

## **Newcastle-under-Lyme Borough Council and Stoke-on-Trent City Council Retail and Leisure Study**

### **Final Report**

**Please Note:** The report has been made accessible due to requirements and has been adapted by the Councils' from the original report. This can be made available on request.

**July 2019**

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## **1.0 Introduction**

### **Instruction and Scope**

1.1 Nexus Planning has been instructed by the joint client of Newcastle-under-Lyme Borough Council and Stoke-on-Trent City Council (hereafter referred to respectively as ‘NULBC’ and ‘SOTCC’) to undertake a new Retail and Leisure Study for the combined Local Plan area. The focus of the Update is to establish the current position in respect of the need for additional retail and leisure facilities in the two authority areas, and consider the vitality and viability of the Councils’ defined centres.

1.2 This Retail and Leisure Study will replace the Newcastle-under-Lyme Borough Council Retail & Leisure Study 2011 (undertaken by Nathaniel Lichfield & Partners) and the Stoke-on-Trent City Council Retail and Leisure Study 2014 (undertaken by WYG Planning). The Study will not only form part of the evidence base to help shape the emerging Joint Local Plan, it will also assist with the Councils’ consideration of planning applications for retail and leisure uses.

1.3 Detailed aims and objectives for the Study are set out at paragraph 5.1 of the supplied Invitation to Tender (‘ITT’). In brief summary, these comprise:

- a quantitative assessment of capacity and the need for convenience and comparison goods retail floorspace across the period to 2033 (taking into account existing planning commitments);
- a qualitative analysis of the existing convenience goods provision, including top-up shopping within defined centres;
- an assessment of the need for additional commercial leisure facilities;
- an overview of current and emerging market conditions and trends in the retail and leisure sector;
- recommendations in respect of the retail network and the hierarchy of centres across the Joint Local Plan area;
- a review of town centre boundaries and primary shopping areas;
- an assessment of the potential for existing centres to accommodate any anticipated future retail or commercial leisure needs;
- consideration of the scope for distinctive specialist retail roles to be developed and supported; and
- the requirement to set a local impact threshold to assist with retail impact testing.

1.4 The Study is informed by new market research, including a household shopper survey of 1,500 households (undertaken by NEMS Market Research) across 13 separate zones. The zones are derived from those utilised in the previous NULBC and SOTCC Retail and Leisure Studies in order to allow comparison of

changing market shares over time. The overall Study Area reflects the principal catchment area for retail and leisure facilities within the two authority areas. A plan of the Study Area is provided as Appendix 1, and the tabulated household survey results are provided as Appendix 2. The Study Area also includes parts of neighbouring authority areas of Cheshire East, Shropshire, Stafford and Staffordshire Moorlands, where residents sometimes look to facilities in Newcastle-under-Lyme and Stoke-on-Trent to meet at least some of their retail and leisure needs. As part of the Study, NEMS Market Research has also undertaken 'in-street' surveys in Newcastle-under-Lyme and Hanley centres in order to gauge shoppers' views in respect of the performance of each centre.

## **Structure of Report**

1.5 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the Study. We then summarise the key findings of the in-street and household surveys, before considering the vitality and viability of defined centres within both authority areas. The remainder of the report is focused around the assessment of retail and leisure needs.

1.6 Accordingly, our report is structured as follows:

- Section 2 identifies current retail and leisure trends of relevance;
- Section 3 provides an overview of the planning policy context;
- Section 4 summarises the findings of the in-street surveys undertaken in Newcastle-under-Lyme and Hanley centres;
- Section 5 summarises the results of the household shopper survey and the changes in market share over time;
- Section 6 summarises our assessment of the vitality and viability of defined centres;
- Section 7 provides an overview of forecast changes in Study Area population and expenditure;
- Section 8 sets out our assessment of retail needs in the two authority areas;
- Section 9 sets out our assessment of leisure needs in the two authority areas; and
- Section 10 summarises our key findings and provides our recommendations.

## **2.0 Current Retail and Leisure Trends**

2.1 In order to provide a context for this Study and help identify the sectors that are more likely to be the subject of additional development proposals, we provide an update of current retail and leisure trends below. In reading this review, it should be noted that, whilst the retail and leisure sectors are dynamic, and new formats continue to come forward to meet shoppers' needs, high streets have been the subject of unprecedented pressures over the past decade. Whilst this is partly due to the ever-increasing number of shoppers who choose to make purchases online, town centres in the Joint Local Plan area have also been impacted through retailers' general preference to trade from a reduced number of stores, and from shoppers' willingness to travel to higher order centres to secure choice. Improvements in technology have also resulted in a lesser requirement for some service uses to have a high street presence (banks, building societies, estate agents and so on).

2.2 The below commentary should be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing conditions at the time of a proposal's determination.

### **The Impact of Brexit and the Current State of the UK Economy**

2.3 Subsequent to the referendum of June 2016, which secured a majority vote for the UK to leave the European Union, it is generally accepted that the immediate future is likely to be one of economic uncertainty with a consequential impact on consumer confidence and spending. In the aftermath of the referendum result of June 2016, Verdict published its Economic & Retail Update in September of the same year. Verdict forecast the following economic trends.

- Retail growth in the short term will be relatively flat. However, a weaker pound effectively brings down the cost of goods for international travellers, who may spend more as a consequence.
- A weaker pound also leads to higher import and manufacturing costs, which retailers may pass onto consumers. Verdict anticipated that the clothing and footwear sector would likely be the subject of the greatest inflationary price increases.
- Brexit may have a negative impact on the housing market and a consequential adverse impact on those retailers who rely on householders investing in their property. As such, there may be less money spent on goods such as DIY, furniture, floor coverings, gardening goods and so on.
- In volume terms, little will change in respect of the food retail sector, but inflationary pressures may mean that shoppers spend more on their groceries and less on other goods.

2.4 More than two years on, Verdict's initial forecast in respect of how the market will react appears accurate.

2.5 As we go on to consider in greater detail below, page 2 of Experian's Retail Planner Briefing Note 16 ('ERPBN16') finds that the UK economy's recovery '...will remain on a sluggish growth trajectory for the next couple of years amid ongoing uncertainty over the final outcome of Brexit negotiations'.

2.6 In terms of inflation, Office for National Statistics data indicates that the rate of inflation (as measured by the consumer prices index) increased from 0.5% at June 2016 to a high of 3.1% at November 2017, before reducing to 1.8% at February 2019. The increasing cost of living has been particularly problematic for the retail sector, as inflation has been principally driven by increasing fuel prices (affecting the cost of electricity, gas and petrol), meaning that consumers have a lesser amount to spend on the high street. Indeed, The Guardian reports that the price of men's clothing in particular has fallen and that the monthly drop in clothing costs in June 2018 was the biggest recorded since 2012 as shops staged their summer sales in a challenging trading environment.

2.7 In respect of the predicted downturn for the DIY sector, both B&Q and Homebase have reported difficult trading conditions in recent times. Kingfisher, owner of B&Q, saw its share price reduce significantly in March 2018 after reporting a 2.8% fall in full year like-for-like sales. Homebase is in even greater difficulty after its previous owner, Wesfarmers, sold the chain to Hilco for £1 in May 2018. It has been widely reported that 300 jobs are to be lost at Homebase's head office and that up to 80 stores could close as efforts are made to stabilise the business.

2.8 In terms of the grocery market, Kantar reports that grocery inflation stands at 1.9% for the 12-week period ending 17 June 2018. Prices (judged on a like-for-like basis, with reference to identical products) have increased over every quarterly reporting period since January 2017. However, this cannot be attributed just to the economic impacts of Brexit. It is also a consequence of weather conditions and factors such as the recent 'sugar tax' on soft drinks (which came into force in April 2018). The increase in prices is not necessarily good news for the industry as it is reflective of costs increasing, and shoppers have often 'traded down' to buy cheaper substitutes or have undertaken more shopping at discount stores in order to avoid price increases.

## **Available Expenditure and the Impact of the Internet**

2.9 ERPBN16 identifies the current state of the retail sector in the UK in the above context and provides forecasts in respect of future growth. Page 3 of

ERPBN16 provides the following summary of the state of the UK economy at December 2018:

'The UK economy has thus far been relatively resilient against the turbulent backdrop of tense Brexit negotiations, the domestic political fallout and the ongoing cloud of uncertainty over the future relationship with the EU. That said, the economy has entered a slower growth trajectory over the past year, with GDP growth set to average close to 1.5% in 2018, the weakest performance in 7 years. This reflects the lacklustre pace of business investment as companies continue to hold back on capital spending due to uncertainty over Brexit negotiations. After a very weak start to the year, consumer spending has recovered some momentum as the squeeze on incomes has unwound, but growth remains below the performance of earlier years. Latest indications suggest spending growth may be faltering again in the run up to Christmas. Looking ahead, our baseline projections assume that the initial phase of the Brexit negotiations will conclude by the end-March 2019 deadline and the focus will shift to defining the new trading relationship over the transition period. However, with so much still to be decided, uncertainty will persist over the final agreement for some time and investment decisions are set to remain cautious. Alongside this, the recovery in consumer spending will remain muted, reflecting sluggish incomes growth. Given this, we project GDP growth to remain close to 1.5% in 2019 and 2020, well below the performance of 2013-2017.'

2.10 Given the above, Experian forecasts limited increases in per capita convenience and comparison goods expenditure over the short term. The below Table 2.1 provides an extract from Figure 1a and Figure 1b of ERPBN16. The convenience goods sector has been the subject of a reduction in per capita consumer expenditure across much of the past decade (in real terms, after allowing for inflation), with some limited growth only returning from 2015. The market conditions can be attributed to the continued rise of the discount operator subsequent to the recession of 2008 and 2009, and the reaction of the 'big four' supermarket operators to increased competition. Experian forecasts that per capita expenditure growth in the convenience goods sector will slow to 0.5% at 2019 (from 1.0% at 2018), with very limited forecast growth thereafter.

2.11 As Table 2.1 indicates, forecast increases in comparison goods spending are more optimistic, but it is evident that per capita comparison goods expenditure increases will be below the level apparent at the turn of the millennium. Experian identifies that per capita comparison goods expenditure growth dropped from 5.5% at 2017 to 2.8% at 2018, and forecasts that it will remain between 2.6% and 3.3% per annum across the next decade and beyond. By way of comparison, Figure 1a of ERPBN16 indicates that per capita expenditure growth was, on average, 8.2% per annum between 1997 and 2007.

Table 2.1: Experian's Identified and Forecast Convenience and Comparison Goods Per Capita Expenditure Growth

Volume Growth Per Head (%)	2013	2014	2015	2016	2017	2018	2019	2020	2021 - 2025	2026 - 2037
Convenience goods	-0.9	-0.1	0.5	1.3	1.3	1.0	0.5	0.1	0.1	0.1
Comparison goods	3.6	4.3	4.9	4.7	5.5	2.8	2.6	2.8	3.3	3.2

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 16

2.12 Whilst the above figures relate to a level of growth which is significantly below that which has historically been available to retailers, the situation is exacerbated through the increasing amount of expenditure which is committed through special forms of trading and, in particular, online.

2.13 In this regard, Appendix 3 of ERPBN16 indicates that a strong increase in online shopping over the past decade has lifted the share of special forms of trading to a level where it now accounts for around 20% of total retail sales (with the internet alone accounting from 17% of total retail sales). Experian forecasts that non-store retailing will continue to grow rapidly, increasing at a faster pace than total retail sales well into the long term. Experian believes that special forms of trading will account for almost 23% of retail sales by 2022, increasing to around 27% by the mid-2030s.

2.14 The below Table 2.2 sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for more than a quarter of comparison goods expenditure and around a fifth of convenience goods expenditure at 2037.

Table 2.2: Experian's Identified and Forecast Market Share of Non-Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2015	2016	2017	2018	2022	2027	2029	2032	2037
Convenience goods	8.2	9.4	11.2	12.4	15.3	17.5	18.0	18.7	19.7
Comparison goods	16.4	18.1	20.7	22.6	26.3	28.1	28.5	28.7	29.0

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 16

2.15 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses , with purchases therefore

helping to sustain tangible retail floorspace. As a consequence, Experian also provides an ‘adjusted’ estimate of special forms of trading, which relates to expenditure which is not available to actual stores. We return to this matter when considering the level of expenditure generated within the Study Area at Section 7 of this report.

2.16 One way in which online expenditure can help sustain bricks and mortar retailers is through the use of the internet to ‘click and collect’, with purchases being picked up at a dedicated counter within a store. Such sales now account for over half of John Lewis internet orders . In addition, it is evident that some retailers (particularly those offering big ticket items) are benefitting from having a bricks and mortar presence which can be used as a ‘showroom’ in order to view and try goods, with some purchases then being made later online. Retailers are also more frequently providing in-store wi-fi and ‘technology points’, which can allow shoppers to browse a wider product range than is carried in-store. Accordingly, whilst new technology provides significant challenges to bricks and mortar operators, it also provides opportunities for more progressive operators that are able to invest in new technology.

## **Convenience Goods**

2.17 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the ‘big four’ supermarket operators’ market share being cut. Mintel finds that the decline of the food superstore is well established and that this can be attributed to two issues.

2.18 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and more people are having difficulties financing the purchase of their own home. Mintel indicates that such people are more likely to undertake food shopping on a ‘as needs’ basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a ‘main food shop’.

2.19 Secondly, the current uncertainty in the economy has made hard discounters (namely Aldi and Lidl) a more attractive proposition. Discounters have also made efforts to try to compete more directly with the ‘big four’ supermarket operators, with larger stores, greater ranges, fresh foods and premium products becoming increasingly prevalent. When analysing the performance of Aldi, Retail Economics notes that it has ‘attacked the heartland of UK grocery’ by undercutting the ‘big four’ with highly competitive prices and investing in more high quality premium produce. In a similar way, Lidl has also adopted an aggressive growth programme relating to its pricing, produce offer and store openings since 2013.

2.20 The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as Marks & Spencer Foodhall) as, collectively, the two stores can meet many food shopping needs.

2.21 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years. As Table 2.3 sets out, the market share of each of the 'big four' has been consistently eroded in recent years, with Tesco and Morrisons being the subject of the largest percentage point losses. Tesco's market share of the UK grocery market has reduced from 23.7% at 2011 to 21.6% at 2016, and Morrisons' market share reduced from 9.5% to 7.7% over the same timeframe. The greatest beneficiaries have been Aldi and Lidl, with the former's market share more than doubling from 1.9% at 2011 to 5.3% at 2016. Lidl's market share increased from 1.9% to 2.7% over the same period.

Table 2.3: Market Share of Principal UK Grocers

	2011	2012	2013	2014	2015	2016
Tesco	23.7%	23.9%	23.0%	22.5%	22.0%	21.6%
Sainsbury's	12.8%	13.1%	12.9%	12.8%	12.2%	11.9%
Asda	12.5%	13.3%	13.0%	13.0%	12.0%	11.5%
Morrisons	9.5%	9.3%	8.9%	8.2%	7.9%	7.7%
Aldi	1.9%	2.6%	3.3%	4.2%	4.8%	5.3%
Co-operative Food	5.5%	5.4%	5.1%	4.9%	4.8%	4.7%
Waitrose	3.5%	3.6%	3.7%	3.9%	3.9%	3.9%
Marks & Spencer	3.6%	3.7%	3.7%	3.8%	3.9%	3.9%
Lidl	1.9%	2.0%	2.0%	2.2%	2.4%	2.7%
Iceland	1.8%	1.9%	1.9%	1.9%	1.8%	1.8%

Source: UK Food & Grocery Retailer Update, October 2016

2.22 As a consequence of the above, the 'big four' grocers have closed some of their loss-making stores and larger stores have accommodated further concessions in order to take floorspace which is no longer required for the operators' main product range. By way of example, Sainsbury's is progressing with plans to open around 250 Argos within Sainsbury's foodstores. Other food superstores have welcomed additional concessions (including day to day services, such as dry cleaning and key cutting).

2.23 In April 2018, a proposed merger between Asda and Sainsbury's was announced, which had the potential to be one of the most significant structural changes affecting large format food retailing in recent times. However, the merger was considered by the Competition and Markets Authority ('CMA'), and a report

published in April 2019 confirmed that the CMA found that UK shoppers and motorists would be worse off if the merger took place, due to expected price rises, reductions in the quality and range of products available, or a poorer overall shopping experience. This final decision to block the deal follows the publication of the CMA's provisional findings and a subsequent consultation period, during which the CMA reviewed responses from a variety of interested parties, including Sainsbury's and Asda themselves.

2.24 Discount operators continue to be generally optimistic in respect of their future growth. Aldi announced ambitious expansion plans in 2017, with an aspiration to trade from around 1,300 stores by 2022 ; a significant increase given it currently trades from 700 stores. Similarly, Lidl announced last year that its intention is to open at least one shop a week in forthcoming years .

2.25 Tesco has started to take on the discounter market with its own operation, called Jack's, which launched in September 2018. It appears that the initial stores trading under the Jack's fascia will occupy former and proposed Tesco stores, which may allow the new operation to grow relatively quickly. Reports suggest that the initial plan is for around 60 Jack's stores to open across the UK.

## **Comparison Goods**

2.26 The comparison goods sector is currently being squeezed by a number of factors, including reduced expenditure growth, the ability of internet shopping to plug gaps in retailer representation, increases in the minimum wage, and business rates changes. This 'perfect storm' has resulted in changes in the structure of retailing on the UK high street and a generally lesser reliance on comparison goods retail.

2.27 Whilst the sector is continually evolving and there are a number of ongoing success stories (including Primark, Zara, Jack Wills, Joules and Hotel Chocolat), recent headlines have focused on failing retailers and store closures. High profile retailers that have struggled include:

- BHS, which entered into administration in April 2016, resulting in the closure of 164 stores;
- Marks & Spencer, which has had problems with its core clothing and homeware business, resulting in a May 2018 announcement that it is to close around 100 stores;
- New Look, which entered into a company voluntary arrangement ('CVA') in March 2018, and intends to close 60 of its 593 stores;
- Maplin, which entered into administration in February 2018, resulting in the closure of 219 stores;
- Toys 'R' Us, which entered into administration in February 2018, resulting in the closure of 100 stores;

- Poundworld, which entered into administration in June 2018, resulting in the closure of 335 stores; and
- House of Fraser, which confirmed in August 2018 that it is to close 31 of its 59 stores.

2.28 Whilst the loss of some of the above names will have significant repercussions for certain towns (particularly those that lose Marks & Spencer and House of Fraser from their high street in very quick succession), it is evident that a number of struggling retailers have failed to ‘move with the times’ and update both their offer and accommodation.

2.29 This is partly a consequence of retailers being unable to reinvest in their business when margins are tight (or non-existent). In this regard, there has been a particular issue in respect of the ‘polarisation’ of shopping habits, whereby shoppers have increasingly been prepared to travel to access a greater choice of shops and services, effectively visiting centres for the day as a leisure activity. Consequently, larger retail venues (with a sub-regional or regional role) have tended to perform relatively well, but smaller town centre centres (particularly those located in satellite towns around major centres) have struggled. The performance of smaller towns has been particularly affected by the last recession and by internet shopping, which has resulted in some retailers covering the UK with a lesser number of stores.

2.30 Colliers has reported that some new entrants to the market aspire to trade from around 50 stores in key locations across the UK and that this trend has an impact in terms of the take-up of available stock on the high street. It is also evident that certain retailers – including Marks & Spencer, Next and retailers within the Arcadia Group – are prepared to close town centre stores and instead just trade out of centre.

2.31 Whilst such structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. In particular, household discount operators, such as B&M Bargains, Poundland and Wilko, have reoccupied a number of medium to large retail units. However, as evidenced by the recent failure of Poundworld, there is some evidence that this market may be approaching capacity.

2.32 More encouragingly, the availability of high street units appears to have helped develop an entrepreneurial spirit, with a number of centres beginning to benefit from a greater focus on independent retailers and modern markets, which are frequently focused around food and drink operators.

## **Leisure and Food & Drink**

2.33 One of the recent high street success stories has been the resurgence of the town centre leisure sector, which has sometimes been focused around new cinemas close to the shopping core (such as the Cineworld cinema which opened in Hanley at the end of 2015) and, increasingly, modern markets.

2.34 Colliers has reported that cinema openings are on the up and niche cinema operators – including Curzon, Everyman and The Light – are able to operate from smaller sites in town centre (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom.

2.35 The importance of independent food and drink operators and modern markets has been exemplified by the success of the Market House in Altrincham in Greater Manchester, which accommodates six different kitchens, a coffee shop, chocolatier, a wine shop and a bar. The success of Altrincham market has resulted in a resurgence of its town centre as a destination to eat and drink, with many new openings occurring because of the popularity of the market. The confidence in Altrincham as a dining destination has had a beneficial impact on the town's vacancy rate, and also now appears to be helping to attract new retailers to the town. The 'Altrincham model' is beginning to be replicated by other centres, with new or refreshed markets and new food halls being planned in many towns.

2.36 The food and drink sector has also been buoyed in recent years by the success of mid-market national multiples, which expanded quickly across the UK. However, there are signs that the 'bubble has burst' and a number of high profile operators have been in financial difficulty. These operators include Byron , Carluccio's and Jamie's Italian , which have closed a number of restaurants in the past few months. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result.

2.37 More generally, the gym market continues to perform well, with the Leisure Database Company identifying that there are now more than 7,000 gyms across the UK, with the fitness market having an estimated value of more than £5bn. The Leisure Database Company suggests that this is a 'golden age of fitness', with around one in every seven Britons having a gym membership.

2.38 Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group and easyGym utilising a format that is based on low costs and high volume. Whilst Pure Gym has become the first operator to reach 200 clubs and to pass the one million members mark , the Gym Group is currently growing at the greatest rate, opening 21 new gyms in 2017 and planning for a further 15 to 20 openings in 2018.

2.39 There are also a number of emerging leisure concepts, which are generally supported by larger town centres, including modern ‘in centre’ bowling alleys (which generally have a strong food and drink offer and are pitched at providing an evening out, as much as the family market), indoor climbing centres , and crazy golf.

## Influential Reports

2.40 The effects of the 2008 recession and the growth in e-commerce led to three influential UK reports on the future of town centres, these being the Portas Review (December 2011), the Grimsey Review (September 2013), and the Taskforce Report: Beyond Retail (November 2013). These three reports share common elements of:

- a recognition that there is a need to diversify town centres, so as to encompass other non-retail functions;
- a recognition of the need for a review of the business rates system, so as to reduce occupational costs for town centre businesses, compared to online retailers;
- a need to make it easier to change the use of buildings in town centres through further reforms to the General Permitted Development Order (which have subsequently been implemented by Government);
- the need for local planning authorities to be more proactive in the use of their CPO powers and for simplification of the CPO procedures; and
- a need for enhancement of secure car parking facilities within town centres and a review of pricing and management practices, so as to enable town centres to better compete with out-of-centre locations with free car parking.

2.41 The Ministry of Housing, Communities and Local Government and HM Treasury published a Future High Street Fund policy paper on 29 October 2018. It outlined structural changes on high streets, summarised below.

- High streets have been affected by major changes in the past decades, and the speed of this change is increasing. Online shopping in particular has become significantly more popular than it was 10 years ago. Between 2007 and 2018 online sales increased six-fold while growth of in-store sales has lagged behind. In 2000, online retailing accounted for less than 1% of retail sales while in August 2018 almost a fifth of all retail sales took place online.
- The rise in online retailing has reduced barriers to entry in the retail market. Online retailers are able to offer competitive prices, more choice and greater convenience than many high street competitors. In turn, consumers are changing what they want from their local high street: there is an increased importance on the overall ‘experience’ of high street shopping. People want local high streets to provide convenience, a sense of community and to add value through services not offered online.

- As a result, high streets are having to evolve and adapt. Evidence shows that high streets with a wide choice alongside well designed and planned residential and office space are more resilient to these changes and are adapting more successfully. In contrast, high streets that rely heavily on traditional retail without sufficient office space and housing surrounding the high street have found it harder to adapt to these changes and tend to be the ones that are struggling.
- Alongside this, local leadership is an important feature of successful high streets. Research shows that strong local leadership is needed to support effective regeneration, reconfiguring space, increasing the number of homes for young and old alike, encouraging more workspaces and reducing congestion with new infrastructure. Well-designed parking policy, active management of change of use of retail units and reinstatement of roads promptly to full use after roadworks can also support vibrant town centres (Institute of Place Management).

2.42 To respond to these challenges, the Government has announced a new £675 million Future High Streets Fund will be set up to help local areas to respond to and adapt to these changes. It will serve two purposes: it will support local areas to prepare long-term strategies for their high streets and town centres, including funding a new High Streets Taskforce to provide expertise and hands-on support to local areas. It will also then co-fund with local area projects including:

- investment in physical infrastructure, including improving public and other transport access, improving flow and circulation within a town/city centre, congestion-relieving infrastructure, other investment in physical infrastructure needed to support new housing and workspace development and existing local communities, and the regeneration of heritage high streets; and
- investment in land assembly, including to support the densification of residential and workspace around high streets in place of under-used retail units.

2.43 It was announced on 5 July 2019 that the Stoke Future High Streets Fund bid was unsuccessful in securing second round funding in order to work up proposals for Longton and Burslem.

### **Implications for Newcastle-under-Lyme and Stoke-on-Trent**

2.44 The above trends have consequences for the future provision of retail and leisure floorspace in the joint Local Plan area. The prevailing conditions in respect of the comparison good market are evident through the difficulties in bringing forward development at the Ryecroft site in Newcastle-under-Lyme town centre and at the Former East West Precinct site in Hanley. In addition, as we go on to consider in Section 6 of this report, the vacancy rates within the principal centres in the Joint Local Plan area are generally well above national average level.

2.45 The offer in Hanley is more substantial than that in Newcastle-under-Lyme and other nearby town centres. In addition, Festival Retail Park has a significant comparison goods offer. As we go on to consider in greater detail later in this report, the consequence of this is that smaller town centres can struggle to establish their role going forward, particularly if they are not able to sustain a critical mass of comparison goods retailers. Upscale retailers generally trade from a limited number of centres, which often means that smaller town centres will be focused around meeting convenience goods and day to day comparison goods needs (most notably, household goods). The future vitality and viability of smaller town centres is therefore not just reliant on the comparison goods sector, but is also dependent on their convenience goods and service offer.

2.46 In respect of the convenience goods sector, all of the ‘big four’ operators currently trade from stores in both Newcastle-under-Lyme and Stoke-on-Trent (albeit the two Asda stores in Stoke-on-Trent are both modestly sized supermarkets and therefore only carry a limited product range). Whilst most of these stores appear to trade in a satisfactory manner, given the current popularity of Aldi and Lidl, we believe that additional pressure for further convenience goods floorspace is most likely to derive from this type of discount operator. In this regard, we note that Lidl has outstanding store requirements in Kidsgrove and Chesterton in Newcastle-under-Lyme .

### **3.0 Planning Policy and Legislative Context**

3.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before briefly considering relevant development plan policy as set out in the NULBC and SOTCC Joint Local Plan Preferred Options Consultation Document.

#### **The Revised National Planning Policy Framework**

3.2 The revised National Planning Policy Framework (‘NPPF’), which was published on 24 July 2018, recognises that a flexible approach will be necessary to provide for the future vitality and viability of town centres, and incorporates a number of policies that impact on the findings of studies of this nature. The revised NPPF reflects the fact that the traditional role of town centres has been undermined by structural changes in the sector, and that there may be a need to plan for a more diverse range of uses going forward. The policies of the NPPF are categorised on a thematic basis.

Plan-Making

3.3 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and quality of development, including policies to deliver retail, leisure and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

## **Building a Strong, Competitive Economy**

3.4 Paragraph 80 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

### **Ensuring the Vitality of Town Centres**

3.5 Paragraph 85 specifically relates to planning for town centres. It states that:

‘Planning policies should:

- a) define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
- f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.’

3.6 The requirement to plan to meet needs across a minimum ten year period represents a change from the previous NPPF which required town centre needs to be met in full across the entire plan period.

3.7 In addition, it is notable that the NPPF Annex 2 Glossary drops the reference to primary and secondary frontages. Page 32 of the Government Response to the Draft Revised National Planning Policy Framework Consultation indicates that, whilst the revised NPPF has removed the expectation in national planning policy that such frontages must be defined, this does not preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach.

### **Ensuring the Vitality of Town Centres Planning Practice Guidance**

3.8 The Ensuring the Vitality of Town Centres Planning Practice Guidance ('the Town Centres PPG') was published in March 2014 and remains in place to provide additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision taking. The Town Centres PPG affirms the Government's aspiration to support town centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.

