

Appendix 3: Nottingham City Centre Healthcheck

Nottingham City Centre

Description

Nottingham city centre is the primary destination for shopping and leisure provision in the Greater Nottingham area. The centre therefore provides a comprehensive offer, geared at meeting the needs of those within the authority area, but also throughout the East Midlands region and the wider UK.

The retail offer in the city centre is underpinned by a strong range of key national multiple comparison operators, which are generally located within the Victoria Shopping Centre and in the central part of the city centre within a concentration running broadly north to south around Mansfield Road, Milton Street, Clumber Street, High Street, Bridlesmith Gate and Lister Gate. These locations provide a sizeable quantum of high-quality, modern retail space.

The city centre also benefits from an extensive independent retail and leisure sector, which is particularly focused in Hockley and Sneinton Market. The east-west retail corridor of independent shops between Derby Road and Sneinton Road is a real strength for the city centre, and a key attractor for visitors. Sneinton Market in particular, hosts a wide range of independent retail, business and leisure operators and has regular events scheduled throughout the year.

While the city centre lacks any large supermarket or superstore, there is representation from a range of smaller format national multiple foodstores, including Tesco Express Sainsbury's Local and Little Waitrose. This provision is supplemented by a good variety of independent and specialist food retailers, which generally occupy small-scale units distributed throughout the city centre.

The leisure sector, and particularly food and drink operators, play a key role in supporting the function of the city centre by driving footfall and activity into it, particularly helping to support the evening economy. Rock City is a well-established live music venue and nightclub, with capacity for around 2,000 people, which has hosted a number of high-profile international acts as well as smaller-scale and local artists. In addition, Nottingham's theatres, cinemas and arena draw from a large catchment area and ensure that the city centre attracts significant levels of activity until late into the evening.

In recent years, the city centre has benefitted from and continues to attract significant levels of public and private investment for large-scale regeneration and refurbishment projects. Currently, the most significant opportunity in this regard is the redevelopment of the former Broadmarsh Shopping Centre in the south of the city centre. Demolition and construction works relating to this project are well underway, and recent years have seen the development of a new Central Library and Nottingham College City Hub, a bus station and car park, and major public realm improvements.

Future plans for the Broadmarsh site involve the retention of the shopping centre's structural frame for independent retail, food and drink businesses, community spaces, and a Community Diagnostic Centre. A forthcoming site-wide masterplan will inform a future planning application for 1,000 new homes, 46,000 sq.m of commercial and office floorspace, and public greenspace. These

works have the potential to transform the southern part of the city centre and are a positive sign that investor confidence in Nottingham remains robust, even in light of the well-documented issues facing the retail and leisure sector within the wider UK (as outlined in Section 2 of the main report).

Moreover, the city centre is set to benefit from the significant housing growth which is anticipated to occur in the Greater Nottingham Planning Partnership Area over the period of the emerging Greater Nottingham Strategic Plan. The Preferred Approach in respect of the emerging plan was published for consultation between January and February 2023. Chapter five of this document sets out the draft housing strategy for the four Council areas in Greater Nottingham. It confirms that a minimum of 49,900 homes will be provided for between 2022 and 2038, distributed as follows.

Authority	Housing Target	Minimum Flexibility Buffer
Broxtowe Borough Council	6,240	10%
Gedling Borough Council	7,950	10%
Nottingham City Council	25,760	0
Rushcliffe Borough Council	9,950	10%
Greater Nottingham Total	49,900	N/A

Approximately 1,000 of these planned homes are expected to be delivered within the Broad Marsh area of the city centre. The new residents will bring additional trips, activity, footfall and expenditure to the centre which will help to support and enhance its vitality and viability.



Figure 1: The Victoria Shopping Centre provides for flagship comparison retailers like John Lewis.



Figure 2: Bridlesmith Gate hosts a vibrant mix of independents and high-end fashion brands.



Figure 3: The city centre contains many listed buildings with high heritage and aesthetic value.

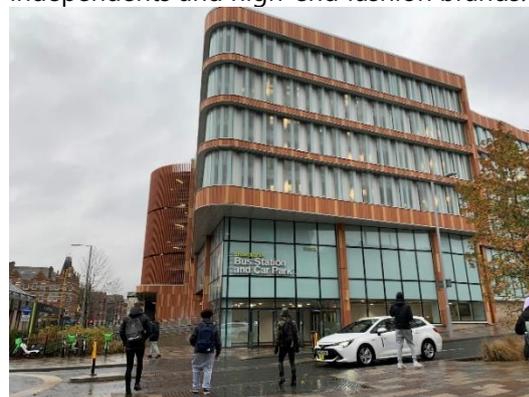


Figure 4: Nottingham has excellent standards of accessibility by public transport, cycle, and foot.

Table 1 City Centre Floorspace Composition (including Broadmarsh)

GOAD Category	Floorspace at 2023 (sq.m)	Floorspace at 2023 (%)	Floorspace UK Average at 2023 (%)
Comparison	92,180	24.1%	29.8%
Convenience	19,420	5.1%	15.5%
Financial	14,000	3.7%	6.4%
Leisure	161,040	42.1%	26.6%
Retail Service	16,870	4.4%	7.2%
Vacant	79,140	20.7%	13.9%
TOTAL	382,650	100.0%	100.0%

Source: Composition of the city centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of November 2023; UK Average from Experian Goad Report December 2023.

Table 2 City Centre Floorspace Composition (excluding Broadmarsh)

GOAD Category	Floorspace at 2023 (sq.m)	Floorspace at 2023 (%)	Floorspace UK Average at 2023 (%)
Comparison	92,180	26.2%	29.8%
Convenience	19,420	5.5%	15.5%
Financial	14,000	4.0%	6.4%
Leisure	161,040	45.7%	26.6%
Retail Service	16,870	4.8%	7.2%
Vacant	48,910	13.9%	13.9%
TOTAL	352,420	100.0%	100.0%

Source: Composition of the city centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of November 2023; UK Average from Experian Goad Report December 2023.

