Town Centre Review Programme

on behalf of

East Staffordshire Borough Council

February 2016

Contents

Executive Summary

Clockwork City was commissioned by East Staffordshire Borough Council (ESBC) to conduct a Town Centre Review for Burton upon Trent, Tutbury and Uttoxeter, and provide guidance for future regeneration efforts in these locations. The Review was specifically asked to look at the potential impact of providing free parking and free public WiFi in each area.

A mixture of online and on-street surveys, desktop research and stakeholder interviews were used to build the report. The survey results show that town centre users are almost entirely 'local', and that the perception of Burton upon Trent and Uttoxeter in the public conciousness is average to poor. Considerable effort should be given to raising both the perceived and actual quality of both locations, with an awareness of the specific target markets at the heart of decision-making.

Car Parking

- The current 'free after three' parking charge structure in Burton upon Trent resonates well with the business community. It should be continued and reviewed after twelve months.
- Parking should be considered a tool to achieve a broader goal rather than a final outcome. For Burton upon Trent, this should lead to further discussion on the future development of evening and night time economy assets and opportunities.
- In Uttoxeter, parking discussions should be built around developing the niche / independent business community (including the leisure, food and beverage sector), as a means of attracting community members back into the town centre. For example, the development and/or enhancement of a public realm focal point, such as Carter's Square.

WiFi

- Free, public WiFi should be considered a tool to achieve a broader goal rather than a final outcome. While connectivity in the public realm will eventually become an expected service, free public WiFi will not have the desired social or economic effect in either town centre.
- Developing business and community skills to become 'discoverable' online, as well as provide regular, relevant content, would support town centre resilience
- Using a WiFi network as part of a parking or wayfinding project would make WiFi a 'working' asset for ESBC rather than merely a substitute for local 4G signal

Tutbury

- This report recommends letting Tutbury continue as it is. Support may be offered through shop front grants and planning control to ensure the village feel is retained, but there is already plenty of free parking and no obvious public realm where free WiFi would be useful.

General

- Local leadership is essential. Bringing together the community, public and private sectors to drive a common sense of place for both locations will ultimately lead to stronger, resilient town centres with a clear connection to their local and regional catchment.
- Public perception of the parking scheme and the general appeal of both centres should be part of any review work conducted in the future

Programme Outline

Clockwork City was commissioned by East Staffordshire Borough Council (ESBC) to conduct a Town Centre Review for Burton upon Trent, Tutbury and Uttoxeter, and provide guidance for future regeneration efforts in these locations. The Review was specifically asked to look at the potential of providing free parking and free public WiFi in each area.

Methodology

The Town Centre Review Programme was split into three stages; 'Discovery', 'Development' and 'Delivery'.

The initial 'Discovery' phase was used to build a qualitative sense of place and quantitative baseline for each study location. This involved site visits to all three locations where a 'first impressions' exercise was undertaken that examined public realm appearance, accessibility, economic diversity and, specifically for this Programme, the online first impression was recorded too (i.e., how easy was it to find information online about a place). During this phase, the WiFi feasibility studies were also conducted.

The 'Development' phase saw local stakeholder networks engaged through a series of face-to-face and phone interviews. The shopping centre managers in both town centres were engaged, as was the Uttoxeter Town Team lead and representatives from Uttoxeter Town Council, Staffordshire County Council, a cross-party group of Councillors from ESBC and the Burton upon Trent market management. Three survey tools were also deployed to capture town centre user opinions and data; an online survey was sent borough-wide using ESBC channels, while a town centre user survey was conducted in Burton upon Trent and Uttoxeter over two Friday and Saturdays in November 2015. ESBC data on parking levels and costs was also obtained.

The results of the baselining and stakeholder-facing elements were then reviewed and further developed through desktop analysis in the 'Delivery' phase. This data contributed to the final report on the feasibility of free parking and public WiFi projects, and informed further recommendations for each location.

Disclaimer

This report has been produced using available information at the time of publishing and primary research developed to meet the report requirements. All recommendations given in this report are for ESBC's consideration and further review, and Clockwork City Limited cannot be held liable for any loss, damage, expense or otherwise incurred or arising by any person using or relying solely on the information in this report.

First Impressions

Burton upon Trent

The town centre feels large with a reasonably diverse range of shops and services on offer. The three shopping centres (Burton Place, Coopers Square, Octagon) have over 150 retailers between them that provide a 'high street' offer, and there are several niche and seemingly independent retailers outside these (cycling, guitar/music shops). There is also a burgeoning evening economy and leisure area based around the cinema and future restaurant developments.

There were however a number of vacant units, especially on the walk from the train station to the centre along Station Street. As a gateway to the town centre, the journey from the station feels forgotten; it is dominated on one side by the brewery, while the road is (understandably) busy with HGV traffic. There was little wayfinding, other than a tiny sign outside the station, to lead people towards the town centre or give confidence that someone was walking in the right direction. This was an issue repeated once within the town centre area too, and the existing wayfinding tools would benefit from a more prominent position and pedestrian-friendly placement.

The public realm was clean and generally well-maintained, certainly nothing out of the ordinary that could not be levelled at any town centre. There were areas for improvement (more public seating for example), especially as the overall impression of Burton upon Trent was of a place that felt busy without anywhere specifically within the public realm to 'rest' rather than 'wander'. There were plenty of people throughout the town centre, especially the Market Place, and the area appears well set to cater for a regional 'high street' shopping audience.

There was a reasonable if limited amount of information online about Burton upon Trent. This was mainly from www.enjoyeaststaffs.co.uk, as well as Tripadvisor and a local heritage society. Searching for 'shopping' brings up hits for the three shopping centres. Similarly on Twitter, there was little common presence to encourage casual users to 'explore' the local offer, and it was therefore hard to form an online opinion of what Burton upon Trent has to offer.

Uttoxeter

The town centre felt much smaller compared to Burton upon Trent. The pedestrianised High Street was a pleasant public realm environment, although the Maltings area is in need of serious redevelopment and investment; it accounted for most of the vacant units seen during Clockwork City's first visit, and makes High Street feel emptier and more run down that it is.

The atmosphere in Uttoxeter was friendly, and the impression was given that many shops are independent businesses. This would make sense given the proximity of Burton upon Trent and other competitors to the town, and marks Uttoxeter out as a point of difference for consumers in the region. Uttoxeter is clearly well known for the racecourse, but wayfinding signage in the town centre was hard to find and therefore as a visitor, Clockwork City did not know the racecourse was eighteen minutes walk from the Town Hall, or that there was a Cinebowl ten minutes away. Helping people discover the opportunities around them once in a destination is a great way to sustain interest in a place by developing 'linked trips' and providing a more rounded visitor experience.

Overall, the first impression of Uttoxeter was a mixed one. It felt friendly, a bit unique, welcoming. But it also felt like a town in transition, split by the A518 into one side (Carter's Square, smaller businesses, traditional high street) and another (Cinebowl, Tesco, Frankie & Bennys), with little seemingly to connect them at the moment. The public realm experience would benefit from investment, and specific attention should be paid to units and state of the Maltings site.

Online, Uttoxeter is dominated by the racecourse and the golf club. When searching for local events, several come up in locations outside of Uttoxeter, specifically Derby. As with Burton upon Trent, there appears to be little, easily discoverable information on what Uttoxeter town centre has to offer. This issue though is easily addressed though, through some simple Digital Business Skills training[1] and utilising free resources, such as Google Business[2].

1 http://www.d2n2skills.co.uk/files/uploads/1425919984.pdf
2 https://www.google.com/business/

Tutbury

Tutbury is substantially different to Burton upon Trent and Uttoxeter. As a destination, its main attractions are the collection of shops, pubs and takeaways running along High Street and Lower High Street, as well as Tutbury Castle, a five minute walk away. On Clockwork City's visits to Tutbury, it felt like an attractive, community High Street with some specialist niche retail that appears to be trading well. The mix of businesses appear to serve 'commuting families', especially during the evening, mean that the high street has a diverse base for an area so geographically small and can be considered a resilient, small high street.

