Barnsley Town Centre Business Plan

FSP Baseline Study

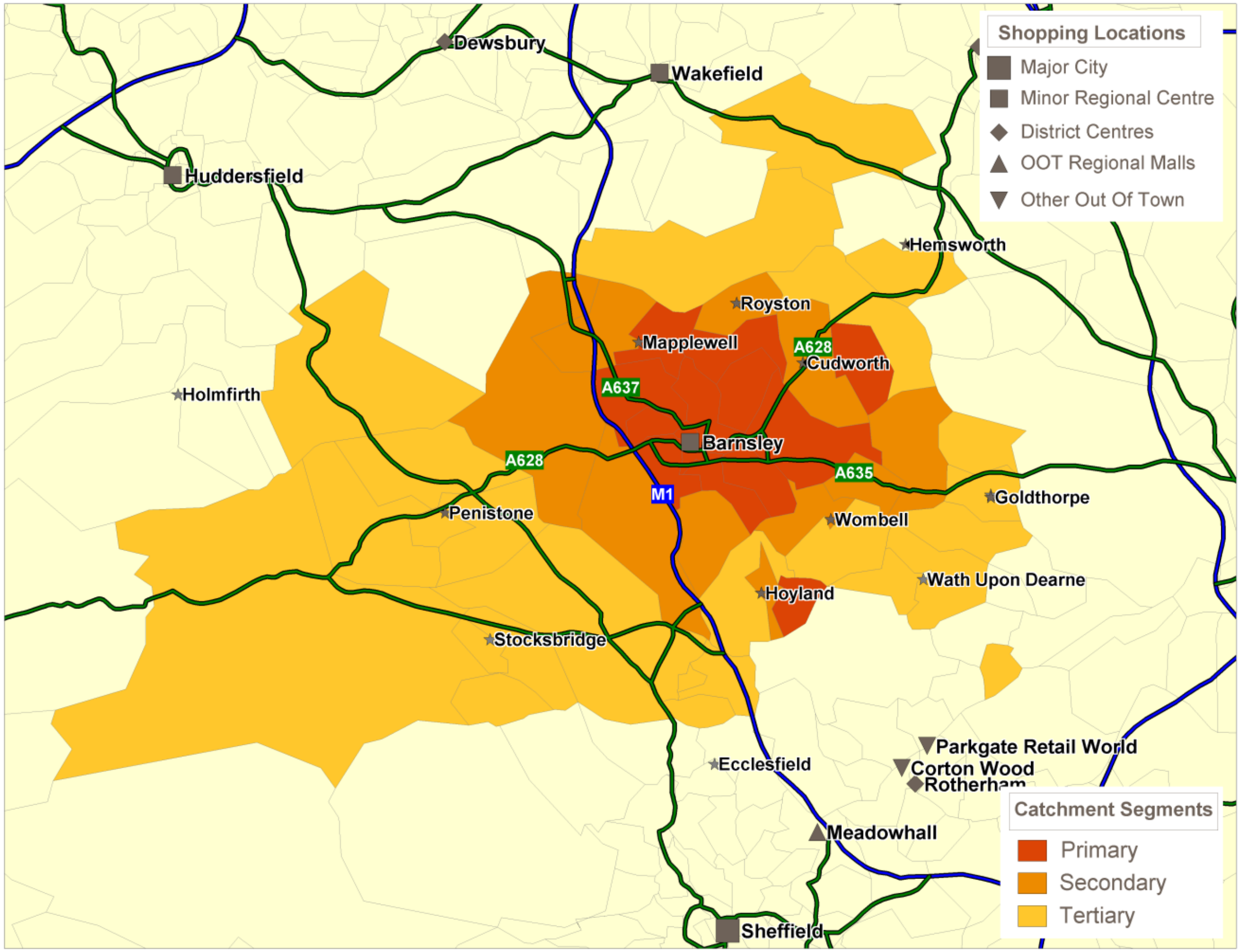
December 8, 2016

Process

- On-street consumer research – a total of 3850 postcodes collected in and around Barnsley town centre including:
  - 1157 short ‘intercept’ surveys
  - 656 detailed shopper surveys
- Online research – 457 workers and students
- Full retail audit, estimating sales and selling space by merchandise category
- Outputs used to:
  - Establish Barnsley’s current catchment area and shopper profile
  - Assess current shopper behaviour and attitudes and how these differ from those of people working locally
  - Assess the opportunity for increased retail and leisure provision
  - Provide recommendations as to the most appropriate tenant mix

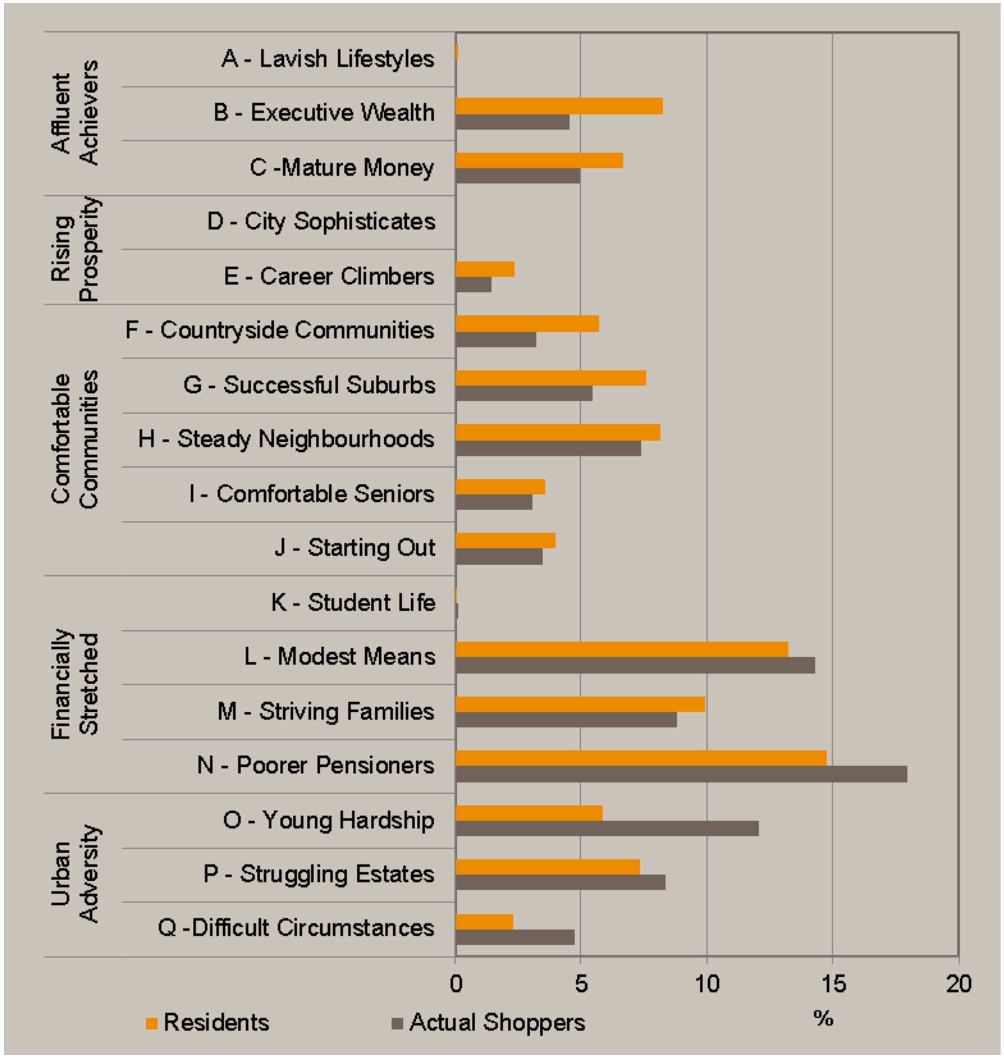
Where do the town centre customers come from?