Table 3 City Centre Unit Composition (including Broadmarsh)

GOAD Category	Units at 2023	Units at 2023 (%)	Units UK Average at 2023 (%)
Comparison	312	22.6%	26.6%
Convenience	87	6.3%	9.3%
Financial	51	3.7%	8.5%
Leisure	461	33.4%	25.6%
Retail Service	177	12.8%	15.8%
Vacant	291	21.1%	14.1%
TOTAL	1,379	100.0%	100.0%

Source: City centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of November 2023; UK Average from Experian Goad Report December 2023.

Table 4 City Centre Unit Composition (excluding Broadmarsh)

GOAD Category	Units at 2023	Units at 2023 (%)	Units UK Average at 2023 (%)
Comparison	312	24.0%	26.6%
Convenience	87	6.7%	9.3%
Financial	51	3.9%	8.5%
Leisure	461	35.5%	25.6%
Retail Service	177	13.6%	15.8%
Vacant	212	16.3%	14.1%
TOTAL	1,300	100.0%	100.0%

Source: City centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of November 2023; UK Average from Experian Goad Report December 2023.

Uses

Nottingham city centre is anchored by a strong range of leisure service operators and comparison retailers.

There are 461 individual leisure service units within the city centre, accounting for approximately 161,040 sq.m gross of floorspace. This figure equates to 42.1% of the total commercial floorspace and is significantly higher than the national average for leisure service floorspace of 26.6%.

The leisure service offering within the city centre is diverse and reflects Nottingham's role as a major national and regional centre. It includes a range of restaurants and other food/beverage outlets, including national operators (such as Bills, Five Guys, Nando's, Pizza Express, Wagamama, and Zizzi). These are supplemented with an excellent variety of independent bars, cafés, restaurants, nightclubs and public houses.

Furthermore the city centre includes a Cineworld cinema at the Cornerhouse and the independent Broadway Cinema on Broad Street, three theatres, and a multi-use indoor arena. Rock City, a 2000-capacity live music venue and nightclub, hosts a mix of international and local artists which draw footfall and activity to the city centre in the evenings.

Other large footprint leisure uses include the ice rink, casino, bowling alley. There are also a series of museums and other tourist attractions including the National Justice Museum, the Nottingham Contemporary Art Gallery and City of Caves.

There is a concentration of leisure uses in the west of the city centre, particularly around the theatres and concert hall. The Cornerhouse provides a range of national multiple restaurants and bars, and there is plentiful further food and drink provision on the surrounding streets. Another concentration of popular bars, cafes and restaurants occurs in the Lace Market area in the east of the city centre, which also contains the arena and bowling alley.

The proportions of comparison retail units and floorspace in the city centre are lower than the current national average, with non-food shops accounting for 24.1% of commercial floorspace and 22.6% of units. This compares to UK averages of 29.8% and 26.6% respectively. It should be noted that these figures reflect the closure of a number of comparison operators which formerly occupied space at the Broadmarsh Shopping Centre, which is currently being redeveloped. If the Broadmarsh units are removed from the equation, then the respective proportions of comparison floorspace and units in the city centre grow to 26.2% and 24.0%, which are closer to (albeit still below) the national averages.

In respect of the operators, Nottingham is well represented by a range of national multiple non-food retailers, which are generally located in the central part of the city centre in a concentration running broadly north to south around Mansfield Road, Milton Street, Clumber Street, High Street,

Bridlesmith Gate and Lister Gate. These areas provide a significant quantum of modern retail floorspace, which includes some larger floorplates.

The Victoria Shopping Centre is a particular focus for high-profile, anchor comparison retailers, including flagship John Lewis and House of Fraser stores and a number of other major national multiples.

The midmarket fashion-based retailers are largely concentrated either in the Victoria Centre or on major routes within its vicinity. There is also a well-established cluster of high-end fashion retailers in the Bridlesmith Gate area, which traces its roots back to the opening of the first Paul Smith store in the 1970s. Paul Smith now occupies Willoughby House on the nearby Low Pavement, and the surrounding clothing retailers include Fred Perry, Hugo Boss and Ted Baker.

The city centre also benefits from a thriving independent comparison retail scene. Approximately 56% of non-food retail occupiers are independents, offering a robust and diverse range of goods. A number of upmarket and/or specialist independent comparison retailers are concentrated in The Exchange and Flying Horse Walk, the city centre's traditional shopping arcades.

Hockley and Sneinton Market are a particular focus for independent retail and leisure operators, with the east-west retail corridor of independent shops between Derby Road and Sneinton Road being a real strength for the city centre and a key attractor for visitors. The Hockley and Lace Market part of the city centre is known for having a quirky and eclectic offer and for its historic character, with landmark heritage assets including St Mary's Church and the former lace warehouse known as the Adams & Page Building. Sneinton Market hosts a wide range of specialist retail, business and leisure operators with regular events scheduled throughout the year.

With regard to convenience retail, the city centre provides for 19,420 sq.m of floorspace which equates to 5.1% of the total commercial floorspace. This level of provision is well below the UK average of 9.3% of floorspace.

The Broxtowe, Gedling, Nottingham City & Rushcliffe Retail Study of September 2015 highlighted the lack of any large supermarket or superstore within the city centre. This situation persists to this day, with the largest individual foodstore being the Tesco Express in the Victoria Centre (2,340 sq.m gross). There is, however, representation from a range of smaller format national multiple foodstores, including another six Tesco Express stores, three Sainsbury's Local shops, a Co-op and a Little Waitrose.

Overall, the city centre's 87 convenience goods operators offer a good range of shops including bakeries, health foods and specialist foods. Approximately 56% of the food retail offer comprises independent stores, predominantly in small-scale units which are distributed throughout the city centre.

Overall, it is considered that the comparison and convenience retail offering within Nottingham city centre is strong and diverse. Notwithstanding these figures being somewhat below the national averages, particularly in terms of the proportion of floorspace, residents do have good access to larger food stores within proximity of the city centre, and access to a range of smaller national multiple and independent convenience operators within the city centre itself.

There are a total of 177 individual retail service units within the city centre, accounting for approximately 16,870 sq.m of floorspace, or 4.4% of the commercial floorspace in the centre. While this figure is below the national average in terms of retail service floorspace, it is reflective of a regional centre of this scale which focusses more on its retail and leisure offer. The number and variety of retail service operators is considered appropriate to the serve the needs of Nottingham city centre, with no obvious gaps in provision. There are number of hairdressers and beauty salons, alongside travel agents, and other services such as opticians. Retail service operators are found throughout the city centre, typically in smaller units, and serve the catchment well.