In the context of this report, there is already ample free parking provision on High Street and off Duke Street, and there are spaces servicing the cluster of small businesses at the junction of High Street and Lower High Street. There is no need for more, and certainly no need to remove the existing parking arrangements.

Public WiFi would also have little beneficial consequence in Tutbury; there is no obvious pedestrian core where people would make use of this, and it seems far more likely that people would use places such as the Dog & Partridge pub to have a drink, read the paper and catch up on emails.

Tutbury, as with any local centre, will always benefit from attention and support. This report recommends that existing free parking in Tutbury remains, and that public WiFi be discounted. If a programme of activity was to be developed for the high street, ESBC may wish to consider:

- Building frontage grants along High Street to ensure the 'village feel' does not get lost through shop front developments, for example
- Engage with resident groups to ensure future tenant mix reflect community needs
- Support local businesses in engaging with consumers online, either through fibre-to-premises broadband programmes or skills training (such as the national Digital Business Skills programme)
- Providing public seating / outdoor cafe space, encouraging activity in the public realm

Survey Themes

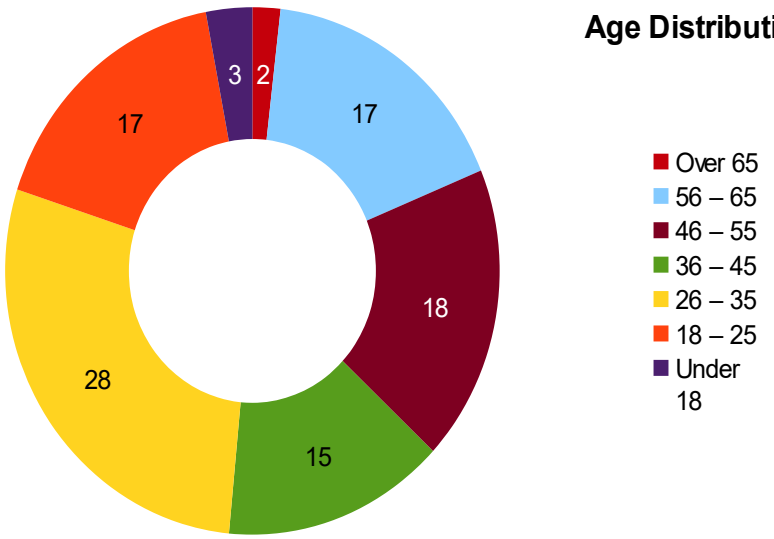
This section reviews the emerging themes from the survey results, both online and on-street, in order to build a picture of the usage and perceptions held of both centres.

About the Survey Population

In total, 174 people responded to the various survey tools. The online survey had 86 responses, whilst 48 people were engaged with on-street in Burton upon Trent, and a further 40 in Uttoxeter. The total survey population was 58% female, 42 % male, and Figure 1 shows the age ranges of respondents both on-street and online.

Figure 1

Age Distribution (%)



Town Centre Users are Local

Almost all survey respondents came from within the Derbyshire (DE) or Staffordshire (ST) postcode areas. The only respondent across any format that did not come from these areas was from Birmingham, 25 miles away. Neither location was visited during an event day, and while event days may see a more geographically varied crowd, it appears both locations are used predominantly by a regional audience.

People Visit Regularly for Food Shopping

Both centres are used at least weekly for food shopping (BuT: 71%, U: 81%), which was by far the most common response when people were asked how often they used certain services in the area. Beyond this, roughly a third of all respondents (between 27% and 36%) use the town centres at least weekly for high street shopping, leisure (such as bars, restaurants, events) and services (banks, hairdressing). There was little correlation between the use of the town centre for food shopping and a consistent (i.e. at least weekly) use for any other activity.

Local Use can be Increased...

Even though Burton upon Trent and Uttoxeter are used regularly for food shopping, a significant proportion of respondents said they '*infrequently*' or '*never*' used either centre for all of the services mentioned above. Figures 2 and 3 show the frequency of use patterns in Burton upon Trent and Uttoxeter respectively. There is considerable potential to attract local users in the '*Leisure*' area of evening and cultural economies, where a high number of people do not use the town centre regularly (BuT: 44%, U: 39%). Uttoxeter is also clearly not regarded as a '*shopping*' destination, with 60% of people saying they *infrequently*' or '*never*' use the town centre for this purpose.

Figure 2: Frequency & Type of Use, Burton-upon-Trent (%)

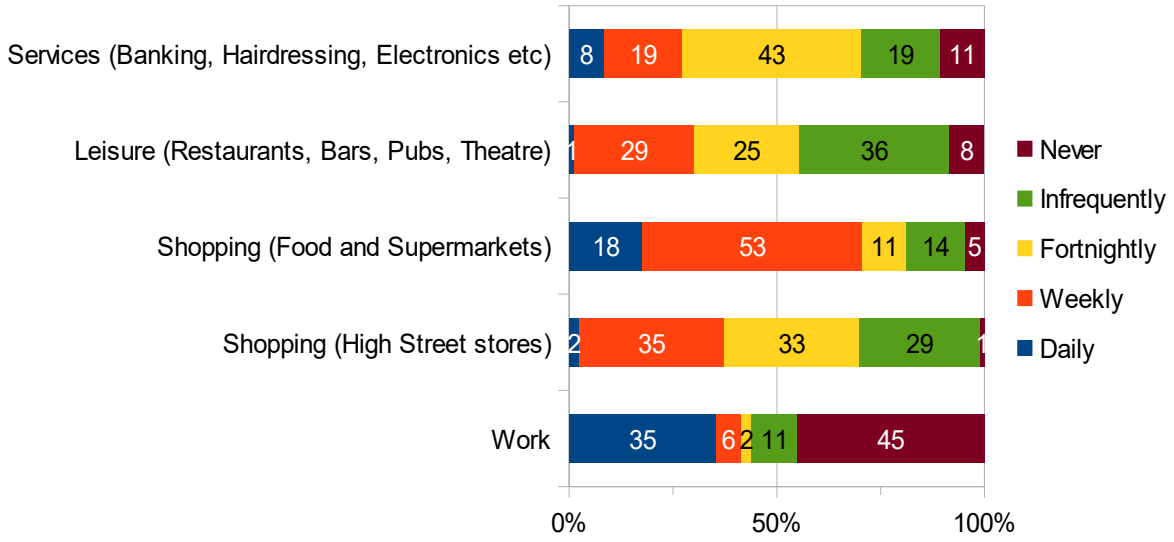
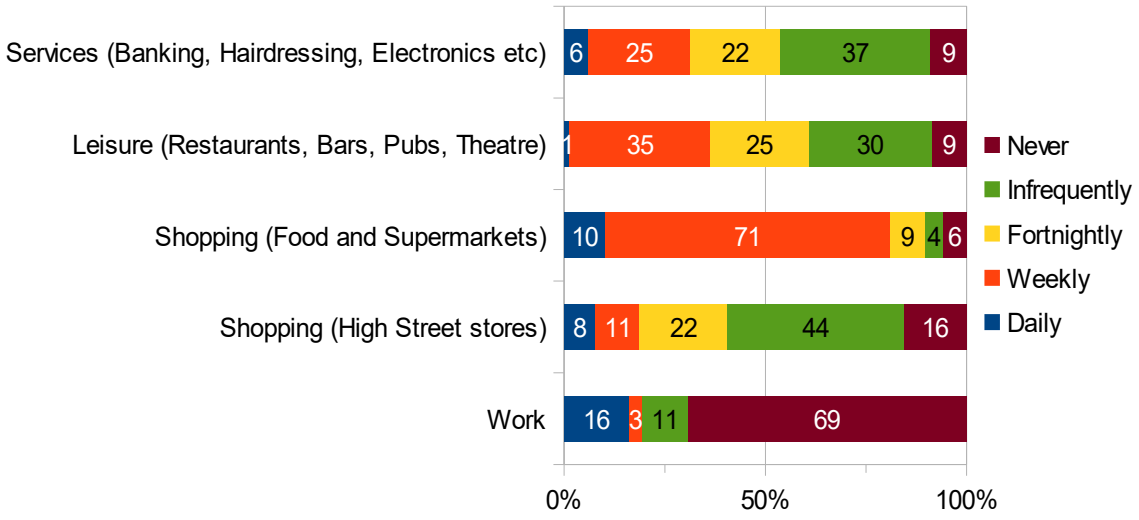


Figure 3: Frequency & Type of Use, Uttoxeter (%)



...But This Requires a Shift in Perceptions

The perception of a town or city can play a hugely influential role in the decision-making process of a shopper, tourist, resident or potential new business start-up. A place can be statistically very safe, but if it *feels* unsafe, people may avoid it. It is the battle of hearts and minds.