3.9 Paragraph 003 of the Town Centres PPG indicates that a local planning authority's strategy for their town centres should include:

- the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period;
- a vision for the future of centres, considering the appropriate mix of uses to enhance overall vitality and viability;
- the opportunity for centres to accommodate any identified needs for additional town centre uses; and
- the timeframe to deliver additional retail floorspace.

3.10 Paragraph 003 goes on to state that town centre strategies should identify changes in the hierarchy of centres, including where a town centre is in decline. In such cases, strategies should seek to manage change positively in order to encourage economic activity and achieve an appropriate mix of uses commensurate with a realistic future for that town centre.

3.11 Paragraph 005 identifies a series of key indicators of relevance in assessing the health of a centre over time . Paragraph 005 also states that not all successful town centre regeneration projects have been retail led or have involved significant new development. Improvements to the public realm, transport (including parking) and accessibility can also play important roles. Any strategy should identify relevant

sites, actions and timescales through the development plan, and should be the subject of regular review.

3.12 Paragraph 009 indicates that the sequential test is of direct relevance to planning. It requires local planning authorities to consider the suitability, viability and availability of sites when considering sequentially preferable opportunities to accommodate additional development for main town centre uses.

### **Changes to Permitted Development Rights**

3.13 On 15 April 2015, the Town and Country Planning (General Permitted Development) (England) Order came into force. The Order consolidates and replaces the Town and Country Planning (General Permitted Development) Order 2015 (and its subsequent amendments), and provides additional permitted development rights. The Order has since been amended, with the most recently published Regulations contained in the Town and Country Planning (Permitted Development, Advertisement and Compensation Amendments) (England) Regulations 2019.

3.14 The May 2019 rights of relevance to town centres include:

- Shops to offices: The regulations introduce the ability to allow shops (A1), financial and professional services (A2), hot food takeaways (A5), betting shops, pay day loan shops and launderettes of up to 500 sqm to change to office use (B1). Prior approval is required which allows the local planning authority an opportunity to consider certain planning impacts, including the sustainability of existing shopping areas.
- Takeaways to residential use: Existing Rights allowing the change of use of up to 150 sqm of shops (A1), financial and professional services (A2), betting offices, pay day loan shops and launderettes to residential use (C3) are amended to also allow hot food take-aways (A5) to change to residential use (subject to prior approval).
- Flexible uses: Existing Rights allow a change of use from any Class A1, A2, A3, A5, B1, D1, or D2 use, “betting office”, or “pay day loan shop” to a temporary “flexible use” (i.e. A1, A2, A3, or B1) for a single continuous period of up to 2 years. From 25 May 2019, the new regulations amend these rights so that the temporary “flexible use” also includes specified community uses (exhibition hall, public library, museum, clinic or health centre, or art gallery (other than for sale or hire)), and extends the period of temporary use from two to three years.

3.15 The above provisions seek to make it more straightforward to secure the reuse of buildings (and thereby reduce the amount of vacant property). It is considered that the relaxation in respect of residential dwellings may be of greatest consequence in large metropolitan areas, which are more likely to benefit from both a substantial stock of office floorspace and strong demand for apartment

development. Furthermore, the broadening of the permitted development rights is indicative of the Government's acknowledgment that centres are having to be 'more than retail' and that the vitality and viability of a centre is more reliant on a mix of retail and leisure uses, which will attract visitors to the centres.

## **Stoke-on-Trent City Council and Newcastle-under-Lyme Borough Council Joint Local Plan Preferred Options Consultation Document**

3.16 At a local level, the 'direction of travel' in respect of the future development strategy and the priorities for town centres is set out in the Joint Local Plan Preferred Options document, which was published for consultation in February 2018.

3.17 Paragraph 2.14 of the Preferred Options indicates that the growth strategy across the Joint Local Plan area will be to deliver:

'...the Objectively Assessed Need of 230 hectares of employment land (including 15% buffer) and 27,800 new homes between 2013 and 2033 (1,390 new homes per year) as a minimum across the plan area, with some potential uplift to help to deliver wider economic aspirations, flexibility and choice where they can be demonstrated to be deliverable during the plan period.'

3.18 In delivering the identified housing need, the Preferred Options seeks to direct the majority of the outstanding requirement to the Urban Areas and Centres of Newcastle-under-Lyme and Stoke-on-Trent, with lesser amounts being directed to the Stoke-on-Trent Wider Urban Area, the Rural Area of Newcastle-under-Lyme, and to proposed Urban Extensions in Newcastle-under Lyme.

3.19 In terms of strategic development, paragraph 3.1 of the Preferred Options indicates that the authorities' centres will be supported, and development will be targeted in order to support the most sustainable locations and support job growth.

3.20 In Stoke-on-Trent, paragraph 3.6 of the Preferred Options sets out a series of future investment priorities for the city centre, including:

- further public realm improvements;
- the Former East West Precinct retail and leisure scheme on the former bus station ;
- further development at Smithfield including delivery of a 140 bed four star hotel;
- improvements to Hanley Indoor Market;
- additional improvements in the cultural quarter around The Potteries Museum and Art Gallery/Regent Theatre and Victoria Hall;
- Station Gateway and Hanley Park improvements; and
- the delivery of eight residential opportunity sites within and on the edge of the city centre.

3.21 Paragraph 5.6 of the Preferred Options confirms that the preferred strategy is to support a ‘town centre first’ approach and paragraph 5.7 sets out the following hierarchy for the authorities’ defined centres:

- Tier 1 Strategic Centres – City Centre (Hanley) and Newcastle-under-Lyme;
- Tier 2a Larger Urban Town Centres – Longton, Tunstall, Stoke and Kidsgrove;
- Tier 2b Smaller Urban Town Centres – Burslem, Fenton and Meir;
- Tier 3 District and Local Centres;
- Tier 4a Rural Centres; and
- Tier 4b Neighbourhoods Centres.

3.22 The Preferred Options indicates that the Strategic Centres are of regional and sub-regional importance, and will act as the primary focus to accommodate major retail development and other main town centre uses.

#### **4.0 Market Research: In-Street Surveys**

4.1 In-street surveys were undertaken in the centres of Hanley and Newcastle-under-Lyme by NEMS in July 2018 to understand how each centre is used and identify those aspects of the centre that may benefit from improvement and change. Our survey is similar to that undertaken by NEMS in Newcastle-under-Lyme in June 2011 in order to inform the 2011 Newcastle-under-Lyme Retail and Leisure Study, but also includes some questions that were included in the NEMS in-street survey that was undertaken in Hanley in July 2013 as part of the 2014 Stoke-on-Trent City Council Retail and Leisure Study. We refer to previous results in order to consider changes over time where it is appropriate to do so.

4.2 In total, 101 surveys were undertaken in Hanley and 100 surveys were undertaken in Newcastle-under-Lyme. In both cases, the surveys were undertaken at different times and on different days to try to ensure interactions with a variety of users.

4.3 In Hanley, the surveys were completed at the following six locations:

- Market Square;
- Albion Square;
- Potteries Museum and Art Gallery
- Crown Bank/top of Piccadilly;
- The Hive; and
- outside Marks & Spencer, Town Road.

4.4 The following five locations were used to undertake the surveys in Newcastle-under-Lyme:

- the junction of High Street, Ironmarket and Merial Street;

- at the Market Cross and Guildhall on High Street;
- outside Wilkinsons, Castle Walk;
- the junction of Castle Walk; and
- the junction of Hassell Street and High Street.

4.5 Each of the precise survey locations is identified on the plans provided at Appendix 3, and the full tabulated survey results are provided at Appendix 4. We set out an overview of the key findings of the survey below, focusing on customer satisfaction ratings, customer behaviour and suggestions for improvement.

### **Purpose of Visit**

4.6 Respondents were asked to identify the principal purpose of their visit to the respective centre. Whilst Hanley has a varied offer, the principal driver of trips, as identified in the below Table 4.1, was to undertake non-food shopping, which was cited by 20.8% of respondents. The next most popular reason to visit was to undertake both food and non-food shopping, which was identified by 17.8% of respondents. As such, the reason more than a third (38.6%) of users visit the centre is to undertake non-food shopping.

4.7 Reference to the previous 2013 in-street survey suggests the principal reasons to visit Hanley – i.e. to undertake shopping and access financial services – remain the same five years on. Notwithstanding this, it appears that the importance of non-food shopping has lessened slightly, as shopping for clothing and other non-food goods previously was, in 2013, the principal reason for 46.3% of visits into Hanley centre.

Table 4.1: Purpose of Visit to Centre

Centre	1st	2nd	3rd	4th
Hanley (2018)	Shopping for non-food items (20.8%)	Shopping for both food and non-food items (17.8%)	Shopping for food items only (16.8%)	To have a stroll and To use services (e.g. bank, post office and so on) (both 11.9%)
Hanley (2013)	Clothes/shoe shopping (40.7%)	Financial services (15.7%)	To browse (10.2%)	Other non-food shopping (5.6%)

Newcastle-under-Lyme (2018)	Shopping for both food and non-food items (23.0%)	To visit a restaurant, café or pub and To have a stroll (both 20.0%)	-	To use services (e.g. bank, post office and so on) (17.0%)
Newcastle-under-Lyme (2011)	Shopping for non-food items (26.0%)	Shopping for both food and non-food items and To have a stroll (both 17.0%)	-	To use services (e.g. bank, post office and so on) (15.0%)

Source: Question 2 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; Question 11 of NEMS July 2013 Stoke-on-Trent In-Street Survey; and, Question 1 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

4.8 In Newcastle-under-Lyme, the most popular reason to visit the centre is to undertake food and non-food shopping as part of the same trip (cited by 23.0% of respondents). Beyond this, the ‘pull’ of the centre appears to be less focused around its retail offer, with one in five respondents indicating that they were in the centre to visit a pub, café or restaurant, and the same proportion of respondents indicating that they were there just to have a stroll. This is perhaps reflective of the more local role of the centre, the nature of its day to day offer and the fact that the principal retail streets are pedestrianised. In this regard, it is evident that a lesser proportion of respondents appear to be visiting to undertake non-food shopping, as this activity was identified by only 33.0% of respondents in 2018, which compares to 43.0% in 2011.

### **Shopping Intentions**

4.9 Of those users who intend to make purchases during their visit, the most popular goods to buy in both Hanley and Newcastle-under-Lyme are food and other grocery items. As Table 4.2 identifies, 62.7% of shoppers in Hanley intended to purchase food and other grocery goods, with the second most popular goods to purchase being clothing and footwear (cited by 43.3% of shoppers). In Newcastle-under-Lyme, a greater proportion of shoppers (70.4%) intended to purchase food and other groceries, and a smaller proportion (27.8%) intended to purchase clothing and footwear.

4.10 The results suggest that Newcastle-under-Lyme’s offer may have narrowed over the past seven years. In particular, we note that a significantly lower proportion of shoppers in 2018 indicated that they intended to purchase health, beauty and

chemist goods during their trip (reduced from 15.5% of shoppers at 2011 to 7.4% of shoppers at 2018), and gift, jewellery, china and glass goods (reduced from 14.1% of shoppers at 2011 to 7.4% of shoppers at 2018). We are unable to undertake a comparison of past trends in Hanley as no comparable question was asked in 2015.

Table 4.2: Goods Respondent Intends to Purchase

Centre	1st	2nd	3rd	4th
Hanley (2018)	Food and groceries (62.7%)	Clothing and footwear (43.3%)	Newspapers and magazines (14.9%)	Don't know (7.5%)
Hanley (2013)	Not available	Not available	Not available	Not available
Newcastle-under-Lyme (2018)	Food and groceries (70.4%)	Clothing and footwear (27.8%)	Newspapers and magazines (14.8%)	Don't know (13.0%)
Newcastle-under-Lyme (2011)	Food and groceries (46.5%)	Clothing and footwear (32.4%)	Health, beauty and chemist items (15.5%)	Gifts, jewellery, china and glass (14.1%)

Source: Question 4 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 3 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

#### Frequency of Visit

4.11 The survey results indicate that a higher proportion of respondents at least occasionally undertake food shopping in Newcastle-under-Lyme than in Hanley. In Newcastle-under-Lyme, just 15.0% of respondents never undertake food shopping in the town centre, which compares to 32.7% in Hanley. Similarly, 52.0% of respondents in Newcastle-under-Lyme undertake some food shopping either daily or at least once a week, which compares to 44.5% of respondents in Hanley. The use of Newcastle-under-Lyme as a food shopping destination is reflective of both the market and the presence of retailers such as Iceland and Heron within the town centre, and Aldi, Lidl and Morrisons at its edge. By way of comparison, Hanley has a greater comparison goods shop role and it is therefore unsurprising that it has a proportionally lesser convenience goods focus.

4.12 As the below Table 4.3 demonstrates, there has been relatively little change in the frequency of visit to Newcastle-under-Lyme town centre to undertake food shopping subsequent to the previous survey being undertaken in 2011. Once again, no comparable question was asked in Hanley in 2013 and we are therefore unable to comment in respect of whether there has been any change in the frequency of visit to undertake food shopping in this centre.

Table 4.3: Frequency of Respondent's Visit to the Subject Centre for Food Shopping

Centre	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Don't do this activity	Don't know
Hanley (2018)	6.9%	37.6%	3.0%	6.9%	8.9%	32.7%	4.0%
Hanley (2013)	Not available	Not available	Not available	Not available	Not available	Not available	Not available
Newcastle-under-Lyme (2018)	3.0%	49.0%	5.0%	10.0%	15.0%	15.0%	3.0%
Newcastle-under-Lyme (2011)	9.0%	40.0%	16.0%	6.0%	12.0%	15.0%	2.0%

Source: Question 5 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 4 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

4.13 Table 4.4 indicates that, of the two centres, respondents in Newcastle-under-Lyme typically visit the centre more frequently to undertake non-food shopping. This is likely to be a consequence of Hanley having the larger catchment area.

Consequently, some respondents travel some distance to access the centre, thereby increasing the likelihood of trips being more sporadic. In Hanley, 29.7% of respondents visit the centre to undertake non-food shopping at least once a week, whereas the respective figure in Newcastle-under-Lyme is 46.0%.

4.14 Comparison with the previous surveys suggests that there has been an increase in recent years in the proportion of users of both centres that rarely or never undertake non-food shopping in the centre. In Hanley, 47.5% of respondents never undertake non-food shopping in the city centre or visit less than once a month for this purpose; this represents a significant increase on the figure of 33.0% recorded in 2013. In Newcastle-under-Lyme, the comparable figure has increased from 15.0% at 2011 to 30.0% at 2018.

Table 4.4: Frequency of Respondent's Visit to the Subject Centre for Non-Food Shopping

Centre	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Don't do this activity	Don't know
Hanley (2018)	3.0%	26.7%	8.9%	5.9%	39.6%	7.9%	7.9%

Hanley (2013)	0.0%	33.3%	4.8%	19.0%	33.3%	0.0%	12.4%
Newcastle-under-Lyme (2018)	2.0%	44.0%	5.0%	10.0%	24.0%	6.0%	9.0%
Newcastle-under-Lyme (2011)	9.0%	38.0%	19.0%	17.0%	11.0%	4.0%	2.0%

Source: Question 6 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; Question 21 of NEMS July 2013 Stoke-on-Trent In-Street Survey; and, Question 5 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

4.15 As the below Table 4.5 identifies, respondents in Newcastle-under-Lyme typically visit the centre more frequently than respondents in Hanley to undertake leisure activities (including visiting cafes, restaurants and bars). In Newcastle-under-Lyme, 41.0% of respondents visit the centre for leisure purposes at least once a week, whereas the respective figure in Hanley is 27.8%. Once again, we consider this to be reflective of the catchment that each centre serves, and due to Newcastle-under-Lyme having more of a ‘day to day’ role.

Table 4.5: Frequency of Respondent’s Visit to the Subject Centre for Leisure Purposes

Centre	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Don’t do this activity	Don’t know
Hanley (2018)	3.0%	24.8%	5.0%	5.9%	17.8%	33.7%	9.9%
Hanley (2013)	Not available	Not available	Not available	Not available	Not available	Not available	Not available
Newcastle-under-Lyme (2018)	4.0%	37.0%	11.0%	7.0%	21.0%	14.0%	6.0%
Newcastle-under-Lyme (2011)	5.0%	18.0%	13.0%	8.0%	23.0%	30.0%	3.0%

Source: Question 7 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 6 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

4.16 In addition, there has been a notable increase in the frequency that respondents use Newcastle-under-Lyme for leisure purposes, with the 14.0% of respondents who identified that they never undertake leisure activities in the centre being less than half the figure recorded seven years ago.

### Type of Leisure Facility Visited

4.17 By far the most popular leisure activity undertaken in each of the centres is to visit restaurants and cafes. Table 4.6 identifies that, of respondents who stated that they would undertake a leisure activity on the day of their visit, 80.5% of those interviewed in Hanley and 79.5% in Newcastle-under-Lyme intended to visit a restaurant or café. In the case of Newcastle-under-Lyme, this represents a significant increase in the figure of 61.1% recorded in 2011. By way of contrast, visiting the pub appears to have become a significantly less popular activity in Newcastle-under-Lyme, with just 4.5% of leisure users intending to make such a visit in 2018 (which compares to 25.0% at 2011).

4.18 Other leisure activities undertaken in both centres include having a takeaway and going for a general walk around. In Hanley, nearly one in ten of those undertaking a leisure activity go to the Potteries Museum & Art Gallery.

Table 4.6: Type of Leisure Facility Visited

Centre	1st	2nd	3rd	4th
Hanley (2018)	Restaurants/cafes (80.5%)	Takeaway food and Walk about (both 12.2%)	-	Museum (9.8%)
Hanley (2013)	Not available	Not available	Not available	Not available
Newcastle-under-Lyme (2018)	Restaurants/cafés (79.5%)	Takeaway food (15.9%)	Walk about (6.8%)	Pubs/bars (4.5%)
Newcastle-under-Lyme (2011)	Restaurants/cafes (61.1%)	Pubs/bars (25.0%)	Takeaway food (13.9%)	Sports facilities (8.3%)

Source: Question 9 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 8 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

### Amount Spent on Different Activities

4.19 There is a significant variance in the results of the 2018 in-street survey and previous surveys in terms of respondents' average spend whilst visiting each centre.

In this regard, it should be noted that the surveys have taken place at different times on different days, with a different sample group. In Hanley at 2018, respondents spend an average of £33.60 on shopping (comprised of £14.63 on food and £18.97 on non-food goods), which compares to £17.45 in Newcastle-under-Lyme (comprised of £10.75 on food and £6.70 on non-food goods). Once more, we believe that this difference is broadly reflective of the respective roles of the centres and the greater comparison goods offer of Hanley. Hanley also benefits from a substantially greater average leisure spend than Newcastle-under-Lyme (an average of £6.00 per person in Hanley and £3.60 in Newcastle.)

4.20 As the below Table 4.7 identifies, the identified average spend on non-food goods in both Hanley and Newcastle-under-Lyme has decreased significantly from the time of the previous surveys. In Hanley, the average non-food expenditure per trip has decreased from £33.40 at 2013 to £18.97 at 2018. In Newcastle-under-Lyme, such expenditure has decreased from £25.90 at 2011 to £6.70 at 2018. However, it should be noted that the historic average spend figure in both centre was influenced by a small number of respondents making large purchases.

Table 4.7: Mean Average Spend By Respondent on Each Type of Activity

Centre	Food and grocery	Non-food goods	Eating/drinking out
Hanley (2018)	£14.63	£18.97	£6.00
Hanley (2013)	£7.70	£33.40	Not available
Newcastle-under-Lyme (2018)	£10.75	£6.70	£3.60
Newcastle-under-Lyme (2011)	£9.60	£25.90	£4.90

Source: Question 6 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; Question 21 of NEMS July 2013 Stoke-on-Trent In-Street Survey; and, Question 5 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

Note: The results have been taken directly from the NEMS survey results and have not been converted to the same price base

## Travel and Car Parking

4.21 As anticipated, the most popular mode of travel to both of the centres is by car. In both centres, around half of visitors (48.5% in Hanley and 50.0% in Newcastle-under-Lyme use this mode of transport). Table 4.8 identifies that the second most popular mode of transport is bus or coach (accounting for 37.6% of respondents in Hanley and 28.0% of respondents in Newcastle-under-Lyme). Substantially more respondents walked into Newcastle-under-Lyme town centre than Hanley on the day of the survey, which again reflects the more localised catchment of Newcastle-under-Lyme.

Table 4.8: Most Popular Mode of Travel to Centres

Centre	1st	2nd	3rd	4th
Hanley (2018)	Private car (48.5%)	Bus/coach (37.6%)	On foot (9.9%)	Taxi (3.0%)
Hanley (2013)	Private car (47.2%)	Bus/coach (37.0%)	On foot (12.0%)	Taxi (1.9%)
Newcastle-under-Lyme (2018)	Private car (50.0%)	Bus/coach (28.0%)	On foot (19.0%)	Taxi (2.0%)
Newcastle-under-Lyme (2011)	Private car (57.0%)	Bus/coach (22.0%)	On foot (17.0%)	Taxi (3.0%)
Hanley (2013)	Private car (47.2%)	Bus/coach (37.0%)	On foot (12.0%)	Taxi (1.9%)
Newcastle-under-Lyme (2018)	Private car (50.0%)	Bus/coach (28.0%)	On foot (19.0%)	Taxi (2.0%)

Source: Question 12 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; Question 4 of NEMS July 2013 Stoke-on-Trent In-Street Survey; and, Question 5 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

4.22 Table 4.8 indicates that there has only been relatively limited fluctuations in the method of transport over time, with the principal difference being a reduction in the use of the motor car to visit Newcastle-under-Lyme (this mode of transport was used by 57.0% of respondents in 2011 and 50.0% of respondents in 2018).

4.23 Table 4.9 indicates that respondents principally rely on a limited number of car parks in each centre. In Hanley, by far the most popular car park is the multi-storey at the Intu Potteries shopping centre, which was used by 49.0% of respondents travelling by car. The results suggest an increase in the car park's popularity since the previous survey was undertaken in 2011, which is perhaps reflective of the success of The Hive cinema and leisure development which opened in December 2015 and has had the effect of shifting the 'centre of gravity' in the centre northwards.

4.24 In Newcastle-under-Lyme, the Midway car park appears to have increased in popularity and was used by 44.0% of respondents travelling by car. This represents a significant increase in the figure of 24.6% that was recorded in 2011, with its identified improvement in performance largely being at the expense of The Square/Vue cinema car park, which was not used by any 2018 survey respondents.

Table 4.9: Most Popular Place to Park

Centre	1st	2nd	3rd	4th
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Hanley (2018)	Intu Potteries (49.0%)	Tesco Extra, Clough Street (16.3%)	Don't know (8.2%)	Dropped off (6.1%)
Hanley (2013)	Intu Potteries (35.3%)	Tesco Extra, Clough Street (17.6%)	On-street (13.7%)	Dropped off (11.8%)
Newcastle-under-Lyme (2018)	Midway multi-storey (44.0%)	On-street (14.0%)	Morrisons, Goose Street (10.0%)	Civic Offices, Corporation Street (6.0%)
Newcastle-under-Lyme (2011)	Midway multi-storey (24.6%)	Morrisons, Goose Street and on street (Both 15.8%)	-	Vue Cinema/The Square multi-storey (12.3%)

Source: Question 13 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; Question 5 of NEMS July 2013 Stoke-on-Trent In-Street Survey; and, Question 11 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

### Reasons for Choosing to Visit the Town Centre

4.25 Table 4.10 identifies the most popular reasons that influenced the respondent to visit the centre on the day of the survey. As is generally the case, the most popular reason for choosing to visit the particular centre is that it is close to home, which was cited by 51.5% of respondents in Hanley and by 64.0% of respondents in Newcastle-under-Lyme town centre. In Newcastle-under-Lyme, the proportion of respondents who indicated that the centre's proximity to their home had been the reason they decided to visit increased 15 percentage points from 49.0% at 2011. This suggests that the offer of Newcastle-under-Lyme may have reduced over the intervening seven years, given that fewer respondents have identified particular attractions within the centre that prompted them to visit. In particular, it is notable that the second most popular factor influencing a visit to Newcastle-under-Lyme in 2011 was the market (identified by 22.0% of respondents), but that this was the fifth most popular response in 2018 (and was identified by just 6.0% of respondents).

Table 4.10: Reasons for the Visit to the Centre

Centre	1st	2nd	3rd	4th
Hanley (2018)	Close to home (51.5%)	Market and Variety of shopping (both 12.9%)	-	Visit a particular shop (9.9%)
Hanley (2013)	Close to home (48.1%)	Choice of High Street retailers (9.3%)	Choice of shops selling non-food goods (8.3%)	Close to friends/family (6.5%)

Newcastle-under-Lyme (2018)	Close to home (64.0%)	Visit a particular shop (15.0%)	Financial services (12.0%)	Close to work (9.0%)
Newcastle-under-Lyme (2011)	Close to home (49.0%)	Market (22.0%)	Visit a particular shop (18.0%)	Attractive environment/nice place (17.0%)

Source: Question 15 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 15 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

### Length of Time Spent in Town Centres

4.26 As Table 4.11 demonstrates, respondents generally spend longer in Hanley city centre than Newcastle-under-Lyme town centre, with the average trip in Hanley at 2018 lasting 110 minutes, compared to 93 minutes in Newcastle-under-Lyme. Once more, this reflects the relative size of the centres and the more extensive offer available at Hanley. The youngest age group (18 to 34 year olds) typically spend the longest in the centre, with respondents within this age range typically spending 14 minutes extra (when compared to the overall sample average) in Hanley and 15 minutes extra in Newcastle-under-Lyme.

4.27 Reference to the historic 2011 Newcastle-under-Lyme in-street surveys suggests that respondents are now spending less time in the centre per trip than seven years ago, with the average dwell time being 96 minutes at 2011. No comparable previous data is available for Hanley.

Table 4.11: Average Length of Time Spent in the Centre

Centre	18 to 34	35 to 54	55 plus	Total
Hanley (2018)	110 minutes	91 minutes	72 minutes	88 minutes
Hanley (2013)	Not available	Not available	Not available	Not available
Newcastle-under-Lyme (2018)	93 minutes	72 minutes	80 minutes	79 minutes
Newcastle-under-Lyme (2011)	101 minutes	96 minutes	93 minutes	96 minutes

Source: Question 17 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; Question 21 of NEMS July 2013 Stoke-on-Trent In-Street Survey; and, Question 5 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

### Comparison with Other Town Centres

4.28 Respondents were asked a series of questions in respect of how the attributes of each centre compare to other centres that the respondent visits. Responses have been recorded on a sliding scale ranging from ‘very good’ to ‘very poor’. In order to present the results in a concise manner, we have attributed a mean average score to each criteria, based on the responses received. In each case, a respondent providing a ‘very good’ response results in a score of five, going down to a score of one for a ‘very poor’ response . This is the same scoring system NEMS previously used in reporting the June 2011 in-street survey results for Newcastle-under-Lyme, which again allows a comparative assessment to be undertaken this dataset. Once more, no such comparable data is available for Hanley.

## **Accessibility**

4.29 In general, the accessibility of the respective centres scored relatively well, with a large majority of respondents identifying that the accessibility of Hanley and Newcastle-under-Lyme both by car and by public transport is either ‘good’ or ‘very good’. Both centres were also very highly rated in respect of the availability of car parking.

4.30 As the below Table 4.12 demonstrates, the principal issue in respect of access and transport relates to the cost of parking, which was identified by some respondents as being problematic, particularly in Newcastle-under-Lyme town centre. However, respondents’ perceptions in respect of parking charges appear to have improved in Newcastle-under-Lyme since the previous survey, when this issue secured a score of 2.3 (which compares to a score of 3.0 at 2018). Despite generally being the subject of higher parking charges, the cost of parking secured a better score from respondents in Hanley than in Newcastle-under-Lyme, which suggests that there is a perception that parking in the former centre is better value.

Table 4.12: Respondents’ Satisfaction with Accessibility Factors

Centre	Accessibility by car	Availability of parking	Parking charges	Traffic congestion	Accessibility by public transport
Hanley (2018)	4.7	4.7	3.7	3.8	4.1
Hanley (2013)	Not available	Not available	Not available	Not available	Not available
Newcastle-under-Lyme (2018)	4.6	4.5	3.0	3.9	4.2
Newcastle-under-Lyme (2011)	4.4	4.1	2.3	3.9	4.2

Source: Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 17 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

## Shopping Facilities

4.31 Table 4.13 indicates that Hanley scored particularly well in respect of its retail offer, with a score of at least 4.0 being secured in relation to the range and quality of both food and non-food shops, and in respect of the market and the nearby retail park offer. The performance of Hanley is reflective of its regional role and the strength of the shopping offer, underpinned by the Intu Potteries shopping centre.