Financial and business services account for approximately 14,000 sq.m or 3.7% of total floorspace in the city centre. The provision of financial and business uses falls below the national averages in terms of both the proportion of floorspace and units. However, the offer is considered to serve the requirements of the residents through the provision of banks, estate agents and other business services. These service units are distributed throughout the city centre.

Daytime/Evening Economy

Nottingham benefits from a genuinely multifunctional city centre underpinned by diverse leisure service and comparison retail offers, which are augmented by a strong office market catering to large-scale occupiers such as HSBC and E.ON as well as numerous small and medium-sized businesses. As such, the city centre remains open throughout the day and evening, encouraging activity throughout.

The daytime economic offer is primarily focused around the key comparison operators, especially around the Victoria Centre and the central north-south route through Clumber Street and the other main shopping streets. This offer is supported by extensive food and drink provision, which (during daylight hours) is primarily focused on cafés and restaurants. These operators act to drive and sustain footfall during the day, resulting in a robust daytime economy that befits Nottingham's status as a regional centre.

Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a town centre and boost the economy. The range of leisure operators (particularly food and drink uses) has grown considerably nationwide in recent years, and is now an integral part of the offer of Nottingham city centre. The

leisure service sector accounts for the greatest proportion of floorspace in the city centre, and forms one of its key strengths.

A number of the city's evening-time leisure operators, particularly its nightclubs, cater to students of Nottingham's two universities as well as weekend visitors. Nottingham Trent has a campus within the city centre which brings trade and footfall to these businesses. The Rock City live music venue and nightclub hosts a number of high-profile and local acts, as well as regular club nights, which play a key role in attracting visitors to the city centre after daylight hours.

In addition, Nottingham's theatres, cinemas and arena draw from a large catchment area, attracting significant footfall and ensuring that there is activity in the city centre until late into the evening. The 17 hotels within the city centre further support both the daytime and evening economies by encouraging additional spending and increasing the available expenditure ready to support businesses throughout the area.

Overall, Nottingham city centre benefits from strong daytime and evening economic offers.

Vacancies

At the time of our visit there were 291 vacant units noted throughout Nottingham city centre. These units account for approximately 79,140 sq.m, or 20.7% of the total commercial floorspace within the centre. This figure is higher than the current national average figure for vacant floorspace, of 13.9%. In terms of the proportion of units, the 21.1% of units identified as being vacant in the city centre is higher than the national average of 14.1%.

However, it should be noted that 79 of the identified vacancies are closures associated with the ongoing redevelopment of the Broadmarsh Shopping Centre (which is covered in more detail below under the 'Opportunity Sites' heading). If these units are removed from the calculation, then the vacancy rates fall to 13.9% of floorspace and 16.3% of units, which are closer to the relevant UK averages.

The vacant units vary in terms of location and size, and the total includes some of the larger units in the centre. Other than units associated with the Broadmarsh redevelopment, the largest vacancy recorded at the time of our survey was the former Debenhams premises at 36-44 Long Row, which extend to approximately 3,300 sq.m gross.

Local press reports state that the City Council has engaged in discussions with Longmead Capital, an investment management firm working on behalf of the site owners, to discuss future plans for the building. However, any future redevelopment is likely to be a 'lengthy process' than involves public consultation.¹ In the meantime, although the building is prominent in the street-scene, it is well-maintained and has high heritage value,

¹ See: <https://www.nottinghampost.com/news/nottingham-news/talks-taking-place-future-nottinghams-8100838>
[accessed 5 February 2024]

achieving Grade II listed status in March 2022. As a consequence, the detrimental impact that the vacancy has on the city centre is limited.

Other vacancies are spread across the city centre, including within the Victoria Centre. There is a particular concentration around Lister Gate and Carrington Street. These streets are located in the south of the city centre, where the works to the Broadmarsh Shopping Centre have caused disruption for the past few years.

In addition to this large-scale Broadmarsh redevelopment project, it was encouraging to note that at the time of our visit a high number of units were noted as being under alteration or in the process of being refurbished. These units were located throughout the city centre and represent positive improvements that will help to bring new activity, trade and footfall.

Thus, while the proportion of vacant units in particular represents some cause for concern, being higher than the national average, we consider the situation in Nottingham to be broadly comparable to other large city centres across the country. We recommend that the Council continue its monitoring of vacancy rates, particularly in areas of the city centre where empty units are concentrated, to ensure that the impacts of the ongoing redevelopment projects are fully understood and that the local authority is well-placed to adapt to the demands of a rapidly changing market.

To complement the vacancy findings set out above, we note that Nottingham City Council has carried out its own vacancy surveys of the city centre for the past ten years. The local authority's most recent results, of July 2023, identified a unit vacancy rate of 11.9%, down from 12.7% in 2022 and the lowest recorded since 2016.

We note that, as well as being carried out at a different time of year, the methodology used in the Council's survey differs from our own, with the main differences being that:

- our survey is based on one 'snapshot' survey of December 2023, whereas the local authority recorded whether units were vacant or occupied over a four-week period during July 2023; and that
- our survey area reflects the Goad area of the city centre, which comprises 1,379 units including the Broadmarsh Shopping Centre or 1,300 units without the Broadmarsh Shopping Centre, whereas the Council's survey encompassed a smaller area of 1,209 units.

Nonetheless, the downward trend identified by the Council is a positive finding that ties in with our own observations to the effect that the city centre is performing robustly even in the context of the challenges affecting vacancy rates across the wider UK.