Resident Population:	Customer Population:
99k	76k
78k	36k
154k	21k
331k	134k



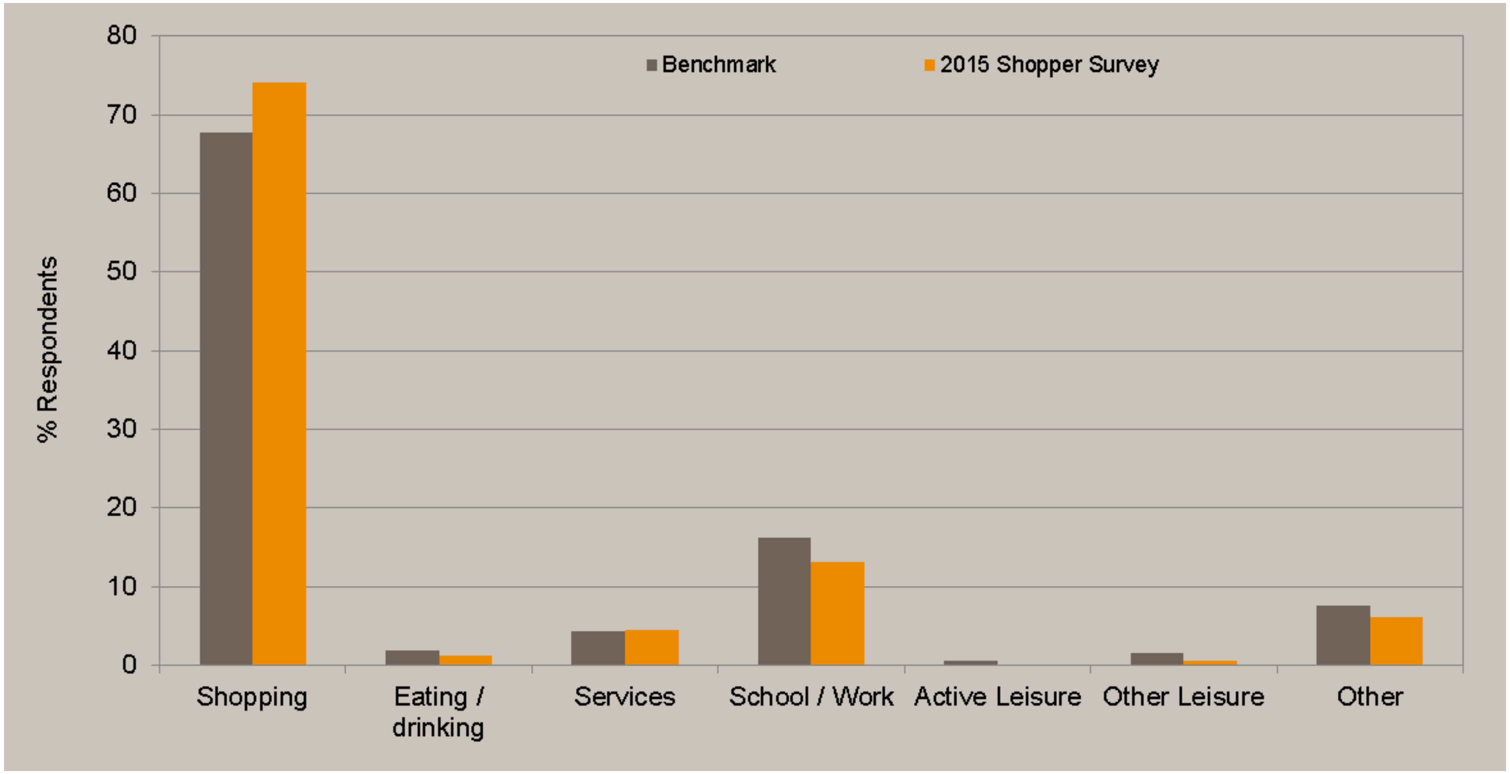
Source: FSP/CES

Profile of town centre customers



Source: FSP/CACI

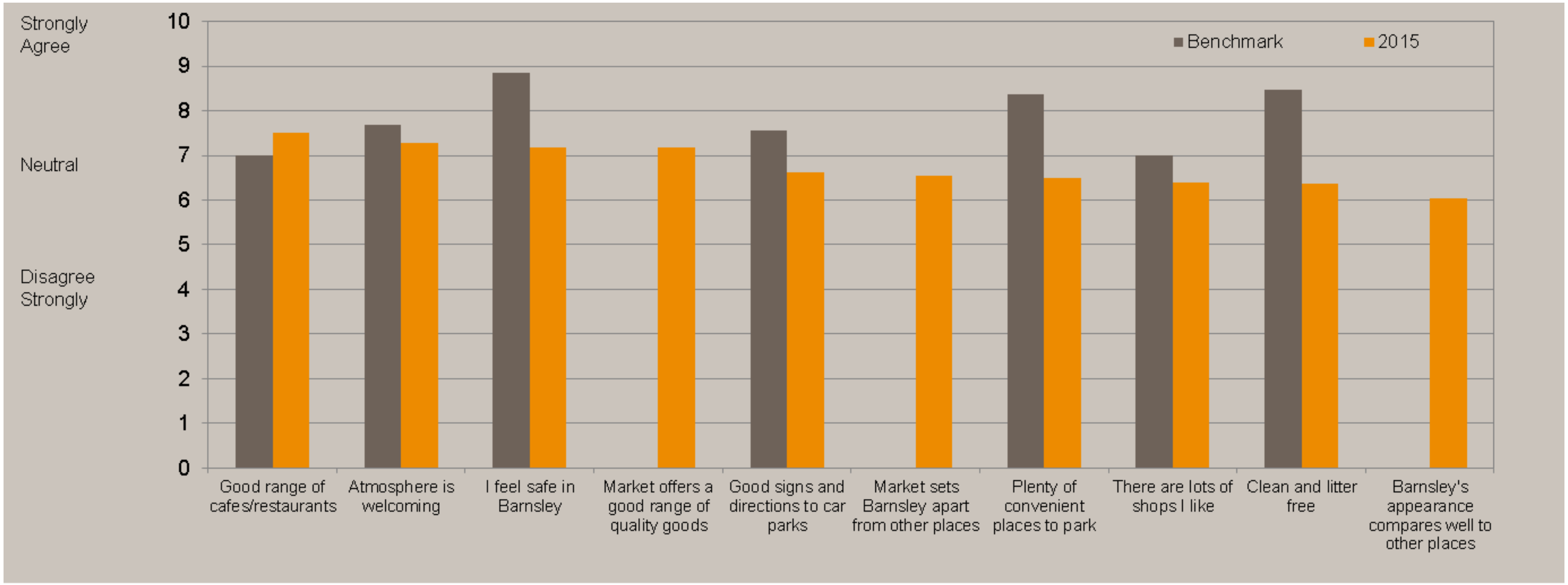
Reasons for being in town



- Workers and students are currently under-represented compared to benchmark locations – barriers include a lack of suitable retail and F&B offer and negative perceptions about anti-social behaviour
- Eating & drinking and Leisure are below benchmark – an enhanced offer will be essential to sustaining an evening economy and to making Barnsley more of a destination & experience

