumping ahead in the last 5 years. This is supported by CACI, who also produce a national retail ranking

Features of the Current Retail and Leisure Sector

Employing over 21,000 people (11.5% of all jobs in Nottingham), the retail and leisure sector is an important source of employment within Nottingham's overall job market.

These figures reported in 2010 also identified that the retail sector had shrunk by 11.3% since 2008, while the leisure sector experienced a decline of 12.8%. This compares with a national reduction of 4.3% and 5% respectively, indicating that Nottingham has experienced a faster rate of decline than the national average.

On a more positive note in July 2012, Experian categorised 43% of Nottingham's retail businesses as 'low risk' for potential to fail, which is higher than both regional and local competitors. CACI also launched a new retail centre health score where Nottingham was assessed as the highest A-grade and was one of only 9 centres outside the South East with an A-grade. (Nottingham, Leeds, Aberdeen, Leicester, Lincoln, Cambridge, Norwich, Cardiff and Bristol).

Experian reported annual spend in Nottingham is estimated at £2.8 billion. This positions the City in 8th place in terms of comparison shopping expenditure in the UK, ranked behind London West End, Birmingham, Glasgow, Manchester, Westfield Stratford, Leeds and Liverpool.

The City Centre has a total of 1,453 retail and leisure outlets, of which 31.59% (459) are comparison goods. Retail services make up a further 7.98 % (116) and 4.68% (68) are convenience outlets. The total floorspace currently stands at 2.67M sq.ft.

Nottingham City Centre has historically benefited from a diverse and regionally leading retail offer driven by a compact City Centre and a range of national brands and independent shops.

Nottingham has 28% of its offer within the comparison sector (multiples and independent) which is lower than both its regional (Liverpool, Manchester, Birmingham, Leeds, Newcastle) and local competitors (Derby, Leicester, Lincoln). Its does however have a higher numbers of bars and restaurants compared to both regional and local peers.

When compared with regional peers, Nottingham has the second highest number of independent outlets after Manchester, with the highest number of independent comparison goods outlets. Nottingham also has the second highest independent leisure offer after Manchester.

There is also a higher number of convenience stores in the city, most likely in response to an increase in the number of students living within the City Centre and to cater for the day time working population.

[3] Nottingham City Centre Data and Trends Analysis, Experian, July 2012.
[4] CACI Retail Dimensions, June 2012.
[5] ONS Business Register and Employment Survey 2010.
[6] Nottingham City Centre Data and Trends Analysis, Experian, July 2012.
[7] CACI Retail Dimensions, June 2012.

Further analysis from Experian identifies a number of brands that when compared to other regional shopping destinations are either not available or are available but hidden within department stores.

With the two shopping centres in the city sitting to the north and south, the corridor between the two along with associated side streets has become the core shopping area. Some parts such as Bridlesmith Gate remain successful; however other areas are looking tired with a lower quality of shopping offer. Feedback from retailers and local property agents suggests that there is a lack of appropriately sized units within the core shopping area (large, box type units with maximum flexibility) which act as a barrier to new brands coming into the city.

There is a strong correlation over the past 10 years of a rise in ranking when a major shopping centre development has come on stream. Uncertainty over the future development of the Broadmarsh has undoubtedly had an impact on confidence and the development of the retail sector. However, the sale of the centre to Intu Properties plc in December 2011 has presented fresh opportunity to bring forward a new retail development for the City Centre.

Markets make up a valuable part of any retail offer, not only by attracting additional footfall but by offering an alternative choice. A review carried out on behalf of Nottingham City Council by The Marketplace in 2011 identified that the main market offer within the City Centre is the Victoria Centre Market, which although above the national average in terms of occupancy, is looking tired and outdated and only appeals to part of Nottingham's shopper catchment demographic. A Fine Foods Market is also held on a monthly basis provides a wider offer but the infrequency limits that appeal.

Vacant Shops Analysis

There are a number of different measures of vacant properties in the City Centre, all of which use different methodologies, cover different geographical areas and therefore give different figures. Data announced by the Local Data Company in February this year sited Nottingham's vacancy rate as high as 26%, while Experian also reported in February a vacancy rate of 18.1%.

Notable areas of vacancy include Derby Road, Hockley, Carrington St, Maid Marian Way, West End Arcade and Hurts Yard. Both Broadmarsh and Victoria Centres display high levels of vacancy, however this is slightly distorted due to anticipated redevelopments.

While the actual vacancy level may vary according to which research we consider, there is still clearly an issue with high vacancy rates within the City Centre. There are a number of factors identified as contributing to the high vacancy rate including level of rent, lease arrangements that are too long, the condition of units being poor or inappropriate, the cost of refurbishment being too high, reduction of footfall in a particular area or a lack of demand.

Car Parking

While Nottingham is recognised to have excellent public transport links, 65% of shopping trips nationally are undertaken by car, and the issue of car parking has been widely recognised as a key issue when considering the success of town centre retail.

In May last year the Nottingham BID commissioned a report from Atkins, to look at the impact of car parking pricing and structures within the City Centre, following concerns raised by their membership. The review concluded that the costs of car parking in the City Centre were broadly comparable to other City Centre shopping destination locations. It also stated that there was no shortage of parking spaces within the City Centre and that they were appropriately located. The main issue they identified however was that the pricing structures were complicated and confusing, with maximum stay restrictions limiting 'useability' of spaces in particular locations.

A total of 24 recommendations were made which suggested improvements to pricing structures, parking policy, signage and communications.

Since the publication of the report, Nottingham City Council have been working with the BID to address the issue of pricing structures and a new simplified system, alongside the lifting of maximum stay restrictions, was introduced in October last year.

[8] Nottingham Markets Report, The Marketplace, 2011.
[9] Shop Vacancy Report, Local Data Company, February 2013.
[10] Nottingham City Centre Vacancy Analysis, Experian, February 2013.
[11] National Travel Survey: 2010, Department of Transport.
[12] Nottingham BID Parking Study, Atkins, May 2012.

This document has been developed in partnership