Opportunity Sites

As noted above, the ongoing redevelopment of the Broadmarsh Shopping Centre represents a significant opportunity to regenerate and transform the south of the city centre. After a long period of decline and previous

plans for refurbishment that never came to fruition, the Broadmarsh site is now within Council ownership. Over the past four years the area has seen the development of a new Central Library and Nottingham College City Hub, a car park and bus station, and major public realm improvements.²

The vision for the future of the Broadmarsh site has been created by Thomas Heatherwick, a designer commissioned by the City Council and the Greater Broadmarsh Advisory Group, and informed by an extensive Council-led public consultation exercise known as the Big Conversation. In July 2023, it was announced that BDP had been commissioned to deliver a '**cohesive site-wide masterplan**' as a precursor to a planning application that will seek permission for 1,000 new homes, 46,000 sq.m of commercial and office floorspace, and new public greenspace.³

The planned redevelopment involves the retention of the structural frame of the former Broadmarsh shopping centre, which is to be repurposed for a wide variety of new uses including independent retail and food/drink businesses, together with innovative community spaces. A new Community Diagnostic Centre is due to open at the site in Spring 2025, and will support 75 new jobs whilst also bringing additional footfall and improving health outcomes across Nottingham.⁴

Other opportunity sites within Nottingham's primary shopping area include the identified vacancies, including the former Debenhams store on Long Row. It will be important to repurpose or reoccupy this floorspace for purposes that contribute to the city centre's vitality and viability.

Outside the primary shopping area, but still within the city centre boundary, the Island Quarter project is another major, large-scale redevelopment opportunity which has the potential to boost the wider centre offer. This mixed-use development (under outline planning permission reference 18/01354/POUT) includes 'Creative Market' uses, office space, residential dwellings, retail, hotel, and student accommodation development, with transport connections to the heart of the city centre. The early phases of the development have already opened to the public. These include new outdoor performance space, restaurants and bars, and an events hall available for private hire.

The number of regeneration opportunity sites across the city centre and the positive signs of both public and private sector investment, means that there are substantial positive indicators for Nottingham's future.

Market Summary

With reference to CoStar data sourced in February 2024, the average annual market rent per sq.ft currently achieved in Nottingham city centre

² See: <https://www.mynottinghamnews.co.uk/nottinghams-4bn-development-programme-highlights-core-citys-ongoing-regeneration/> [accessed 5 February 2024].

³ See: <https://www.architectsjournal.co.uk/news/bdp-picked-to-deliver-heatherwicks-nottingham-broad-marsh-masterplan> [accessed 5 February 2024].

⁴ See: https://www.nottinghampost.com/news/local-news/new-nottingham-health-facility-built-9070877_amp [accessed 6 February 2024].

is £29.97 per sq.ft, with this figure representing a small (-1.0%) decrease on the £30.26 per sq.ft average achieved in the previous 12-month period.

The average market sale price per sq.ft has also declined over the past 12-month period, from £195 per sq.ft to £180 per sq.ft (-8.1%). CoStar forecasts that market sale prices will remain fairly static over the next five years, hovering around the £175 mark before rising to approximately £183 per sq.ft by 2029.

In respect of yields, CoStar find that the current market yield is 8.2%, with this figure rising by 0.6% in the previous 12-month period. The market yield in the city centre is forecast to remain largely static over the next five years, with the figure estimated to fall marginally to 8.0% by 2029.

Increases in rents and decreases in yields are generally considered positive signs in respect of investor confidence in a given location. Nottingham's performance in these areas has and is forecast to remain relatively consistent, a sign that investor confidence in the city centre is robust despite the various well-documented challenges facing the retail and leisure sector (as outlined in Section 2 of the main report).

In respect of the probability of leasing vacant premises, 50% of premises can be anticipated to be leased after around 10.2 months on the market, with approximately 80% of premises being let within 18 months.

Pedestrian Flows

A considerable amount of pedestrian activity was observed throughout all areas of Nottingham city centre at different parts of the day and evening. During the daytime, activity was generally busiest along the north-south retail spine and within the Victoria Shopping Centre. The pedestrianised nature of the main shopping streets in the city centre results in a compact and walkable environment, which accommodates relatively straightforward movement on foot. We observed a number of linked trips between different operators in this central part of the city centre.

At the time of our field visit, the 'Winter Wonderland' Christmas Market was being held in the Old Market Square area of the city centre. This proved to be a popular attraction which drew substantial crowds.

In the east of the city centre, the Hockley and Sneinton Market areas drew significant levels of footfall, with the flows being particularly strong along the east-west retail corridor of independent shops between Derby Road and Sneinton Road.

In general pedestrian activity became lighter towards the south and at the western periphery, although there was consistently some level of foot traffic. The relative lack of activity in the southern part is largely attributable to the lack of active frontages and the construction works associated with the ongoing Broadmarsh redevelopment. In the west of the centre, retail and leisure uses become less concentrated, with the balance tipping more towards office and residential uses which draw less footfall during the day.

Overall, the city centre benefits from a good level of footfall driven by its strong comparison retail and leisure services offer and a number of key anchors.

Accessibility

Nottingham city centre enjoys an excellent standard of accessibility by public transport. Nottingham Railway Station lies a short walk to the south of the primary shopping area and provides local services to destinations such as Creswell Crags, Newstead Abbey and Newark, as well as direct trains to Sheffield, Leeds, Barnsley and Chesterfield.

In addition, the city centre is served by five tram stops, which form part of the Nottingham Express Transit (NET) network. NET services run as frequently as every seven minutes at peak times and connect the city centre to destinations as far as Hucknall and Phoenix Park in the north, Clifton in the south, and Toton Lane in the west. Seven park and ride facilities provide for 5,000 free parking spaces, allowing visitors to travel in and out of the city centre without using their cars.

The new Broadmarsh Bus Station operates 24 hours per day. The station has nine departure bays for local bus services, which run to destinations including Newark, Bingham, Coalville, East Midlands Airport, Keyworth, Cotgrave, and Loughborough. A further two bays are used for National Express coach services which link Nottingham to the wider UK.

There is also a 10-bay Victoria Bus Station in the north of the city centre, which provides plentiful frequent services calling at the Shopping Centre and along Lower Parliament Street, Milton Street and Mansfield Road. This station provides connections to destinations including Derby, Mansfield, Chesterfield, Cotmanhay, Alfreton, New Ollerton, and Sutton-in-Ashfield.

In terms of access by bicycle, the city centre benefits from some cycling routes and infrastructure is being improved through a City Centre Cycle Routes scheme. These works involve the installation of new crossings and will link existing routes with new lanes and are due to be completed in 2024.⁵ Cycle parking and bike lockers are provided throughout the city centre.