Source: FSP

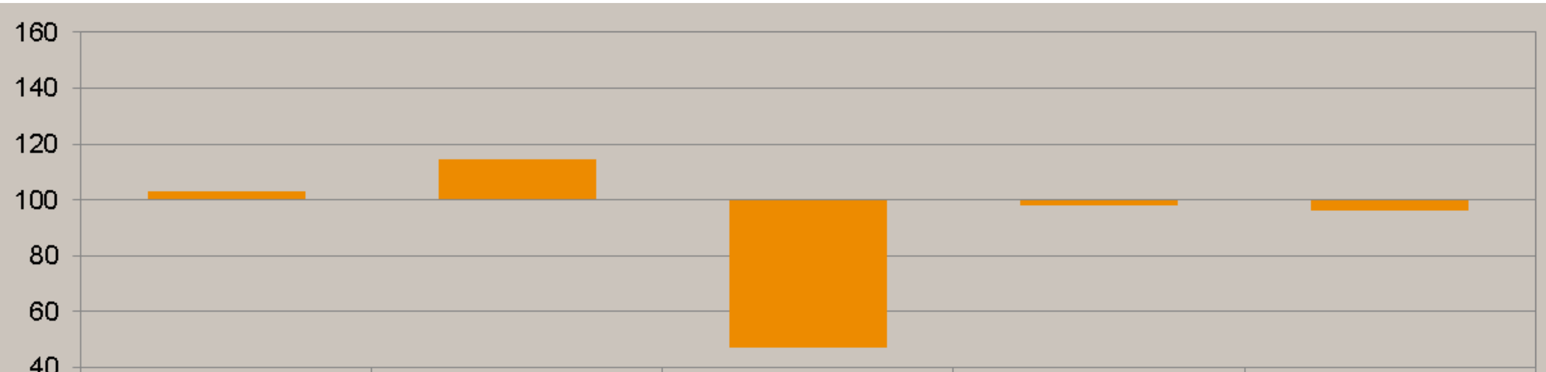
What do existing customers think about Barnsley?



- Safety and cleanliness are below benchmark and a priority now – these are opinions of people already using Barnsley and are likely to be a barrier to increased visits
- Perceptions on car parking need to be addressed – improved signage to car parks will assist accessibility to those less familiar with the town
- A number of these aspects will require significant time and investment to improve, aspects such as Parking Signage and Cleanliness offer some immediate easy wins to help improve shopper perceptions

