THE RETAIL GROUP

informed solutions

Blackburn Town Centre Vision and Opportunities Assessment Study

An overview of the study and strategy presentation to Overview & Scrutiny Committee

BLACKBURN with DARWEN BOROUGH COUNCIL

16 March 2016

Objectives, Approach and Outputs

Identify:

- Vision for the future Blackburn 'retail' offer to meet needs of all future customers
- How established physical location and development opportunities will enable the vision to be delivered; and other physical factors needed
- Provide inputs to the required evidence base that will assist in future decision making

Project Immersion and Information Collation

Postcode & Street Survey

Customer Groups Lifestyle Identification and Quantification

Town Centre and Local Reviews

Competing Centres and Exemplar Locations Review

Consumer and Retail Trends Overview

Three core outputs:

Future Blackburn Customer

Vision for Blackburn Town Centre

Delivering the Vision

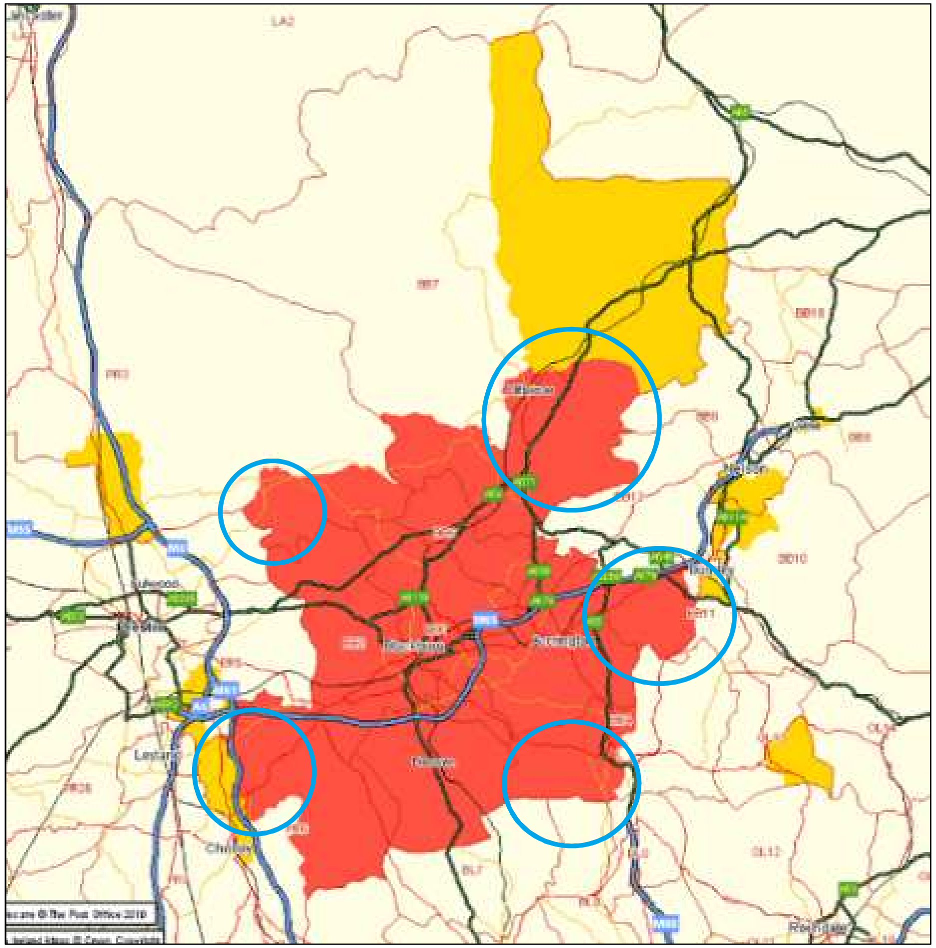
Resident Catchment and Non-resident Consumers

Resident Catchment

- **Catchment is growing; 296,000** resident base
- **Town is extending its appeal**; covering a wider geographic area, more inflow