Road access to the city centre by private car has recently been improved through works associated with the new Broad Marsh Bus Station and Car Park. These enhancements include a new Southern Relief Route which provides a more appropriate route for through traffic connecting Maid Marian Way with London Road.⁶ The car park provides for 1,304 spaces and allows easy access to all parts of the city centre via six key routes.

⁵ See: <https://www.transportnottingham.com/new-crossings-to-be-installed-as-city-centre-cycle-route-works-press-ahead/> [accessed 5 February 2024]

⁶ See: <https://www.transportnottingham.com/everything-you-need-to-know-about-the-new-broad-marsh-car-park/> [accessed 5 February 2024]

With regard to accessibility for people with impairments or mobility requirements, travelling north to south through the city centre could prove challenging due to the local topography. Some of the more historic streets are narrow and windy, which could also be difficult for some visitors to navigate. In general, however, the pavements are even and well-maintained, the streets are wide and clutter free, and there is good provision of benches and other street furniture available for those who need to stop and rest.

Perception of Safety

Due to its relatively large size, the perception of crime varies somewhat throughout Nottingham city centre. Notwithstanding, the consistent footfall throughout the centre contributes to a general feeling of safety and security during the daytime.

As well as being busy with foot traffic, the main retail areas in the city centre and other principal streets provide plentiful active frontages and the linear layouts allow for a high degree of natural and passive surveillance. All of these factors mean that there are few opportunities to commit crime during the day.

At night, an extensive network of street lighting ensures the city centre is well-lit, and visible CCTV cameras (operated by the City Council 24 hours per day) act to deter crime and increase perceptions of safety. Moreover, as detailed under the 'Daytime/Evening Economy' heading, Nottingham's strong night-time leisure provision brings activity across the city centre even well after daylight hours. The new Broad Marsh Bus Station is open 24 hours per day, and has CCTV and on-site security staff to ensure a safe waiting environment for passengers.

However, the historic nature of much of the city centre means that several of the side streets are narrow, windy and less well-monitored. Occasionally, evidence of vandalism and anti-social behaviour such as graffiti were observed in these secondary locations.

Environmental Quality

The public realm in the city centre is generally of a very high standard, with Nottingham benefitting from a number of valuable heritage assets including numerous of Grade II listed buildings. The traditional shopping streets in the Lace Market and Old Market Square areas, together with The Exchange and Flying Horse Walk arcades, provide a unique and high-quality urban environment.

Within the main retail core, these assets are set within wide streets that provide visually interesting and attractive street-scenes with extensive active frontages. The north-south retail spine of the city centre is pedestrianised, which contributes to a pleasant shopping environment free from the noise and pollution impacts of car traffic. The centre is generally clean and tidy, although we did observe some limited litter on the day of our visit.

This outdoor environment is complemented by the modern Victoria Shopping Centre, which has benefitted from major investment including a programme of refurbishment works completed in 2015. The shopping centre feels spacious, easily navigable and well-maintained.

Notwithstanding, there are parts of the city centre where the environmental quality is of a somewhat poorer standard. The south of the city centre is generally lower in environmental quality, and the Broadmarsh redevelopment has exacerbated this issue in the short-term by creating a large area of inactive frontages and part-finished demolition/construction works.

Nottingham city centre is also somewhat lacking in green/open space, although there is tree planting in the pedestrianised areas. The forthcoming Broadmarsh proposals are anticipated to alleviate this issue through the inclusion of a new football pitch-sized 'Green Heart' public space, which would lie at the centre of the redeveloped site. It should also be noted that Nottingham Castle, a significant tourist attraction which offers some greenspace, is located just outside and to the west of the defined Primary Shopping Area and Goad area (although still within the overall City Centre Boundary).

Conclusions

In summary, Nottingham benefits from a genuinely multifunctional city centre underpinned by diverse leisure service and comparison retail offers, which are augmented by a strong office market catering to large-scale occupiers as well as numerous small and medium-sized businesses. As such, the city centre remains open throughout the day and evening, encouraging activity throughout.

While the proportion of vacant units in particular represents some cause for concern, being higher than the national average, we consider the situation in Nottingham to be broadly comparable to other large city centres across the country. We recommend ongoing monitoring of vacancy rates, particularly in areas of the city centre where empty units are concentrated, to ensure that the impacts of the ongoing redevelopment projects are fully understood and that the local authority is well-placed to adapt to the demands of a rapidly changing market.

The ongoing redevelopment of the Broadmarsh Shopping Centre represents a significant opportunity to regenerate and transform the south of the city centre. After a long period of decline and previous plans for refurbishment that never came to fruition, the Broadmarsh site is now within Council ownership. Over the past four years the area has seen the development of a new Central Library and Nottingham College City Hub, a car park and bus station, and major public realm improvements.

The vision for the future of the Broadmarsh site involves the retention of the structural frame of the former Broadmarsh shopping centre, which is to be repurposed for a wide variety of new uses including independent retail and food/drink businesses, together with innovative community spaces,

and a new Community Diagnostic Centre due to open in Spring 2025. BDP has been commissioned to deliver a 'cohesive site-wide masterplan' as a precursor to a planning application that will seek permission for 1,000 new homes, 46,000 sq.m of commercial and office floorspace, and new public greenspace.

A considerable amount of pedestrian activity was observed throughout all areas of Nottingham city centre at different parts of the day and evening. During the daytime, activity was generally busiest along the north-south retail spine and within the Victoria Shopping Centre, with the independent shops and leisure operators in the Hockley and Sneinton Market areas in the east also drawing substantial levels of footfall. The pedestrianised nature of the main shopping streets in the city centre results in a compact and walkable environment, which accommodates relatively straightforward movement on foot. We observed a number of linked trips between different operators in this central part of the city centre. Overall, the city centre benefits from a good level of footfall driven by its strong comparison retail and leisure services offer and a number of key anchors.