While the frequency of use data in Figures 2 and 3 does show two town centres with reasonable levels of activity, local respondents' perceptions of these places offers further insight into potential opportunities for Burton upon Trent and Uttoxeter. Figures 4 and 5 show a breakdown of the perception of certain services. '*Working*' has been removed from both figures due to the very high level of 'Don't Know' responses.

Figure 4: Perceptions of Burton-upon-Trent (%)

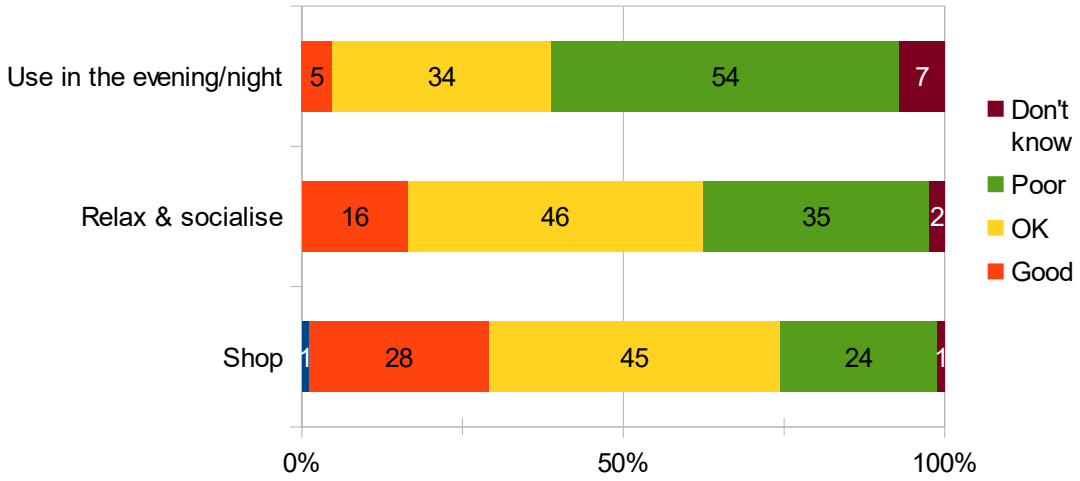
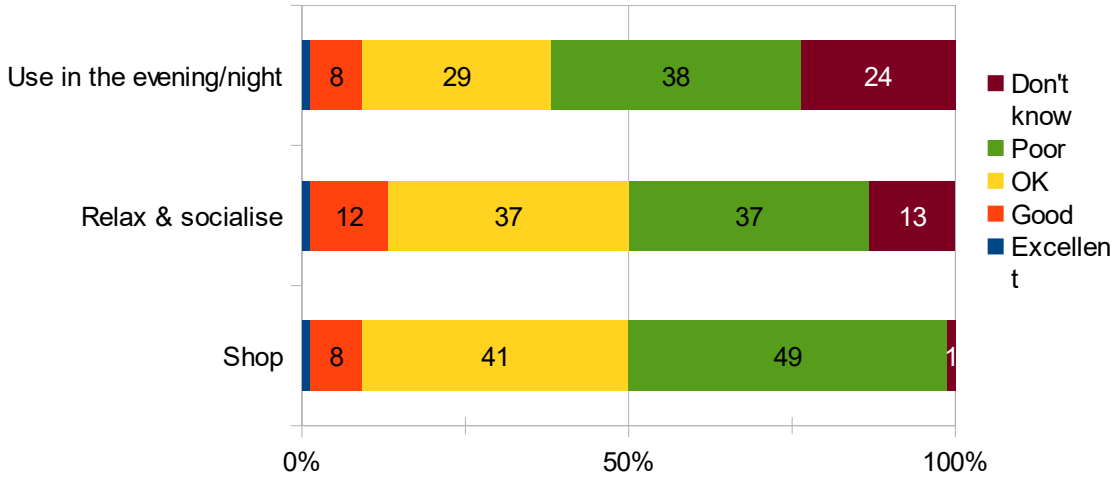


Figure 5: Perceptions of Uttoxeter (%)



What is clear is that there is general apathy and dissatisfaction from some of the sample population about their respective town centres. Both are regarded as '*poor*' places to visit in the post-work and evening period (BuT: 54%, U: 38%), and they score equally poorly when considered as a place to '*relax and socialise*' (BuT: 35%, U: 37%). Unsurprisingly, Burton upon Trent scores reasonably well as a place to '*shop*' (28% Good, 24% Poor) compared to Uttoxeter (8% Good, 49% Poor).

These findings indicate valuable opportunities for both centres to consider. As town centres become more than retail destinations[3], the experience of visiting needs to be supported by a diversity of uses. Leisure businesses during the day and evening periods would create an incentive to dwell in the town centre, bring a 'buzz' to the area, and help form a more resilient, non-retail dominant economy.

Specifics about Burton upon Trent

Respondents were asked to give their views on what makes Burton upon Trent an interesting place, what they would do to improve the area, and how they would describe it; Figure 6 provides an overview.

Figure 6: Comments about Burton upon Trent	
Positive	**Negative**
Interesting history	Not enough diversity
Accessibility	Rundown & tired image
Broad range of shops	Outdated
Convenient	Unsafe

There were five recurring themes local respondents wanted to see in order to improve Burton upon Trent town centre:

- Reconnect with the river, opening up the waterfront as a public space
- Encourage more evening businesses to open
- Improve the public realm throughout the town centre (especially pavements)
- Improve accessibility and parking
- Attract more branded retail to the town to compete with Derby

Throughout the qualitative survey responses, there was a desire for Burton upon Trent to become more 'cosmopolitan'. Whether this was embracing the possibilities of the waterfront, enhancing existing public realm or creating reasons for people to be in the centre after 5pm, the feedback was clear that Burton upon Trent is perceived as a tired, outdated location. This is perhaps unfair on the town centre, which on Clockwork City's visits felt busy and vibrant, but as a vision of what Burton upon Trent can strive towards, it is certainly an exciting one.

3 http://policy.bcsc.org.uk/beyondretail/docs/BeyondRetail2013.pdf

Specifics about Uttoxeter

Respondents were asked to give their views on what makes Uttoxeter unique, what they would do to improve the area, and how they would describe it; Figure 7 provides an overview.

Figure 7: Comments about Uttoxeter	
Positive	**Negative**
Full of character (quaint, historical)	Lacking in services and appeal
Friendly	No direction, lost
Independent retail scene	A forgotten town centre
Convenient	
The Makers Market	

There were four recurring themes as to what local respondents wanted to see in order to improve Uttoxeter town centre:

- Fewer charity shops and bargain stores
- Address vacant units (particularly Maltings) through new tenants or window dressing
- Address business mix to entice more independent retail and leisure operators
- More seating and greenery

From the conversations held with stakeholders and survey respondents in Uttoxeter, there was a sense that the town centre had not got a clear identity to build upon. The closure of the Cattle Market, a site that was seemingly the cornerstone of the town centre's identity, has not fully been replaced in local users' minds.

As a 'high street' shopping destination, Uttoxeter cannot compete with the local and regional centres around it. The town centre does though have an existing mixture of niche and independent retailing as well as a favourable leisure and social scene based around the cafes and ad hoc events programme. Based on local perceptions and desires of what Uttoxeter can and 'should' be, building upon the unique assets within Uttoxeter would help rebuild the sense of place for the town centre, as well as establishing it as a social destination for local and regional users, compared to the shopping destination of Burton upon Trent.

Establishing a a geographical town centre focal point would help (re)establish peoples' perceptions of Uttoxeter's local identity. A space to provide further seating, outdoor cafe and event space would meet respondents' perceptions and help 'replace' the Cattle Market – the presence of Costa and the independent Bear Coffee Co. are likely to provide a base to build a further leisure upon.