Source: FSP

Key Benchmarks



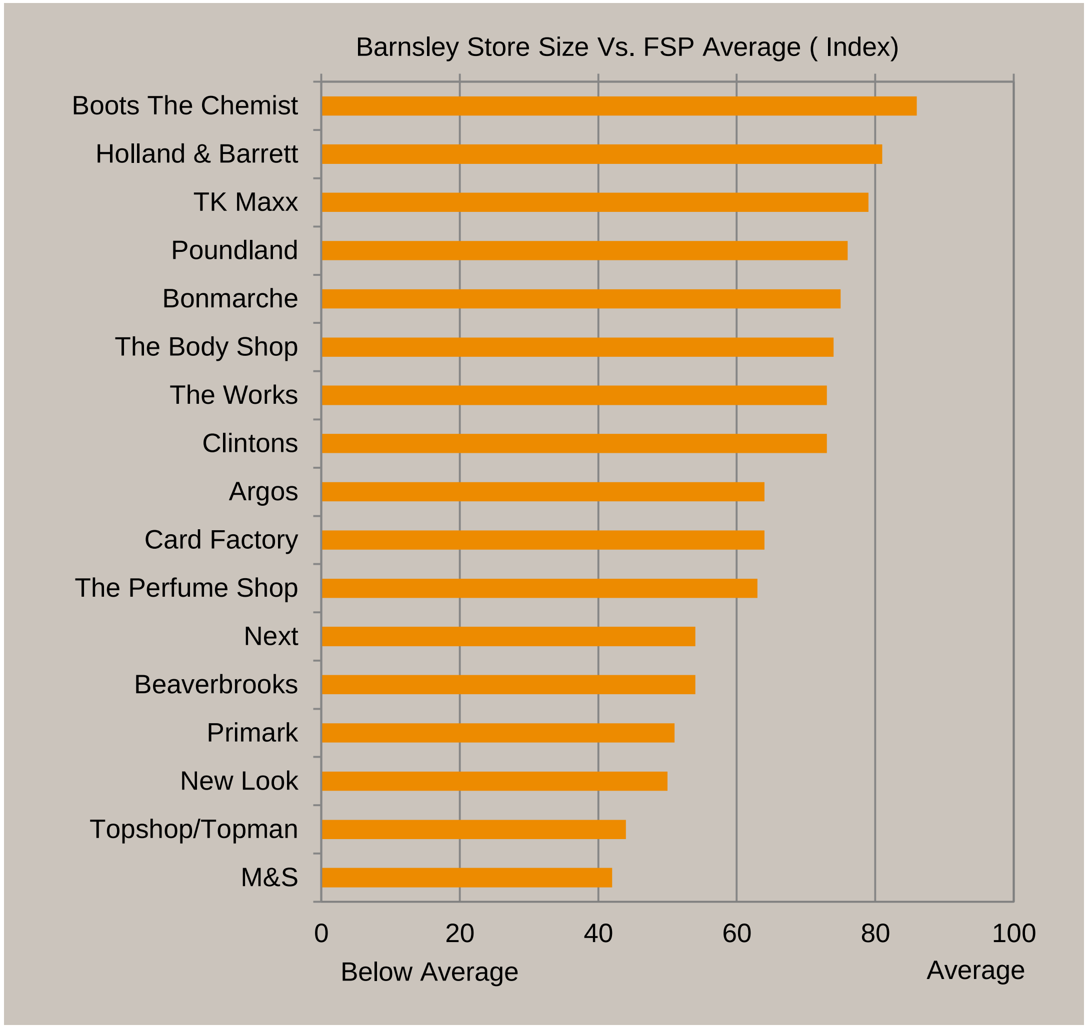
	NPS	Visit Frequency (p.a.)	Spend per Captia (£)	Dwell Time (mins)	Catering Visitors (%)
2015	-1	80	12	88	50
Benchmark	-2	70	25	90	53
Index	103	115	47	98	96

- FSP has benchmarked research findings against a range of similar locations
- Most KPIs are broadly in line with benchmark apart from spend
- Increased visit frequency often results in lower spend per visit, however, the extent to which spend is below average is the fundamental element which needs to be improved for businesses within Barnsley to thrive
- Spend can be increased through an improved retail and leisure offer – in turn this will assist in making Barnsley more of a day out destination
- Information from FSP's report should be used to help existing and new businesses understand town centre customers and how to attain additional spend

Source: FSP

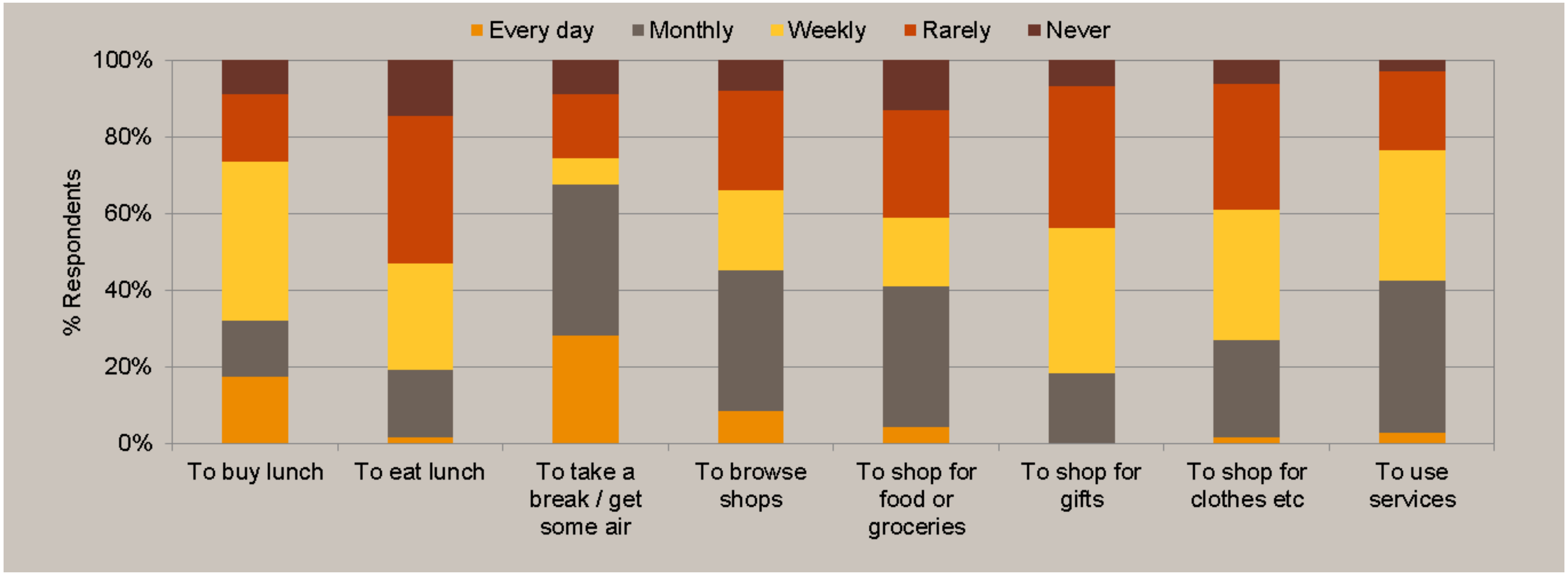
Undersized Retailers

- A number of existing retailers are smaller than the FSP audited average
- This means they stock a limited range compared to other locations, leading people to shop elsewhere as they cannot find what they want