Nottingham city centre enjoys an excellent standard of accessibility by public transport. Road access to the city centre by private car has recently been improved through works associated with the new Broad Marsh Bus Station and Car Park. With regard to accessibility for people with impairments or mobility requirements, travelling north to south through the city centre could prove challenging due to the local topography. Some of the more historic streets are narrow and windy, which could also be difficult for some visitors to navigate. In general, however, the pavements are even and well-maintained, the streets are wide and clutter free, and there is good provision of benches and other street furniture available for those who need to stop and rest.

The public realm in the city centre is generally of a very high standard, with Nottingham benefitting from a number of valuable heritage assets including numerous of Grade II listed buildings. Notwithstanding, there are parts of the city centre where the environmental quality is of a somewhat poorer standard. The south of the city centre is generally lower in environmental quality, and the Broadmarsh redevelopment has exacerbated this issue in the short-term by creating a large area of inactive frontages and part-finished demolition/construction works.

Nottingham city centre is also somewhat lacking in green/open space, although there is tree planting in the pedestrianised areas. The forthcoming Broadmarsh proposals are anticipated to alleviate this issue through the inclusion of a new football pitch-sized 'Green Heart' public space, which would lie at the centre of the redeveloped site.

Overall, Nottingham city centre is considered to be vital and viable, benefitting from robust daytime and night-time economies that befit its status as a regional centre, excellent accessibility and a high level of environmental quality. The number of regeneration opportunity sites

across the city centre and the positive signs of both public and private sector investment, means that there are substantial positive indicators for Nottingham's future.



Legend

- Comparison
- Convenience
- Financial & Business Services
- Leisure Services
- Retail Services
- Vacant
- Miscellaneous



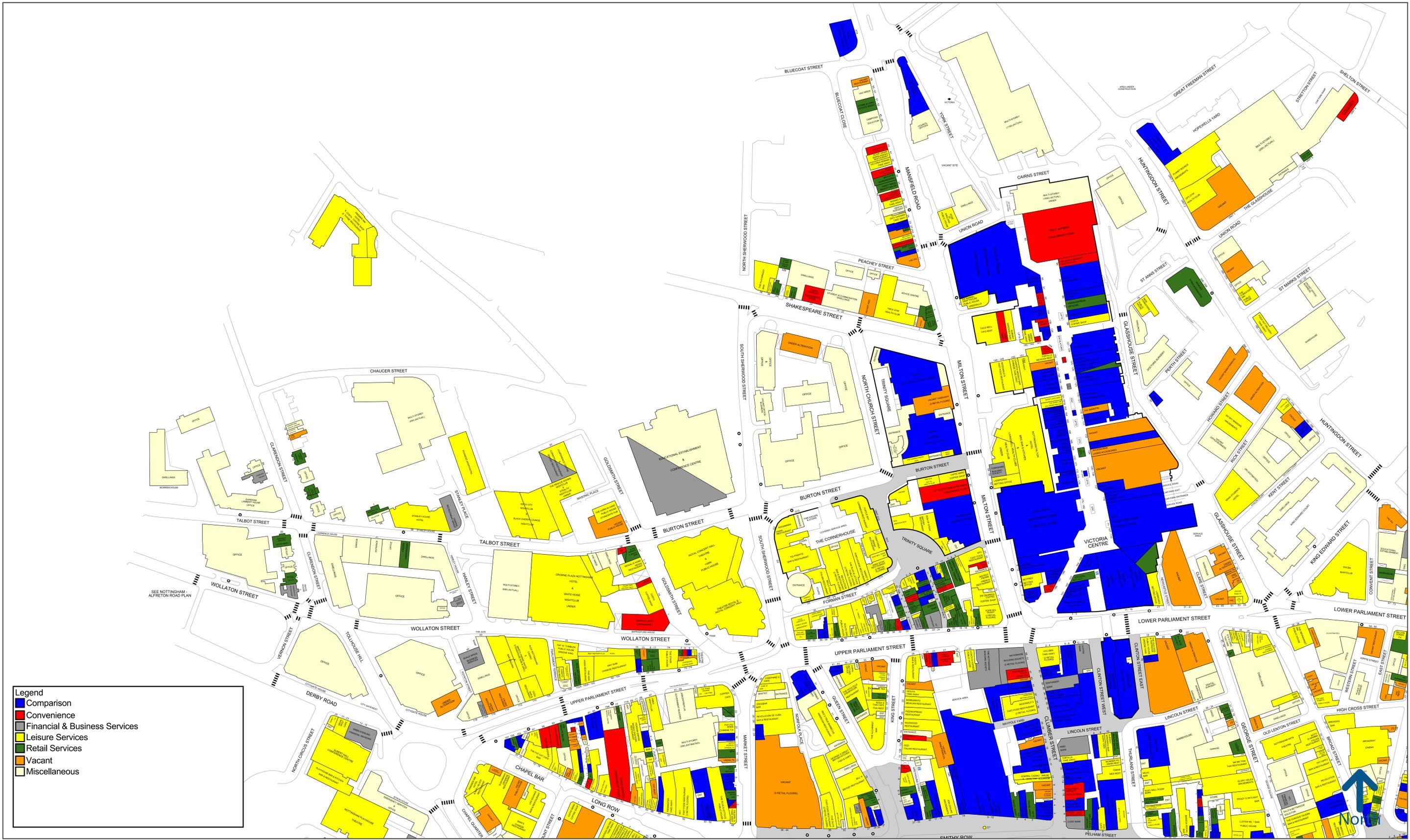
125 metres

Experian Goad Plan Created: 01/02/2024
Created By: Nexus Planning Ltd



Copyright and confidentiality Experian, 2022. © Crown copyright and database rights 2022. OS 100019885

For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011



Legend

- Comparison
- Convenience
- Financial & Business Services
- Leisure Services
- Retail Services
- Vacant
- Miscellaneous