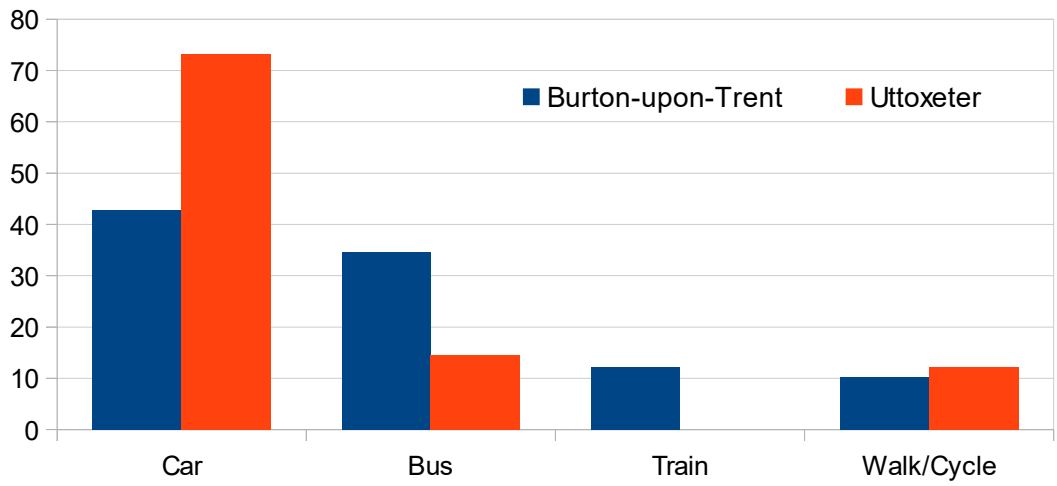
Parking

Parking is an emotive topic when it comes to town centres. Users expect convenient and safe parking environments, but frequently want to pay as little as possible for this service. There is of course a cost to offering parking - business rates have to be paid on spaces, then there is maintenance, cleansing, enforcement and safety to consider. Therefore, and contrary to recent public and media opinion, there is no such thing as free parking, just subsidised parking.

Current Situation

Figure 8 shows the modes of transport used by on-street survey respondents in both Burton upon Trent and Uttoxeter. In the latter, the car is clearly the dominant choice, while in Burton upon Trent, the car is still the preferred mode of transport, but there is at least more breadth to the range of modes people use to access the town centre.

Figure 8: Mode of Transport (%)



In December 2015, during the development of this report, ESBC instigated free parking in two sites in Burton upon Trent (Burton Place; Coopers Square) and one in Uttoxeter (Maltings). All spaces are offered free of charge between 1500 and 0800, with ESBC bearing the cost of maintaining the service and associated lost income.

During periods when car parking is not subsidised by ESBC, car parking in Burton upon Trent is offered at £1 for two hours and £2.20 for four hours across eleven sites. The only exception is Fleet Street, where anything beyond two hours costs £3.50. In Uttoxeter, the Maltings would usually cost £1 for two hours and £2.80 for four hours, while the Trinity Road site costs £1.80 for four hours. There is also a permanently free parking site on Fairfield, a five minute walk from Uttoxeter High Street.

Disregarding the current free parking offer, Figure 9 shows that parking costs in Burton upon Trent and Uttoxeter are already competitively low. An RAC study[4] in 2012 found that average parking charges per year, per household, equate to £47, compared to annual fuel costs per vehicle of £1,600. Reasonable parking charges are therefore not a significant cost for town centre users to bear relative to the costs of purchasing and fuelling a car, so the 'cost' of parking to the consumer now becomes about perception of value rather than the actual financial transaction. As shown in Figures 4 and 5, local respondents had a poor perception of both Burton upon Trent and Uttoxeter as places to visit. Destinations such as Stratford, Derby and Bullring in Birmingham are charging between 100% and 450% more than Burton upon Trent because of their actual and perceived appeal to visitors.

Figure 9: Comparison of Competitor Parking Charges (as of December 2015)

Location	Sites	2hrs	4hrs	Comments
Bullring, Bham	3	£4.50	£7.00	Privately owned
Coalville	8	£0.50	£2.00	Charges 0800-1700. Free on Sunday
Derby	12	£2.40 - £3.10	£4.30 - £4.90	Most operate 0800-1800
Lichfield	9	£1.80	£3.60	£1 Sundays
Loughborough	11	£1.60	£3.20	0600-1800
Stratford	8	£2.00	£4.00	£2 'evening charge' after 1600
Tamworth	9	£1.40	£2.20	Free on Sundays. Ventura Park free
Burton upon Trent	11	£1.00	£2.20	Free between 1500 and 0800
Uttoxeter	3	£1.00	£2.80	Free between 1500 and 0800

4 http://www.racfoundation.org/assets/rac_foundation/content/downloadables/spaced_out-bates_leibling-jul12.pdf

Should ESBC Subsidise Parking?

As mentioned at the top of this chapter, parking is an emotive topic. We can now see that it is also a subjective topic. The Federation of Small Businesses (FSB) argues that free parking is vital for small businesses, especially those reliant on rural populations, and parking charges should be set as per a location's needs and context[5]. The Association of Town and City Management, in their 2014 report 'Parking – What Works', and the RAC's 2012 report, place more emphasis on the contextual (i.e., subjective) circumstances. Parking policies, including charges, must be set "in accordance with an evidence based strategy for the town centre, with parking...a subset of a transport and accessibility plan"[6].

Essentially, subsidised parking should be considered a tool for ESBC to meet broader goals. In this case, the goal is to (re)vitalise the afternoon and evening economies in Burton upon Trent and Uttoxeter.

This report agrees with the **current 'free after three' programme** in key ESBC car park locations. It is recommended that this programme be **reviewed after six and twelve months** to consider the financial impact on the local authority, the impact on vends (i.e., number of cars using the spaces between 1500 and 0800), and business feedback on the programme (for example, transaction numbers, store turnover, average basket prices).

It is also recommended that ESBC take this opportunity to begin a broader **accessibility review**, encompassing parking services but also walking and cycling routes, signage and public realm improvements, bus routes and future evolution of parking stock to incorporate modern payment methods. The change from 'pay and display' to 'pay on exit' has already been discussed by ESBC and due to infrastructure reasons, was unfeasible. Other options could be explored though, including mobile payment or CCTV number plate recognition payment systems to replace the current ticketing regime. The user journey from car parks to the town centre should also be considered – high quality wayfinding, pedestrian environments and lighting all have a part to play in making the experience of parking, often the first and last impression of a town centre for a user, a positive one.

5 Federation of Small Businesses (2008) Parking Policies of Sustainable Communities
6 http://thegreatbritishhighstreet.co.uk/pdf/GBHS-What-Works.pdf

Parking Case Studies

Braintree

A cheaper parking scheme was launched by Braintree District Council in November 2011 as part of the 'Backing Our Towns' programme[7]. The premise was to charge 10p per stay between 3pm-7pm, Mon to Fri, and all day Sunday, in order to address quiet trade in the afternoon after feedback from businesses. The scheme used a 10p minor charge to cover for maintenance of pay and display services as well as data collection.

By November 2012, parking vends across the seven short stay car parks had increased by 44,500. There was an operating loss of circa £40,000 to the Council, but worth a gain to Braintree business of £445,000, assuming the average spend per 'new' parking vend was £10.The scheme has been extended until March 2016 due to its success with users and businesses. Critical to this is a marketing and promotion strategy to residents and shoppers.

Maidenhead

A large multi-story car park was converted from a 'pay on exit' system to a 'pay and display' system to avoid congestion at the entrance lanes. The shopping centre management monitored this and saw a decline in overall visitor numbers, as well as shorter total trip durations of those who remained. This was attributed to the inconvenience of the new 'pay and display' system.

In 2012, automatic number plate recognition[8] technology was installed on the entry and exit lanes. Payment for parking is now made at one of ten terminals throughout the shopping centre, and operates in the same manner a 'pay on exit' system would, except now none of the entrances or exits are now barriered. This has resulted in visitor numbers rebounding and traffic flow being considerably eased around previous choke points.