Table 4.13: Respondents' Satisfaction with Shopping Facilities

Centre	Range of non-food shops	Quality of non-food shops	Range of food shops	Quality of food shops	Range of warehousing/retail parks	Market
Hanley (2018)	4.3	4.4	3.9	4.3	4.0	4.0
Hanley (2013)	Not available	Not available	Not available	Not available	Not available	Not available
Newcastle-under-Lyme (2018)	3.4	3.9	3.5	3.9	2.9	2.8
Newcastle-under-Lyme (2011)	3.2	3.5	3.3	3.8	2.6	3.6

Source: Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 17 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

4.32 Whilst Newcastle-under-Lyme secures lesser scores in respect of the strength of its retail offer, respondents' perceptions generally seem to have improved slightly over the last seven years. The largest recorded increase relates to the quality of non-food shops, which increased from a score of 3.5 at 2011 to a score of 3.9 at 2018. The single factor which respondents have become less satisfied about in Newcastle-under-Lyme is the market, which secured a score of 2.8 in 2018, down from 3.6 in 2011. We are aware that the number of stalls at the market has declined in recent years and that the Council has sought to bring in an external operator to take responsibility for its management and improve its offer.

## **Leisure Facilities**

4.33 The more comprehensive offer of Hanley is reflected in how respondents rated its leisure facilities. The centre scored very strongly in terms of its theatre, cinema and evening entertainment provision, which is a consequence of the Regent Theatre, Victoria Hall and now The Hive cinema underpinning the centre's cultural offer. The centre scored less strongly in respect of its town centre events programme, and in respect of its general liveliness and character.

4.34 Unsurprisingly, given its more localised role and more limited leisure offer, Newcastle-under-Lyme generally performed slightly less well than Hanley in terms of respondents' views with regard to this sector. However, a majority of visitors who expressed an opinion considered that Hanley's performance in respect of all of the criteria listed in the below Tables 4.14a and 4.14b is either 'quite good' or 'very good'. Newcastle-under-Lyme scores particularly well in respect of its cinema provision, which reflects the presence of the Vue cinema on High Street, which was refurbished in 2017.

4.35 As Table 4.14b identifies, there was very little difference in terms of how the quality of the food and drink offer in the respective centres was rated. Newcastle-under-Lyme's strong performance in respect of this criterion is reflective of the food and drink offer on the northern and southern parts of High Street, and the pleasant pedestrian environment along Ironmarket that helps foster such uses.

Table 4.14a: Respondents' Satisfaction with Leisure Facilities

Centre	Daytime entertainment and leisure facilities	Evening entertainment and leisure facilities	Theatres	Cinemas	Town centre events
Hanley (2018)	4.3	4.6	4.8	4.7	3.6
Hanley (2013)	Not available	Not available	Not available	Not available	Not available
Newcastle-under-Lyme (2018)	3.4	3.8	3.7	4.2	3.6
Newcastle-under-Lyme (2011)	3.6	3.8	3.5	4.1	3.6

Source: Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 17 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

Table 4.14b: Respondents' Satisfaction with Leisure Facilities

Centre	Liveliness, street life and character	Quality and number of places to eat and drink
Hanley (2018)	3.7	4.1
Hanley (2013)	Not available	Not available
Newcastle-under-Lyme (2018)	3.6	4.0
Newcastle-under-Lyme (2011)	3.8	3.9

Source: Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 17 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

## Environment

4.36 Despite the recent public realm works in Hanley, Newcastle-under-Lyme generally fared the better of the two centres in respect of users' perceptions of the environment of each centre. As Table 4.15 identifies, Newcastle-under-Lyme scored appreciably better in terms of the attractiveness of its built environment, the planting and landscaping, the layout of the centre, and in respect of personal safety. Whilst some of the public realm in Newcastle-under-Lyme is a little dated, it has an exceptionally large number of planters and (in summer) hanging baskets along High Street and Ironmarket, and benefits from there being a clear and easy to navigate retail 'circuit'. In addition, the principal shopping streets are pedestrianised, allowing for easy access.

4.37 Notwithstanding this, there appears to be an issue with the provision of public toilets in Newcastle-under-Lyme, which a majority of respondents rated as ‘quite poor’ or ‘very poor’. The issue appears to have worsened since the undertaking of the previous in-street survey in Newcastle-under-Lyme in 2011, with the score for the public toilet provision decreasing from 3.4 in 2011 to 1.8 in 2018.

Table 4.15: Respondents' Satisfaction with the Environment of the Centre

Newcastle-under-Lyme (2018)	3.9	3.9	4.3	3.9	1.8	4.3
Newcastle-under-Lyme (2011)	3.9	4.0	4.1	4.1	3.4	4.5

Source: Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 17 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

4.38 The improved public realm in Hanley is reflected in its strong performance in respect of its general shopping environment. However, the centre scored less strongly in terms of the attractiveness of the built environment and the layout of the centre. This is perhaps reflective of the condition of some of the mid-century buildings (in particular, the vacant East West Precinct site), and due to Intu Potteries and The Hive to some degree ‘turning their back’ on other parts of the centre.

#### Suggested Improvements to the Centres

4.39 Respondents were asked for their views in terms of how each of the centres could be improved. Table 4.16 identifies that the most popular suggestion in Hanley was to improve the range of local and speciality retailers, which was cited by 25.7% of respondents. The next most popular response was that there was nothing in particular which required improvement. The responses suggest that there is a general satisfaction with the national multiple and leisure offer, as other responses principally related to the fabric of the centre and respondents’ sense of security.

4.40 In Newcastle-under-Lyme, responses focused more on the facilities provided within the centre. The most popular suggested improvements related to the need to improve the market and to increase the range of national multiple retailers, both of which were identified by 38.0% of respondents. The next most popular response given in Newcastle-under-Lyme were to improve the range of local and speciality retailers (mentioned by 32.0% of respondents). Whilst comparison with the 2011 in-street survey results indicates that these perceived issues are longstanding, the need to improve the market was identified by a larger proportion of respondents in 2018 than seven years ago.

Table 4.16: Most Popular Suggestions to Improve the Centre

Centre	1st	2nd	3rd	4th
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Hanley (2018)	Increase the range of local/speciality retailers (25.7%)	Nothing in particular (22.8%)	Make the centre safer (21.8%)	Improve the appearance of the town centre (16.8%)
Hanley (2013)	Not available	Not available	Not available	Not Available
Newcastle-under-Lyme (2018)	Improve the market and Increase the range of national/multiple chain stores (both 38.0%)	-	Increase the range of local/speciality retailers (32.0%)	Don't know (14.0%)
Newcastle-under-Lyme (2011)	Increase the range of local/speciality retailers (56.0%)	Increase the range of national/multiple chain stores	Newcastle-under-Lyme (2011)	Increase the range of local/speciality retailers (56.0%)

Source: Question 20 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 18 of NEMS June 2011 Newcastle-under-Lyme In-Street Survey

4.41 Respondents were also asked to consider specific types of shops and services that the respective centres would benefit from. As Table 4.17 identifies, almost half of respondents in Hanley failed to identify any specific shops or service, with the most popular responses being the need for independent or specialist shops (cited by 18.8% of respondents), followed then by department stores (9.9%), and then public amenities (7.9%). In Newcastle-under-Lyme, 36.0% of respondents indicated that there was a need for more clothing shops, followed then by department stores (cited by 31.0% of respondents), High Street names (30.0%), and footwear stores (27.0%). To some extent, the responses in Newcastle-under-Lyme are all variations on a theme, suggesting a lack of national multiple comparison goods anchor tenants.

Table 4.17: Shops and Services to Improve the Centre

Centre	1st	2nd	3rd	4th
Hanley (2018)	None mentioned or didn't know (49.5%)	Independent/specialist shops (18.8%)	Department stores (9.9%)	Public amenities (7.9%)
Hanley (2013)	Not available	Not available	Not available	Not Available
Newcastle-under-Lyme (2018)	Clothing stores (36.0%)	Department stores (31.0%)	High Street names (30.0%)	Footwear stores (27.0%)

Newcastle-under-Lyme (2011)	Not available	Not available	Not available	Not Available
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Source: Question 21 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

4.42 The vast majority of respondents in both Hanley and Newcastle-under-Lyme failed to identify any additional leisure facilities that are required in the centre that they were visiting. Table 4.18 identifies that, in Hanley, the most popular response was that the centre needed more outdoor events (identified by 10.0% of respondents), followed by a perceived need for entertainment and activities for young people, and a requirement for parks and gardens (both of which were identified by 9.0% of respondents).

4.43 In Newcastle-under-Lyme, 9.9% of respondents identified a need for an art gallery, followed then by entertainment and activities for young people (suggested by 8.9% of respondents), and then restaurants and cafes (7.9%).

Table 4.18: Leisure Facilities to Improve the Centre

Centre	1st	2nd	3rd	4th
Hanley (2018)	None mentioned or didn't know (68.%)	Outdoor events (10.0%)	Entertainment/ None mentioned or didn't know (68.%)	-
Hanley (2013)	Not available	Not available	Not available	Not Available
Newcastle-under-Lyme (2018)	None mentioned or didn't know (71.3%)	Art galleries (9.9%)	Entertainment/ activities for young people (8.9%)	Restaurants and cafes (7.9%)
Newcastle-under-Lyme (2011)	Not available	Not available	Not available	Not Available

Source: Question 22 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

## Markets

4.44 In Hanley, 38.6% of respondents intended to visit one of the centre's markets on the day of their visit. The survey indicates that 37.6% of respondents in Hanley intended to go to the indoor market in Intu Potteries, 12.9% intended to go to the Fountain Square outdoor market and 11.9% intended to go to the Market Square outdoor market . In Newcastle-under-Lyme, 45.0% of respondents intended to visit

the outdoor market. As such, the markets clearly remain an important part of each centre's offer.

4.45 As the below Table 4.19 identifies, those who do visit the markets visit them fairly regularly. Newcastle-under-Lyme outdoor market attracts the most loyal customer base, with 75.5% of those intending to visit on the day of survey doing so either daily or more than once a week. In Hanley, 73.7% of those using the Intu Potteries indoor market do so either daily or once a week or more, with the large majority of users of the outdoor markets at Market Square and Fountain Square also doing so very frequently.

Table 4.19: Frequency of Respondent's Visit to the Subject Centre for Leisure Purposes

Market	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Don't know
Hanley Indoor Market	10.5%	63.2%	5.3%	2.6%	15.8%	2.6%
Hanley Market Square	8.3%	58.3%	0.0%	16.7%	8.3%	8.3%
Hanley Fountain Square	7.7%	53.8%	15.4%	7.7%	7.7%	7.7%
Newcastle-under-Lyme	2.2%	73.3%	6.7%	8.9%	8.9%	0.0%

Source: Question 23 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

4.46 In terms of the factors that respondents like about the markets, the most popular attributes at Newcastle-under-Lyme market were the freshness of the food (cited by 42.2% of respondents), the market's friendly atmosphere (40.0%), the variety of the offer (35.6%), and value for money (31.1%). In Hanley, the freshness of the food was a popular factor at all three markets, alongside value for money (which was identified by the largest number of respondents in respect of Fountain Square and the joint highest number of respondents in respect of Market Square).

Table 4.20: Aspects of Markets Respondents Particularly Like

Market	1st	2nd	3rd	4th
Hanley Indoor Market	Freshness of food (23.7%)	All on one level (18.4%)	Friendly atmosphere	-

Hanley Market Square	Freshness of food and Friendly atmosphere and Value for money (all 33.3%)	-	-	All on one level and Quality of food (both 16.7%)
Hanley Fountain Square	Value for money (46.2%)	Freshness of food (30.8%)	All on one level and Friendly atmosphere (both 23.1%)	-
Newcastle-under-Lyme	Freshness of food (42.2%)	Friendly atmosphere (40.0%)	Variety (35.6%)	Value for money (31.1%)

Source: Question 25 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

4.47 Table 4.21 identifies the factors that respondents most dislike about the markets. At all markets, respondents considered the principal issue related to their being not enough stalls or that too many stalls were changing. This issue appears to be particularly pronounced at Newcastle-under-Lyme, where 68.9% of respondents identified that there are not enough stalls, and 33.3% of respondents noted an issue with stalls closing down.

Table 4.21: Aspects of Markets Respondents Particularly Dislike

Market	1st	2nd	3rd	4th
Hanley Indoor Market	Empty stalls/stalls closing down (50.0%)	Not enough stalls (36.8%)	Nothing (34.2%)	Too many stalls selling the same goods (13.2%)
Hanley Market Square	Nothing (50.0%)	Not enough stalls (33.3%)	Empty stalls/stalls closing down (25.0%)	Not big enough and Too many stalls selling the same goods (both 8.3%)
Hanley Fountain Square	Nothing (53.8%)	Empty stalls/stalls closing down and Not enough stalls (both 23.1%)	-	Not big enough (15.4%)

Newcastle-under-Lyme	Not enough stalls (68.9%)	Empty stalls/stalls closing down (33.3%)	Nothing (26.7%)	Not big enough (22.2%)
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Source: Question 26 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

## Safety and Security

4.48 Table 4.22 summarises respondents' views in respect of their perceived safety both during the day and into the evening. Whilst a majority of respondents' feel safe walking around both centres during the daytime, Newcastle-under-Lyme performs particularly well, with 87.0% feeling safe. However, only 17.8% of respondents in Hanley and 6.0% of respondents in Newcastle-under-Lyme feel safe walking around at night. The particularly low figure for Newcastle-under-Lyme may be reflective of it being the quieter of the two centres and, as such, it generally benefits from a lesser level of natural surveillance. In the case of both centres, a minority of respondents believe that the centre feels safer than it did five years ago.

Table 4.22: Perceptions of Safety

Question	Hanley			Newcastle-under-Lyme		
	Yes	No	Don't know	Yes	No	Don't know
Do you generally feel safe walking around in the day?	68.3%	28.7%	3.0%	87.0%	9.0%	4.0%
Do you generally feel safe walking around at night?	17.8%	26.7%	55.4%	6.0%	20.0%	74.0%
Do you feel safer than you did five years ago?	18.8%	35.6%	45.5%	18.0%	13.0%	69.0%

Source: Questions 31, 32 and 33 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

4.49 Table 4.23 summarises the views of respondents in terms of factors that may help engender a greater feeling of safety and security. In this regard, the most influential factor in improving safety was considered to be an increase in policing or patrolling, which is recognised by 76.2% of respondents in Hanley and 74.0% of respondents in Newcastle-under-Lyme as being beneficial in improving security. In both centres, the second most influential identified factor is the increased use of CCTV cameras, which was thought to be helpful by 42.6% of respondents in Hanley and 46.0% of respondents in Newcastle-under-Lyme.

Table 4.23: Factors Which May Assist in Providing for a Safer Centre

Factor	Hanley			Newcastle-under-Lyme		
	Yes	No	Don't know	Yes	No	Don't know
Increased policing/patrolling	76.2%	15.8%	7.9%	74.0%	17.0%	9.0%
Increased CCTV use	42.6%	34.7%	22.8%	46.0%	35.0%	19.0%
Improved street lighting	33.7%	41.6%	24.8%	28.0%	42.0%	30.0%
Fewer pubs/clubs etc	19.8%	56.4%	23.8%	30.0%	45.0%	25.0%
More people living in the town centre	8.9%	56.4%	34.7%	20.0%	42.0%	38.0%
More secure car parks	33.7%	42.6%	23.8%	31.0%	37.0%	32.0%
Removal of shrubs/street furniture	2.0%	81.2%	16.8%	0.0%	86.0%	14.0%

Source: Question 34 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

## Summary

4.50 The in-street survey has gleaned a large amount of information relating to respondents' views, which can be fully understood with reference to the complete tabulated results provided at Appendix 4. In summary, the following changes are considered to be indicative of the current role and performance of Newcastle-under-Lyme and Hanley:

- the principal reason to visit both centres is still to go shopping (particularly in Hanley), which emphasises that, whilst the offer of centres will need to broaden, retail remains a primary function;

- the most popular goods to purchase in both Newcastle-under-Lyme and Hanley are food and grocery goods (which 70.4% of respondents in Newcastle-under-Lyme and 62.7% of respondents in Hanley intended to purchase on the day of their visit);
- the second most popular intended purchases in both centres were clothing and footwear, followed then by newspapers and magazines;
- a higher proportion of respondents at least occasionally undertake food shopping in Newcastle-under-Lyme compared to Hanley, which is reflective of the relatively strong convenience goods offer and relatively moderate comparison goods offer in and around Newcastle-under-Lyme town centre;
- in addition, respondents in Newcastle-under-Lyme typically visit this centre more frequently than respondents in Hanley to undertake non-food shopping and to undertake leisure activities, which may be attributable to Newcastle-under-Lyme having the smaller catchment area and therefore generally being a more convenient centre for its users to travel to;
- comparison with previous surveys suggests that there has been an increase in recent years in the proportion of users of both centres who rarely or never undertake non-food shopping in the respective centres;
- around four out of every five respondents indicated that their favoured leisure activity in the centre of their visit was eating out at cafes and restaurants;
- the survey results suggest that the average level of expenditure in each centre per visit has decreased significantly since the time of the previous surveys;
- respondents typically spend longer in Hanley than in Newcastle-under-Lyme, and the average length of visit is related to the age of the respondents (younger respondents typically spend longer in each centre);
- in terms of the performance of each centre relative to competing venues, Hanley scored well in respect to the strength of its retail and leisure offer, whilst Newcastle-under-Lyme generally fared better with regard to the quality of its environment;
- in terms of potential improvements to the centres, respondents identified a need to increase the range of local and speciality retailers in Hanley, and to increase the range of national multiple operators and speciality retailers in Newcastle-under-Lyme;
- in addition, a particular need to attract further clothing and department store retailers was identified in Newcastle-under-Lyme;
- whilst a large proportion of respondents expressed an intention to visit the centre's market on the day of their visit, concerns were raised (particularly in Newcastle-under-Lyme) in respect of the closure of market stalls and the number of stalls that remain; and
- there is a general perception that both centres are not particularly safe and secure after dark.

## **5.0 Market Research: Household Survey**

### **Study Area and Survey**

5.1 A survey of 1,500 households was undertaken by NEMS Market Research in order to ascertain where residents go to undertake a range of shopping and leisure activities. In considering the area to be surveyed, we have carefully considered the Study Areas adopted for the previous Newcastle-under-Lyme and Stoke-on-Trent Retail Studies, and have used these as the basis for the defined Study Area for this commission. In this regard, it is advantageous that zones previously identified within each of these respective Study Areas can be ‘knitted’ together to form a composite Study Area.

5.2 As such, our approach has been to adopt:

- Zones 1, 2 and 5 of the 2011 Newcastle-under-Lyme Retail & Leisure Study; and
- Zones 1, 3, 4, 5, 6, 7, 8, 9, 10 and 11 from the 2014 Stoke-on-Trent Retail & Leisure Study.

5.3 This provides a 13 zone Study Area, which we believe appropriately covers the principal areas (both within the two authority areas and, importantly, beyond) where residents look to facilities within the two areas to meet their retail and leisure needs. We provide a plan illustrating the extent of the Study Area at Appendix 1.

5.4 In undertaking the household survey, it is necessary to undertake a sufficient sample in order to identify not just broad shopping patterns, but the accurate trading performance of individual stores. This is particularly important if the household survey is to be relied on to determine the acceptability of future proposal for retail and other main town centre uses in the area, as the impacts arising from such proposals may need to be considered with reference to the trading performance (and ongoing viability) of particular stores.

5.5 In this regard, we note that four zones in the proposed Study Area would have populations of around 65,000 persons or more, and that the previous 2014 Stoke-on-Trent Retail & Leisure Study identified that there is a requirement for such zones to be the subject of a minimum 150 surveys. We believe that this remains an appropriate approach. As such, NEMS has undertaken 150 household surveys within our Zones 1, 3, 9 and 12, and 100 household surveys in each of the other nine zones.

5.6 The 13 zones reflect broad areas where residents may be expected to exhibit some similarities in respect of their shopping habits. The below Table 5.1 sets out the postcode sectors which define each of the zones (and also clarifies how each

zone was identified in the previous Newcastle-under-Lyme and Stoke-on-Trent Retail Studies).

5.7 The zones have been used as the basis for the NEMS household survey and inform the assessment of retail needs set out at Section 8 of this report. The Stoke-on-Trent authority area comprises parts of Zones 1, 3, 4, 5, 6, 7 and 8, and the Newcastle-under-Lyme authority area is principally comprised of parts of Zones 2, 7, 12 and 13 (and very small parts of Zones 5, 8, 10 and 11).

Table 5.1: Study Area Zones by Postcode Sector

Survey Zone	Postcode Sectors
1 – Hanley	ST1 1, ST1 2, ST1 3, ST1 4, ST1 5, ST1 6, ST2 0, ST2 7, ST2 8, ST2 9, ST4 2, ST4 3
2 – Newcastle West	ST7 8, CW3 9
3 – Longton and Fenton	ST3 1, ST3 2, ST3 3, ST3 4, ST3 5, ST3 6, ST3 7, ST11 9
4 – Stoke	ST4 1, ST4 4, ST4 5, ST4 6, ST4 7, ST4 8
5 – Burslem	ST6 1, ST6 2, ST6 3, ST6 4, ST6 7, ST6 8
6 – Tunstall	ST6 5, ST6 6
7 – Kidsgrove	ST7 1, ST7 4
8 – Biddulph	ST8 6, ST8 7
9 – Rural East	ST9 0, ST9 9, ST10 1, ST10 2, ST10 3, ST10 4, ST13 5, ST13 6, ST13 7, ST13 8
10 – Rural South	ST12 9, ST15 0, ST15 8, ST21 6
11 – Rural North	CW12 1, CW12 2, CW12 3, CW12 4, ST7 2, ST7 3
12 – Newcastle East	ST5 0, ST5 1, ST5 2, ST5 3, ST5 4, ST5 5, ST5 6, ST5 7, ST5 8, ST5 9
13 – Rural West	TF9 2, TF9 4

Notes: Zones 1, 3, 4, 5, 6, 7, 8, 9, 10 and 11 correspond to the identically numbered zones in the Stoke-on-Trent Retail and Leisure Study of 2014; Zones 2, 12 and 13 correspond to Zones 1, 2 and 5 of the Newcastle-under-Lyme Retail & Leisure Study of 2011

## Market Share Analysis

5.8 In analysing the market share of the two authority areas and the study area as a whole, it is useful, where possible, to compare these patterns with those established by the previous household surveys undertaken by each respective authority. In this regard, the previous household survey for Stoke was undertaken in July 2013, and the previous household survey for Newcastle was undertaken in June 2011. However, as the Study Area for the 2019 study has been formed by

amalgamating zones from the previous studies, it has not been possible to compare shopping patterns for each type of goods. In any event, where possible, we do provide comparisons below as part of the overall analysis.

5.9 Table 5.2 below lists the comparative zones from the previous Stoke and Newcastle retail studies for reference.

Table 5.2: Study Area Zones by Postcode Sector

<b>2018 Survey Zone</b>	<b>2013 Stoke Retail Study Zone</b>	<b>2011 Newcastle-under-Lyme Study Zone</b>
1 – Hanley	1	4
2 – Newcastle West	-	2
3 – Longton and Fenton	3	-
4 – Stoke	4	-
5 – Burslem	5	-
6 – Tunstall	6	-
7 – Kidsgrove	7	-
8 – Biddulph	8	-
9 – Rural East	9	-
10 – Rural South	10	-
11 – Rural North	11	-
12 – Newcastle East	-	1
13 – Rural West	-	5

### **Convenience Goods Shopping Trips by Zone**

5.10 Table 5.3 below provides the breakdown of main and top-up food market share to destinations in Stoke, Newcastle and the overall Study Area for each of the 13 zones. We compare these, where possible, with the market shares identified for each authority area in the previous studies.

5.11 Looking at the retention of main and top-up food trips within the Study Area as a whole, we can see that within all zones except Zone 13, the market share to existing destinations is above 80.0% for both main and top-up shopping. Indeed, for Zones 1, 3, 4, 5, 6, 7, 8 and 9, the market share attracted to destinations in the Study Area is over 90.0% for both main and top-up shopping, which is not unsurprising given the extent of the Study Area and the wide choice of convenience facilities available to residents to meet their convenience shopping needs.

5.12 In terms of the proportion of shopping trips directed to destinations within Stoke administrative area, we can see that the highest proportion is within Zones 1 (Hanley), 3 (Longton and Fenton), 4 (Stoke), 5 (Burslem), and 6 (Tunstall). In each case, the proportion of trips directed to existing convenience destinations within the Stoke administrative area for both main and top-up shopping is above 80.0%. For

Zones 2, 12 and 13 which broadly cover the Newcastle-under-Lyme authority area, the proportion of trips attracted to destinations within the administrative area are lower for both main and top-up food shopping, with 68.7% and 83.5% in Zone 2 for main and top-up shopping respectively and 65.6% and 88.5% in Zone 12. However, the proportion of trips attracted to facilities located in Newcastle-under-Lyme in Zone 13 is substantially lower at 14.7% of main food trips and 45.8% of top-up trips. Residents in Zone 13 are instead choosing destinations in Market Drayton (principally the Morrisons on Maer Lane) to meet their main and top-up food shopping requirements.

Table 5.3: Market Share of Convenience Goods Secured by Facilities in Each Authority Area and Study Area

Zone	Stoke Mark et Share				Newca stle- under- Lyme				Over all Study Area	
	2018		2013		2018		2011		2018	
	Main	Top -up	Main	Top -up	Main	Top- up	Main	Top-up	Main	Top- up
1 – Hanley	90.7 %	96.2 %	91.1 %	100.0%	6.1%	0.6 %	-	-	100.0 %	99.4 %
2 – Newcastle West	8.2%	3.2 %	-	-	68.7%	83.5 %	75.5 %	72.8 %	77.0 %	88.8 %
3 – Longton and Fenton	93.2 %	82.9 %	87.2 %	87.0 %	1.0%	0.8 %	-	-	99.1 %	96.5 %
4 – Stoke	84.5 %	88.4 %	78.9 %	88.1 %	0.8%	14.6 %	-	-	96.5 %	100.0 %
5 – Burslem	89.1 %	90.1 %	90.6 %	89.9 %	3.8%	8.6 %	-	-	100.0 %	100.0 %
6 – Tunstall	86.1 %	84.7 %	81.6 %	70.2 %	13.2%	7.5 %	-	-	99.3 %	100.0 %
7 – Kidsgrove	14.7 %	12.1 %	20.1 %	11.3 %	75.4%	74.1 %	-	-	98.6 %	98.4 %
8 – Biddulph	16.7 %	9.2 %	33.6 %	12.4 %	15.3%	0.0 %	-	-	97.7 %	98.9 %
9 – Rural East	15.1 %	10.1 %	19.0 %	11.6 %	1.8%	0.9 %	-	-	92.9 %	94.2 %
10 – Rural South	12.2 %	5.3 %	8.7%	6.2 %	2.3%	2.0 %	-	-	80.3 %	92.4 %

11 – Rural North	3.2%	3.2 %	3.6%	1.5 %	20.0%	8.9 %	-	-	88.6 %	88.4 %
12 – Newca stle East	31.9 %	9.7 %	-	-	65.6%	88.5 %	79.0 %	80.7 %	99.0 %	98.2 %
13 – Rural West	6.5%	2.5 %	-	-	14.7%	45.8 %	13.6 %	30.7 %	21.3 %	57.3 %
Total	50.1 %	42.5 %	-	-	20.9%	23.0 %	-	-	94.5 %	95.5 %

Source: Table 3 of Appendix 7 of the 2019 Retail Study

Notes: Comparable figures taken from Appendix 5 of the March 2014 Stoke Retail Study and Appendix 7 of the October 2011 Newcastle-under-Lyme Retail Study

5.13 Looking at the shifts in shopping patterns since the previous household surveys in 2011 and 2013, the overall authority wide market shares have remained broadly consistent in the majority of circumstances. However, there have been some shifts within certain zones. For example, Zone 8 (Biddulph) has witnessed a reduction in main food market share attracted to Stoke destinations from 33.6% to 16.7%, principally due to an increase in market share attracted to destinations in Cheshire East in Zone 11 including the two Aldi stores, the Morrisons and the Tesco in Congleton.