Non-resident Consumers

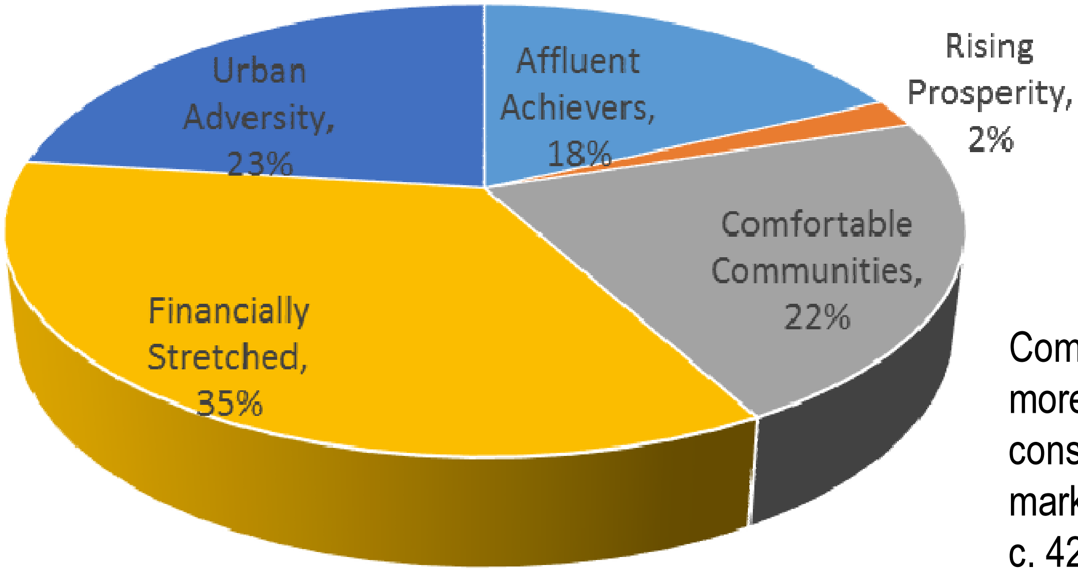
- A very important group; **possibly not targeted enough, more could be done**
- Workers; 17,000 (town) – 71,000 (borough)
- Students; 15,000
- Visitors; 3.99 million per annum



Resident Catchment Profile

* Source: CACI Acorn

Value seekers and lower mass market c. 58% (vs. 40% GB)



Comfortably off and more aspirational consumers lower mid market and above c. 42% (vs. 59% GB)

Broad base of consumers; mix of value seekers, mass market and mid to upmarket

Mass and lower mid market families are the solid customer base

Top and tailed by value and aspirational consumers

How will these Customer Groups change in the future?

- **Population growing not declining**, broad profile and customer types will remain constant
- **New housing** in particular will be targeting **more families**
- National **population trend is ageing**, there are and will continue to be more older consumers
- Further education & its recent investment will broaden appeal from within and outside the borough, **bringing more young people**
- **Workplace population continues to grow** with ongoing demand for more offices and large-scale business investment and development locally
- Infrastructure improvements are ongoing, continuing to improve **Blackburn's connectivity to a wider audience**

Trends…how we shop…

- More ways to shop; "I need it how, when and where I want"
- Increasingly linked to 'leisure'
- Still as much about convenience as it is about inspiration
- Remain enamoured with value
- The 'Shopping Experience'

There will be 'more' customers, increasing demand for retail, F&B, services and leisure

Convenience and leisure remain key attributes

Existing Offer and Usage

- Recognised as a ‘shopping’ destination; it is the major reason to visit
- Shoppers want more choice
- High visit frequency
- No linked shopping and leisure trips
- No destination leisure and catering trips; leisure and F&B not associated with town centre
- Anchors under-performing
- F&B and Market under-achieving
- Town centre currently one-dimensional
- Disconnect between shops, other elements and growing customer base
- The Mall is a strength and a weakness
- Blackburn's ‘hidden’ offer and assets

Blackburn vs. Exemplar Locations

Six locations reviewed, all 'bigger' towns, for direction; Derby, Leicester, Portsmouth, Bradford, Gloucester and Wakefield

- **Integrated leisure** – cinemas in shopping centres
- **Visible retail activity**; multi-format retail activity
- Benefitted from investment
- Extended **'early evening' opening hours** at major shopping centres
- More than 'one' market – market offer is multi-dimensional
- **F&B offer is extensive and multi-dimensional**
- **Big attractors**; such as John Lewis and outlet shopping
- Where applicable **multi-cultural offers** are clearly visible and promoted as part of the offer
- Clear grouping / zoning of the offer in areas / quarters
  - Mid market
  - Value / price conscious
  - Independent
  - F&B
  - Markets
  - Cultural

What does a 'Big' Town Centre Need to deliver?