Newcastle

In 2010, Newcastle's council-owned car parks and city centre retailers joined together to launch the Alive after Five initiative[9]. Parking became free after 5pm and retailers agreed to keep their doors open until 8pm Monday to Friday and until 7pm on Saturdays.

In 2012 it was estimated that the scheme had provided a £157m boost to the city's economy. But it was the broader impact of the scheme that was also felt by the city's universities and professional services companies, who benefited from having a more cosmopolitan and attractive city centre offer for their employees and students, as well as local bar, restaurant and cultural venue operators.

7 http://www.braintree.gov.uk/info/200564/parking/610/10p_parking
8 https://www.parkreg.co.uk/
9 http://www.getintonewcastle.co.uk/?attachment_id=7990

WiFi

Connectivity, whether through smartphones, tablets or laptops, is becoming an increasingly important and expected social norm in an era where 38 million British adults use the internet daily, and smartphone use rose from 24% in 2010 to 58% in 2014[10] - over 90% of people surveyed for this report said they owned a smartphone, and presumably the large majority of town centre users within East Staffordshire are already 'connected' (Innovate UK report, 2016) consumers.

Connectivity in the public realm can take many forms, from WiFi networks to Near Field Communication tags (NFC) used in contactless technology, and mobile 3G/4G networks. ESBC's aspiration is to review the feasibility of installing a free, public WiFi network in Burton upon Trent and/or Uttoxeter, and the likely impact of this for residents and town centre users.

Clockwork City used Elephant WiFi to review the installation and running costs of a WiFi network in both town centres. The company has had success in delivering similar schemes with an award-winning example currently operating in Hinckley[11], Leicestershire. Three scenarios were examined – the first two reviewed the installation of a WiFi system for the town centre areas of Burton upon Trent and Uttoxeter, while the third scenario focused on a potential pilot location of Burton upon Trent Market Place. Figure 10 provides an overview of the costs associated with each scenario. These figures should be used as a guide for a future installation tender process.

Figure 10: WiFi Installation Costs	
Burton upon Trent	
Capital Costs	£38,600
Line rental (for 3 years)	£1,900
Elephant Maintenance & Reporting (per month)	£330
Annual Power Costs[12]	£183
Uttoxeter	
Capital Costs	£29,650
Line rental (for 3 years)	£1,900
Elephant Maintenance & Reporting (per month)	£220
Annual Power Costs	£122
Burton upon Trent Market Place	
Capital Costs	£17,877
Line rental (for 3 years)	£1,900
Elephant Maintenance & Reporting (per month)	£110
Annual Power Costs	£61

10 http://www.ons.gov.uk/ons/rel/rdit2/internet-access---households-and-individuals/2014/index.html
11 https://www.atcm.org/townteamuploads/tt_case_study_-_hinckley
12 Power Costs assumes an average wattage per device of 16.75W, running 24/7, based on latest 2015 kWh price data https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/487644/table_224.xls

WiFi Infrastructure

The infrastructure proposed by Elephant WiFi relies on lamp column and wall-mounted equipment. Lamp columns would be fitted with a non-intrusive bracket fitted to support the equipment, and power would be drawn from a connection cable running through the internal cavity of the column. The power block for each piece of equipment fits inside an industry-standard lamp column. Wall-mounted equipment would be installed on a J-pole, and be powered from a nearby lamp column supply. Their system uses WiFi Access Points situated at key junctions around the proposed area, and it is the installation and technology in these that equates to the capital costs in Figure Ten. Technical data can be found in Appendix B and C for Burton upon Trent and Uttoxeter respectively.

Types of Network Available

Elephant WiFi were chosen for this project in part because of their work in Hinckley, but also because of their scalable approach to rolling out a network. They are able to provide an easy to access WiFi network for people to use while in the town centre, operating much like the current 3G/4G data coverage.

Elephant WiFi also provide more advanced capabilities associated with the WiFi network, which accounts for a proportion of the monthly maintenance fee in Figure 10. This includes footfall tracking, user analytics and a data capture service, where pending a user's permission (gained when they first access the network), certain data is collected and retained about them. This information includes demographic data about the visitor, how often they visit, how long they stay and, by utilising tracking data, their unique movements. The value of capturing this data is that it can be used to enhance the overall visitor experience through targeted social media, real time marketing and evidence on footfall routes in the town centre. Careful consideration should be given to how ESBC may utilise data such as this; analytical support can be contracted out to an external firm (for example, Elephant WiFi) to ensure appropriate social and business offers are targeted at users, but a dedicated point of contact within ESBC would also be required to ensure data protection and general usefulness of the data for the Council. There are also issues regarding staff costs to consider alongside public privacy concerns.

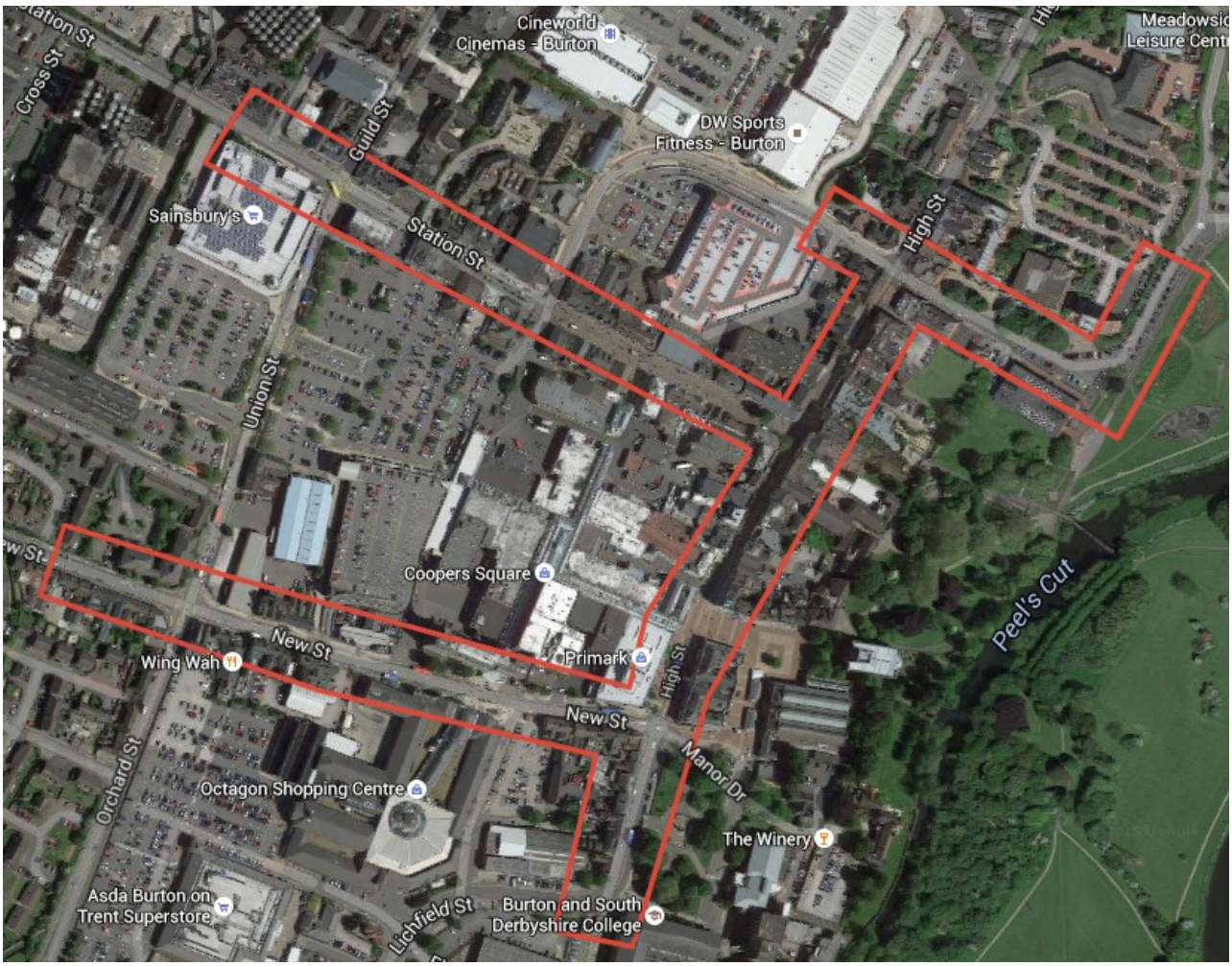
The WiFi network provides monetisation opportunities too, where access to the network, anonymised user data, and promotional activity across the network can be used to generate income. Advertising space can be sold on the initial WiFi 'welcome' page, marketing messages can be sent to users (pending their permission), or use of the network can be charged for in the same way access is on trains[13],[14]. The latter option would inevitably become a barrier to use, and it is therefore recommended ESBC disregards this.