### **Main Destinations for Main Food Shopping Trips by Zone**

5.14 Turning to focus on the principal destinations for main food shopping, Table 5.4 below provides the top three main food destinations based on the proportion of shopping trips directed to them at 2018, along with the zonal retention for each zone. The Table also sets out the previous principal destination for each zone from the 2011 and 2013 household surveys.

5.15 The table demonstrates that for the majority of zones, the principal destination for main food shopping at 2011/2013 remains within the top three destinations at 2018. However, there have been some considerable shifts in shopping patterns, principally as a result of an increase in popularity of and the introduction of new Aldi and Lidl stores across the Study Area.

5.16 For example, within Zone 1 we can see that the Morrisons at Festival Park has remained the principal destination for main food shopping, but the market share from Zone 1 residents has dropped from 23.6% in 2013, to 15.4% in 2018. Instead, 13.0% of main food shopping trips are now attracted to the Aldi on Victoria Road in Fenton, which has increased from 8.2% in 2013. A similar, albeit more exaggerated

pattern can be seen in Zone 5 (Burslem). Within Zone 5, the principal destination in 2013 for main food shopping was the Morrisons at Festival Park in Stoke which achieved a market share of 30.4%. In 2018, the equivalent market share from Zone 5 residents attracted to the Morrisons is 12.7% and instead, 27.0% of trips are attracted to the Aldi in Norton and 18.2% to the Asda in Tunstall. Another key shift in shopping patterns for main food shopping can be seen in Zone 4. In 2013, the principal destination was the Sainsbury's store located at Minton House in Stoke, which attracted 25.2% of main food trips from Zone 4 residents, which has dropped to 5.3% in 2018, a reduction of 19.9 percentage points. We can see that instead, residents are choosing the Tesco at Springfields, the Aldi on Newcastle Road and the Sainsbury's on Etruria Road to meet their main food shopping requirements.

5.17 The overall zonal market shares have remained broadly consistent across the zones, with minor fluctuations across the majority, which is expected. A more considerable shift can be seen in Zone 6 – Tunstall, which has experienced a drop from 27.3% in 2011 to 15.3% in 2018 (a reduction in 12.0 percentage points). This shift is due to a higher proportion of trips now being attracted to destinations in Zone 5 compared to in 2013, which has risen from 36.5% to 56.2%, an increase in 19.7 percentage points. The key destinations are the Aldi and Asda stores in Tunstall, which were both present at the time of the previous survey.

Table 5.4: Market Share of Main Food Shopping Trips

Zone	2018 Market Share				2011/2013 Market Share	
	Highest Market Share	Second Highest Market Share	Third Highest Market Share	Zonal Main Food Shopping Retention	Highest Market Share	Zonal Main Food Shopping Retention
1 - Hanley	Morrisons, Festival Park (15.4%)	Aldi, Victoria Road, Fenton (13.0%)	Tesco Extra, Longton Retail Park (10.8%)	64.6%	Morrisons , Festival Park (23.6%)	67.4%
2 – Newcastle West	Morrisons, Lower Milehouse Land (22.5%)	Asda, Morris Square, Wolstanton (11.5%)	Sainsbury's, Liverpool Road, Newcastle (11.2%)	0.7%	Morrisons , Lower Milehouse Land (24.7%)	-

3 – Longton and Fenton	Tesco Superstore, Meir (33.9%)	Tesco Extra, Longton Retail Park (19.0%)	Aldi, Meir Retail Park, Meir (14.5%)	73.7%	Tesco Extra, Longton Retail Park (28.3%)	70.1%
4 – Stoke	Tesco Superstore, Springfields , Stoke (22.0%)	Aldi, Newcastle Road, Stoke (13.2%)	Sainsbury's, Etruria Road, Stoke (10.3%)	53.9%	Sainsbury's, Minton House, Stoke (25.2%)	54.9%
5 – Burslem	Aldi, Leek New Road, Norton (27.0%)	Asda, Scotia Road, Tunstall (18.2%)	Morrisons, Festival Park, Stoke (12.7%)	26.6%	Morrisons, Festival Park, Stoke (30.4%)	20.1%
6 – Tunstall	Asda, Scotia Road, Tunstall (39.4%)	Aldi, Brownhills Road, Tunstall (16.8%)	Lidl, High Street, Tunstall (11.1%)	15.3%	Asda, Scotia Road, Tunstall (22.0%)	27.3%
7 – Kidsgrove	Aldi, Liverpool Road, Kidsgrove (31.9%)	Tesco, Liverpool Road, Kidsgrove (26.8%)	Morrisons, Lower Milehouse Lane, Newcastle (7.8%)	59.3%	Tesco, Liverpool Road, Kidsgrove (32.5%)	48.4%
8 – Biddulph	Sainsbury's , Wharf Road, Biddulph (37.9%)	Aldi, Mountbatten Way, Congleton (9.8%)	Aldi, Liverpool Road, Kidsgrove (8.4%)	37.9%	Sainsbury's, Wharf Road, Biddulph (41.4%)	42.0%
9 – Rural East	Morrisons, Newcastle Road, Leek (26.7%)	Aldi, Haywood Street, Leek (18.7%)	Sainsbury's, Churnet Way, Leek (14.1%)	76.1%	Morrisons, Newcastle Road, Leek (31.3%)	73.8%
10 – Rural South	Morrisons, Church/Mill Street, Stone (32.4%)	Aldi, Stafford Road, Stone (22.7%)	Co-op, Stafford Street, Eccleshall (8.9%)	65.8%	Morrisons, Church/Mill Street, Stone (45.9%)	63.3%

11 – Rural North	Tesco, Barn Road, Congleton (16.7%)	Asda, Lawton Road, Alsager (14.0%)	Morrison s, Bridesto n Shoppin g Centre, Congleto n (11.1%)	60.4%	Tesco, Barn Road, Congleton (24.3%)	65.6%
12 – Newcastl e East	Asda, Wolstanton Retail Park, Newcastle (12.4%)	Aldi, Blackfriar s Road, Newcastl e (12.1%)	Sainsbur y's, Liverpool Road, Newcastl e (10.3%)	65.1%	Morrisons , Lower Milehouse Lane, NUL (24.7%)	-
13 – Rural West	Morrisons, Maer Lane, Market Drayton (44.0%)	Local Shops, Market Drayton (12.6%)	Aldi, Audley Avenue, Newport (8.0%)	2.5%	Morrisons , Maer Lane, Market Drayton (60.2%)	-

Source: Table 3 of Appendix 7

Notes: Comparable figures taken from Appendix 5 of the March 2014 Stoke Retail Study and Appendix 7 of the October 2011 Newcastle-under-Lyme Retail Study

5.18 Whilst we are unable to identify the zonal market shares for the Newcastle zones (Zones 2, 7, 12 and 13) we can establish the principal main food shopping destinations in 2018 and compare these to 2011. The principal shift in patterns is witnessed within Zone 12, within which the Morrisons on Millhouse Lane is no longer the principal destination and instead, the Asda on Wolstanton Retail Park and the Aldi at Blackfriars Road are now the principal two destinations for Zone 12 residents.

### Main Destinations for Top-up Food Shopping Trips by Zone

5.19 Turning to the market share patterns for top-up shopping, Table 5.5 below sets out the principal destinations for each of the 13 zones, and compares these with the findings of the 2011 and 2013 household survey findings. The Table also sets out the zonal market share retention levels, i.e. the proportion of trips residing from residents attracted to destinations in the same zone.

5.20 Again, the biggest reduction in zonal market share retention can be witnessed in Zone 6, where the level of retention has dropped from 47.3% to 26.7%, a reduction in 20.6 percentage points. This shift in patterns can be attributed to the increase in shopping trips to the Aldi and Asda located in Tunstall in Zone 5.

5.21 For a number of the zones, there has been a shift in top-up shopping trips from local shops to larger national multiple retailers. For example, in Zone 5, the principal destination in 2013 were local shops in Burslem town centre, but in 2018, the principal destination is now the Asda in Tunstall. The same can be seen in Zone 6, where trips have shifted from local shops in Tunstall to the Aldi, also located in Tunstall.

Table 5.5: Market Share of Top-Up Food Shopping Trips

Zone	2018 Market Share			Zonal Top-up Food Shopping Retention	2011/2013 Market Share	
	Highest Market Share	Second Highest Market Share	Third Highest Market Share		Highest Market Share	Zonal Top-up Food Shopping Retention
1 - Hanley	Tesco Extra, Clough Street, Stoke (10.2%)	Co-op, Christchurch Street, Fenton (9.8%)	Tesco Extra, Longton Retail Park, Longton (7.3%)	72.9%	Tesco Extra, Clough Street, Stoke (12.6%)	90.8%
2 – Newcastle West	Co-op, Church Street, Audley (16.5%)	Tesco Express, Church Street, Audley (8.8%)	Co-op, Morningside, Madeley (7.0%)	64.7%	Other shops, Audley and Other shops, Madley (both 7.6%)	-
3 – Longton and Fenton	Tesco Superstore, Lysander Road, Meir (20.2%)	Aldi, Whittle Road, Meir Retail Park, Meir (10.3%)	Tesco Extra, Longton Retail Park, Longton (8.8%)	91.2%	Tesco Superstore, Lysander Road, Meir (14.8%)	75.4%
4 – Stoke	Aldi, Stanley Matthews Way, Trentham (25.5%)	Co-op Mayne Street, Hanford (14.5%)	Tesco Express, Esso Garage, Hartshill (10.1%)	71.5%	Sainsbury's, Minton House, Stoke (18.8%)	75.1%

5 – Burslem	Asda, Scotia Road, Tunstall (18.0%)	Co-op, Knypersle y Road, Norton (13.5%)	Aldi, Brownhills Road, Tunstall (8.2%)	50.8%	Local shops, Burslem town centre (12.9%)	58.8%
6 – Tunstall	Aldi, Brownhills Road, Tunstall (19.1%)	Asda, Scotia Road, Tunstall (17.9%)	Tesco Express, Biddulph Road, Great Chell (11.0%)	26.7%	Local shops, Tunstall town centre (15.0%)	47.3%
7 – Kidsgrove	Aldi, Liverpool Road, Kidsgrove (22.4%)	Tesco Superstor e, Liverpool Road, Kidsgrove (17.1%)	Co-op, Whitehill Road, Kidsgrove (11.1%)	72.2%	Tesco Superstor e, Liverpool Road, Kidsgrov e (33.2%)	79.9%
8 – Biddulph	Sainsbury' s, Wharf Road, Biddulph (64.8%)	Local shops, Biddulph Moor (6.5%)	Home Bargains, Wharf Road, Biddulph	85.3%	Sainsbur y's, Wharf Road, Biddulph (59.0%)	81.6%
9 – Rural East	Morrisons, Newcastle Road, Leek (20.9%)	Aldi, Haywood Street, Leek (13.2%)	Asda, Springfield Road, Leek (11.8%)	83.2%	Morrison s, Newcastl e Road, Leek (15.7%)	87.6%
10 – Rural South	Aldi, Stafford Road, Stone (31.0%)	Morrisons, Church/Mi ll Street, Stone (22.4%)	Co-op, Stafford Street, Eccleshall (20.7%)	84.2%	Morrison s, Church/M ill Street, Stone (20.9%)	82.0%
11 – Rural North	Tesco Superstor e, Barn Road, Congleton (13.5%)	Morrisons, Brideston e Shopping Centre, Congleton (10.4%)	Asda, Lawton Road, Alsager (9.9%)	69.1%	Co-op, Lawton Road, Alsager (17.0%)	80.0%

12 – Newcastle East	Aldi, Blackfriars Road, Newcastle (9.2%)	Morrisons, Lower Milehouse Lane, Newcastle (9.1%)	Asda, Morris Square, Wolstanton (8.3%)	80.0%	Morrisons, Lower Milehouse Lane, Newcastle (10.8%)	-
13 – Rural West	Co-op, Eccleshall Road, Loggerheads (41.6%)	Morrisons, Maer Lane, Market Drayton (21.7%)	Lidl, Towers Lawn, Market Drayton (7.1%)	44.9%	Morrisons, Maer Lane, Market Drayton (21.3%)	-

Source: Table 3 of Appendix 7

Notes: Comparable figures taken from Appendix 5 of the March 2014 Stoke Retail Study and Appendix 7 of the October 2011 Newcastle-under-Lyme Retail Study

## Comparison Goods Analysis

5.22 We set out below a similar analysis of shopping patterns but for comparison goods shopping trips within the Study Area. The comparison analysis is split according to the eight categories of goods included within the household survey. We also provide an overall review of the total comparison market share attracted to destinations.

## Comparison Goods Market Share

5.23 Table 5.6 below sets out the market share of each of the eight categories of goods attracted to destinations in Stoke, Newcastle-under-Lyme and the overall study area. We can see from the table that destinations within Stoke attract a higher proportion of the trips of each of the categories of goods, with the highest proportion for electrical goods at 71.2%. Just over half of this proportion of trips is attracted to Festival Heights and Festival Retail Park (37.3%) which includes operators such as Argos Extra and Currys PC World.

5.24 The proportion of clothing and footwear trips attracted to destinations in each authority area is lower at 56.4% for Stoke and 18.5% for Newcastle-under-Lyme. We go into more detail below with regard to clothing and footwear shopping patterns, but looking overall 33.4% of trips are attracted to Hanley city centre and 7.6% to Festival Retail Park and Festival Heights.

5.25 Overall, destinations in the Study Area attract over 80.0% of shopping trips for each category of goods other than small household goods which falls just under 80.0%. The highest overall study area market share is for chemist goods, where 93.2% of all trips are attracted by destinations in the Study Area. This higher market

share is not unusual as residents will typically choose to purchase such goods from local chemist and pharmacies or as part of a wider shop at larger foodstores close to home.

Table 5.6: Market Share of Comparison Goods Secured by Facilities in Each Authority Area and Study Area

Year	Type of Comparison Goods Shopping	Stoke	Newcastle-Under-Lyme	Overall Study Area
2019	Clothing and footwear	56.4	18.5	81.3
	Books, CDs, DVDs and stationery	50.1	17.9	85.1
	Small household goods	54.5	11.5	78.6
	Toys, games, bicycles and recreational goods	67.9	7.3	88.5
	Chemist goods (including health and beauty)	47.1	21.0	93.2
	Electrical goods	71.2	6.8	86.8
	DIY and gardening goods	55.9	21.3	88.9
	Furniture, carpets and floor coverings	57.7	11.8	85.6
	Overall comparison goods	52.8	19.5	79.4

Source: Tables 9 to 25 of Appendix 7

Notes: Comparable figures taken from Appendix 5 of the March 2014 Stoke Retail Study and Appendix 7 of the October 2011 Newcastle-under-Lyme Retail Study

5.26 Table 5.7 below provides the proportion of market share for each of the eight categories of goods which is retained within the Study Area from each of the 13 zones. The Table demonstrates that the zone with the highest proportion of trips directed to destinations in the Study Area is Zone 1, which ranges from 91.0% for clothing and footwear, to 100.0% for DIY & gardening products. The lowest

proportions of market share attracted to destinations in the Study Area are from Zone 13, which covers Market Drayton to the south west of the Study Area. Within this zone, the proportions of market share range from 16.1% for chemist goods to 46.6% for clothing and footwear. The low proportion of chemist goods market share retained in the Study Area is due to the popularity of Market Drayton for purchasing such goods (which attracts 67.7% of the market share from Zone 13 residents), which is located just outside the Study Area boundary. As such, whilst this proportion is low, residents are not having to travel unsustainable distances to meet their shopping requirements.

Table 5.7 Overall Comparison Goods Market Shares

Zone	Overall Study Area Market Share							
	Clothing and Footwear	Books, CDs and DVDs	Small hou ehold	Toys Etc	Chemi st	Electri cal	DIY & Garde ning	Furnitu re and Furnis hings
1 - Hanley	91.0%	94.9%	95.0 %	98.3%	98.4%	98.2%	100.0 %	94.5%
2 – Newcastle West	72.0%	75.3%	74.3 %	66.4%	79.4%	77.3%	65.0%	61.4%
3 – Longton and Fenton	90.0%	96.8%	79.1 %	98.7%	97.0%	96.9%	96.8%	89.4%
4 – Stoke	86.2%	84.0%	88.8 %	98.2%	93.7%	98.2%	100.0 %	86.7%
5 – Burslem	96.4%	89.8%	89.5 %	100.0 %	100.0 %	97.7%	99.0%	100.0 %
6 – Tunstall	91.1%	97.5%	89.1 %	94.2%	100.0 %	98.9%	100.0 %	96.4%
7 – Kidsgrove	92.7%	85.5%	80.8 %	92.9%	91.5%	92.0%	92.2%	88.9%
8 – Biddulph	81.1%	91.6%	84.6 %	97.6%	98.3%	90.8%	95.8%	97.0%
9 – Rural East	78.9%	80.9%	76.7 %	91.5%	98.1%	83.6%	92.6%	88.4%
10 – Rural South	36.9%	47.9%	24.9 %	48.7%	76.6%	44.1%	59.8%	57.2%

11 – Rural North	59.4%	74.2%	62.0 %	58.8%	89.1%	45.4%	52.7%	67.1%
12 – Newcas- tle East	86.9%	85.4%	89.8 %	91.6%	97.5%	98.1%	96.1%	89.0%
13 – Rural West	46.6%	25.5%	30.2 %	8.0%	16.1%	37.7%	20.7%	31.9%
Total	81.3%	85.1%	78.6 %	88.5%	93.2%	86.8%	88.9%	85.6%

Source: Tables 9 to 25 of Appendix 7

Notes: Comparable figures taken from Appendix 5 of the March 2014 Stoke Retail Study and Appendix 7 of the October 2011 Newcastle-under-Lyme Retail Study

5.27 We provide commentary below in respect of the shopping patterns for each of the eight categories of goods and any associated key trends relating to the specific nature of retailing.

### Non-Bulky Shopping Patterns

5.28 Table 5.8 below provides the non-bulky comparison goods markets shares on a zonal basis to destinations within the Stoke administrative area and within the Newcastle-under-Lyme administrative area.

5.29 We provide commentary with regard to each category of comparison goods below.

Table 5.8 Non-Bulky Goods Market Shares

Zone	Stoke Market Share					Newcastle-under-Lyme Market Share				
	Clothing and Footwear	Books, CDs and DVDs	Small household	Toys Etc	Che mist	Clothing and Footwear	Books, CDs and DVDs	Small household	Toys Etc	Che mist
1 - Hanley	81.8%	84.0 %	89.3 %	97.2 %	96.8 %	8.7%	7.1%	5.7%	0.0 %	1.0%

2 – Newcastle West	26.9%	11.3 %	36.2 %	41.0 %	5.9%	45.1%	61.8 %	38.1 %	25.4 %	72.5 %
3 – Longton and Fenton	81.3%	78.6 %	71.8 %	96.8 %	90.3 %	8.3%	9.9%	4.9%	2.0 %	1.3%
4 – Stoke	56.0%	60.4 %	66.1 %	89.3 %	70.9 %	24.8%	19.0 %	21.2 %	8.9 %	22.8 %
5 – Burslem	83.2%	83.3 %	70.9 %	92.0 %	94.4 %	13.2%	4.5%	4.1%	6.0 %	3.2%
6 – Tunstall	74.0%	87.7 %	87.8 %	82.1 %	82.1 %	17.2%	9.8%	1.3%	0.0 %	13.9 %
7 – Kidsgrave	49.7%	36.6 %	58.4 %	74.7 %	21.9 %	38.6%	39.0 %	14.8 %	16.0 %	56.4 %
8 – Biddulph	45.7%	35.8 %	38.0 %	36.9 %	19.0 %	17.0%	8.7%	14.5 %	2.4 %	1.7%
9 – Rural East	44.9%	17.0 %	38.1 %	45.9 %	14.6 %	9.0%	4.8%	0.9%	1.8 %	0.6%
10 – Rural South	21.0%	21.5 %	9.0%	11.6 %	6.9%	7.4%	0.0%	1.3%	0.0 %	2.4%
11 – Rural North	25.9%	13.1 %	20.3 %	17.4 %	8.3%	19.2%	18.4 %	8.5%	12.3 %	11.8 %
12 – Newcastle East	42.9%	24.5 %	48.1 %	63.6 %	16.8 %	43.2%	60.9 %	40.3 %	26.2 %	80.7 %
13 – Rural West	22.0%	19.7 %	20.3 %	5.5%	5.5%	18.2%	5.8%	9.8%	2.4 %	9.9%
Total	56.4%	50.1 %	54.5 %	67.9 %	18.5 %	81.3%	17.9 %	11.5 %	7.3 %	21.0 %

Source: Tables 9 to 25 of Appendix 7

Notes: Comparable figures taken from Appendix 5 of the March 2014 Stoke Retail Study and Appendix 7 of the October 2011 Newcastle-under-Lyme Retail Study The figures for Hanley centre include the market share attracted to the Potteries Shopping Centre

5.30 Table 5.9 below provides the top three destinations for clothing and footwear shopping for the 13 zones within the Study Area, and compares these against the principal destination identified in the 2011/2013 household surveys.

5.31 We can see from the table that Hanley centre is the principal destination for clothing and footwear shopping for residents in Zones 1, 3, 4, 5, 6, 7, 8, 9, 11 and 12, as was the case for the respective zones back in 2011/2013. For Zone 10, Stafford town centre has remained the principal destination and for Zone 13, Telford town centre has also remained the principal destination. However, for Zone 2, Newcastle-under-Lyme is now the principal destination for clothing and footwear shopping which attracts 25.6% of trips from Zone 2 residents and the proportion attracted to Hanley centre has reduced from 30.6% to 17.4%, a reduction in 13.2 percentage points.

5.32 Overall, other than within Zone 6, the proportion of clothing and footwear trips attracted to Hanley centre has decreased within each zone.

Table 5.9: Market Share of Clothing and Footwear Trips by Zone

Zone	2018			2011/2013 Top Market Share
	Top Market Share Highest Market Share	Second Highest Market Share	Third Highest Market Share	
1 - Hanley	Hanley town centre (51.1%)	Festival Retail Park (12.5%)	Longton town centre (8.9%)	Hanley town centre (63.3%)
2 – Newcastle West	Newcastle-under-Lyme (25.6%)	Hanley town centre (17.4%)	Wolstanton Retail Park (7.9%)	Hanley town centre (30.6%)
4 – Stoke	Hanley town centre (28.3%)	Stoke-upon-Trent town centre (11.1%)	Wolstanton Retail Park (10.6%)	Hanley town centre (45.5%)
3 – Longton and Fenton	Hanley town centre (40.3%)	Longton town centre (29.7%)	Freeport Talke Outlet Mall and Meir Retail Park (both 4.4%)	Hanley town centre (42.6%)
5 – Burslem	Hanley town centre (49.0%)	Festival Retail park (10.2%)	Freeport Talke Outlet (7.9%)	Hanley town centre (50.6%)

Zone	2018			
	Top Market Share Highest Market Share	Second Highest Market Share	Third Highest Market Share	2011/2013 Top Market Share
6 – Tunstall	Hanley town centre (39.0%)	Tunstall town centre (19.7%)	Freeport Talke Outlet (10.7%)	Hanley town centre (36.1%)
7 – Kidsgrove	Hanley town centre (21.8%)	Wolstanton Retail Park (18.4%)	Tunstall town centre (15.6%)	Hanley town centre (46.9%)
8 – Biddulph	Hanley town centre (35.2%)	Tunstall town centre (8.5%)	Freeport Talke Outlet (6.3%)	Hanley town centre (40.5%)
9 – Rural East	Hanley town centre (35.5%)	Leek town centre (21.7%)	Derby city centre (4.3%)	Hanley town centre (48.4%)
10 – Rural South	Stafford town centre (29.8%)	Hanley town centre and Queens Retail Park (both 10.1%)	-	Stafford town centre (25.6%)
11 – Rural North	Hanley town centre (15.3%)	Freeport Talke Outlet (14.2%)	Crewe town centre (10.6%)	Hanley town centre (24.3%)
12 – Newcastle East	Hanley town centre (28.4%)	Newcastle-under-Lyme (19.5%)	Festival Retail Park (13.1%)	Hanley town centre (35.1%)
13 – Rural West	Telford town centre (24.2%)	Hanley town centre (15.8%)	Market Drayton town centre (9.1%)	Telford town centre (21.7%)
Total	Hanley town centre (33.4%)	Festival Retail Park (7.5%)	Longton town centre (7.1%)	-

Source: Tables 9 to 25 of Appendix 7

Notes: Comparable figures taken from Appendix 5 of the March 2014 Stoke Retail Study and Appendix 7 of the October 2011 Newcastle-under-Lyme Retail Study;

figures for Hanley centre include the market share attracted to the Potteries Shopping Centre.

### **Books, CDs and DVDs Goods**

5.33 Looking at the shopping patterns associated with purchasing books, CDs and DVDs, Hanley centre is the principal destination across the Study Area as a whole, attracting 31.8% of trips, followed by Newcastle-under-Lyme which attracts 8.8% of the total trips.

5.34 The market share of Stoke destinations within each zone ranges from 11.3% in Zone 2 to 87.7% in Zone 6. For the respective Newcastle-under-Lyme proportions, the figures range from 0.0% in Zone 10 to 61.8% in Zone 2. The overall Study Area market share for books, CDs and DVDs goods ranges from 25.5% in Zone 13 to 97.5% in Zone 6.

5.35 Looking at some key shifts in shopping habits across the Study Area, we can see that in 2018, 9.7% of residents in Zone 2 chose Hanley centre to purchase books, CDs and DVDs, compared to 30.6% in 2011. Instead, 52.4% of trips from Zone 2 residents are now attracted to Newcastle-under-Lyme town centre compared to 24.7% in 2011, indicating that residents are no longer bypassing Newcastle to meet their needs.

5.36 The proportion of trips attracted to Hanley centre has reduced since 2013 from 50.7% to 33.1% in 2018. Instead, 21.1% of respondents are now choosing to shop at Meir Retail Park, compared to 3.9% in 2013.

### **Small Household Goods**

5.37 Looking at shopping patterns for small household goods, Table 5.9 demonstrates that the market share to destinations in the Stoke authority area ranges from 9.0% in Zone 10 to 89.3% in Zone 1. For Zone 1 residents, the principal destination is Hanley centre (28.4%), followed by Longton town centre (16.0%). However, for Zone 10 residents, the principal destination is Stafford town centre which attracts 18.6% of trips and which is located outside of the Study Area.

5.38 The proportion of trips attracted to destinations within Newcastle-under-Lyme ranges from 0.9% in Zone 9 to 40.3% in Zone 12. Overall, the proportion of trips attracted to destinations within the Study Area ranges from 24.9% in Zone 10 to 95.0% in Zone 1.

### **Recreational Goods**

5.39 Turning to shopping patterns for toys and recreation goods, the proportion of market share attracted to facilities in Stoke ranges from 5.5% from Zone 13 residents to 97.2% from Zone 1 residents. Principal destinations for Zones 1, 3, 5 and 6 which broadly cover the Stoke authority area include Hanley centre and the Festival and Festival Heights Retail Parks. For residents in Zones 1 and 3, Longton town centre is also a popular choice for purchasing toys and recreational goods, which includes large national multiples such as Smyths Toys, Sports Direct, Argos and Tesco Extra, all selling a range of toys and recreational goods.

5.40 For Zones 2, 7, 12 and 13 which broadly cover the Newcastle-under-Lyme authority area, the principal destinations include Hanley centre and the Festival Retail Parks (for Zone 7 residents), Hanley and Newcastle-under-Lyme centres for Zone 2 and 12 residents and Market Drayton town centre for Zone 13 residents. The overall Study Area market share equates to 88.5%.

### **Chemist Goods**

5.41 Looking at the market share for chemist goods, the proportion of shopping trips attracted to facilities in Stoke ranges from 5.5% in Zone 13 to 96.8% in Zone 1. For Zones 1, 3, 5 and 6, the proportion of shopping trips to Stoke facilities ranges from 82.1% in Zone 6, to 96.8% in Zone 1. The principal destination for purchasing chemist goods for Zone 1 and 5 residents is Hanley centre and the Festival Retail Parks, for Zone 3 residents the principal destinations are Longton town centre and Meir Retail Park and for Zone 6 residents, the principal destination is Tunstall town centre.