- Ease of access and use – 'convenience'
- Right type of shops – 'retail requirements'
- Different retail areas and formats
- Good range of and easy access to services
- Leisure offer and appeal including F&B
- Fulfil a social role, including F&B
- A varied but positive experience
- Appeal to a broad cross-section of customer groups
- Integrated and multiple reasons to use

Fulfil an important role in its local community

Compete in a broader hierarchy for occasional / destination users and visitors

Blackburn today probably 3 out of 5 in many areas

Blackburn's 'Issues and Opportunities'

- Room to improve its 'success' with each of its visible communities to varying degrees
  - Targeted bespoke areas, themes, products / brands, services, leisure facilities
  - Much broader F&B, clustered and dispersed clusters
  - 'Visible' indicators that each customer group is welcome
  - Extended trading hours
- Requires 'future proofing', in particular against evolving competition
- Opportunity to increase retail 'visibility', extend choice, improve offer
- Blackburn is more than just the Mall; strengthen non-Mall areas, bring people out of the shopping centre
- Attractors not 'pulling their weight' and there could be more…
- Evening offer / role / appeal / economy is essentially 'missing'
- Combining and strengthening the 'collective' appeal of the offer through navigation, legibility and integration (town centre wide)
- Adding more dimensions to Blackburn's town centre offer

Opportunities to deliver more, deliver better, broaden appeal and improve 'relevance'

All aspects to become <u>multi</u>-dimensional

Vision & Aims

'Blackburn a multi-dimensional town centre experience'

- Add more offers and reasons to use
- Create more differentiated areas
- More appeal to all customer groups
- Expand the layers of choice
- Integrate existing elements
- Make better use of existing elements, retail, leisure, other
- Create connectivity
- Increase visibility and access to all elements
- Improve signage and routing
- Provide the space & enable developments

Expand and radiate out from the core activity

Adding the Extra 'Dimensions'

Retail

- More brands and choice, visibility and formats
- Stronger 'anchors' e.g. M&S, market, food
- New 'attractors'
- Family oriented brands
- Youth brands
- Asian stores (and market)
- Independents
- Accessible 'top up food' shopping

F&B

- Much more choice
- Eat-in offer more than take-away
- Social / leisure appeal
- Family oriented brands
- Youth / student appeal
- Asian appeal / offer
- Linked to other attractors

Leisure

- More diverse leisure uses 'in town centre' or clearly linked to town centre
- Additional / relocate or better integrate Cinema
- Integrate and support existing leisure with 'relevant' F&B / other offer

Services

- Centrally or arterially located
- Easy to get to
- Quick and easy to access
- More specialists, gaps to fill

Adding the Extra 'Dimensions' contd.