13 https://www.virgintrains.co.uk/experience/wifi
14 https://www.crosscountrytrains.co.uk/on-board-with-crosscountry/wifi-on-board

Burton upon Trent Study Area

The proposed study area for the provision of free WiFi in Burton upon Trent is shown in Figure 11. According to the latest Ofcom Mobile Coverage[15] data, the study area has "sufficient signal to use [3G and] 4G data reliably" from the four network providers of EE, O2, Three and Vodafone. There is also free WiFi available in both Coopers Square and the Octagon shopping centres, as well as in various cafes and pubs for customers.

Figure 11: Burton upon Trent Free WiFi Study Area



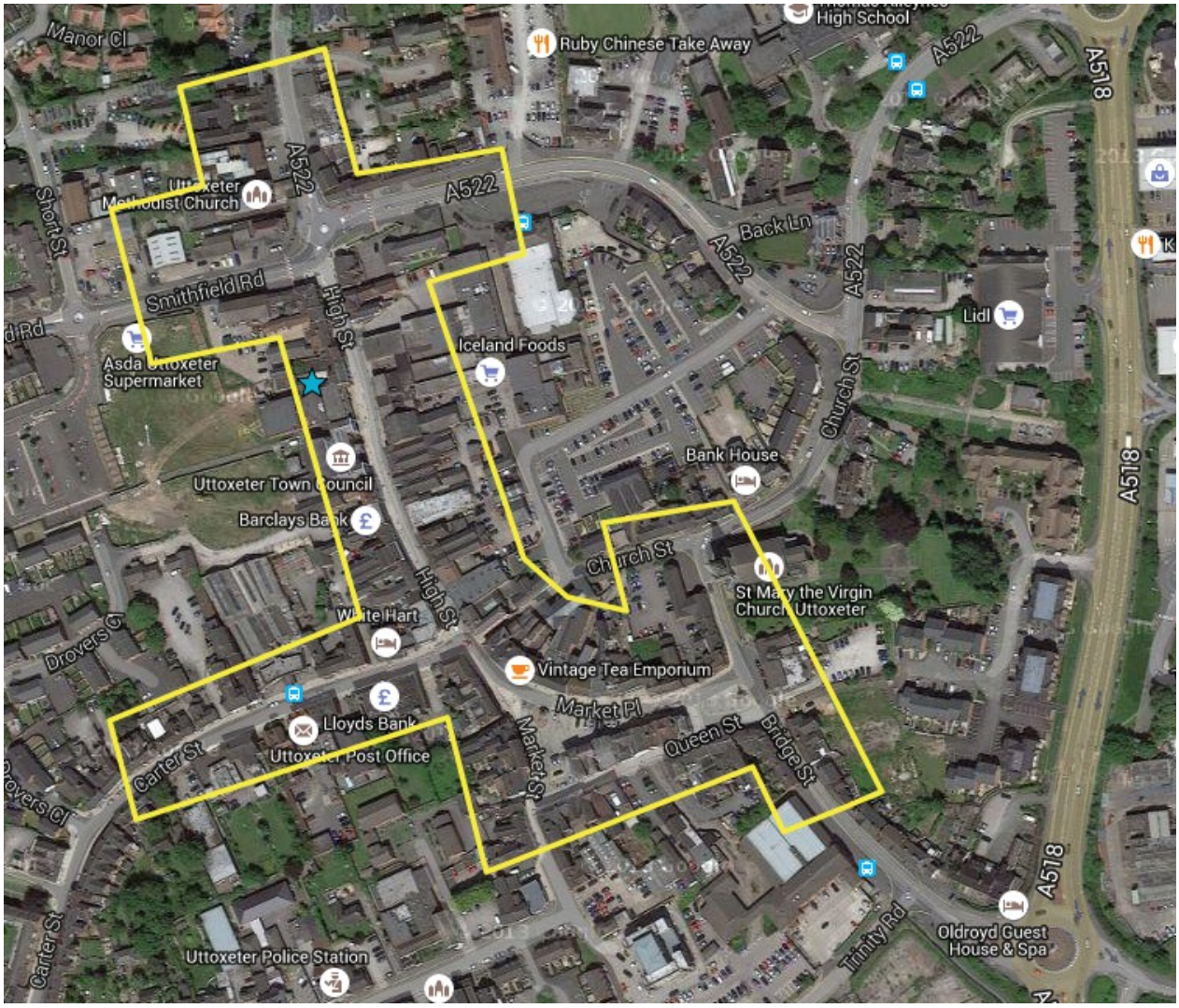
While reliable and widely available 3G/4G signal is present, this does not necessarily rule out the value of free public WiFi, as borne out by the two shopping centres providing this. Both centres provide this service as it was what customers expected, with one centre using the data gathered to add to their marketing and footfall tracking information. The network in Burton upon Trent would use seven lamp column mounted devices and two wall-mounted devices, one on the Library and one at the corner of High Street and Worthington Street (on a CCTV column). The Library would be the main phone line connection point.

15 http://www.ofcom.org.uk/mobile-coverage

Uttoxeter Study Area

The proposed study area for the provision of free WiFi in Uttoxeter is shown in Figure 12. According to the latest Ofcom Mobile Coverage data[16], the study area is "unlikely to have sufficient signal to use 4G data reliably". The only network to offer a sufficient 4G service is EE. There is plenty of 3G signal available. Customer WiFi is provided by a small number of cafes and pubs, and anecdotally, a high street bank chain.

Figure 12: Uttoxeter Free WiFi Study Area



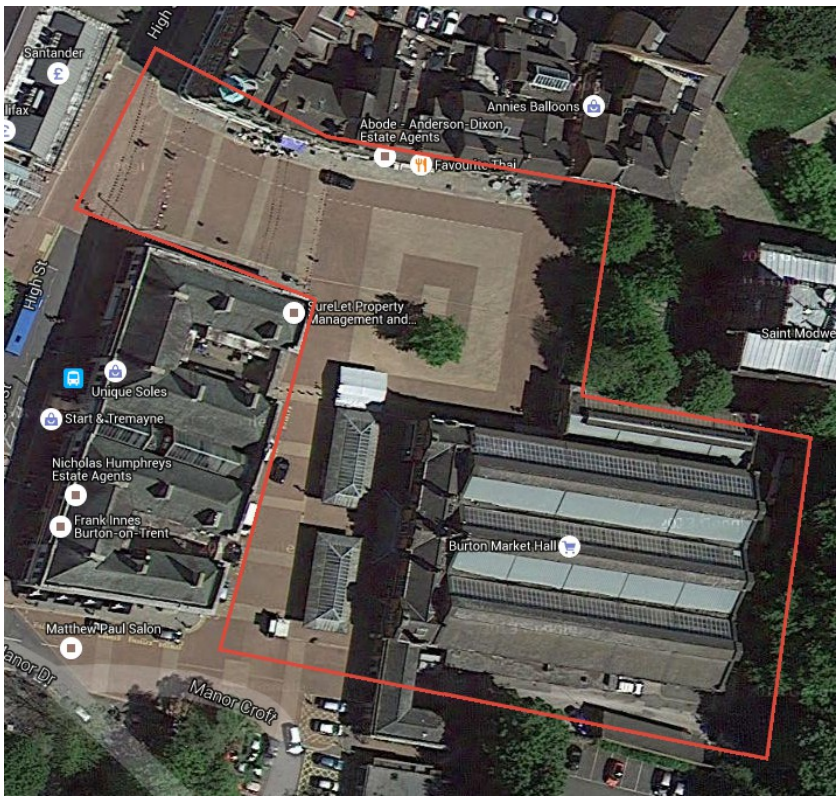
The network in Uttoxeter would use three lamp column mounted devices and three wall-mounted devices, one on the Town Hall, one on Carter Street and one on Bridge Street (on a CCTV column) The Town Hall (marked with a blue star in Figure 12 would be the main phone connection point.