5.42 Turning to the proportion of trips attracted to destinations in Newcastle-under-Lyme, the figures range from 0.6% in Zone 9 to 80.7% in Zone 12. Looking at the shopping patterns to purchase chemist goods in Zones 2, 7, 12 and 13, the principal destinations include Newcastle-under-Lyme town centre for Zones 2 and 12, Kidsgrove town centre for Zone 7 and Market Drayton town centre for Zone 13.

### **Bulky Shopping Patterns**

5.43 Table 5.9 then sets out the respective Stoke and Newcastle-under-Lyme market shares for the three categories of bulky comparison goods for each of the 13 zones.

5.44 We provide additional commentary below in respect of each of the three categories of goods, but again we can see that the higher levels of market share to facilities within Stoke or Newcastle are from those zones which broadly correspond with the authority areas. In particular, we can see that the proportion of market

share from Zone 1 residents to destinations in Stoke to purchase all three categories of bulky goods is high, ranging from 81.8% for furniture and furnishings to 93.5% for electrical goods.

5.45 Looking at Zone 12, which covers Newcastle-under-Lyme town centre, the proportion of market share attracted to destinations in the Newcastle authority area ranges from 15.5% for electrical goods to 68.7% for DIY and gardening goods.

Table 5.10 Bulky Goods Market Shares

Zone	Stoke Market Share			Newcastle -under- Lyme Market Share		
	Electrical	DIY and Gardening	Furniture and Furnishings	Electrical	DIY and Gardening	Furniture and Furnishings
1 - Hanley	93.5%	97.6%	81.8%	3.7%	1.8%	8.7%
2 – Newcastle West	57.2%	15.4%	26.9%	18.8%	49.6%	45.1%
3 – Longton and Fenton	94.4%	89.0%	81.3%	0.0%	5.2%	8.3%
4 – Stoke	80.2%	61.9%	56.0%	18.0%	34.0%	24.8%
5 – Burslem	91.6%	87.8%	83.2%	4.7%	2.2%	13.2%
6 – Tunstall	96.6%	87.2%	74.0%	1.1%	10.9%	17.2%
7 – Kidsgrove	68.2%	32.0%	49.7%	21.8%	54.0%	38.6%
8 – Biddulph	41.1%	61.1%	45.7%	2.0%	12.0%	17.0%
9 – Rural East	53.8%	42.0%	44.9%	3.0%	1.5%	9.0%
10 – Rural South	26.2%	41.3%	21.0%	0.0%	0.9%	7.4%
11 – Rural North	20.2%	4.5%	25.9%	2.1%	19.8%	19.2%
12 – Newcastle East	82.5%	27.4%	42.9%	15.5%	68.7%	43.2%

13 – Rural West	29.2%	16.3%	22.0%	3.6%	4.4%	18.2%
Total	71.2%	55.9%	56.4%	6.8%	21.3%	18.5%

Source: Tables 9 to 25 of Appendix 7

Notes: Comparable figures taken from Appendix 5 of the March 2014 Stoke Retail Study and Appendix 7 of the October 2011 Newcastle-under-Lyme Retail Study

## **Electrical Goods**

5.46 Looking firstly at the electrical goods market share, we can see that the principal destination for residents in Zones 1, 5 and 6 which broadly cover the Stoke authority area, are the Festival Heights and Festival Retail Parks located on edge of Hanley centre. Operators at the retail parks include Argos and Currys PC World, which will be attracting the residents to the retail parks to purchase such goods.

5.47 For Zones 2, 7, 12 and 13, which broadly cover the Newcastle-under-Lyme authority area, the principal destination is also the facilities at Festival Retail Park, demonstrating the pull of the retailers to purchase electrical goods. Indeed, of the bulky goods, the proportion of market share attracted to facilities in the Newcastle authority area to purchase electrical goods is the lowest, with just 21.8% of shopping trips from Zone 7 being attracted to destinations in the borough.

## **DIY & Gardening Goods**

5.48 In terms of DIY and gardening goods, again the proportion of trips attracted to destinations in the Stoke and Newcastle authority areas ranges considerably from zone to zone. For Zone 1 residents, 97.6% of the shopping trips are attracted to destinations in Stoke, with 34.7% travelling to Festival and Festival Heights Retail Parks, a further 13.2% to Hanley centre and 18.4% to Meir Retail Park. For Zones 5 and 6, the principal destination for purchasing DIY and gardening goods are also the Festival and Festival Heights Retail Parks, attracting 57.0% and 39.0% respectively.

5.49 Looking at Zone 12 residents, a total of 68.7% of trips are attracted to destinations in the Newcastle authority area, of which 30.8% are to Newcastle-under-Lyme town centre and 21.8% are to Wolstanton Retail Park. For Zone 13 residents, the principal destination is Market Drayton, which attracts a total of 64.1% of the trips when including the Homebase.

## **Furniture Goods**

5.50 Finally, turning to the market shares associated with purchasing furniture goods, across the 13 zones, the proportion attracted to Stoke facilities ranges from 21.0% in Zone 10 to 83.2% in Zone 5 and to Newcastle facilities, the proportion ranges from 7.4% in Zone 10 to 45.1% in Zone 2.

5.51 Principal destinations for purchasing furniture goods for Zone 1 residents include Fenton town centre (which attracts 23.1% of trips), Hanley centre (which attracts 19.3% of trips) and Stoke town centre which attracts 12.2% of trips. For residents in Zones 5 and 6, the principal destinations are also Hanley centre and the two Festival Retail Parks.

5.52 Looking at residents in Zone 12, the principal destinations are Festival and Festival Heights Retail Parks which together attract 24.9% of trips, followed by Newcastle town centre which attracts 22.8% of trips. Residents in Zone 2 are choosing Chesterton (17.6%) and Newcastle town centre (16.3%), along with Nantwich town centre (15.1%).

## **Summary**

5.53 The purpose of this section is to set out a summary in respect of the convenience and comparison shopping patterns across the Joint Local Plan area. We set out below the key findings in respect of both types of goods.

## **Convenience Goods**

5.54 In analysing convenience goods shopping patterns, it is clear that residents will typically choose convenience destinations which are closer to home, given that they undertake these shops more regularly than they do for their comparison shops. As such, zonal convenience goods retention rates are higher than those identified for comparison goods.

5.55 Overall, the market share of shopping trips for convenience goods shopping in each of the zones (other than Zone 13) retained in the Study Area for both main and top-up food is higher than 80%, and in most cases higher than 90%.

5.56 The household survey results demonstrate that for the majority of zones in the Study Area, the principal destination for main food shopping at 2011/2013 remains within the top three destinations at 2018. However, there have been some considerable shifts in shopping patterns, principally as a result of an increase in popularity of and the introduction of new Aldi and Lidl stores across the Study Area.

5.57 In terms of top-up food shopping, the biggest reduction in zonal market share retention can be witnessed in Zone 6, where the level of retention has dropped from 47.3% to 26.7%, a reduction in 20.6 percentage points. This shift in patterns can be attributed to the increase in shopping trips to the Aldi and Asda located in Tunstall in Zone 5. In addition, for a number of the zones, there has been a shift in top-up shopping trips from local shops to larger national multiple retailers.

### **Comparison Goods**

5.58 Turning to comparison goods shopping, as referenced above, residents will typically travel further distances, but less often to meet their comparison goods shopping needs.

5.59 Firstly looking at non-bulky shopping patterns, overall, destinations in the Study Area attract over 80.0% of shopping trips for each category of goods other than small household goods which falls just under 80.0%. The highest overall study area market share is for chemist goods, where 93.2% of all trips are attracted by destinations in the Study Area. This higher market share is not unusual as residents will typically choose to purchase such goods from local chemist and pharmacies or as part of a wider shop at larger foodstores close to home.

5.60 Hanley centre is the principal destination for clothing and footwear shopping for residents in the majority of the zones, excluding Zones 2, 10 and 13. However, overall, other than within Zone 6, the proportion of clothing and footwear trips attracted to Hanley centre has decreased since the previous household survey has been undertaken.

5.61 In terms of bulky good shopping patterns, we can see that the higher levels of market share attracted to facilities within Stoke or Newcastle are from those zones which broadly correspond with the authority areas. In particular, we can see that the proportion of market share from Zone 1 residents to destinations in Stoke to purchase all three categories of bulky goods is high, ranging from 81.8% for furniture and furnishings to 93.5% for electrical goods. Looking at Zone 12, which covers Newcastle-under-Lyme town centre, the proportion of market share attracted to destinations in the Newcastle authority area ranges from 15.5% for electrical goods to 68.7% for DIY and gardening goods.

## **6.0 Healthcheck Summary and Conclusions**

6.1 Paragraph 85 of the NPPF indicates that planning policies should promote the long term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The

same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.

6.2 Paragraph 002 of the Town Centres PPG indicates that development plans should set out a positive strategy or vision to bring about successful town centres which enable sustainable economic growth and provide a wide range of social and environmental benefits. Paragraph 005 of the Town Centres PPG identifies a range of indicators that should be assessed over time in order to establish the health of a town centre. The indicators include the following:

- diversity of uses;
- proportion of vacant street level property;
- retailer representation and intentions to change representation;
- pedestrian flows;
- accessibility;
- perception of safety and occurrence of crime; and
- the state of town centre environmental quality.

6.3 Comprehensive healthcheck assessments have been undertaken for the nine city and town centres, which have been supplemented by more concise audits of district, local, rural and neighbourhood centres. Detailed healthchecks of the principal centres are provided as Appendix 5 and a schedule summarising the provision available within the smaller centres and our key findings in respect of these centres is provided as Appendix 6. Plans showing the distribution of the local and neighbourhood centres are also provided at Appendix 6.

6.4 In terms of classifying the use of units within each centre, the following classification is adopted, which accords with the methodology adopted by Experian Goad.

- Convenience – includes operators selling food and drink items, including bakers, butchers, CTN, fishmongers, convenience store, frozen foods, greengrocers, grocers and delicatessens, health foods, markets, off licences and supermarkets
- Comparison – includes operators selling non-food goods including antique shops, booksellers, carpets and flooring, catalogue showrooms, charity shops, chemist and drug stores, clothing and footwear, crafts and gifts, DIY and home improvement, electrical goods, florists, music and musical instruments, office supplies, sports, camping and leisure goods, toys, games and hobbies, vehicle and motorcycle sales and vehicle accessories.
- Retail service – includes clothing and fancy dress hire, dry cleaners and launderettes, filling stations, health and beauty, opticians, photo processing, photo studio, post offices, repairs, alterations and restoration, travel agents, TV, cable and video rental, vehicle rental, vehicle Repairs and Services and video tape rental.

- Leisure service – includes bars and wine bars, bingo and amusements, cafes, casinos and betting offices, cinemas, theatres and concert halls, clubs, disco, dance and nightclubs, fast food and take away, hotels and guest houses, public houses, restaurants, and sports and leisure facilities.
- Financial and business service – includes building societies, building supplies and services, business goods and services, employment and careers, financial services, legal services, other business services, printing & copying, property services and retail banks.

6.5 We provide an overview of centres' position in the retail hierarchy below , before summarising the key conclusions from our healthcheck assessments.

#### Regional Retail Hierarchy

6.6 Table 6.1 sets out the retail hierarchy on a sub-regional basis with reference to Venuescore's UK Shopping Venue Rankings 2016/17. Venuescore's index ranks nearly 3,500 retail venues in the UK (including town centres, standalone malls, retail warehousing and factory outlet centres) based on the strength of their current provision. Each retail venue is ranked with reference to the provision of national multiple retailers, including anchor stores, fashion operators, and non-fashion multiples. The score attached to each operator is weighted to reflect its overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks & Spencer and Selfridges receive higher weightings. Due to the way the rankings are compiled, relatively small centres can secure a relatively high rank if they are anchored by national multiple retailers.

6.7 Based on its score and the strength of its offer, Venuescore categorises each centre in order to help identify its role. The eight categories comprise: 'Major City', 'Major Regional', 'Regional', 'Sub-Regional', 'Major District', 'District', 'Minor District' and 'Local'. The position of retail destinations in the table is derived from the 2015/16 Rankings; some competing centres within the sub-region are included by way of context. Venuescore's Market Position Classification and Index, as set out in the below Table 6.1, provide an indication as to the market that the destination serves; the higher the index score, the more upmarket the destination is.

6.8 Hanley is categorised as a Regional centre and had a Venuescore of 203 at 2016/17. It ranked 78th of all UK centres surveyed in 2016/17, which represents a reduction of 11 places from its 67th position at 2015/16. Whilst Hanley is the only Regional centre in the authority area, Stafford town centre (which is located around 29 kilometres to the south of Hanley ) and Crewe town centre (around 25 kilometres to the north-west) are also identified as a Regional centres. Crewe's ranking has decreased since 2010 and Stafford's has declined significantly from 140th in 2010 to 184th in 2016/17. However, Stafford now benefits from the Riverside retail scheme and we anticipate that its ranking will improve in future years.

6.9 Newcastle-under-Lyme town centre has a Venuescore of 86th and was ranked 312th of all UK shopping venues at 2016/17. Whilst this is an improvement on its rank of 318th in 2015/16, it represents a relatively significant decline from its position of 257th in 2010. However, in considering changes in a centre's performance, it is important to note that the loss of even one high profile national multiple operator can impact significantly on the Venuescore ranking of moderately sized town centres and any sudden changes in performance should be viewed in this context. Newcastle-under-Lyme is the second highest ranked centre in the Joint Local Plan area and is identified as being of Sub-Regional importance, which reflects its role for residents within the western part of the Study Area.

Table 6.1: Venuescore's Sub-Regional Shopping Hierarchy

Retail Venue	Score 2016/17	Location Grade	Rank 2010	Rank 2013/14	Rank 2015/16	Rank 2016/17	Market Position Classification	Market Position Index (Average 100)
Hanley city centre	203	Regional	65	70	67	78	Middle	96
Stafford town centre	131	Regional	140	172	186	184	Middle	95
Crewe town centre	123	Regional	188	197	188	197	Lower Middle	88
Newcastle-under-Lyme town centre	86	Sub-Regional	257	338	318	312	Lower Middle	89
Longton town centre	72	Major District	398	382	396	390	Lower Middle	77
Leek town centre	59	Major District	524	548	435	500	Middle	94
Congleton town centre	49	Major District	653	636	615	620	Lower Middle	90
Festival Retail Park	45	District	602	681	675	682	Middle	98
Stoke Freeport	34	District	1,071	864	831	937	Middle	110
Wolstanton Retail Park	34	District	1,653	1,798	974	937	Lower Middle	86
Stone town centre	29	District	1,176	1,263	1,047	1,111	Middle	103
Hartshill local centre	25	Minor District	1,961	1,204	1,232	1,276	Lower Middle	79
Springfield Retail Park	23	Minor District	1,526	1,452	1,281	1,368	Lower Middle	87
Tunstall town centre	20	Minor District	706	1,263	1,281	1,559	Lower Middle	75

Jasper Retail Park	21	Minor District	1,346	1,322	1,486	1.481	Lower Middle	85
Trentham Shopping Village	20	Minor District	1,493	1,524	1,548	1,559	Upper Middle	115
Meir Park Neighbourhood Centre	18	Local	1,526	1,907	1,789	1,696	Middle	93
Clayton	19	Local	1,886	2,061	1,908	1,625	Middle	109
Fenton town centre	16	Local	1,139	1,798	2,034	1,888	Middle	96
Keele Motorway Services	17	Local	2,680	1,907	2,034	1,775	Upper Middle	111
Burslem town centre	11	Local	1,377	-	2,193	2,815	Middle	94
Liverpool Road	15	Local	-	2,428	2,394	2,021	Middle	96
Octagon Shopping Park	11	Local	-	-	2,394	2,815	Lower Middle	87
Cobridge Retail Park	11	Local	-	2,216	2,577	2,815	Upper Middle	110
Kidsgrove town centre	11	Local	-	-	2,827	2,815	Middle	102
Cross Heath	10	Local	-	-	3,152	3,133	Middle	96

Source: Venuescore UK Shopping Venue Rankings 2010, 2013/14, 2015/16 and 2016/17

Note: Venues outside the Joint Local Plan area are italicised

6.10 Of the other retail venues in Newcastle-under-Lyme and Stoke-on-Trent, Longton town centre has the highest ranking (390th position) and is categorised as a Major District centre. It is then followed by Festival Retail Park (682nd position), Stoke-on-Trent Freeport Outlet (937th) and Wolstanton Retail Park (937th). The rank of the Freeport Outlet and Wolstanton Retail Park has improved significantly in recent years, and the performance of these destinations is reflective of the level of out of centre floorspace within the Joint Local Plan area.

6.11 The other defined town centres within the Joint Local Plan area generally perform modestly and are identified as either being Minor District or Local centres (the exception to this is Meir, which is not identified in the Venuescore rankings).

## **Stoke-on-Trent's Principal Centres**

### **Hanley City Centre**

6.12 Hanley, as the principal centre in Stoke-on-Trent, is the primary economic and social destination in the city. Largely anchored by the Intu Potteries Shopping Centre, Hanley accommodates a considerable variety of comparison goods and service operators.

6.13 The centre is split between the main shopping areas along the pedestrianised routes of Lamb Street, Market Square and Tontine Street (which form part of the primary shopping area) and the area focused on Piccadilly, which is home to a large number of independent retail and service operators. Based on the centre boundary as identified by Experian Goad, at the time of our survey there were a total of 579 units recorded in Hanley, comprising a total gross floorspace of 169,850 sq.m.

6.14 Convenience and comparison goods operators dominate the commercial floorspace of Hanley. Retail operators collectively account for a total of 91,180 sq.m of retail floorspace, which equates to 53.7% of total retail floorspace.

6.15 The comparison goods retail offer in the city centre is diverse, with such operators accounting for 71,360 sq.m of floorspace. This figure equates to 42.0% of total retail floorspace; by way of comparison, the national average floorspace for comparison goods is 34.6%. There are 157 comparison goods units within the city centre, which represents a significant decline on the 192 comparison goods units recorded at the time of the previous survey in 2013. Comparison goods units are concentrated in and around Intu Potteries shopping centre, which is clearly the focus of retail in the city centre. Our survey of the centre identified that 25 of the 30 major retailers recognised by Experian Goad as being the most likely to improve the appeal of a centre are present in Hanley.

6.16 The convenience goods offer has grown considerably since the time of the previous survey. There were 30 convenience goods units within the survey area at the time of our site visit, which equates to approximately 19,820 sq.m of floorspace or 11.7% of the total stock of floorspace in the city centre. Although the proportion of floorspace in this use is lower than the current UK floorspace average of 15.3%, the current figure in Hanley represents a significant increase in comparison to the 5.6% of floorspace (equating to 8,740 sq.m of floorspace across 23 units) recorded by the 2013 survey.

6.17 Services (retail, leisure, and financial and business) comprise a total of 38.2% of units and 27.4% of all floorspace in the city centre. These figures indicate that the service provision in Hanley is proportionally less than national average level, which

equates to 48.9% of units and 39.7% of floorspace. However, overall, the provision of leisure and retail services in Hanley is considered to be relatively comprehensive with a range of service uses, and is again indicative of its strong regional role. Broadly speaking, the service provision in Hanley is similar to that which was apparent at the time of the previous survey both in respect of floorspace and the composition of units. The exception to this is the financial and business service sector, where there has been a decline in both the number of such operators and the amount of floorspace dedicated to the use.

6.18 To some degree, the loss of such operators has been mitigated by significant improvements in Hanley's leisure offer in the form of The Hive cinema and leisure development (which, to some degree, is symptomatic of the changing role of town centres). The number of independent leisure service operators in the south western part of the city centre is also considered to be a strength.

6.19 At the time of our visit, there were 168 vacant units recorded throughout Hanley which equates to an exceptionally high vacancy rate of 29.0%. Vacant units account for approximately 32,110 sq.m of floorspace, a figure which equates to 18.9% of the total stock within the centre. It should be noted that the vacancy rate includes managed vacancies in respect of tenants that have been decanted to provide for the redevelopment of the East West Precinct site. Indeed, if the East West Precinct site was removed from the total, the vacancy rate drops to 15.4% of the total floorspace and 24.7% of the total number of units. However, the vacancy rate is still significantly above national average level even after allowance is made for this.

6.20 The vacancy rate of 18.9% in respect of vacant floorspace is also significantly above the national average figure of 9.9%. However, only a limited proportion of large units are vacant, which suggests that there are too many small units with too few operators to take them.

Table 6.2: Hanley SWOT Analysis

Strengths	Weaknesses
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<p>Hanley is the principal economic and social destination in the Joint Local Plan area and has a good range of comparison goods operators, focused around the Intu Potteries shopping centre. It is well integrated into the city's public transport network and is considered to have a high quality, modern public realm. The centre has a varied and balanced offer including retail, services and cultural uses.</p>	<p>The centre has a significantly higher than average vacancy rate, which impacts upon the vitality and viability of Hanley, and restricts its economic potential. In particular, the East West Precinct does not provide an attractive gateway into the centre from the bus station, albeit we note that it is in the process of being demolished. In addition, whilst there are signs of the food and drink offer of the centre modernising (with new, independent operators such as Klay and Nom restaurant and bar), the provision is below that which might be expected in a centre of with Hanley's role and function.</p>
<p><b>Opportunities</b></p> <p>Hanley's growing independent leisure service offer is largely concentrated in the south west of the centre. The strong footfall observed around Intu Potteries should be used to drive growth and further investment throughout the rest of Hanley. The East West Precinct site represents a key opportunity site, which is now in the control of SOTCC. We are aware that the Council unveiled initial proposals for the site focused around an arena, Youth Zone and other complementary forms of development at the MIPIM property conference of March 2019.</p>	<p><b>Threats</b></p> <p>A number of edge of centre and out of centre retail parks provide significant competition to Hanley. The high (and increasing) vacancy rate in the centre provides a real cause for concern.</p>

6.21 The quality of the public realm in Hanley is very good, with appreciable improvements being secured through the Council's phased renewal of pedestrianised areas in recent years. Well designed and maintained public spaces (together with assets such as the new bus station) should help encourage new investment into the centre, particularly once the East West Precinct has been brought forward for development, thereby improving footfall and pedestrian flows in the southern part of the centre.

### Burslem Town Centre

6.22 Burslem is a historic town centre which was once a key part of the area's ceramic industry. It consequently includes many historic, period buildings many of which are now vacant. There have been considerable efforts in recent years to improve the centre's public realm and provide for the regeneration of Burslem as a cultural centre.

6.23 There are 167 retail and service units in Burslem which account for a total of 34,750 sq.m of floorspace. The amount of convenience and comparison goods operators in Burslem has remained broadly the same since the time of the previous survey in 2013, although the proportion of convenience and comparison goods floorspace is far less than the national average (29.0% compared to 50.7%). It would therefore be advantageous to diversify and broaden the retail offer in Burslem. The service sector is also lacking in the variety that one would expect within a centre of Burslem's size.

6.24 The environmental quality of the centre is highly varied, with some areas benefiting from high quality public realm improvements and other areas significantly blighted by the number and presence of vacant units. The Queen's Theatre is currently closed and is in need of refurbishment in order to bring it back into active use. Like all centres within Stoke-on-Trent, Burslem is well integrated into the public transport network and therefore benefits from a high level of accessibility.

6.25 Burslem has a vacancy rate equating to 33.0% of floorspace and 34.1% of units. Once more, both of these figures are significantly in excess of the respective national average figures. The vacancy rate has also significantly increased since the undertaking of the previous health check assessment. The level of vacancies is considered to be symptomatic of a real issue in respect of operator demand in Burslem and has an appreciably impact on its vitality and viability. As such, we believe that Burslem may simply have 'too much floorspace' and that there may be a need to consider other uses (such as residential) in order to consolidate the centre's offer. This in turn may assist in providing a critical mass of activity to assist in sustaining businesses and allowing Burslem's potential as a creative hub to be realised.

6.26 Given the above, we believe that the performance of Burslem is relatively poor and that there is a need to encourage further operators to the centre (or to ensure that other non-commercial uses are introduced). Efforts to diversify Burslem's offer through the introduction of additional cultural uses are having some success, but it would be beneficial for the centre to also support an improved range of retailers and service providers.

Table 6.3: Burslem SWOT Analysis

Strengths	Weaknesses
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There are many high quality period buildings within the centre which create a distinctive and attractive public realm. There is also a burgeoning cultural sector in Burslem, which has potential to create a particular point of interest and differentiate the centre from competing centres.	The vitality of the centre is significantly compromised by its extremely high vacancy rate, with around one third of units vacant at the time of our survey. The amount of vacant stock is not only symptomatic of limited operator demand, but also means that the centre is quiet, as there are limited attractions to encourage visits. Furthermore, there is a limited provision of attractions to encourage visitors during the day.
<b>Opportunities</b> The number of vacant properties and lack of demand may help provide an environment (as a consequence of cheap rents) in which cultural uses can flourish. Further momentum in respect of the centre's cultural role could help improve the long term vitality and viability of Burslem. There are a number of development opportunities in the town centre (including Chapel Lane and the area around Queen Street) which may be suitable to accommodate future residential growth. Furthermore, extensive new residential development is proposed to come forward within walking distance of the centre, which could result in an increased footfall within the centre.	<b>Threats</b> The greatest threat to the centre is the high vacancy rate. This is impacting on the attractiveness of the centre, which not only reduces footfall but means that operators are less likely to take space. Like all town centres in Stoke-on-Trent, there are a large number of competing centres in close proximity. This competition means that Burslem simply has too much stock in the modern era.

## Fenton Town Centre

6.27 Fenton is the smallest town centre in Stoke-on-Trent, both in terms of the quantum of floorspace and the number of operators it accommodates. The centre is surrounded by a combination of residential and employment uses, and is located along a major arterial route (the A5007 City Road). This increases the centre's accessibility, but also reduces the overall level of pedestrian safety. Whilst Albert Square provides a very pleasant environment and provides an opportunity for users to linger, the mix of operators in the centre is limited and the provision is very substantially below what would be expected of a town centre.

6.28 There are a total of 34 units within the town centre, which account for a total of 6,158 sq.m of floorspace. Fenton lacks the diversity of comparison and convenience goods retailers that one would expect to find in a town centre and there would be significant benefit in diversifying Fenton's retail offer in order that it performs a role more commensurate with its designation. In this regard, the key

anchor tenant in the centre is a small format Co-op foodstore, which is perhaps emblematic of Fenton's role and function.

6.29 Fenton's vacancy rate equates to 15.2% of floorspace and 26.5% of units. These figures are both greater than the UK average (very substantially so in respect of the proportion of units that are vacant). However, it should be noted that the previous survey recorded a vacancy figure of 44.2% in respect of floorspace. The principal reason for this substantial change is the re-classification of the former Magistrates Court and buildings along Gimson Street as non-retail units.

6.30 The environmental quality of Fenton is varied, with some areas benefiting from recent public realm improvements and other areas blighted by poorly maintained units and increased vacancy rates. Fenton is well connected to the surrounding residential areas with a generally good level of accessibility, however the main roads running through the centre impede pedestrian activity.

6.31 Whilst Fenton meets some local needs, we do not believe that it performs as a town centre (albeit we understand its historic role). As such, consideration should be given to its appropriate position in the retail hierarchy.

Table 6.4: Fenton SWOT Analysis

Strengths	Weaknesses
Albert Square Conservation Area is considered to have a good standard of environmental quality. There is evidence of recent public realm investment in this area.	Fenton lacks a diversity of uses compared with other centres throughout Stoke-on-Trent, and is only thought able of meeting the needs of the immediate residential community. The 'functional' centre's location along a major arterial route compromises pedestrian and user safety. The offer of the centre is significantly more limited than would be expected in a designated town centre.
Opportunities	Threats
Long-term uses should be secured for the attractive buildings of the former Magistrates Court and buildings along Gimson Street. A greater focus of activity around Albert Square may encourage more users to the centre.	There are very few national multiple operators with a presence in Fenton, and the centre generally lacks number and range of operators that is generally associated with a town centre designation. In addition, parts of the centre (along the A5007 City Road) are of a relatively poor environmental quality.

## Longton Town Centre

6.32 Longton is the largest town centre in Stoke-on-Trent and, after Hanley and Newcastle-under-Lyme is the third largest retail centre in the Joint Local Plan area. The town centre is focused around three main areas: The Strand, Market Street and Longton Exchange. There is further additional retail provision to the west of the centre at Longton Retail Park.

6.33 Longton town centre has a strong range of operators, and despite it being of variable environmental quality, the centre's historic role is exemplified by the number of national multiple operators which retail a presence in the centre.