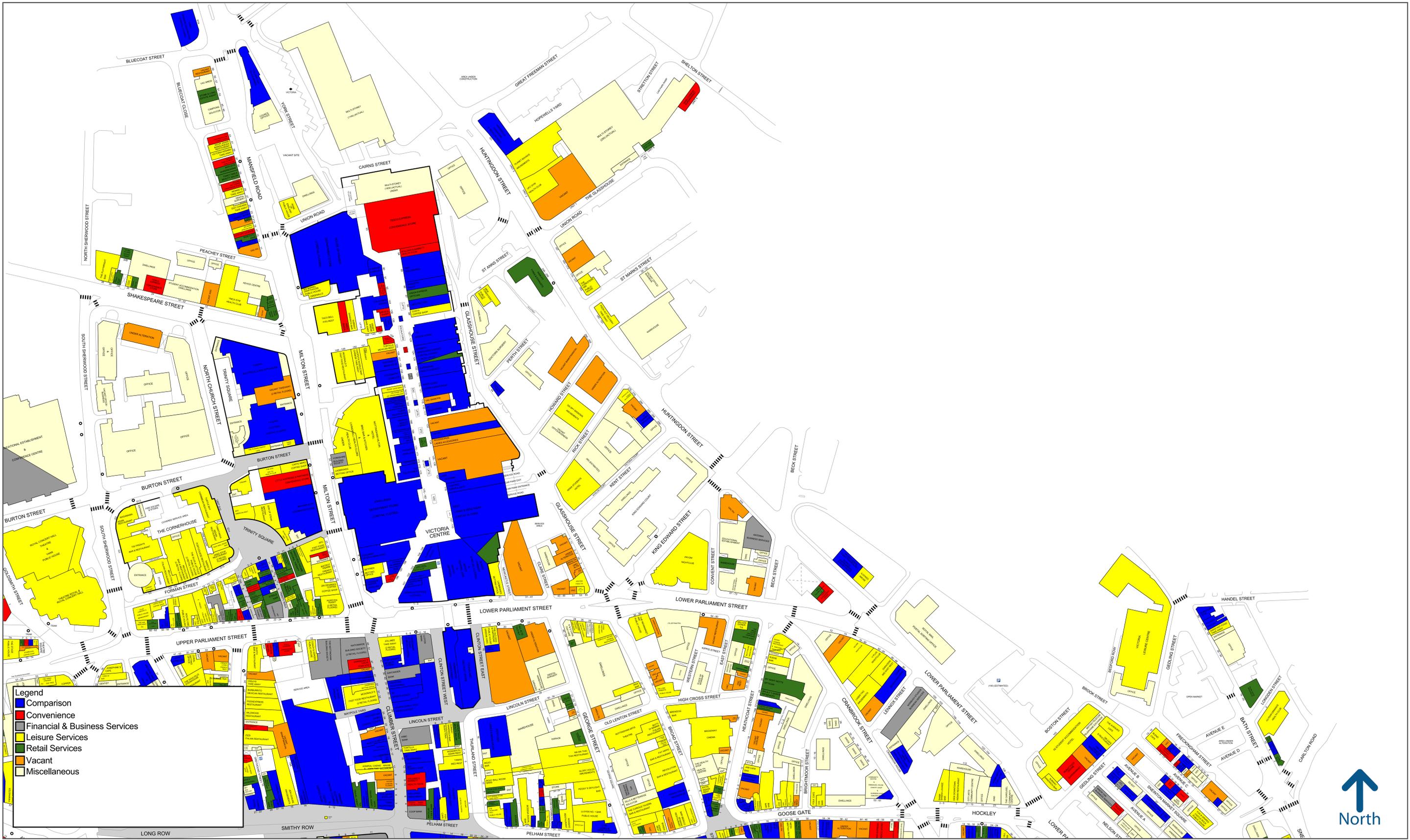
50 metres

Experian Goad Plan Created: 01/02/2024
Created By: Nexus Planning Ltd



Copyright and confidentiality Experian, 2022. © Crown copyright and database rights 2022. OS 100019885

For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011



Legend

- Comparison
- Convenience
- Financial & Business Services
- Leisure Services
- Retail Services
- Vacant
- Miscellaneous