Source: FSP

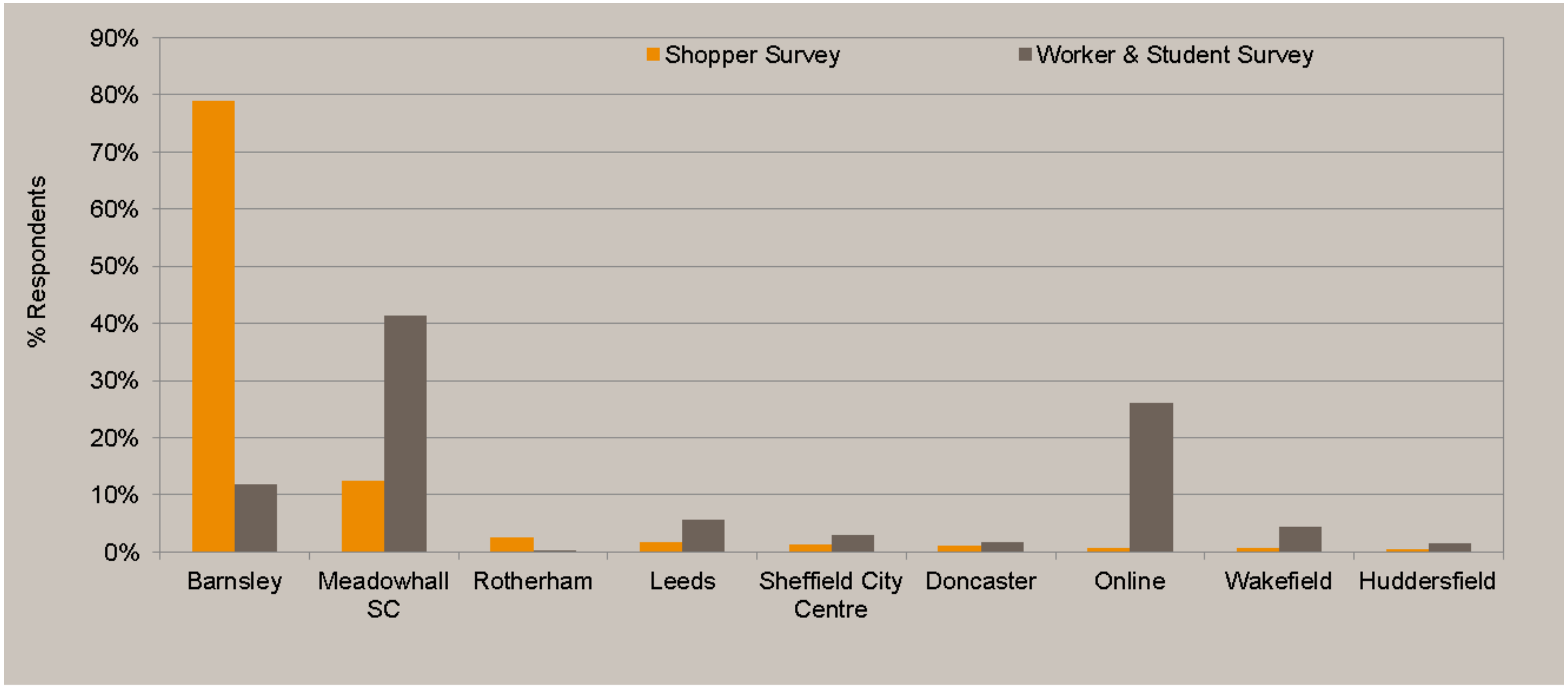
Key Segment – Students and Workers



- Students and Workers are a key target – they are in Barnsley because they have to be, but are not currently using the town centre as widely as they could
- Barriers include the range of stores & F&B and perceptions of anti-social behaviour
- Workers in particular are likely to be key users of an evening leisure and F&B offer

Source: FSP/BMBC

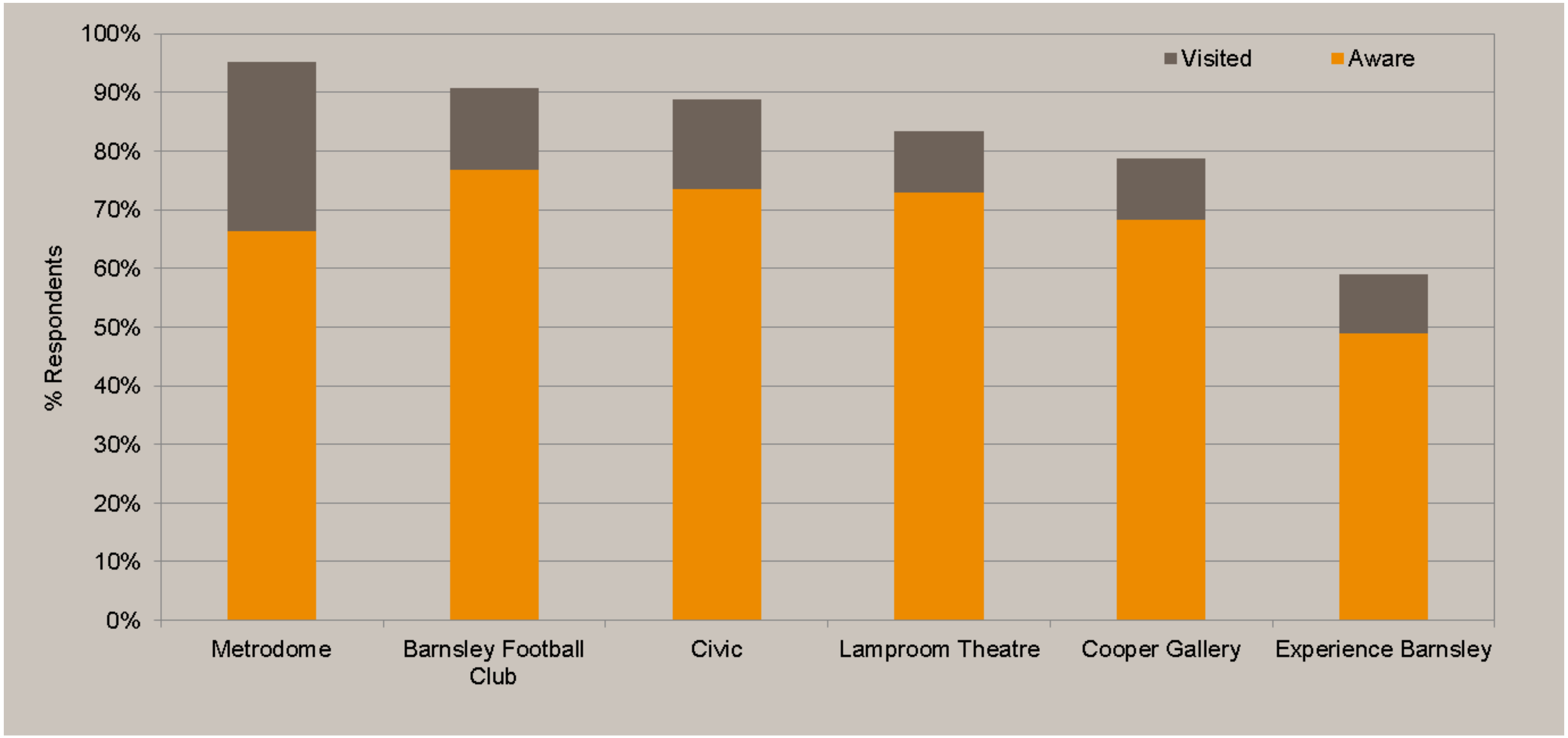
The Competition



- The difference between shoppers and workers / students shows that Barnsley is losing more potential customers to Meadowhall and to online retailers
- Barnsley can't compete with larger destinations such as Meadowhall in terms of the scale or depth of offer but needs to make the most of its strengths and address negative perceptions
- In order to combat threat of online shopping, Barnsley need to provide an experience that can't be replicated online including Leisure offer and events