6.34 There are 227 units within the town centre which account for 56,970 sq.m of floorspace. The majority of the floorspace is occupied by the centre's 89 convenience and comparison goods operators, which account for 34,990 sq.m of floorspace (equating to 61.5% of the total stock). In addition, the centre accommodates 85 service operators (accounting for 11,460 sq.m and 20.1% of the stock).

6.35 At the time of our survey, there were 53 vacant units (23.3% of the total number of units), which collectively provide 10,520 sq.m of floorspace (equating to 18.5% of the stock). The vacancy rate, both in terms of floorspace and number of units, is therefore higher than the national average. The current position represents a slight increase in the amount of vacant floorspace in Longton compared to that recorded by the previous survey in 2013 (at which point 17.9% of floorspace was vacant).

6.36 The centre lacks a distinctive character and has a generally poor environmental quality. In particular, the Longton Exchange shopping centre is very dated in appearance and would benefit from refurbishment (or, possibly, from redevelopment). As such, in order to help boost Longton town centre's future vitality and vitality, we believe that improving the environmental quality of Longton Exchange and reducing the currently high vacancy rate are key priorities.

Table 6.5: Longton SWOT Analysis

Strengths	Weaknesses
Longton accommodates a reasonable extensive range of operators, both in respect of its retail and service offer. There is a key public transport interchange located within the centre which helps to drive the reasonably good levels of pedestrian activity which were noted at the time of our visit. The Tesco Extra store to the west and its associated car park help to anchor the centre and bring activity to the wider area.	Unlike other larger centres in the Joint Local Plan area, Longton is considered to be a bit lacking in character and is of a generally poor environmental quality. Longton Exchange Shopping Centre, which is a focal point of the centre, is in a particularly poor state of repair. Whilst the Shopping Centre accommodates some national multiple operators, the centre has a generally weak fashion offer.

Opportunities	Threats
<p>The centre currently feels disjointed between large format retailers to the west of Longton and the existing centre, including Longton Exchange. The creation of improved links between these two elements may allow the centre to better exploit the activity brought into the wider area by Tesco Extra.</p>	<p>Like other town centres in Stoke-on-Trent, the vacancy rate (particularly given that a number of vacant units are long-term vacancies) presents cause for concern. This acts to reduce the overall vitality of the centre, and has a considerable negative impact in respect of the centre's environmental quality.</p>

### **Meir Centre**

6.37 Meir is the easternmost centre in the Joint Local Plan area and is located at the periphery of Stoke-on-Trent, at the junction of the A50 and the Sandon Road/Weston Road. The centre's proximity to such a significant junction impacts on its environmental quality somewhat, although its location does ensure that the centre benefits from a high level of accessibility and is generally convenient for its catchment population.

6.38 The centre is largely linear, lining Weston Road and Sandon Road and, whilst it is relatively small, it has a good provision of services to meet the day-to-day needs of the area.

6.39 Whilst Meir's retail offer is not particularly extensive (there are 19 convenience and comparison goods operators, which occupy 3,647 sq.m of floorspace), the centre accommodates a Co-op foodstore and Premier Convenience, both of which are able to support top-up food shopping. There are a total of 70 retail and service units within the existing district centre boundary, which provide a total of 8,366 sq.m of floorspace. Meir has a much improved retail service offer, which is exemplified by an increase of 6.1 percentage points in respect of the proportion of floorspace dedicated to this use (11.8% of floorspace at 2013, increasing to 17.9% of floorspace at 2018).

6.40 At the time of the previous survey in 2013, a vacancy rate equivalent to 14.6% of floorspace and 10.0% of total units was recorded. Our 2018 survey identified that 15.9% of floorspace and 23.5% of all units are vacant. Clearly, the very significant increase in the proportion of vacant units is of concern; most of these vacancies are along Weston Road in the northern part of the centre.

6.41 The quality and condition of some units in Meir reduces the attractiveness and vitality of the centre. In addition, the centre's environmental quality is also compromised by the major arterial routes running through the centre. However, Meir benefits from a large number of community facilities that add to its overall offer and which should help sustain its future vitality and viability. As such, whilst the vacancy

rate is a clear cause for concern and parts of the centre are in need of investment, the centre benefits from some important community facilities (including Meir Library, Meir Primary Care Centre and Weston Coyney Medical Practice) which help drive footfall and should help in attracting additional commercial tenants.

Table 6.6: Meir SWOT Analysis

Strengths	Weaknesses
Meir serves a localised catchment, which is reflected in its limited retail offer. However, the centre accommodates some important community facilities, including Meir Library, Meir Primary Care Centre and Weston Coyney Medical Centre. Such uses help underpin the centre and should help in securing additional representation to reduce the vacancy rate going forward. The centre sits on the A50 and is accessible to the surrounding residential areas.	The quality and maintenance of some units in Meir reduces the attractiveness and vitality of the centre. The quality of the environment is also compromised by the presence of the A50 and the Meir Interchange roundabout which sits within the centre. The vacancy rate is high and should be addressed as a priority.
Opportunities	Threats
The development of Meir Primary Care Centre and Weston Coyney Medical Centre has brought significant investment into the area, and the centre's strong offer in respect of its good range of community facilities should help attract new commercial tenants.	There has been an increase in the number of vacant units since the previous study, which is indicative of general market conditions and the issues that Stoke-on-Trent's centre are facing.

## **Stoke Town Centre**

6.42 Stoke is the civic centre of Stoke-on-Trent and therefore performs a key role for the wider city. The centre contains many buildings of historic merit, particularly in and around the Conservation Area to the north-west of the centre. Stoke train station, the primary access to the national railway network for the entire conurbation, is located adjacent to the centre. Stoke also plays an important role in accommodating students, and there have been a number of purpose built new-build student accommodation facilities facilitated over the last couple of years (London House, Lomax Building etc). The student accommodation also assists in encouraging footfall within the town centre throughout the daytime and evening.

6.43 Although the centre provides a range of convenience and comparison goods shopping for the surrounding community (including an indoor market), the environmental quality of the centre is considered to be relatively poor. This is due to the condition of a number of shopfronts and a concentration of vacant units in the centre.

6.44 There are 179 operators in Stoke which account for a total of 39,350 sq.m of floorspace. The vacancy rate is considerably higher than the national average, with 63 units (equating to 35.2% of all units) and 10,310 sq.m of floorspace (equating to 26.2% of commercial floorspace) vacant at the time of our survey. The proportion of vacant floorspace has increased from 20.3% in 2013 to 26.2% in 2018, indicating that the centre is facing challenges with regard to its vitality and viability.

6.45 There are 92 convenience and comparison goods operators, which account for 55,560 sq.m of floorspace and 69 service operators which account for 9,860 sq.m of floorspace. When compared to national average levels, convenience goods operators account for a high proportion of floorspace due to the presence of the Sainsbury's superstore.

6.46 Whilst the convenience goods provision in the centre is relatively strong, the comparison goods provision is weak. In addition, the centre's higher than national average vacancy rate detracts from the environmental quality of the centre, and consequently further reduces the vitality of the centre.

6.47 Stoke is clearly struggling, which is evidenced by its high vacancy rate. Although the centre clearly performs a key role for local residents and an important civic function, the lack of demand for commercial units is a considerable issue to overcome.

Table 6.7: Stoke SWOT Analysis

Strengths	Weaknesses
Stoke town centre acts as the civic core for Stoke-on-Trent in which there are many historic buildings. The centre is located adjacent to Stoke train station, and the centre therefore acts as the key gateway into the city. Stoke town centre also contains a good convenience goods offer.	There is a concentration of vacant units along Liverpool Road, and within the designated Conservation Area. However, vacancies are commonplace throughout Stoke, with a number of units in a poor state of repair with a consequent impact on the centre's environmental quality.
Opportunities	Threats

<p>Due to the centre's proximity to conurbation's primary train station, Stoke is a key gateway for the wider region. As a result the centre may well provide appropriate opportunities for future residential development. Furthermore, the former Spode works site presents an opportunity for a mix of uses, focusing on cultural, employment and residential uses, and as such has the potential in the future to increase footfall within the centre. The centre's student population also brings additional opportunities through the increased footfall within the centre, throughout both the day and evening.</p>	<p>Stoke has a high vacancy rate and low levels of pedestrian activity throughout much of the centre. It is therefore clear that the high vacancy rate has reduced the centre's vitality and is threatening the long-term viability of much of the centre.</p>
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## Tunstall Town Centre

6.48 Whilst High Street has historically been the focus of the Tunstall town centre, the development of Alexandra Retail Park (which opened in 2014) to the east has significantly diversified the offer available in the area. However, this has also had the effect of shifting the 'centre of gravity' of the centre and, as such, there was limited footfall along parts of High Street at the time of our visit. There is a clear issue in respect of vacancies in the traditional centre.

6.49 There are 215 units in Tunstall which account for a total of 53,900 sq.m of floorspace. Our survey recorded 60 vacant units which collectively provide 11,130 sq.m of floorspace. This equates to a vacancy rate of 27.9% in respect of units and 20.6% in respect of floorspace. These figures are significantly greater than the national average rates and represent an increase on those recorded at the time of the previous survey. There are 75 convenience and comparison goods operators which account for a total of 31,210 sq.m of floorspace, which equates to 57.9% of the commercial stock. By way of contrast, the 80 service operators in the centre account for 11,560 sq.m of floorspace, which equates to 21.4% of the stock. The service offer is therefore relatively weak, particularly in respect of the financial and business services sector.

6.50 The high vacancy rate is having a negative impact on the overall viability and vitality of Tunstall town centre, with a resultant effect on the centre's environmental quality and footfall. This accordingly reduces Tunstall's attractiveness as a destination, and further reduces the viability of the centre. Improvements, including re-purposing of vacant units should be sought. The centre does however continue to perform a vital role, with strong pedestrian flows noted around Alexandra Retail Park at the time of our visit. Alexandra Retail Park not only accommodates a good range

of national multiple retailers (such as Home Bargains, Iceland and DW Sports), but also Tunstall Primary Care Centre and is supported by a large car park. The location of Alexandra Retail Park is such that it relates well and is accessible to that part of the centre that is focused around High Street. As a consequence, we believe that consideration should be given to expanding the boundary of the town centre to accommodate the retail park.

Table 6.8: Tunstall Town Centre SWOT Analysis

Strengths	Weaknesses
Development of Alexandra Park on the eastern edge of the centre has assisted in diversifying and strengthening the range of comparison retailers in Tunstall. The range of service operators and uses within the centre is generally strong.	Conversely, the development of Alexandra Park has reduced the function of the ‘traditional’ linear High Street in Tunstall, reflected in the concentration of vacant units in the west of the centre. The ‘centre of gravity’ has shifted and it will be important to find new uses for retail units which may be difficult to re-let.
Opportunities	Threats
The former Bingo Hall on High Street represents a key development opportunity as a large vacant site in the centre. Consideration should be given to the potential to redevelopment this unit to accommodate other uses.	It appears that Alexandra Retail Park may have contributed to reducing the vitality of the traditional High Street, but has increased overall activity in the area. There is significant cause for concern in respect of the centre’s increased vacancy rate.

## Newcastle-under-Lyme's Principal Centres

### Newcastle-under-Lyme Town Centre

6.51 After Hanley, Newcastle-under-Lyme is the second largest centre in the study area. It is an historic market town with a generally smart and well-maintained public realm; the centre is therefore an attractive destination. The range of operators within the centre is considered appropriate to support its role and to serve the needs of a diverse catchment area. Using the centre boundary as identified by Experian Goad, we have identified a total of 326 units in the centre, which have a total gross floorspace of 77,570 sq.m.

6.52 There are 125 convenience and comparison goods retailers located within Newcastle-under-Lyme, with these units accounting for a total of 35,840 sq.m of floorspace, which equates to 46.2% of the total stock of floorspace. The proportion of floorspace and units occupied by retail uses is broadly in line with the respective UK national average figures. However, there have been losses in respect of the comparison goods sector since the undertaking of the previous survey in 2011.

6.53 There are 142 service (leisure, retail and financial and business) operators in Newcastle-under-Lyme. These account for 43.6% of all units in the town centre and 31,410 sq.m of floorspace (which is 40.5% of the total stock of floorspace). The provision of service operators is broadly similar to national average levels, and the diversity of the offer in Newcastle-under-Lyme is considered suitable to serve the needs of the centre and as being helpful in securing the continued vitality and viability of the town centre.

6.54 Our survey recorded a total of 59 vacant units in Newcastle-under-Lyme, which account for a total of 10,320 sq.m of retail floorspace. The current vacancy rate in respect of floorspace is 13.3% and 18.1% of units are vacant. This suggests that many of the vacancies relate to relatively small units. However, since our survey was undertaken, the branch of Dunelm on High Street in Newcastle-under-Lyme has closed which represents the loss of one of the centre's larger national multiple operators (and the availability of one of the centre's larger units).

6.55 Although there has been an evident reduction in the centre's comparison goods offer (with Newcastle-under-Lyme very much playing a secondary role to Hanley), the centre remains a generally attractive destination. Whilst the development site at Ryecroft has the potential to further diversify the centre's offer, the 2017 scheme which benefits from a NULBC resolution to grant planning permission (through planning application reference 17/00637/FUL) has stalled and will now not be progressed. The previous scheme provided for a mixed-use development comprising retail (Class A1), leisure (Class A3, A4, A5, D1 and D2), and financial and professional services.

6.56 We are aware that this scheme was considered by Members at NULBC Cabinet on 7 November 2018, with a resolution that the scheme will not be progressed as it is not deliverable due to current and foreseeable market conditions. As a consequence, NULBC is currently engaging with consultants to understand the type of commercial development that would be viable on the site in the future, and the ability for short-term interim uses to generate additional footfall for the benefit of Newcastle-under-Lyme town centre as a whole.

6.57 Ryecroft therefore remains an important opportunity to drive footfall in the north of the town centre and modernise the centre's offer. In addition to delivering the redevelopment of this site, there is also a need to address the vacancy rate as a matter of urgency and to further consider how the market can evolve in order to remain a key asset for the town. However, notwithstanding this, Newcastle-under-Lyme remains a generally pleasant town to visit, albeit it is in need of further investment in order to remain relevant and competitive.

Table 6.9: Newcastle-under-Lyme Town Centre SWOT Analysis

Strengths	Weaknesses
<p>Newcastle-under-Lyme is an attractive market town, with a high quality and well-maintained public realm. The centre has a strong diversity of uses, which creates a vital and viable centre, despite the higher than average vacancy rate. The centre maintains a considerable range of independents and national multiples, and has a strong food and drink sector. The Vue cinema is a key asset for the centre.</p>	<p>In recent years a number of national multiples (particularly fashion operators) have vacated premises in Newcastle-under-Lyme. Due to the centre's location within the ring road, it feels somewhat isolated from surrounding residential areas.</p>

## Opportunities Threats

The Ryecroft development site provides a key opportunity to drive footfall to the north of the town centre and to counterbalance the strong drivers of footfall in the southern part of the centre, including the Vue cinema, market and bus station. Following the decision not to proceed with a retail-led development at the Ryecroft site in the current and foreseeable market conditions, there is a need to reconsider the appropriate future for the site. Any significant delay in realising the development at Ryecroft will risk further reducing the strength of the northern part of the centre. The centre's proximity to Hanley is likely to continue to cause issues in attracting retailers who may only need representation in one of the centres. As such, there will be a need to further diversify the centre's offer in order to provide for its future good health.

## Kidsgrove Town Centre

6.58 Kidsgrove is a small centre located in the north of Newcastle-under-Lyme. The centre accommodates a relatively modest range of convenience, comparison and service operators, and is comprised of two parallel, linear concentrations of shops and services along the A50 Liverpool Road and King Street/Market Street. Kidsgrove is one of the few centres in the Joint Local Plan area (along with Longton and Stoke) that benefits from direct access to a train station, and it therefore benefits from good accessibility to the wider area.

6.59 There are a total of 78 units, accounting for a total of 10,091 sq.m of floorspace, within Kidsgrove. At the time of our survey, there were five vacant units in the centre, providing a total of just 363 sq.m of floorspace. The vacancy rate of 6.4% in respect of units and 3.6% in respect of floorspace is very significantly below national average, and is by far the strongest performance in any of the principal centres within the Joint Local Plan area.

6.60 There are 26 convenience and comparison goods operators in Kidsgrove. These account for 4,929 sq.m of floorspace, which equates to 48.8% of the stock of floorspace. The 47 service operators account for 4,800 sq.m of floorspace or 47.6% of all floorspace.

6.61 Whilst the centre has a relatively strong retail service and leisure service offer, its convenience goods offer is limited. However, in this regard, residents also benefit from the Aldi and Tesco Extra foodstores located along Liverpool Road (the latter of which relates particularly well to the town centre). The Tesco Extra superstore helps boost activity in the area and Kidsgrove is considered to currently be a vital and viable centre.

Table 6.10: Kidsgrove Town Centre SWOT Analysis

<b>Strengths</b>	<b>Weaknesses</b>
The centre is accessible and is of a reasonable environmental quality. Kidsgrove is considered to have a decent provision of retail service and leisure service operators, and benefits from a very low vacancy rate.	There were relatively light pedestrian flows noted in Kidsgrove at the time of our visit. The centre does not benefit from any obvious retail 'circuit'. However, many of the retailers have specialist offer which attracts a particular clientele, rather than just attracting custom through browsing.
<b>Opportunities</b>	<b>Threats</b>
Kidsgrove is one of the only centres (along with Longton and Stoke) to have direct access to a train station, and there is a good range of community facilities within the centre.	Whilst Kidsgrove performs well, its offer is somewhat one dimensional and it would be helpful for it to diversify further (particularly in respect of its retail offer) in order to help underpin its future vitality and viability.

## **Stoke-on-Trent Local and Neighbourhood Centres**

### **Local Centres**

6.62 We have visited and reviewed each of the 22 centres in Stoke-on-Trent designated as 'local centres' by the Joint Local Plan Preferred Options Consultation Document.

6.63 Nexus has adopted a scoring system to determine how the centres are performing and as such, where they should sit within the recommended hierarchy. The scoring system replicates that which was adopted by WYG in the previous Stoke Retail Study, and therefore allows direct comparison. The scoring system is based on an assessment of the provision of facilities, ATM services and the proportion of

national operators, types and scale of facilities provided and vacancies which were located in each centre.

6.64 The scoring system has been applied as follows:

1. Facilities Points – based on a review of convenience stores, Post Offices and pharmacies. Each facility receives a score of four.
2. ATM score – one or more ATMs in a centre is scored as three, no ATMs receives a score of 0.
3. Percentage of national operators, scored as follows:
  - 25% or more of units scores four points;
  - 24%-1% of units scores two points; and
  - 0% of units scores zero points.
4. Percentage of vacancies, scored as follows:
  - 0%-10% of units scores six points;
  - 11-24% of units scores four points;
  - 25%-49% of units scores two points; and
  - 50% of units or more scores zero points.

6.65 The centres reviewed vary considerably in size, from 29 units recorded at the centres of ‘Fenton, Victoria Road’ and ‘Milton, Leek Road/Millrise Road’, to two units at ‘Hanford, Mayne Street’. The provision of retail and service facilities also varies considerably between the centres, with four centres having no convenience store. Similarly, the quality of operators varies significantly, with three of the centres accommodating no national multiple operators. Nine local centres had no vacant units at the time of our visit and, as whole, the smaller centres have a lesser issue in respect of their vacancy rate.

6.66 Alongside a number of individual boundary recommendations, we have considered the status of each centre in the retail hierarchy. Accordingly, it is recommended that four local centres be re-designated as neighbourhood centres on the basis that they do not provide the level of provision we would expect to find in a local centre. We recommend that the following centres are re-designated as Neighbourhood Centres:

- Centre 4 – Norton, Kynpersley Road;
- Centre 20 – Bucknall, Werrington Road;
- Centre 48 – Dresden, Carlisle Street; and
- Centre 56 – Lightwood, Belgrave Road.

6.67 Whilst the following local centres are proposed to be re-designated as neighbourhood centres in the Preferred Options Consultation Document, we believe that they continue to perform the role of a local centre and should remain designated as such:

- Centre 3 – Chell Heath, Chell Heath Road;

- Centre 39 – Heron Cross, Heron Street/Grove Road; and
- Centre 47 – Dresden, Trentham Road.

6.68 We believe that the proposed designation of other local centres as set out in the Preferred Options is appropriate.

### **Neighbourhood Centres**

6.69 Neighbourhood centres, although likely to only serve the day-to-day needs of an immediate, limited area, perform an important role in providing retail and service provision throughout Stoke-on-Trent. We have also visited each of the 29 neighbourhood centres identified in the Preferred Options Consultation Draft.

6.70 Once more, the centres vary considerably in both size and quality of provision. The largest neighbourhood centre, ‘Shelton, College Road’, has 11 units, whilst the smallest four centres each have two units. The retail and service provision varies significantly, with 10 of the 29 neighbourhood centres not containing a convenience store. Whilst 17 of the centres contained no vacant units, five centres have more than a third of commercial premises vacant.

6.71 Based on our site visits, we believe that all of the neighbourhood centres make some contribution to meeting needs which arise locally and we do not propose that any are re-designated or removed from the retail hierarchy.

### **Newcastle-under-Lyme District, Rural and Neighbourhood Centres District and Rural Centres**

6.72 The Preferred Options Consultation Document proposes the designation of eight district and rural centres throughout Newcastle-under-Lyme. These vary considerably in size, ranging from 62 units at ‘Wolstanton, High Street’ to three units at ‘Baldwin’s Gate, Newcastle Road’. In addition, ‘Halmer End, High’ has no concentration of commercial units and, as such, does not, in our view, function as a centre.

6.73 Notwithstanding this, the provision of retail and service operators across the eight centres is generally considered to be of a good quality, with the large majority having at least one convenience store and the large majority supporting some form of representation from national multiple operators. Half of the centres contained no vacant units. The majority of district and rural centres in Newcastle-under-Lyme therefore appear to be performing well.

6.74 The single recommendation we have is the removal of Centre 8 ‘Halmer End, High Street’ from the retail hierarchy. As mentioned, any facilities in this centre are dispersed and there is no recognisable ‘centre’.

## **Neighbourhood Centres**

6.75 We have visited and surveyed a total of 18 neighbourhood centres in Newcastle-under-Lyme. The centres reviewed again corresponded with those identified in the Preferred Options Consultation Document. Once more, these vary considerably in size, with the largest centre – ‘Newcastle Town, George Street’ – accommodating 42 units and having a resultant offer which is more comparable to a district centre designation. The smallest proposed neighbourhood centre – ‘May Bank, Oxford Road’ – contains just one unit.

6.76 The centres vary significantly in terms of quality of provision. However, only three centres lack a convenience store. Half of the centres contained no vacant units, with only four centres having a vacancy rate greater than 10%. The majority of the neighbourhood centres appear to be performing well, with only four of the centres not underpinned by a national multiple operator.

6.77 In addition to ‘May Bank, Oxford Road’, two further centres currently classified as neighbourhood centres were, at the time of our visit, found to lack the range of uses that merits designation. As such, we recommend that the following centres are removed from the retail hierarchy:

- Centre 12 – Chesterton, Birch House Road;
- Centre 17 – May Bank, Oxford Road; and
- Centre 26 – Wolstanton, Dimsdale Parade East.

6.78 No further recommendations with respect of centre designation are made as all other centres were found to contain a sufficient range or level of provision considered necessary to meet the definition of a centre. Although ‘Newcastle Town, George Street’, which is proposed to be designated a local centre, is of a size comparable to the designated district centres, its provision is dominated by leisure service operators and there is a limited range of retailers. We believe that ‘Newcastle Town, George Street’ thereby meets needs which arise in the immediate area and, as such, a neighbourhood centre designation is considered to be more appropriate.

## **7.0 Population and Expenditure**

### **Study Area Population**

7.1 The population within each postcode sector and each zone at 2019 has been calculated using Experian Micromarketer G3 data (2017 estimate, which was issued in December 2018). In estimating the future population of the Study Area, consideration has been given to the authorities' population projections across the timeframe of the Joint Local Plan from 2013 to 2033.

7.2 In this regard, we understand that the identified Joint Local Plan requirement for 27,800 dwellings over the plan period equates to a population increase of 44,527 persons in the 20 years from 2013. We understand that the figure equates to a population growth of 24,039 persons in Stoke-on-Trent and 20,488 persons in Newcastle-under-Lyme.

7.3 We are aware that the two authorities have monitored housing completions between 2013 and 2018, and that there has been an identified under provision of new housing in both authority areas across this five year period. Whilst we would ordinarily assume that future population growth between 2018 and 2033 (i.e. a 15 year period) would equate to three-quarters of the overall requirement, we are informed that there will be a need to make up the current backlog in housing delivery throughout the remaining 15 years of the plan period.

7.4 We are informed that addressing this backlog will result in further population growth of 2,596 persons in Stoke-on-Trent and 3,835 persons in Newcastle-under-Lyme in the 15 years between 2018 and 2033. As such, our approach in respect of population growth across the Joint Local Plan area can be summarised as follows.

Table 7.1: Planned Population Growth Across Joint Local Plan Area

	Stoke-on-Trent	Newcastle-under-Lyme	Joint Local Plan Area
A. Planned population growth 2013 to 2033	24,039	20,488	44,527
B. Planned population growth 2018 to 2033 (Equates to three-quarters of A)	18,029	15,366	33,395
C. Population growth allowance to account for backlog	2,596	3,835	6,431
D. Population change (Equals B+C)	20,625	19,201	39,826

7.5 Our methodology therefore provides for a population increase of 20,625 persons in Stoke-on-Trent and 19,201 persons in Newcastle-under-Lyme between 2018 and 2033.

7.6 The zones within the Study Area cut across local authority areas, with some zones falling within three different authority areas. Where a zone incorporates a neighbouring authority area (such as Cheshire East, Stafford and Staffordshire Moorlands), there is a need to sub-divide the zone in order to consider growth both inside and outside the Joint Local Plan area. For areas outside the Joint Local Plan area (where residents often use facilities that are not located within Newcastle-under-Lyme and Stoke-on-Trent), the use of Experian's own population forecasts is considered to be appropriate.

7.7 In order to apportion future population growth in a broadly appropriate manner, we have been provided with a schedule setting out each authority's pipeline of residential sites on a zonal basis . As a consequence of this, we are able to identify how future population growth may be delivered across the authority areas. Population growth (and available expenditure) has been considered in five-year intervals working back from 2033. The base year of the Study is 2019 and the reporting years for the purpose of future need are 2023, 2028, 2029 and 2033.

Table 7.2: Proposed Newcastle-under-Lyme and Stoke-on-Trent Housing Distribution

Zone	Stoke-on-Trent			Newcastle-under-Lyme			Joint Authority
	Population growth according to housing pipeline	Proportion of growth	Population increase	Population growth according to housing pipeline	Proportion of growth	Population increase	
1	6,439	37.9%	7,808	-	-	-	7,808
2	-	-	-	1,097	10.4%	2,006	2,006
3	1,885	11.1%	2,286	-	-	-	2,286
4	4,595	27.0%	5,572	-	-	-	5,572
5	2,761	16.2%	3,348	-	-	-	3,348
6	1,224	7.2%	1,484	-	-	-	1,484
7	-	-	-	2,023	19.3%	3,699	3,699
8	-	-	-	-	-	-	-
9	11	0.1%	13	-	-	-	13
10	93	0.5%	113	-	-	-	113
11	-	-	-	-	-	-	-
12	-	-	-	6,538	62.3%	11,954	11,954

13	-	-	-	844	8.0%	1,543	1,543
Total	17,008	100.0%	20,625	10,502	100.0%	19,201	39,826

7.8 We assume that the population growth will be delivered in an equitable manner from 2018 to 2033 (i.e. 1,375 persons a year in Stoke-on-Trent and 1,280 persons a year in Newcastle-under-Lyme).

7.9 The above Table 7.2 identifies the proposed distribution of housing growth across the two authority areas. The final column provides our estimate of how future population growth would be distributed based on the pipeline of proposed housing commitments. Our approach indicates that the majority of population growth across the Joint Local Plan area will be delivered in the central Zones 1, 4 and 12. We estimate that these zones will account for 63.6% of future growth arising within the Joint Local Plan area, which equates to a population growth of 25,334 persons.

7.10 Outside of the Joint Local Plan area, Experian population forecasts have been used. Experian's data provides 2016 base year population estimates which accord with the findings of the 2011 Census release. Its methodology in calculating projected changes in population is based on a 'demographic component model', which takes into consideration birth and death rates, and net migration.

7.11 Using the above methodology, Table 7.2 sets out our estimate of future population growth across the Study Area, utilising the housing land supply pipeline provided by NULBC and SOTBC, and Experian Micromarketer G3 data.