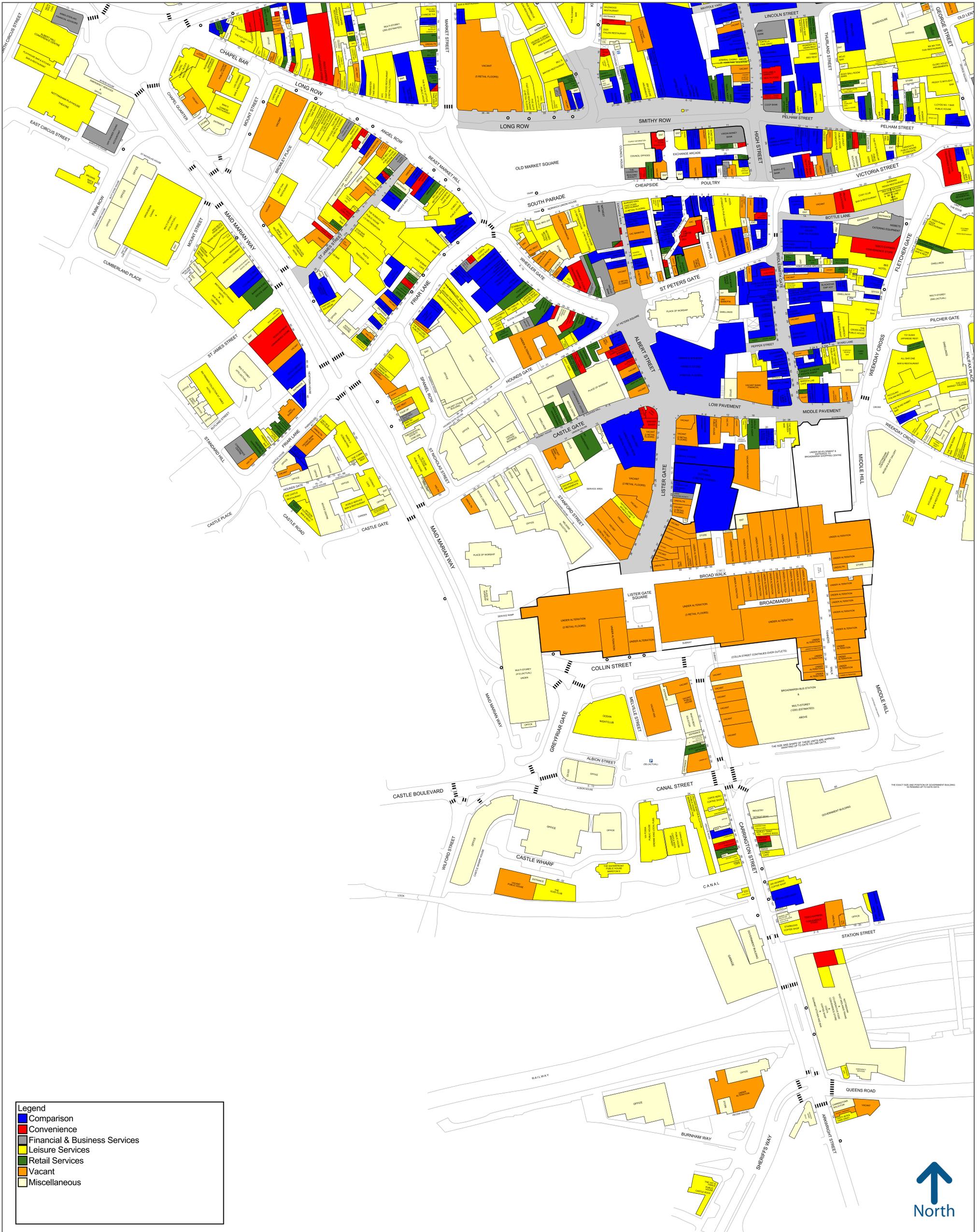
50 metres

Experian Goad Plan Created: 01/02/2024
Created By: Nexus Planning Ltd



Copyright and confidentiality Experian, 2022. © Crown copyright and database rights 2022. OS 100019885

For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011



Legend

- Comparison
- Convenience
- Financial & Business Services
- Leisure Services
- Retail Services
- Vacant
- Miscellaneous



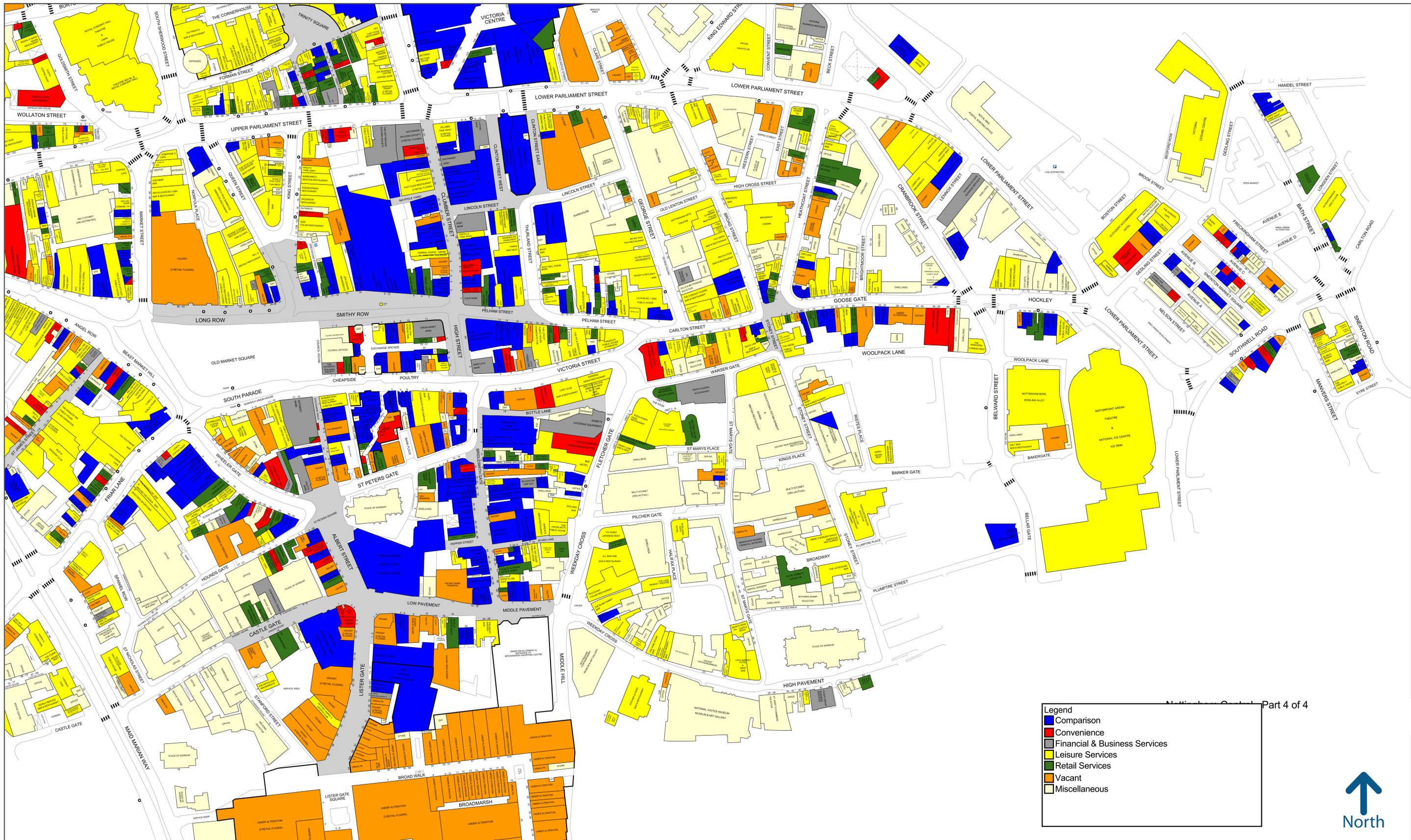
50 metres

Copyright and confidentiality Experian, 2022. © Crown copyright and database rights 2022. OS 100019885



Experian Goad Plan Created: 01/02/2024
Created By: Nexus Planning Ltd

For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011



Part 4 of 4

Legend

- Comparison
- Convenience
- Financial & Business Services
- Leisure Services
- Retail Services
- Vacant
- Miscellaneous



50 metres

Experian Goad Plan Created: 01/02/2024
Created By: Nexus Planning Ltd



Copyright and confidentiality Experian, 2022. © Crown copyright and database rights 2022. OS 100019885

For more information on our products and services:
www.experian.co.uk/goad | goad.sales@uk.experian.com | 0845 601 6011