Retail

F&B

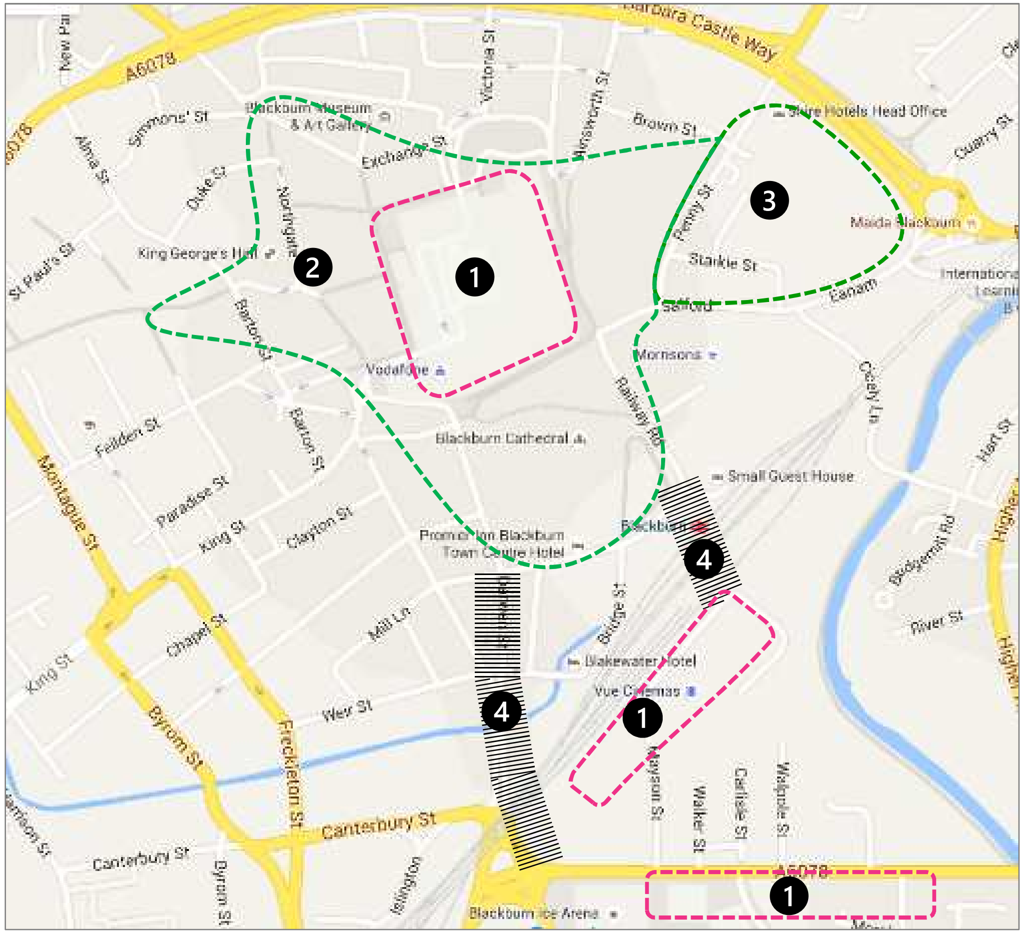
Leisure

Services

Facilities & Experience

- Expanding parking provision
- Making better use of existing parking on periphery
- On-line retail 'click and collect' facilities / parking
- Integration of appropriate facilities into shopping, leisure and F&B offers
- Special needs; disabled and elderly access to the different elements
- Family focused facilities, from parking spaces to baby change and free to use entertainment
- Multi-language welcoming to all
- Events programme to expand the offer on a temporary basis
- Targeted events at specific customer groups

Delivering the Vision
Core Current and Future Areas of Activity



Key

1 Current core areas of activity

2 Future areas of activity

3 Second stage expansion

4 Priority integration corridors

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Delivering the Vision
Active and Visible "Retail" Areas

Key

1. Large retail units onto King William Street & Town Hall Street
2. Specialist retail and markets onto Church Street
3. Increase presence onto Ainsworth Street
4. Large retail units, convenience and non town centre uses
5. Areas for independents, specialist services and convenience
6. Edge of town big box retail
7. Future outlet centre

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Summary and Priorities

- **King William Street/Mall:** Expand M&S, large retail units, externalise the Mall, events location, high impact visible retail activity
- **Town Hall Street/King William Street/Northgate:** Large retail units, small niche leisure (cinema, hotel, day spa), F&B, services
- **Church Street/Cathedral Gardens:** Market, street market, Specialist retail, F&B, services
- **Ainsworth Street/Bus station/Brown to Penny streets:** Large retail units, leisure, non town centre retail uses, convenience / food

Priority Areas

- **Blakey Moor/Waves: F&B, leisure, service, convenience**
- **Darwen Street (top):** Independent, specialist, F&B
- **Railway Road:** Specialist, service, independent, convenience
- **Cathedral Quarter**: F&B, events
- **Upper King William Street/Sudell Cross:** Services and independents
- **Thwaites:** Destination retail, leisure, visitor attraction – outlet centre, themed leisure and visitor destination (urban Go Ape and go kart etc.)