Table 7.3: Estimated Study Area Population by Survey Zone

Zone	2018	2019	2023	2028	2029	2033	Methodology for Estimating Growth
1	82,619	83,144	85,232	87,831	88,352	90,443	Authorities' housing land supply and Experian
2	15,028	15,166	15,732	16,405	16,540	17,092	Authorities' housing land supply and Experian
3	78,771	78,922	79,630	80,447	80,603	81,242	Authorities' housing land supply and Experian
4	44,471	44,844	46,325	48,173	48,549	50,042	Authorities' housing land supply and Experian

5	42,561	42,784	43,701	44,816	45,040	45,930	Authorities' housing land supply and Experian
6	25,096	25,195	25,591	26,086	26,184	26,580	Authorities' housing land supply
7	27,085	27,338	28,334	29,562	29,813	30,800	Authorities' housing land supply and Experian
8	20,982	21,024	21,207	21,457	21,494	21,639	Authorities' housing land supply and Experian
9	66,785	66,901	67,406	67,840	67,907	68,147	Authorities' housing land supply and Experian
10	32,842	32,979	33,706	34,296	34,384	34,759	Authorities' housing land supply and Experian
11	51,125	51,341	52,214	53,149	53,324	53,749	Authorities' housing land supply and Experian
12	86,954	87,758	90,942	94,932	95,731	98,918	Authorities' housing land supply and Experian
13	12,094	12,230	12,787	13,491	13,629	14,172	Authorities' housing land supply and Experian
Total	586,414	589,625	602,806	618,485	621,550	633,513	

7.12 The above table sets out our estimate that the Study Area population will increase from 589,625 persons at 2019 to 633,513 persons at 2033, which equates to a growth of 43,888 persons over the 14 year period.

#### Retail Expenditure

7.13 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population.

7.14 The base year for the Experian expenditure data is 2017. Our methodology takes account of the fact that certain types of special forms of trading expenditure will not be available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.

7.15 Figure 5 of Appendix 3 of ERPBN16 provides forecasts in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and in the future. We have ‘stripped out’ any survey responses which relate to expenditure committed via special forms of trading and have instead made an allowance derived from Experian’s recommendation (which we consider to be the most appropriate means by which to account for such expenditure).

7.16 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a store’s shelves or stockroom (particularly in the case of convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered ‘available’ to support floorspace within the Study Area.

7.17 Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian’s ‘adjusted’ allowance for special forms of trading (which is provided at Figure 5 of ERPBN16). This allowance indicates that 3.4% of convenience goods expenditure and 15.5% of comparison goods expenditure is ‘lost’ to shops at base year 2017 through special forms of trading purchases.

7.18 Having made allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN16. Experian provides overall growth rates and ‘adjusted’ rates, which account for any additional increases in expenditure lost to special forms of trading. We set out Experian’s expenditure growth estimates below as our Table 7.4.

7.19 The latest growth rates suggest that Brexit will likely influence per capita expenditure growth in the short term, but that growth in comparison goods expenditure should pick up post-2020 as confidence in the economy returns. The outlook is less optimistic in respect of convenience goods growth, which is a consequence of shoppers embracing discount retailers and looking to secure value from the food shopping.

7.20 For convenience goods, Experian forecasts negative or very limited per capita expenditure growth across the entire period to 2033 (in the range -0.7% to 0.2 per annum). The position is even more pessimistic when account is taken of future growth in special forms of trading, with Experian forecasting that the first year of

growth will occur in 2031. Overall, it is evident that per capita convenience goods expenditure which is available to stores is forecast to fall slightly across the period to 2033.

Table 7.4: Experian Retail Planner Briefing Note 15 Convenience and Comparison Goods Annual Growth Rates

Year	Convenience Goods	Convenience Goods 'Adjusted SFT'	Comparison Goods	Comparison Goods 'Adjusted SFT'
2018	1.1	0.7	2.8	1.0
2019	0.4	0.1	2.6	1.5
2020	0.1	-0.1	2.8	1.8
2021	0.3	0.1	3.2	2.4
2022	0.0	-0.2	3.2	2.6
2023	0.2	0.0	3.5	2.9
2024	0.1	0.0	3.3	3.0
2025	0.1	0.0	3.2	2.9
2026	0.1	0.0	3.3	3.0
2027	0.1	0.0	3.2	3.0
2028	0.2	0.1	3.1	2.9
2029	0.1	0.0	3.2	3.0
2030	0.1	0.0	3.2	3.1
2031	0.2	0.1	3.3	3.2
2032	0.1	0.0	3.2	3.1
2033	0.2	0.1	3.3	3.2

Source: Figure 6 of Appendix 3, Experian Retail Planner Briefing Note 16 (December 2018)

7.21 The position in respect of comparison goods expenditure is more positive. Whilst Experian forecasts that per capita comparison goods expenditure growth will fall from 2.8% at 2018 to 2.6% at 2019, forecast growth rates recover in the medium to long term. Per capita comparison goods expenditure growth is forecast to increase to 3.2% at 2022, and then to 3.5% at 2023. Experian then forecasts that the annual comparison goods per capita growth rate will remain at or above 3.0% across the remainder of the period to 2033; its forecast therefore suggests that there will be relatively healthy growth in comparison goods expenditure, even after accounting for expenditure lost to special forms of trading.

7.22 Given the inherent uncertainties associated with predicting the performance of the economy over time (particularly in the current economic and political climate), long term growth forecasts should be viewed with some caution. As such, assessments of this nature should be reviewed on a regular basis in order to ensure that forecasts over the medium and longer term reflect changing circumstances. In this regard, we also note that paragraph 85 of the newly published NPPF requires local planning authorities to allocate sites to meet likely needs ‘...looking at least ten

'years ahead', which differs from the previous requirement to meet needs across the entire plan period. We believe that this change directly reflects current economic conditions and structural issues in the retail sector in recent years.

7.23 By applying Experian's recommendations in respect of special forms of trading and expenditure growth, we are able to produce expenditure estimates for each survey zone and the Study Area as a whole at 2019, 2023, 2028, 2029 and 2033.

#### Convenience Goods Expenditure

7.24 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £1,260.1m of convenience goods expenditure originates within the Study Area at 2019. The below Table 7.5 indicates that available Study Area convenience goods expenditure is forecast to then increase to £1,355.6m at 2033.

Table 7.5: Total Available Study Area Convenience Goods Expenditure

2019 (£m)	2023 (£m)	2028 (£m)	2029 (£m)	2033 (£m)
1260.1	1286.8	1320.0	1327.8	1355.6

Source: Table 2a of Appendix 7 In 2017 prices

7.25 Table 7.6 indicates that this represents an increase of £95.6m (or 6.9%) across the Study Area between 2019 and 2033. Given the slight fall in per capita convenience goods expenditure identified above, this increase can be attributed to the forecast growth in the Study Area's population.

Table 7.6: Growth in Available Study Area Convenience Goods Expenditure

Growth 2019-23 (£m)	Growth 2019-28 (£m)	Growth 2019-29 (£m)	Growth 2019-33 (£m)
26.7	59.9	67.7	95.6

Source: Table 2a of Appendix 7 In 2017 prices

7.26 We have assumed that around 75% of available convenience goods expenditure would take the form of main food shopping and that around 25% would take the form of top-up shopping (which relates to smaller purchases, often including staple items such as milk and bread) . By applying this ratio, we estimate that main food shopping trips account for £945.1m of Study Area convenience goods expenditure at 2019, and top-up shopping trips account for £315.0m.

#### Comparison Goods Expenditure

7.27 For comparison goods, Table 7.7 sets out our estimate that the resident population of the Study Area will generate £1,701.2m of comparison goods

expenditure at 2019. Available comparison goods expenditure is then forecast to increase significantly to £2,711.2m at 2033. As identified by Table 7.8, this represents a very substantial increase of £1,010.0m between 2019 and 2033. The large majority of this growth is forecast to occur in the medium to long term (i.e. after 2023).

7.28 The identified increase in comparison goods expenditure growth is substantial, but it represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due to both a reduction in the overall level of growth when compared to that achieved in the early part of this millennium and as a consequence of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping).

Table 7.7: Total Available Study Area Comparison Goods Expenditure

<b>2019 (£m)</b>	<b>2023 (£m)</b>	<b>2028 (£m)</b>	<b>2029 (£m)</b>	<b>2033 (£m)</b>
1,701.2	1,913.9	2,271.3	2,350.8	2,711.2

Source: Table 8 of Appendix 7 In 2017 prices

Table 7.8: Growth in Available Study Area Comparison Goods Expenditure

Growth 2019-23 (£m)	Growth 2019-28 (£m)	Growth 2019-29 (£m)	Growth 2019-33 (£m)
212.7	570.0	649.6	1,010.0

Source: Table 8 of Appendix 7 In 2017 prices

7.29 We sub-divide comparison goods expenditure into eight categories, these being: ‘Clothing and Footwear’, ‘CDs, DVDs and Books’, ‘Health, Beauty and Chemist Goods’, ‘Small Household Goods’ and ‘Toys, Games, Bicycles and Recreational Goods’ (collectively referred to as non-bulky goods); and DIY’, ‘Electrical’ and ‘Furniture’ (collectively referred to as bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian’s estimates are reflected in the detailed expenditure tables set out at Table 7b of Appendix 7.

7.30 In considering expenditure growth, it should be noted that not all growth arising within the Study Area will be to support additional floorspace. Instead, account needs to be taken of: the market share of expenditure secured by retailers within the Joint Local Plan area; the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and, the expenditure that will be claimed by committed retail developments. We consider the matter of expenditure growth and future floorspace requirements in the following Section 8 of this report.

## **8.0 Assessment of Retail Needs**

8.1 Our retail capacity tables set out our step-by-step approach to estimating quantitative retail need and are provided at Appendix 7. A summary of our methodological approach, together with our findings, is provided below.

### **General Approach to Estimating Need**

8.2 Retail capacity modelling follows the basic principle that: Available Expenditure minus Expected Turnover of Existing and Committed Floorspace equals Expenditure Surplus or Deficit. We summarise the key considerations relating to each component of the equation below.

#### **Available Expenditure**

8.3 As we set out in Section 7 of this report, available expenditure within a zone is calculated by multiplying the population at a given reporting year by the estimated per capita expenditure. The available expenditure takes into consideration:

- estimated population growth;
- forecast increases in per capita expenditure; and
- forecast increases in special forms of trading.

#### **Turnover**

8.4 The turnover relates to the expenditure required by existing retailers (and by retail commitments benefitting from an extant planning permission) in order to ensure that they trade viably. For convenience goods retailers, the expected ‘benchmark’ turnover of existing convenience goods facilities is calculated with reference to GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers 2018 and Mintel Retail Rankings 2018 data.

#### **Surplus/Deficit**

8.5 The expenditure surplus (or deficit) is calculated by subtracting the turnover of existing and committed floorspace from the available expenditure in each of the authority areas. A surplus figure effectively represents an under-provision of retail facilities within the Joint Local Plan area (which may indicate that additional floorspace could be supported), whereas a deficit would suggest a quantitative over-provision of retail floorspace.

8.6 Although a surplus is presented as a monetary figure, it can be converted to a floorspace requirement through the application of an appropriate sales density. In

this regard, the floorspace requirement will vary according to operator and the likely sales density they could achieve. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector there is significant variation in the sale densities of bulky operators, with electrical retailers typically having higher sales densities than DIY or furniture retailers.

8.7 The turnover of destinations is generally considered with reference to retailers' net sales areas and all of the following floorspace figures relate to net sales areas. Our assessment considers convenience and comparison goods needs on a Joint Local Plan area basis, but then also subdivides the identified requirement in order to provide figures for Newcastle-under-Lyme and Stoke-on-Trent.

#### Capacity for Future Convenience Goods Floorspace

8.8 In order to identify the likely need for additional convenience goods floorspace across the Joint Local Plan area, it is first necessary to consider the performance of the current provision. In this respect, the built up areas of Newcastle-under-Lyme and Stoke-on-Trent already accommodate a reasonably good variety of foodstore operators. As such, we believe that many of the food shopping trips which originate within the Study Area, but are directed to facilities outside of the Joint Local Plan area, occur principally because the trip is convenient (i.e. close to home or work), rather than due to any significant deficiencies in Newcastle-under-Lyme and Stoke-on-Trent's offer. Consideration of convenience goods shopping patterns on a zone-by-zone basis does not suggest that there is a significant problem with shoppers driving significant distances outside the Joint Local Plan area to access convenience goods shopping facilities. Given this, we believe that the existing convenience goods market share of 68.4% of Study Area convenience goods expenditure spent within the Joint Local Plan area is broadly appropriate and could be sustained in the future.

8.9 Based on the existing market share, we estimate that £861.8m of convenience goods expenditure which originates within the Study Area is claimed by retailers in Newcastle-under-Lyme and Stoke-on-Trent at 2019. We have given consideration to the likelihood of any material inflow of expenditure originating outside the Study Area to foodstores located within the Joint Local Plan area. In this regard, we are of the view that:

- the Study Area boundary is relatively extensive and, in our view, incorporates the catchment population that looks towards facilities in Newcastle-under-Lyme and Stoke-on-Trent to meet their needs; and
- there is very little self-catering holiday accommodation in the area and, as such, no significant resulting food shopping that arises as a consequence.

8.10 As such, we do not believe that foodstores benefit from any material level of inflow.

8.11 For each convenience goods retail destination, the identified survey derived turnover is compared its expected benchmark performance (which is estimated with reference to company average sales densities and the estimated net sales areas of individual shops). Our assessment assumes a ‘goods based’ approach, which disaggregates expenditure by sector, as it is important to recognise that major foodstore operators generally also sell some comparison goods, such as clothing, household goods, books and CDs. To account for this, the typical split between convenience and comparison goods provision for each operator has been identified and this multiplier has been applied to the estimated net floorspace of each foodstore. This provides an indication of the likely floorspace dedicated to the sale of convenience goods at each store and provides for an estimation of convenience goods benchmark turnover.

8.12 The calculation of the estimated benchmark turnover of individual stores allows an assessment to be made in respect of individual retailers’ trading performance and whether (on an aggregated basis) surplus expenditure exists to support additional floorspace. For smaller shops (where it is more difficult to collate accurate floorspace and sales density data), we assume that stores are trading ‘in equilibrium’ (i.e. the survey-derived turnover equates to the anticipated benchmark turnover).

8.13 Our assessment is summarised below at Table 8.1 and identifies that convenience goods floorspace in the Joint Local Plan area has an expected benchmark turnover of £854.4m at 2019, which is slightly below the estimated survey derived turnover of £861.8m. As such, taken collectively, convenience goods floorspace is ‘overtrading’ (i.e. its turnover is less than would be expected by reference to company average performance) by £7.4m.

8.14 In order to appraise the future need for additional convenience goods floorspace, it is necessary to consider how the performance of stores will be affected by forecast expenditure growth. Accordingly, Table 8.1 also sets out the anticipated increases in expenditure that will be available to convenience goods retailers within the Joint Local Plan area, assuming the current convenience goods market share is maintained. We have assumed that the benchmark turnover of floorspace will change going forward in accordance with the forecast changes in floorspace efficiency set out in ERPBN16.

8.15 Table 8.1 sets out our estimate that the convenience goods expenditure available to facilities in the Joint Local Plan area will increase to £880.1m at 2023, to £902.8m at 2028, and to £927.2m at 2033. When the forecast increase in available convenience goods expenditure is compared to growth in the benchmark turnover of such floorspace, a modest convenience goods surplus of £56.4m is apparent at final reporting period of 2033.

Table 8.1: Quantitative Need for Convenience Goods Floorspace in the Joint Local Plan area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2019	854.4	861.8	7.4
2023	867.3	880.1	12.8
2028	870.8	902.8	32.0
2029	870.8	908.1	37.3
2033	870.8	927.2	56.4

Source: Table 6a of Appendix 7 Notes: Assumes constant market share (68.4%) of Study Area expenditure claimed by facilities in the Joint Local Plan area; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 16

In 2017 prices

8.16 In considering the future position in respect of convenience goods needs, it is also necessary to take into consideration commitments and the claim these may make on expenditure. We summarise relevant convenience goods commitments at the below Table 8.2.

Table 8.2: Convenience Goods Commitments in the Joint Local Plan area

Area	Zone	Location	Planning App. Reference	Proposal	Net Conv v Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimate T'over at 2018 (£m)	Status
N-u-L	Zone 7	Unit 7, Linley Trading Estate	14/003 63/ REM	Class A1 retail foodstore (with 1,386 sq.m of floorspace)	707	11,372	8.0	Extant
	Zone 12	5-9 High Street, Newcastle	14/001 92/ FUL	Change of use of medical practice to two retail units	108	7,000	0.8	Under construction
		Zanzibar, Marsh Parade, Newcastle	15/010 61/ COU	Change of use from nightclub to Class A1 retail and Class A3 restaurant use	245	7,000	1.7	Under construction

<b>New castl e- unde r- Lym e Sub- Total</b>				<b>1,06 0</b>		<b>10.5</b>		
S-o-T	Zone 1	Warner Street/ Broad Street/ Potteries Way	51551	Office-led mixed-use scheme with 1,970 sq.m of retail floorspace to be built out	460	7,000	3.2	Extant
	Zone 3	Former Dresden Primary School, Belgrave Road	56751	Demolition of former school and erection of foodstore	338	10,000	3.4	Under construction
		Lightwood Tavern, 581 Lightwood Road	60965	Change of use to retail convenience store	263	10,000	2.6	Extant
	Zone 4	Former Dyson Technologies, Shelton New Road	54871	Mixed-use development, including residential, and up to 816 sq.m of Class A1, A2 and A5 floorspace	286	7,000	2.0	Extant
		Land to the south and rear of London House	58753	Retail unit below student accommodation - assumed most likely to be occupied by convenience goods retailer	146	7,000	1.0	Extant

	City General Hospital	58753	Two storey hospital building with retail and service units (amounting to 1,463 sq.m) on ground floor	341	10,000	3.4	Extant
	Aldi, Newcastle Road	58349	Single storey extension to store	239	10,517	2.8	Under construction
Zone 6	Clanway Farm Local Centre	-	Mixed-use allocation providing for up to 1,000 sq.m of retail	233	7,000	1.6	Extant
<b>Stoke-on-Trent Sub-Total</b>				<b>2,330</b>		<b>20.1</b>	
<b>Joint Local Plan area Total</b>				<b>3,389</b>		<b>30.6</b>	

Source: Table 6c of Appendix 7

Notes: Estimated sales density generally reflect operator where known or are considered to be typical for the type of development proposed; a threshold of 200 sq.m of net retail sales has been adopted for commitments (account is not made of commitments below this level on the basis that they will not materially impact on shopping patterns and capacity)

In 2017 prices

8.17 We estimate that extant retail planning permissions together provide approximately 3,389 sq.m of convenience goods sales floorspace across the Joint Local Plan area, and that this floorspace would have a turnover of around £30.6m at 2019 (if it was operational). Convenience goods commitments are generally limited to relatively small-scale convenience stores and floorspace which is contained within larger mixed-use developments. The most significant convenience goods commitments is planning permission reference 14/00363/REM, which provides for a new foodstore (with a gross floorspace of 1,386 sq.m) at Linley Trading Estate in Newcastle-under-Lyme.

8.18 Full details of the assumptions made in estimating the turnover of convenience goods commitments are provided in the notes that accompany Table 6c of Appendix 7.

8.19 Clearly, the extant commitments act to further diminish the need for any additional convenience goods floorspace over the period to 2033. As such, after an allowance has been made to account for the turnover of commitments, there is no requirement for any additional convenience goods provision up to 2023 and limited capacity up to 2029 of between 500 and 900 sq.m. However, across the reporting period to 2033, we identify a floorspace requirement of between 2,100 and 3,500 sq.m.

Table 8.3: Quantitative Need for Convenience Goods Floorspace in Joint Local Plan area After Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2018	7.4	30.6	-23.2	-1,900	-3,300
2023	12.8	31.0	-18.2	-1,500	-2,600
2028	32.0	31.2	0.9	100	100
2029	37.3	31.2	6.2	500	900
2033	56.4	31.2	25.3	2,100	3,500

Source: Table 6d of Appendix 7

Notes: Assumes constant market share (68.4%) of Study Area expenditure claimed by facilities in Joint Local Plan area; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 16; minimum floorspace requirement based on an assumed sales density of £11,952 per sq.m at 2018 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £7,000 per sq.m at 2018 (which is typical figure for discount operators)

In 2017 prices

### **Convenience Goods Capacity in Newcastle-under-Lyme**

8.20 Notwithstanding the above findings, we consider below whether there is any localised quantitative need for additional convenience goods floorspace within the Newcastle-under-Lyme and Stoke-on-Trent authority areas. The Newcastle-under-Lyme authority area is principally comprised of parts of Zones 2, 7, 12 and 13 (and very small parts of Zones 5, 8, 10 and 11), and the Stoke-on-Trent authority area comprises parts of Zones 1, 3, 4, 5, 6, 7 and 8.

8.21 As the below Table 8.4 demonstrates, we estimate that convenience goods floorspace in Newcastle-under-Lyme claims around £267.9m at 2019, based on an

identified market share of 21.3% of all such expenditure that originates within the Study Area. This compares to an anticipated benchmark survey of £267.8m; consequently, there is surplus of £0.1m at 2019, which increases to £15.3m at 2033.

Table 8.4: Quantitative Need for Convenience Goods Floorspace in Newcastle-under-Lyme

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2019	267.8	267.9	0.1
2023	271.8	273.6	1.7
2028	272.9	280.6	7.7
2029	272.9	282.3	9.3
2033	272.9	288.2	15.3

Source: Table 6e of Appendix 7

Notes: Assumes constant market share (21.3%) of Study Area expenditure claimed by facilities in Newcastle-under-Lyme; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 16

In 2017 prices

8.22 We estimate that identified commitments within Newcastle-under-Lyme have a collective turnover of £10.4m at 2019. As Table 8.5 identifies, the commitments eliminate the identified expenditure surplus to 2033. The deficit is £35.7m at 2018, reducing to £20.8m at 2033. As such, there is no quantitative need for additional convenience goods floorspace in Newcastle-under-Lyme over the reporting period.

Table 8.5: Quantitative Need for Convenience Goods Floorspace in Newcastle-under-Lyme After Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2019	0.1	10.5	-10.4	-900	-1,500
2023	1.7	10.7	-8.9	-700	-1,300
2028	7.7	10.7	-3.0	-200	-400
2029	9.3	10.7	-1.4	-100	-200
2033	15.3	10.7	4.6	400	700

Source: Table 6f of Appendix 7

Notes: Assumes constant market share (21.3%) of Study Area expenditure claimed by facilities in Newcastle-under-Lyme; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 16; minimum floorspace requirement based on an assumed sales density of £11,952 per sq.m at 2018 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £7,000 per sq.m at 2018 (which is typical figure for discount operators)

In 2017 prices

### **Convenience Goods Capacity in Stoke-on-Trent**

8.23 Our assessment indicates that convenience goods facilities in Stoke-on-Trent overtrade. Table 8.6 identifies that convenience goods floorspace in Stoke-on-Trent claims around £594.0m at 2019, based on an identified market share of 47.2% of all such expenditure that originates within the Study Area.

8.24 This compares to an anticipated benchmark turnover of £586.7m. As such, a limited expenditure deficit of £7.3m is therefore apparent at 2019. Assuming the convenience goods facilities in Stoke-on-Trent maintain their existing market share over the reporting period to 2033, we estimate that an expenditure surplus of £11.1m will be apparent by 2023, increasing to £24.3m at 2028, and then to £41.1m at 2033.

Table 8.6: Quantitative Need for Convenience Goods Floorspace in Stoke-on-Trent

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2019	586.7	594.0	7.3
2023	595.5	606.6	11.1
2028	597.9	622.2	24.3
2029	597.9	625.9	28.0
2033	597.9	639.0	41.1

Source: Table 6g of Appendix 7

Notes: Assumes constant market share (47.2%) of Study Area expenditure claimed by facilities in Stoke-Trent; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 15

In 2016 prices

8.25 We estimate that identified convenience goods commitments in Stoke-on-Trent would have a collective turnover of £20.1m, if operational at 2019.

Table 8.7: Quantitative Need for Convenience Goods Floorspace in Stoke-on-Trent After Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2019	7.3	20.1	-12.7	-1,100	-1,800
2023	11.1	20.4	-9.3	-800	-1,300
2028	24.3	20.4	3.9	300	600
2029	28.0	20.4	7.5	600	1,100
2033	41.1	20.4	20.7	1,700	3,000

Source: Table 6h of Appendix 7

Notes: Assumes constant market share (47.2%) of Study Area expenditure claimed by facilities in Stoke-on-Trent; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 16; minimum floorspace requirement based on an assumed sales density of £11,952 per sq.m at 2018 (which equates to the average sales density of the ‘big four’ foodstore operators); maximum floorspace requirement based on an assumed sales density of £7,000 per sq.m at 2018 (which is typical figure for discount operators)

In 2017 prices

8.26 As the above Table 8.7 demonstrates, accounting for commitments extinguishes any need for further convenience goods in the SOTCC authority area until 2028. At 2028, there is a small expenditure residual of £3.9m, which equates to a need for a further 300 sq.m to 600 sq.m of convenience goods floorspace. By 2033, the surplus increases to £20.7m, which equates to a need for a further 1,700 sq.m to 3,000 sq.m of convenience goods floorspace.

### **Capacity for Future Comparison Goods Floorspace**

8.27 Our methodology in calculating comparison goods capacity deviates from that employed in respect of convenience goods. This is because it is difficult to accurately estimate a benchmark turnover for comparison goods floorspace, both because of the number of units involved (which are occupied by a wide variety of retailers), and due to the variation in the trading performance of floorspace depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the position for comparison goods floorspace that it is trading ‘at equilibrium’ at base year 2019 (i.e. our survey derived turnover estimate effectively equates to the benchmark trading performance).

8.28 We therefore assume that there is a nil quantitative need for any additional comparison goods floorspace across the Study Area and two authority areas at 2019. Going forward, we again assume that the performance of comparison goods facilities will be commensurate with the identified market share currently claimed by such provision with the Joint Local Plan area.

8.29 We have made a modest allowance for comparison goods inflow based on the results of the in-street surveys carried out by NEMS in July 2018. The results indicate that 3.0% of survey respondents in Newcastle-under-Lyme and 4.0% of respondents in Stoke-on-Trent travelled from outside the Study Area into the respective centre on the day of the survey. These results are in line with our expectations; given the size of the Study Area and the scale of the centres, we did not anticipate that a significant number of visitors to either centre reside outside the Study Area.

8.30 On this basis, we have assumed an inflow allowance of 3.0% for Newcastle-under-Lyme town centre and an inflow allowance of 4.0% for the city centre at Hanley, including Intu Potteries shopping centre. We have also assumed that Festival Retail Park benefits from inflow of 4.0% given its proximity to the city centre and the strength of its offer. We do not believe that any other comparison goods shopping destination within the Joint Local Plan area is likely to benefit from any material level of inflow and we therefore make no further provision for inflow in other areas.

8.31 The inflow allowance has the effect of increasing the Joint Local Plan area's identified estimated comparison goods turnover from £1,179.7m to £1,202.7m (inflow therefore representing just 1.9% of total turnover). This very modest allowance is a consequence of the very large Study Area, which fully encompasses the principal catchment area of the authorities' retail provision.

8.32 The £1202.7m of comparison goods expenditure that originates the Study Area and is claimed by facilities within the Joint Local Plan area equates to a market share of 69.3% of all such comparison goods expenditure (reflecting the important role of Hanley across the sub-region). By making provision for inflow and 'rolling forward' this market share, our assessment estimates that existing facilities within the Joint Local Plan area will attract £1,353.0m at 2023, increasing to £1,605.6m at 2028, and then to £1,916.7m at 2033.

8.33 As Table 8.8 sets out, given forecast increases in comparison goods expenditure and allowing for annual forecast changes in the productivity of existing floorspace, we estimate that, at 2023, there will be an expenditure surplus of £13.8m to support additional comparison goods floorspace across the Joint Local Plan area. This surplus is forecast to increase to £83.1m at 2028, £104.3m at 2029 and then to £210.7m at 2033.