Source: FSP/BMBC

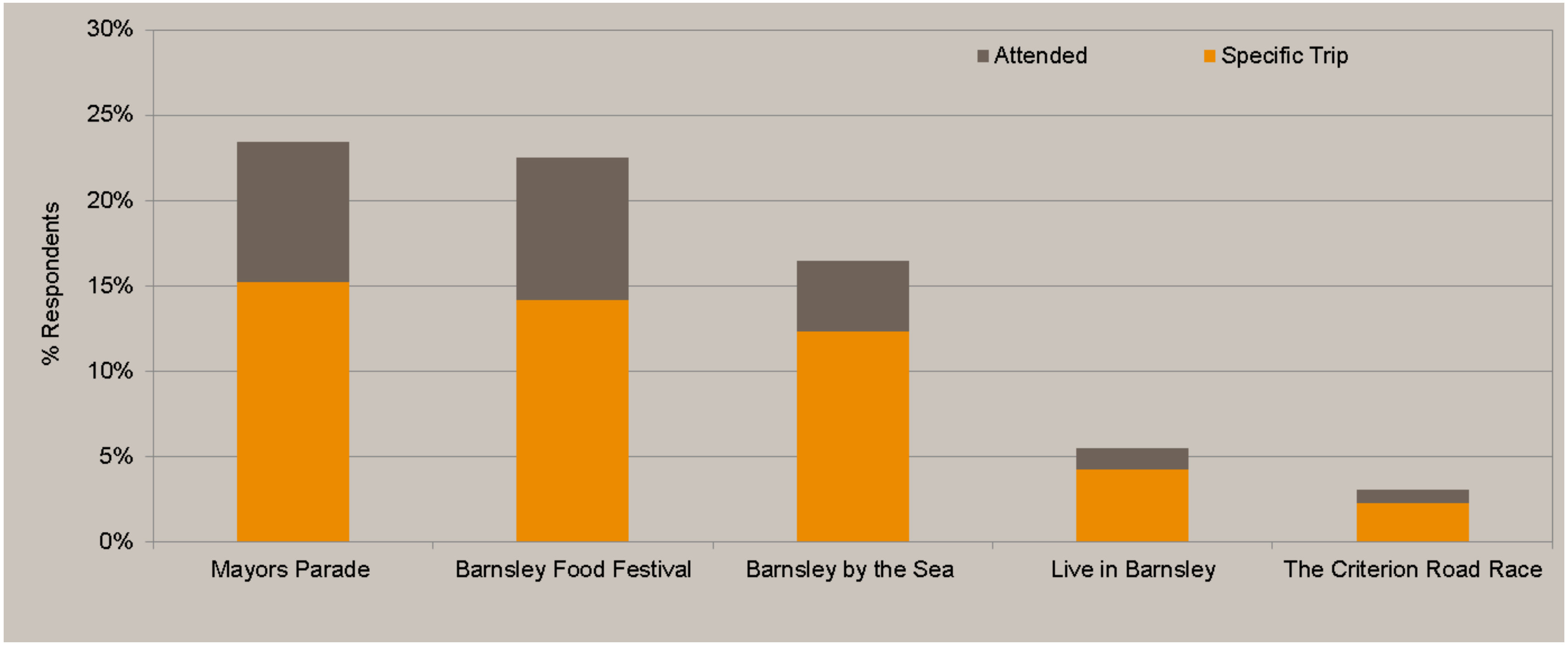
Town Centre Leisure Destination



- Awareness of all Leisure destinations is high but usage is less so
- An enhanced F&B offer would help both the Civic and Lamproom Theatre
- Addressing negative perceptions of safety, cleanliness and anti-social behaviour will assist in attracting more families and affluent catchment residents who may not be using Barnsley at the moment