16 http://www.ofcom.org.uk/mobile-coverage

Burton upon Trent Market Place Study Area

After the ESBC Councillor focus group, a potential 'proof of concept' pilot location was identified in Burton upon Trent's Market Place, shown in Figure 13. As per the wider Burton upon Trent study area, 3G and 4G connectivity is reliable in the external areas of the market place. Internal connectivity was patchy once inside, but not poor. A WiFi service would be provided using two internal and one external connection point, on the flat roof above the management office.

Figure 13: Burton upon Trent Market Place WiFi Study Area



The costs shown in Figure 10 relate to a WiFi network and footfall tracking and counting system for the Market Place. After discussions with the Market Management team, this was perceived to be the most suitable option to help support existing traders, attract new businesses, and raise the appeal of the venue as a function and event space. Costs could be reduced by removing the footfall counting and tracking elements, which would effectively provide a 'pure' WiFi network.

The Market Place presents an opportunity test WiFi use prior to a wider town centre roll-out in twelve months time. The Market Place offers a traditional community hub location, near to Council services, that would bring footfall and activity to area and provide opportunities for a popup or community enterprise cafe provider, or even an urban popup parklet[17], with free WiFi providing a significant part of the attraction. While the WiFi network could be used to support market traders in using contactless payment system, many are traditionally cash-based entrepreneurs and may resist this change.

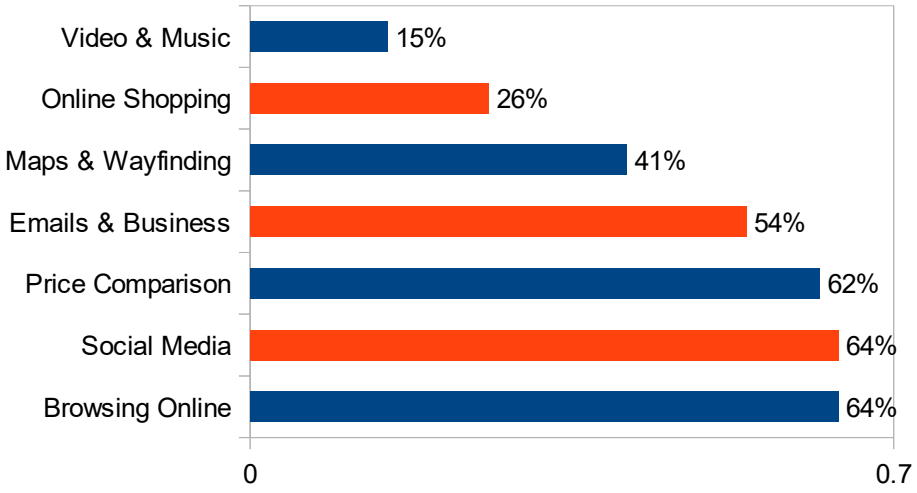
17 http://pavementtoparks.org/parklets/

The User Perspective on WiFi

Both survey groups (online and on-street) were asked for their views on public WiFi networks and the affect it would have on their usage of each town centre. While 90%+ owned a smartphone, the results do not bare out the logic of simply installing free public WiFi. When asked whether free town centre WiFi would make someone visit more often, 57% said '*No*' and only 32% said '*Yes*'. This pattern was also seen when respondents were asked whether free WiFi would make them stay longer per visit; 68% said '*No*'. When split by location, 63% said '*No*' in Burton upon Trent, and 74% said '*No*' in Uttoxeter. Interestingly, there was no correlation between these answers and the age of the respondent. It would be simple to expect younger respondents to be 'pro-WiFi' and therefore want to visit more / stay for longer in the town centre because of this, but, as this report will discuss below, their non-conformity to this assumption is further evidence of people wanting a richer experience from their town centres, and of WiFi being one part of the broader jigsaw.

Figure 14 shows how respondents would use public WiFi, if it was available. Browsing and social media are expected favourites (64%) but just as popular is price comparisoning (62%), otherwise known as 'showrooming', the activity of going into a store, finding an item, then searching online to read reviews or find it cheaper elsewhere. This is an issue for retailers, but town centres can be 'showroomed' too, where the offers and experiences in one town centre are weighed against another online, and a subsequent decision on where to visit then made.

Figure 14 : Likely Activities When Using Public WiFi



Finally, respondents were asked how they would react should the free public WiFi have adverts for local businesses, offers and events tied to the use of it. Overall, 45% would be happy to hear about these, 41% would be put off using the WiFi, and 14% would put up with the adverts. These numbers do not rule conclusively for or against the use of adverts and promotional material as part of the proposed WiFi networks, but the opportunity to promote local news and offers in a personalised way should be given serious consideration, albeit with appropriate control over the frequency and number of adverts 'pushed' to WiFi users should ESBC go ahead with this.

The Potential Impact of Free Public WiFi

Free public WiFi, in principle, is a good idea. Connectivity will soon be seen as a fundamental part of public life, like running water, or a light switch. The rise of free WiFi (for patrons) in cafes, bars and shopping centres is proof that the customer expects this to be provided. But in these locations, there is a reason to dwell; good coffee, comfy seats, spending time with friends.

Results from the town centre users surveys show that public WiFi is in itself not a significant 'pull' factor when town centre users decide where to shop, socialise and spend their time. It is a useful but functional service and one that, especially in Burton upon Trent, is already provided by solid 3G and 4G mobile data coverage. Equally seen in the survey data was that user perceptions of both areas were at best average; in other words, they lack the 'good coffee and comfy seats' that attract people to dwell in a coffee shop and use their in-house WiFi.

There is a significant chance a free WiFi network, with no sign in process, will simply replace users' mobile data connection; this will save the user money, but have little if any impact on the performance of town centre businesses. The return on investment for ESBC is likely to be, at best, minimal, while the capital and revenue costs of the service will impact on the Council's bottom line. For businesses to benefit from a public WiFi network, they need to be discoverable online (in its most basic form, this is a simple website or town centre directory), and have regularly updated content (i.e. what is sold, how much it is, their opening hours). Without this, a WiFi network will simply fulfil peoples' activities in Figure 14, streaming music and updating social media using ESBC's network rather than their mobile provider's.

As the case studies on page twenty-five show, some non-financial return on investment can be gained by using the WiFi network as a marketing database of town centre users. Data can be captured to target specific news about businesses, offers and events to certain demographics and at certain times of day. A similar capital budget and larger revenue budget (due to ongoing proactive management and maintenance of the service) would be required. A more ambitious, and likely equally more expensive, programme would look to build a 'digital ecosystem' for Burton upon Trent and Uttoxeter, where a WiFi network is linked to a footfall monitoring map and iBeacon system, 'pushing' messages to people as they walk past a certain business to promote seemingly personalised offers. This ecosystem would require considerable active management, and it may be best to consider the private sector or Destination Staffordshire's role in leading a programme such as this.

Should ESBC Provide Free Public WiFi?

Consumers (shoppers, tourists, residents, workers) increasingly want more than a purely functional interchange from their town centre visits; they expect more than a simple transaction and are increasingly looking to recapture the excitement of 'going to town'. While installing a free public WiFi network may appear a tempting panacea to solving the issue of an economically underperforming town centre, in reality this is simply not the case. WiFi is part of the solution, but not the final step.