Source: FSP

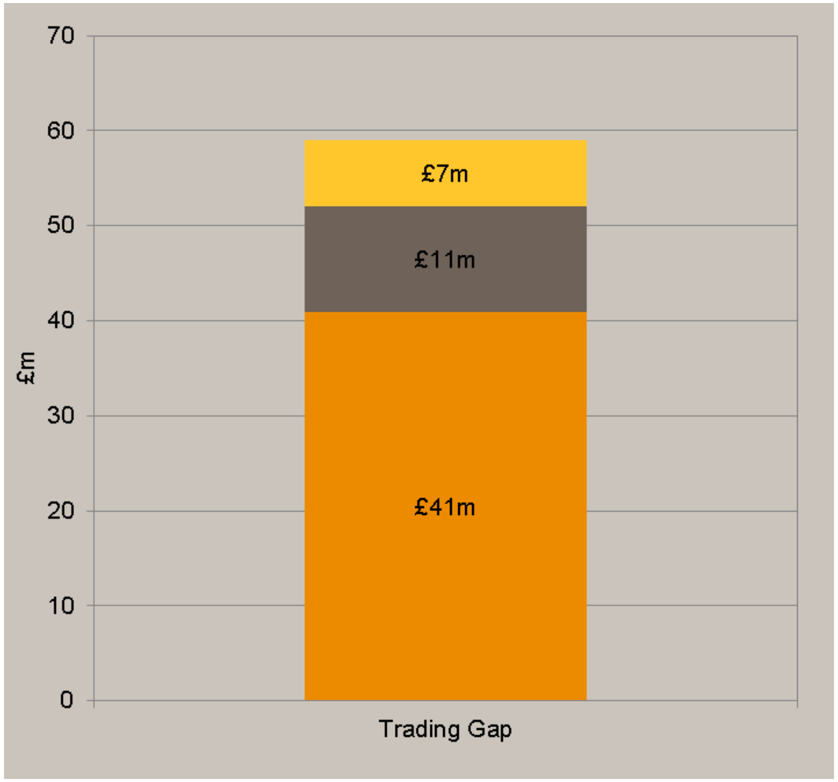
Marketing of Events

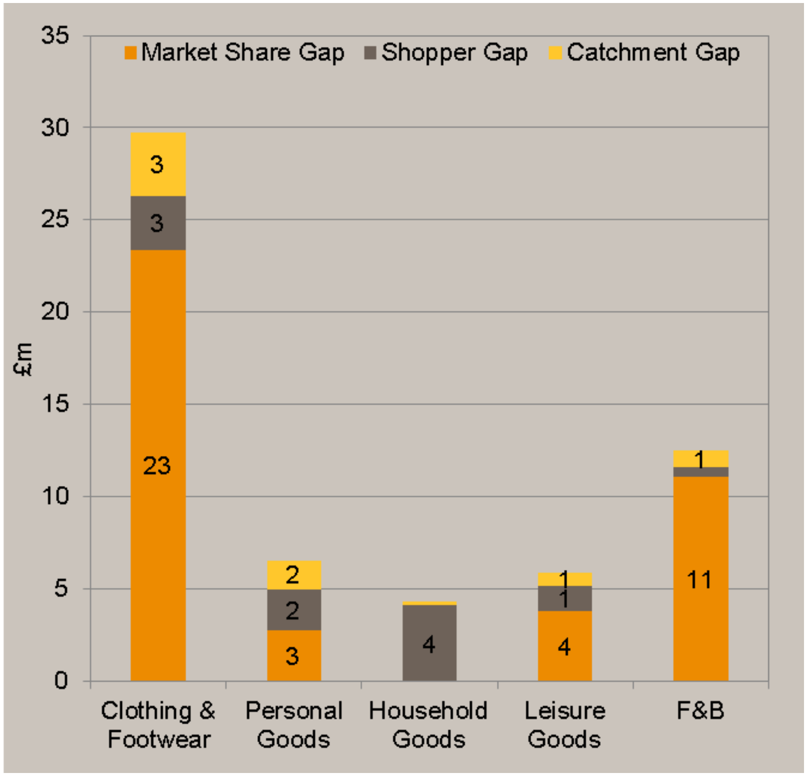


- The majority of those attending events came specifically to Barnsley to go to them confirming that these type of events are successful in attracting people to the town centre
- As Barnsley improves, these type of events, along with news of new retail and F&B entrants, should be used to entice non-users into the town centre
- The success of events should be tracked through footfall and through retailer sales

Source: FSP

The Future



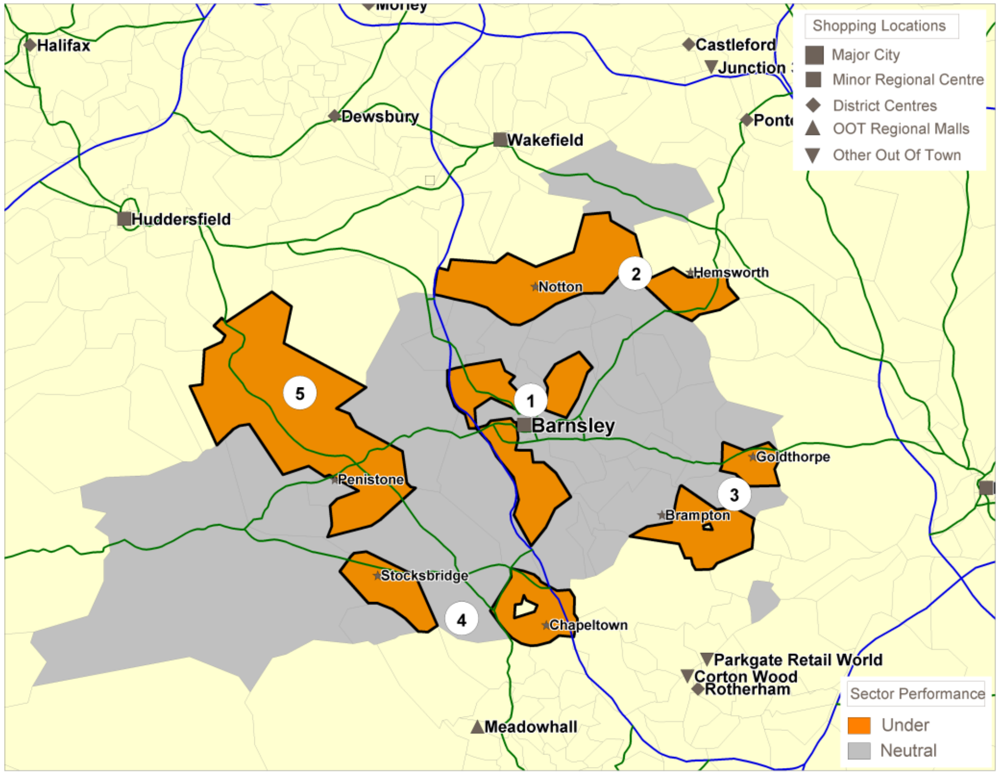


- The retail and F&B offer in Barnsley needs to improve to serve existing shoppers better as well as to attract new shoppers to the town centre
- The scale of the Trading Gap confirms there is an opportunity for new entrants to thrive and for existing operators to improve their performance

Source: FSP/CES

Target Audience

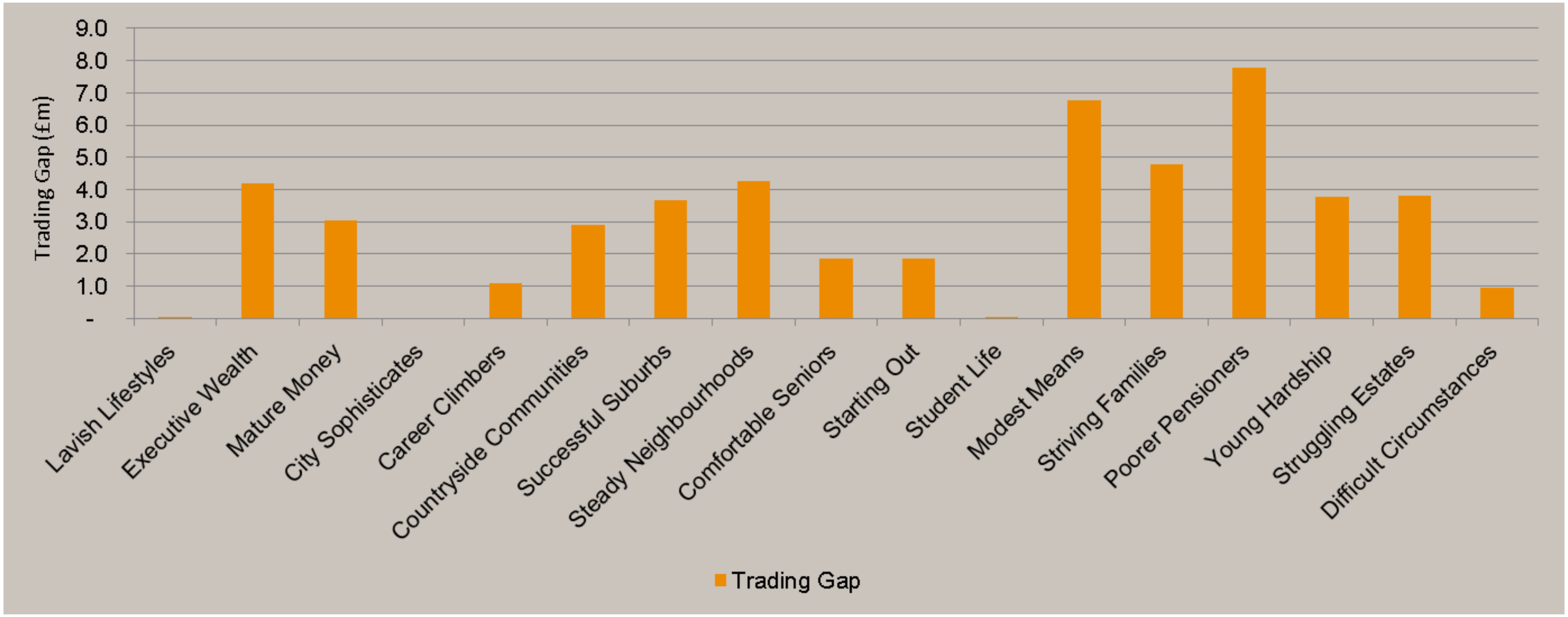
- Under-performing zones are specific areas where more town centre users can be drawn from
- This should be a longer term objective as requires a change in shopping habits – people need a reason to visit Barnsley
- Messages should be tailored for each zone (eg zone 5 is significantly more affluent than the existing Barnsley shopper profile



Source: FSP

Target Audience

- This shows the potential additional value by ACORN *Group*
- Largest opportunities are from less affluent *Groups* – key messages should be improvements to the retail offer.
- More affluent *Groups* are more likely to be enticed to Barnsley as a day out / leisure destination
- A enhanced evening economy is likely to be a draw for all *Groups*



Source: FSP

Barnsley

Catchment Size
331k Residents
134k Shoppers

Catchment Spend
Residents £1.4bn
Shoppers £0.5bn

Shoppers
74% visit Barnsley for shopping

Party Size
1.54

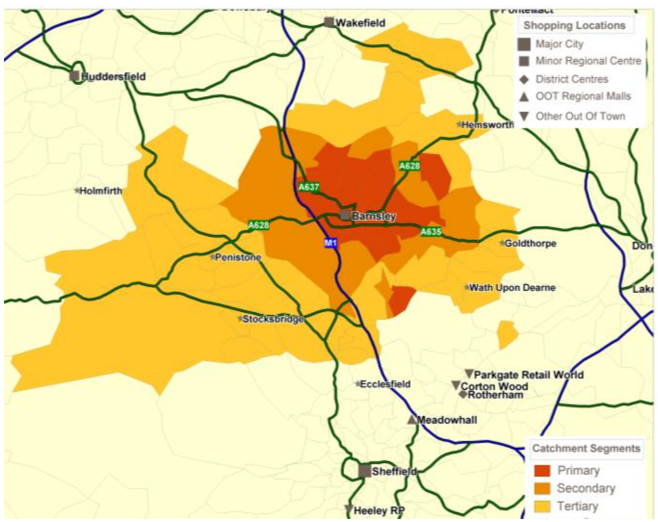
Spenders
84%

Visit Frequency
80 p.a.
(+15% Benchmark)

Dwell Time
88 mins

NSLSP Rank
132nd of 2824

'With its exciting new development plans, Barnsley offers an exciting opportunity for expanding businesses'



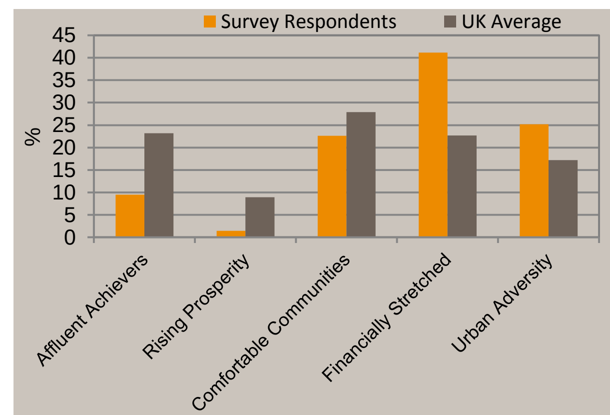
Trading Gap
Opportunity for additional turnover
£59m

Key Retailers

TK Maxx, Primark, Next, M&S, Wilko

Mass market shopper Profile

Comfortable Communities and *Financially Stretched* account for 69% of shoppers



Source: FSP/CACI/CES

Absent Retailers

Clothing and Footwear	Personal	Household	Leisure	Catering
Apricot	Argento	**Linens Direct**	Build-a-Bear Workshop	Barburrito
***Deichmann**	***Chisholm Hunter**	**Maplin**	*DW Sports	Bella Italia
Dr Martens	*F Hinds	*MenKind	*HMV	***Burger King**
***Evans**	* The Fragrance Shop	**Ponden Home**	***Mountain Warehouse**	*Caffe Nero
Footasylum	Lush	Tiger	***Ryman**	Chiquito
*H&M	*Pandora Jewellery		Smiggle	Chopstix
***Hawkshead**				Ed's Easy Diner
*Hotter				Five Guys
Jack & Jones				Handmade Burger Company
*JD				Krispy Kreme
Moss				Las Iguanas
*Office				***Mc Donalds**
***Peacocks**				***Muffin Break**
***Quiz**				Nando's
*River Island				*Pizza Hut
*Schuh				Prezzo
***Slaters**				*Starbucks
				TGI Friday's

- Those in bold are retailers that would be suitable for Barnsley now - others would be more likely to consider as part of the Better Barnsley development
- The information from FSP's report can be used by agents to promote vacant units now – either through a generic document or by bespoke summary documents for target retailers

Source: FSP

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