It is recommended that for Burton upon Trent and Uttoxeter, the development of **free public WiFi is considered only as part of a wider placemaking strategy.** As per the previous section, Burton upon Trent and Uttoxeter would benefit from 'good coffee and comfy seats'; in more formal terms, a phase of public realm enhancement and a business mix strategy. If the ultimate purpose of installing WiFi is to re-energise the town centres, the research conducted for this Review has established WiFi alone cannot achieve this. There is **considerable scope to physically improve both town centres** (wayfinding, walking and access routes, the Maltings site in Uttoxeter, evening economy opportunities in Burton upon Trent) that should be considered a priority over a free public WiFi network at this stage. The reasonably high level of capital expenditure required to install public WiFi is easily justifiable within a broader development programme. If local car parking stock is altered to accept mobile payments, WiFi here would be a sound investment to support this infrastructure, for example.

At the request of the ESBC Councillor focus group, a placemaking proof of concept could be considered around Burton upon Trent Market Place. It has the current appeal and future potential to provide a focal point for footfall and event activity, could support a street cafe style environment, and would provide local traders with a simple route to engaging with consumers digitally (contactless payment, for example), although as mentioned previously, their cash-only business model may present a barrier to this. It would also be prudent to engage with local transport operators, as the most likely users of free WiFi 'on-street' would be people waiting for buses on New Street and High Street.

A future roll out in Uttoxeter could be based around a leisure cluster, or the potential development of the Library site as a service hub, as mentioned by Uttoxeter Town Council and briefly by Staffordshire County Council. There feels like broader issues need to be resolved within Uttoxeter before specifics such as WiFi, can be considered; the role of the Local Plan and Big Heath Local groups needs to be considered alongside that of the three local authorities in the area, and a concerted effort to establish a common sense of identity should be prioritised to help guide future decision-making on, for example, whether a public WiFi network is appropriate and where this should be phased in.

WiFi Case Studies

Hinckley

A partnership of the local authority, Hinckley Business Improvement District and DCLG began a web development and social media training programme for the business of Hinckley. This work was driven by the desire to make Hinckley visible to an online audience. In order to realise their ambition of upskilling local businesses, a WiFi network was seen as a key cornerstone for this. The scheme cost £26,000 and £650 a month to maintain[18]. Access to the network is free for members of the public, although data is collected to enhance marketing and promotional activity, to better push messages about local businesses and events to users.

Kendal

The Lakeland town has recently installed free public WiFi in a trial capacity[19]. Four key streets are covered, at a cost to the local authority of £20,000 for a one year trial. A further annual maintenance fee of £500 is envisioned should the trial extend beyond March 2016. The rational behind the pilot was to create 'connected town centre users, while also using this as an opportunity to ensure businesses and events are discovered and the general visitor experience is enhanced.

Mansfield

Mansfield was one of the first UK town centres to install free public WiFi[20], and it was their business improvement district that led on this. A crowdfunding drive raised £30,000 to cover installation and management costs, and with the project being delivered within six months of conception. The 'Mansfield Hot Spot' covered roughly 500m2 of the town centre, with annual running costs in 2014 roughly around £10,000 (phone line leasing, maintenance). At peak times over 3,000 users log into the Hot Spot, but it has been the broader benefits of the network that have led to Mansfield BID continuing the service. These include access to anonymous user data that have allowed the BID to create new events to appeal to certain demographics, development of local business and event promotion opportunities on the home page, and market traders embracing the service to take contactless payment.

All three of the above case studies *use* public WiFi in the same way a business would; to gather data about and therefore better understand their customer. While the ethics of data collection should rightly be debated by ESBC, the logic of 'knowing' town centre users and building future projects around their interests and needs is sound. Doing so would build a stronger, locally-appealing and appropriate town centre, by creating seemingly personalised experiences and matching user perceptions with deliverables on the ground. All three measure in some form the number and demography of people accessing their network, the pages they visit, and use this information to personalise their next experience.

18 https://www.atcm.org/townteamuploads/tt_case_study_-_hinckley
19 http://www.southlakeland.gov.uk/business-and-trade/townvillageprojects/kendal-town-centre-wifi/
20 https://www.atcm.org/townteamuploads/tt_case_study_-_mansfield

Concluding Remarks

Great locations have a clear sense of place, delivered to users through numerous formats. An engaging social media strategy should sit alongside high quality street entertainment or a diverse evening and leisure economy offer, as key objectives for any successful place. Great locations connect with people through multiple channels and offer them an experience that attracts, engages and retains loyalty in the long term. There is no one solution – a town centre's personality, its sense of place, should lead local decision-making on the types of projects to be undertaken and ensure the feeling of local authenticity flows through the deliverables.

There is a need to be clear as to the roles of Burton upon Trent and Uttoxeter. They are not similar locations and as such should not be treated similarly. The former is a more natural retail destination, and support should be given to ensure the town centre grows to adapt to visitor and regional user demands. This may include closer working relationships with the shopping centres, transport operators, Molson Coors, and ESBC officers, as well as investing in public realm links between the station, town centre and waterfront. A high quality public realm experience is a great asset for any location looking to improve and maintain a sense of place and pride in a local area.

Uttoxeter has the potential to be an excellent local town centre, providing leisure and convenience facilities for its local catchment, hosting great events (such as the Makers' Market), and being able to capitalise on major event days at the racecourse. Uttoxeter has history, and to the outside observer, a charm that some survey respondents did not see. Helping local residents recognise and celebrate this unique sense of place, one that is in contrast to the 'high street' feel of Burton upon Trent, will help Uttoxeter become a resilient local centre in the medium term.

Throughout the 'Discovery' phase, there was a clear need for local leadership in both town centres. In Burton upon Trent, this would be easily resolved through a closer working relationship between the public and private sectors. It is heartening to see that both sectors agree on the need for a new parking strategy for the town centre, and the current 'free after three' model has now been rolled out. In the future, consideration should be given to joint projects, such as marketing and promotion of the town centre retail offer, engagement with community and residents groups, and a strategy to enhance the leisure, evening and night time economy offer.

In Uttoxeter, efforts should be made to achieve clarity between the aims of ESBC, Staffordshire County Council and Uttoxeter Town Council. Involvement with the Big Heath Local plan may also be beneficial to support the resilience of Uttoxeter town centre, as this group looks to build community assets. Support for their Community Chest initiative, designed to fund local projects and hub locations, would open interesting, grass-root opportunities to reinvigorate local interest. There is also the potential to consolidate services with Staffordshire County Council in Uttoxeter Library, and work to establish a WiFi Phase One roll-out similar to Burton upon Trent Market Place here for Uttoxeter.

Summary of Recommendations

- ESBC should continue the 'free after three' **parking** trial, reviewing this after six and / or twelve months, assessing the financial cost of the scheme compared to the effectiveness amongst the business community
  - A business survey, or series of business meetings, may be required to gauge business community perceptions and gather information about turnover, customers served etc

- ESBC's **parking stock** should be reviewed regarding options to remove the current 'pay upfront' system. Potential options include ANPR systems

- Both Burton upon Trent and Uttoxeter suffer from apathetic to negative public perceptions; projects that address these attitudes should be prioritised. The value of the public realm in forming and improving perceptions of places should not be overlooked
  - An '**Accessibility Review**' for both town centres, or at least Burton upon Trent, should be launched alongside Staffordshire County Council. This review would examine the user journey to, from and within the respective town centres, and look for improvements in the pedestrian environment (seating, lighting, public spaces, wayfinding), consider how public transport interfaces with the town centre (walking route from Burton station for example), and consider the parking experience mentioned above
  - ESBC should input into **Uttoxeter's Neighbourhood Plan**, where appropriate. This may help guide planning and development goals for Uttoxeter and ensure the town centre remains appealing and accessible for local residents
  - A programme to continue developing the **leisure, evening and night time economy** offer in Burton upon Trent should begin, where further sites and landlords are identified in order to build on areas near Bella Italia and Cineworld

- ESBC should **not install free public WiFi** in either town centre at this time unless this is part of a wider development strategy, due to the lack of clear evidence this will meet the desired objectives
  - A 'digital ecosystem' approach would offer better support for businesses and the broader town centre. A programme to help businesses become 'discoverable' online (websites, social media) and adding and updating content regularly themselves (events, products, offers) updated and promoted by a partnership of the public and private communities, would have more impact on their resilience
  - Using WiFi to support parking or wayfinding schemes could also be considered

Appendix A
List of Figures

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