Table 8.8: Quantitative Need for Comparison Goods Floorspace in Joint Local Plan area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2019	1,202.7	1,202.7	0.0
2023	1,339.2	1,353.0	13.8
2028	1,522.6	1,605.6	83.1
2029	1,557.6	1,661.9	104.3
2033	1,705.9	1,916.7	210.7

Source: Table 26a of Appendix 7

Notes: Assumes constant market share (72.3%) of Study Area expenditure claimed by facilities in Joint Local Plan area; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 16  
In 2017 prices

8.34 Once more, the above assessment does not take into consideration existing commitments and their claim on the identified expenditure surplus. Table 8.9 summarises current extant planning permissions that provide for additional comparison goods floorspace. We estimate that these commitments would have a total turnover of £13.4m, if operational at 2019. The commitments take a variety of forms, including retail floorspace associated with larger mixed-use developments, comparison goods retail at foodstore developments, and extensions to large format retail units at retail parks. Very few of the comparison goods commitments relate to 'high street' retail.

Table 8.9: Comparison Goods Commitments in the Joint Local Plan Area

Area	Zone	Location	Planning App. Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimate T'over at 2018 (£m)	Status
N-u-L	Zone 7	Unit 7, Linley Trading Estate	14/003 63/	Class A1 retail foodstore (1,386 sq.m of floorspace)	125	5,000 0	0.6	Extant
	Zone 12	5-9 High Street, Newcastle	14/001 92/ FUL	Change of use of medical practice to two retail units	108	4,000	0.4	Under construction
		Zanzibar, Marsh Parade, Newcastle	15/010 61/ COU	Change of use from nightclub to Class A1 and Class A3	245	4,000	1.0	Under construction
		8-10 High St, Newcastle	12/002 18/ FUL	Retail unit	254	4,000	1.0	Under construction

Newcastle-under-Lyme Sub-Total					732		3.1	
S-o-T	Zone 1	Warner Street/Broad Street/Potteries Way	51551	Office-led mixed-use scheme with 1,970 sq.m of retail floorspace	460	5,500	2.5	Extant
		Mothercare, Ridgehouse Drive	59179	Extension to mezzanine floor	503	3,893	2.0	Extant
	Zone 3	Former Dresden Primary School, Belgrave Road	56751	Demolition of former school and erection of foodstore	18	5,000	0.1	Under construction
		Lightwood Tavern, 581 Lightwood Rd	60965	Change of use to retail convenience store	14	5,000	0.1	Extant
	Zone 4	Former Dyson Technologies, Shelton New Road	54871	Mixed-use development, including residential, and up to 816 sq.m of Class A1, A2 and A5 floorspace	286	4,000	1.1	Extant
		Land to the south and rear of London House	58753	Retail unit below student accommodation - assumed most likely to be occupied by convenience goods retailer	8	5,000	0.0	Extant

	City General Hospital	58753	Two storey hospital building with retail and service units on ground floor (amounting to 1,463 sq.m)	341	5,000	1.7	Extant
	Aldi, Newcastle Road	58349	Single storey extension to store	52	7,220	0.4	Under construction
	Former Spode Works	58781	Mixed-use redevelopment	231	4,000	0.9	Under construction
	Pets at Home, Springfield s RP	61910	Mezzanine floorspace	262	2,276	0.6	Extant
Zone 6	Clanway Farm Local Centre	-	Mixed-use allocation providing for up to 1,000 sq.m of retail	233	7,000	1.6	Extant
Stoke-on-Trent Sub-Total				2,407		10.4	
Joint Local Plan area Total				3,139		13.4	

Source: Table 6c of Appendix 7

Notes: Estimated sales density generally reflect operator where known or are considered to be typical for the type of development proposed; a threshold of 200 sq.m of net retail sales has been adopted for commitments (account is not made of commitments below this level on the basis that they will not materially impact on shopping patterns and capacity)

In 2017 prices

8.35 Given the turnover of identified commitments, there is an identified deficit of comparison expenditure up to 2023. However, a capacity surplus of £66.1m is apparent at 2028, increasing to £86.9m at 2029, and then to £191.7m at 2033.

8.36 The identified surplus could support between 11,000 sq.m and 18,900 sq.m of floorspace at 2028, increasing to between 14,500 sq.m and 24,800 sq.m at 2029, and to between 32,000 sq.m and 54,800 sq.m at 2033. The minimum figure is based on the identified capacity being met through the delivery of 'high street' retail floorspace and the maximum figure relates to capacity being met by bulky goods floorspace or in smaller centres (both of which typically accommodate retailers which achieve lesser sales densities).

8.37 The identified requirement in respect of additional comparison goods floorspace is set out below at Table 8.10.

Table 8.10: Quantitative Need for Comparison Goods Floorspace in Joint Local Plan Area After Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2019	0.0	13.4	-13.4	-2,200	-3,800
2023	13.8	14.9	-1.1	-200	-300
2028	83.1	17.0	66.1	11,000	18,900
2029	104.3	17.4	86.9	14,500	24,800
2033	210.7	19.0	191.7	32,000	54,800

Source: Table 26d of Appendix 7

Notes: Assumes constant market share (72.3%) of Study Area expenditure claimed by facilities in Joint Local Plan area; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 16; minimum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2018; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m

In 2017 prices

8.38 In considering comparison goods commitments, it is again relevant to note that the capacity assessment is based on the market share of each local authority area being maintained going forward. We are unaware of any significant proposed development which is likely to have a very significant impact on either authority's future comparison goods market share. However, in considering the above floorspace requirements, it will be appropriate to consider the changes in comparison goods shopping patterns that may arise as a consequence of future development. As such, we recommend that the Council monitors any substantial proposed retail development in neighbouring authorities in order to form a view as to whether it is likely to impact upon future floorspace requirements.

Comparison Goods Capacity in Newcastle-under-Lyme

8.39 Our assessment indicates that facilities in Newcastle-under-Lyme claim a market share of 15.2% of all comparison goods expenditure generated within the Study Area. This equates to £257.8m at 2019. After allowance is made for the limited inflow of comparison goods expenditure to the area, the turnover of comparison goods retailers located within the authority area increases marginally to £261.1m at 2019.

8.40 By making provision for inflow and ‘rolling forward’ the identified market share, our assessment finds that comparison goods facilities in Newcastle-under-Lyme will attract an estimated £293.7m at 2023, increasing to £348.5m at 2028, £360.7m at 2029 and then to £416.1m at 2033.

8.41 Over the short term to 2023, a relatively limited comparison goods expenditure surplus of £3.0m is available, increasing to £18.0m at 2028, £22.6m at 2029 and then to £45.7m at 2033.

Table 8.11: Quantitative Need for Comparison Goods Floorspace in Newcastle-under-Lyme

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2019	261.1	261.1	0.0
2023	290.7	293.7	3.0
2028	330.5	348.5	18.0
2029	338.1	360.7	22.6
2033	370.3	416.1	45.7

Source: Table 26e of Appendix 7

Notes: Assumes constant market share (15.2%) of Study Area expenditure claimed by facilities in Newcastle-under-Lyme; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 16

In 2017 prices

8.42 We estimate that comparison goods commitments in Newcastle-under-Lyme would have a turnover of just £3.1m, if operational at 2019. As such, they do not greatly impact on the identified level of capacity in the authority area.

8.43 As Table 8.12 identifies, once account has been taken of commitments, the identified comparison goods expenditure surplus equates to £14.2m at 2028, increasing to £18.7m at 2029 and then to £41.4 at 2033.

Table 8.12: Quantitative Need for Comparison Goods Floorspace in Newcastle-under-Lyme after Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2019	0.0	3.1	-3.1	-500	-900
2023	3.0	3.4	-0.4	-100	-100
2028	18.0	3.9	14.2	2,400	4,000
2029	22.6	4.0	18.7	3,100	5,300
2033	45.7	4.3	41.4	6,900	11,800

Source: Table 26f of Appendix 7

Notes: Assumes constant market share (15.2%) of Study Area expenditure claimed by facilities in Newcastle-under-Lyme; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 16; minimum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2018; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m

In 2017 prices

8.44 The identified surplus could support between 2,400 sq.m and 4,000 sq.m at 2028, increasing to 3,100 sq.m and 5,300 sq.m at 2029, and to between 6,900 sq.m and 11,800 sq.m at 2033.

#### Comparison Goods Capacity in Stoke-on-Trent

8.45 Our assessment indicates that facilities in Stoke-on-Trent claim a market share of 54.2% of all comparison goods expenditure generated within the Study Area. At 2019, this equates to a turnover of £921.9m. We estimate that inflow will account for a further £19.7m of comparison goods expenditure in Stoke-on-Trent at 2019 (this represents just 2.1% of the total turnover of comparison goods provision in Stoke).

8.46 By making provision for inflow and ‘rolling forward’ the identified market share, our assessment finds that comparison goods facilities in Stoke-on-Trent will attract £941.6m at 2019, increasing to £1,059.3m at 2023, to £1,257.1m at 2028, £1,301.1m at 2029 and then to £1,500.6m at 2033.

8.47 After account is taken of the need for existing retailers to improve their trading performance, a comparison goods expenditure surplus of £10.8m is evident at 2023, increasing to £65.0m at 2028, £81.6m at 2029, and then to £165.0m at 2033.

Table 8.13: Quantitative Need for Comparison Goods Floorspace in Stoke-on-Trent

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2019	941.6	941.6	0.0

2023	1,048.5	1,059.3	10.8
2028	1,192.1	1,257.1	65.0
2029	1,219.5	1,301.1	81.6
2033	1,335.6	1,500.6	165.0

Source: Table 26g of Appendix 7

Notes: Assumes constant market share (54.2%) of Study Area expenditure claimed by facilities in Stoke-on-Trent; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 16  
In 2017 prices

8.48 Committed comparison goods floorspace in Stoke-on-Trent has an estimated turnover of £10.8m at 2019. As the below Table 8.14 identifies, taking account of consented floorspace has a limited effect on the identified comparison goods expenditure surplus, which equates to £51.9m at 2028, rising to £68.2m at 2029, and to £150.3m at 2033.

8.49 As set out below at Table 8.14, the identified surplus could support between 8,700 sq.m and 14,800 sq.m of floorspace at 2028, increasing to between 11,400 sq.m and 19,500 sq.m at 2029, and then to between 25,100 sq.m and 42,900 sq.m at 2033.

Table 8.14: Quantitative Need for Comparison Goods Floorspace in Stoke-on-Trent after Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2019	0.0	10.4	-10.4	-1,700	-3,000
2023	10.8	11.5	-0.7	-100	-200
2028	65.0	13.1	51.9	8,700	14,800
2029	81.6	13.4	68.2	11,400	19,500
2033	165.0	14.7	150.3	25,100	42,900

Source: Table 26h of Appendix 7

Notes: Assumes constant market share (54.2%) of Study Area expenditure claimed by facilities in Stoke-on-Trent; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 16; minimum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2018; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m

In 2017 prices

## Addressing Quantitative Capacity

8.50 It is important to reiterate that the above capacity assessment is a theoretical exercise, based on forecast increases in population and expenditure. It also takes into consideration Experian's forecasts in respect of how existing retailers will need to increase their turnover in order to remain viable propositions.

8.51 Partly as a consequence of the authorities' ambitious growth targets, the identified comparison goods capacity is significant in both Newcastle-under-Lyme and Stoke-on-Trent. However, it is clear that the retail market as a whole is depressed and that centres within the two authority areas have been impacted more than most. In particular, there is an issue in respect of some of Stoke-on-Trent's town centres performing a significantly reduced role (compared with the historic function) and being characterised by very high vacancy rates.

8.52 In this context, it is important to establish that the above quantitative capacity assessment does not, of itself, justify further proposals for out of centre retail and leisure floorspace. Indeed, it is evident that the stock of vacant floorspace within the principal centres in Newcastle-under-Lyme and Stoke-on-Trent is such that it could (through refurbishment and redevelopment, if necessary) meet the identified quantitative need in full.

8.53 In this regard, our survey work has identified that there is a total of 88,561 sq.m of vacant floorspace across the nine principal centres in the Joint Local Plan area. This figure is more than double the maximum comparison goods floorspace requirement identified in the above assessment.

8.54 As such, the key message from the capacity assessment is not that there is a pressing need for additional retail floorspace; rather, there is simply too much stock. The priority should be to ensure that future retail requirements are directed towards the centres in order to bring about the re-occupation or redevelopment of these premises. Even if this is achieved, there will be a need to redevelop some of the stock for other non-retail (and non-commercial) uses.

#### Qualitative Need

8.55 As we set out at paragraph 8.15 of this section, convenience goods retail facilities in the Joint Local Plan area turn over £861.8m at 2019, which is just over the benchmark turnover identified at £854.4m. In examining the performance of specific stores, it is evident that smaller, discount supermarkets (operated by the likes of Aldi and Lidl) are generally performing better than food superstores relative to their expected benchmark performance .

8.56 The below Table 8.15 provides an overview of the current performance of existing larger foodstores (which provide an estimated net convenience goods sales area of 619 sq.m or more ) in the Joint Local Plan area with reference to their expected trading performance. There are a total of 12 food superstores across the

Joint Local Plan area , which collectively have a convenience goods turnover of £426.9m, which is substantially less than their anticipated benchmark turnover of £512.5m.

Table 8.15: Performance of Convenience Goods Floorspace at Principal Foodstores within Joint Local Plan Area at 2018

Zone	Store	Gross Floorspace (sq.m)	Estimated Net Conv. Floorspace (sq.m)	Sales Density (£ per sq.m)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Over-trading (£m)
1	Aldi, Leek New Road, Norton	1,854	1,051	10,517	11.7	30.4	18.7
	Aldi, Victoria Road, Berry Hill, Fenton	1,388	787	10,517	8.8	24.4	15.6
	Co-op, Werrington Road, Stoke-on-Trent	1,379	721	10,514	7.9	0.4	-7.5
	Farmfoods, Leek Road, Hanley	1,100	627	6,362	4.0	1.7	-2.3
	Lidl, Dividy Road, Bentilee	1,947	1,084	9,814	10.9	8.0	-3.0
	Marks & Spencer, Hanley	1,703	881	10,176	9.5	6.6	-2.9
	Morrisons, Festival Park	8,256	3,555	12,293	44.7	43.9	-0.8
	Sainsbury's , Etruria Road	5,786	2,527	11,356	27.7	21.3	-6.4
	Tesco Extra, Clough Street	11,109	5,221	13,401	66.4	22.9	-43.4
3	Aldi, Whittle Road, Meir	1,439	815	10,517	8.6	27.6	19.0
	Farmfoods, Edensor Road	934	761	6,362	4.8	1.4	-3.4

	Lidl, The Strand, Longton	1,290	718	9,814	7.3	9.3	2.0
	Tesco Extra, Longton RP	10,333	4,857	13,401	61.4	47.1	-14.2
	Tesco, Meir RP	7,381	3,348	13,401	42.3	59.1	16.8
4	Aldi, Newcastle Road	1,235	700	10,517	7.4	34.0	26.7
	Aldi, Stanley Matthews Way	1,534	869	10,517	9.1	26.1	17.0
	Lidl, Boothen Park	1,111	619	9,814	6.2	2.9	-3.3
	Sainsbury's , London Road	7,602	3,319	11,356	36.4	11.6	-24.8
	Tesco, Newcastle Road	5,469	2,293	13,401	29.0	39.3	10.3
5	Aldi, Brownhills Road	1,744	860	10,517	9.0	26.2	17.1
6	Asda, Scotia Road	7,090	2,698	13,268	35.8	43.0	7.2
	Lidl, High Street	2,061	1,474	9,814	11.6	11.4	-0.2
7	Aldi, Liverpool Road, Kidsgrove	1,314	745	10,517	7.8	25.2	17.4
	Tesco, Liverpool Road	3,897	1,634	13,401	20.7	28.5	7.9
12	Aldi, Blackfriars Road, N-u-L	1,519	861	10,517	9.1	23.9	14.8
	Asda, Wolstanton Retail Park, N-u-L	8,991	3,422	13,268	45.4	29.0	-16.4

	Lidl, Lower Street, N-u-L	1,342	747	9,814	7.5	9.0	1.4
	Marks & Spencer, Wolstanton Retail Park	1,456	753	10,176	8.1	3.8	-4.4
	Morrisons, Goose Street, N-u-L	5,814	2,503	12,293	31.5	24.2	-7.3
	Morrisons, Lower Milehouse Lane, N-u-L	6,487	2,793	12,293	35.1	28.5	-6.6
	Sainsbury's , Liverpool Road,	N-u-L	9,057	4,581	11,356	36.1	28.4

Source: Table 5 of Appendix 7

Notes: The above summary table provides details of the trading performance of foodstores with a net sales area of 619 sq.m or above, which correlates to the estimated net sales area of the smallest discount store in both authority areas, this being the Lidl at Boothen Park in Stoke-on-Trent-on-Trent; there are two Asda stores at Scotia Road and the household survey results suggest that there has been some confusion between the two in undertaking the surveys – as such, the turnover of the larger store is an estimate as there has been a need to manually adjust the result to provide for a realistic trading performance

In 2017 prices

8.57 The food superstore with the strongest performance is the Tesco at Meir Retail Park in Stoke-on-Trent, which has an estimated convenience goods benchmark turnover of £42.3m and an estimated survey derived turnover of £59.1m (we therefore estimated that it is effectively overtrading by around £16.8m).

8.58 By way of contrast, the Tesco Extra at Clough Street in Stoke-on-Trent has a convenience goods benchmark turnover of £66.4m and an estimated survey derived turnover of just £22.9m (the survey therefore has it undertrading by an estimated £43.4m), and the Sainsbury's at London Road in Stoke-on-Trent has a convenience goods benchmark turnover of £36.4m and an estimated survey derived turnover of just £11.6m (it is undertrading by an estimated £24.8m).

8.59 Whilst the identified trading performances of the Tesco Extra and Sainsbury's stores are unusually poor (and the stores probably trade more strongly in practice), it is evident that throughout the Joint Local Plan area the formerly dominant 'big four' are frequently being rejected in favour of discount foodstores. As such, the

performance of the ‘big four’ operators suggests that it is highly unlikely that there will be any requirement in the foreseeable future for any further large food superstores in the area. This is consistent with the current strategy of the ‘big four’ who are currently very circumspect in terms of their appetite to bring forward additional large superstores.

8.60 We do, however, note that some discount foodstores – notably those that are operated by Aldi – in the joint authority are performing exceptionally strongly. The eight Aldi stores in the Joint Local Plan area have a collective convenience goods benchmark turnover of £71.5m and an estimated survey derived turnover of £217.8m; as such, their convenience goods floorspace overtrades by an estimated £146.3m.

8.61 However, the performance of Lidl stores in the Joint Local Plan area is not as strong. The five Lidl stores have a collective estimated convenience goods turnover of £43.6m and a survey derived turnover of £40.5m; their convenience goods floorspace therefore undertrades slightly by £3.0m.

8.62 As set out at Section 2 of this report, both discount operators have substantially improved their share of the national grocery market in recent years. Notwithstanding this, the very strong performance of Aldi foodstores across the Joint Local Plan area suggests that this type of foodstore may currently be underprovided for and that the two authorities could expect further planning applications for such uses in the short to medium term (potentially including proposals to extend existing stores). Such planning applications should be considered having regard to the qualitative benefits which may result from the delivery of additional convenience goods retail facilities, but also with regard to the magnitude of the impact arising at any defined centre.

8.63 In terms of the spatial distribution of convenience goods facilities, we note that there is no substantial food shopping provision across the rural part of Newcastle-under-Lyme. However, this is not unexpected given that a significant and concentrated population is required to support supermarkets capable of meeting most main food shopping needs. Notwithstanding this, we note that most of the rural and neighbourhood centres in Newcastle-under-Lyme accommodate a small format grocery store, which is at least capable of meeting day to day top-up needs. However, this is not the case in the rural centre of ‘Halmer End, High Street’ and the neighbourhood centres of ‘Chesterton, Birch House Road’, ‘May Bank, Oxford Road’ and ‘Wolstanton, Dimsdale Parade East’ (as a consequence, we do not believe that these destinations currently comprise a ‘centre’ which merits formal designation).

8.64 It will be appropriate to support proposals for further convenience goods shops in rural areas (where no unacceptable impacts arise would arise at any defined centre) in order to address shortfalls in provision, provide for improved

customer choice, and reduce the need to travel. However, we anticipate that the greatest interest in delivering additional foodstores will arise in the urbanised part of Newcastle-under-Lyme. In this regard, we note that Lidl has very recently submitted a planning application which provides for the erection of a new foodstore on the site of Kidsgrove Working Mens Club at Hardingswood Road in Kidsgrove . We are aware that Lidl has had a longstanding interest in acquiring representation in the area, which is unsurprising given the strong performance of facilities in Zone 7 (most particularly the Aldi at Liverpool Road in Kidsgrove, but also the Tesco at Liverpool Road). Newcastle-under-Lyme itself is considered to be well provided for in respect of its food retail provision, as Aldi, Asda, Lidl, Morrisons (with two superstores) and Sainsbury's all have representation in relatively central locations. As such, whilst there may be interest in providing further discount foodstore provision, the area is considered to be generally well provided for in respect of its convenience goods provision.

8.65 Similarly, we believe that Stoke-on-Trent generally accommodates a good range of convenience goods facilities, which are distributed appropriately throughout the authority area. In particular, we note that there are large food superstores located to the north (Asda), to the south (Tesco Extra and Tesco) and centrally (Morrisons, two Sainsbury's and Tesco). In addition, there are six Aldi and four Lidl stores across the authority area. Given the poor identified performance of large food superstores in Stoke-on-Trent, we do not anticipate that there will be any further requirement for representation from the 'big four' and, once again, any further food retail proposals are likely to be directed at the discount sector.

8.66 There are a number of smaller centres in Stoke-on-Trent which do not benefit from any convenience store provision. As set out in the schedule provided as Appendix 6, these comprise the neighbourhood centres of: 'Norton – Pinfold Avenue'; 'Bank Top – High Lane'; 'Bradeley – Joyce Avenue'; 'Baddeley Green – Baddeley Green Lane'; 'Sneyd Green – Milton Road'; 'Bucknall – Werrington Road'; 'Shelton – Stoke Road'; 'Sandforth Hill – Heathcote Street'; 'Oakhill – London Road'; 'Weston Coyney – New Kingsway'; 'Dresden – Carlisle Street'; and, 'Trentham – Werburgh Drive'; and, the local centre of 'Normacot – Uttoxeter Road'. As a result, we believe that two of these destinations (Bucknall – Werrington Road' and 'Dresden – Carlisle Street') do not, in practice, comprise a 'centre' which merits designation.

8.67 We plot the distribution of the larger supermarkets and food superstores across the Joint Local Plan area at Appendix 8.

8.68 Turning to comparison goods, the importance and relative dominance of the city centre at Hanley as a comparison goods shopping venue (together with the offer available at Festival Retail Park) means that other centres in the Joint Local Plan area have a more localised role and function than might otherwise be the case. Given the location and relative accessibility of Hanley, we do not think this, in itself, is particularly problematic in respect of meeting comparison goods needs.

8.69 Indeed, as we identified as Section 4 of this report, the market share of shopping trips claimed by facilities in the Joint Local Plan area is considered broadly appropriate and indicates that most of the comparison goods shopping needs of Newcastle-under-Lyme and Stoke-on-Trent's residents are met within the area.

8.70 Accordingly, whilst centres generally (including Hanley) would benefit from improved comparison goods provision in order to help bring vacant stock into active use and improve activity, we do not consider there to be significant qualitative deficiencies in respect of comparison goods shopping in the Joint Local Plan area which need to be addressed. Should further comparison goods floorspace be proposed, there is a clear need to direct this to higher order town centre and the city centre of Hanley in accordance with 'town centre first' principles, in order to help underpin the health of these centres.

## 9.0 Assessment of Leisure Needs

### Commercial Leisure: Bingo, Casinos, Cinema and Ten Pin Bowling

9.1 Our approach to the assessment of commercial leisure needs necessarily deviates from our retail methodology, in part because it is difficult to source some of the required information to undertake a similar exercise for the leisure sector . In addition, the commercial leisure sector is different to the retail sector; large-scale leisure uses are relatively limited in number and customers often expect to travel at least some distance in order to access them. As such, we believe it is sensible to consider the general appropriateness of provision on a Study Area basis, with reference to the typical number of persons required to support particular uses.

9.2 Our assessment considers the typical population required to support bingo halls, casinos, cinema screens and ten pin bowling alleys, and is based around three key stages.

9.3 We firstly calculate the expected Study Area and local authority population for the relevant reporting years (2019, 2023, 2028, 2029 and 2033).

9.4 We then calculate the number of persons required to support a bingo hall, casinos, cinema screens and bowling alleys nationally, across the UK. We have identified the current level of provision across the UK with reference to the following sources:

- Mintel's Casinos and Bingo UK report (March 2018), which identifies that there are 355 bingo halls and 145 casinos across the UK;
- the UK Cinema Association website , which identifies that there are 4,309 cinema screens across the UK; and
- Mintel's Ten Pin Bowling UK report (May 2017), which identifies that there are 5,242 bowling lanes across the UK.

9.5 We then apply the respective ratio to the Study Area population in order to gauge the ‘benchmark’ level of provision for each type of provision.

9.6 We supplement our assessment with an overview of current patterns of commercial leisure trips throughout the Study Area (as identified by the household survey) in order to identify any qualitative deficiencies in provision.

Bingo

9.7 The Study Area authority area accommodates three dedicated bingo halls, these being the Buzz Bingo at Albion Street and the Mecca Bingo at Etruria Road in Hanley, and the Buzz Bingo at Victoria Road in Fenton. The former of these bingo halls comprises the ground floor of a three-storey office building, and the Mecca Bingo at Hanley and Buzz Bingo at Fenton are modern, standalone units with adjacent car parking. Whilst there is no bingo hall in the Newcastle-under-Lyme authority area, the three halls are considered to be relatively accessible to most of the residents of the Study Area.

9.8 As Table 9.1 identifies, the most popular bingo hall by far is Buzz Bingo at Fenton, which secures 50.7% of trips to play bingo that originate within the Study Area, followed then by Mecca Bingo at Etruria Road (which secures 20.4% of Study Area trips), and then Buzz Bingo at Hanley (16.6%). These three bingo halls collectively secure 87.7% of all trips to play bingo that originate within the Study Area, with the remainder either being directed towards more informal games (taking place at community centres or pubs) or outside the Study Area. The market share secured by facilities within the Study Area is considered to be high and reflective of a strong level of provision.

Table 9.1: Market Share Secured by Bingo Halls

8	The Barley Mow, Biddulph	0.0	0.0	0.0	0.0	0.0	0.0	37.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9
11	Community Centre, Alsager	0.0	0.0	0.0	0.0	0.0	0.0	38.7	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Outside SA	Gala, Queen's RP, Stafford	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	74.4	0.0	0.0	0.0	0.0	3.7
Outside SA	Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	16.9	0.0	0.0	0.0	0.0	0.0	3.7
Total		100	100	100	100	100	100	100	100	100	100	100	100	100	100

Note: Market share derived from 2018 NEMS household survey 'weighted and filtered' results; table includes all destinations located within the Study Area and those outside that secure a market share of at least 3.0%

9.9 Mintel's Casinos and Bingo UK report identifies that there are 355 bingo halls across the UK, which equates to a bingo hall for every 186,029 persons or thereabouts . Accordingly, as the below Table 9.2 demonstrates, we estimate that the Study Area population of 589,625 persons could support around 3.2 bingo halls at 2019, increasing to around 3.4 bingo halls at 2033 based on the forecast population of 633,513 persons. Given that there are currently three bingo halls across the Study Area, we do not believe that there is any pressing requirement for further facilities across the plan period.

Table 9.2: Bingo Hall Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support Bingo Hall	Potential Number of Halls Supported by Study Area	Current Number of Bingo Halls	Capacity
2019	589,625	186,029	3.2	3	0.2
2023	602,806	186,029	3.2	3	0.2
2028	618,485	186,029	3.3	3	0.3
2029	621,550	186,029	3.3	3	0.3
2033	633,513	186,029	3.4	3	0.4

Note: Typical population to support bingo hall calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to the ONS 2016 mid-year population estimates for the UK (population at 2017 has been used); bingo halls in Study Area are Buzz Bingo at Albion Street and Mecca Bingo at Etruria Road in Hanley, and Buzz Bingo at Victoria Road in Fenton

9.10 In considering the potential need for additional bingo facilities, it is also important to recognise that the sector has been significantly affected by the ban on smoking in enclosed workplaces that came into force in 2007 as a consequence of the Health Act 2006. Subsequent to the Act's enforcement, new bingo hall openings are a rare event, which reinforces our view that it is unlikely that there will be any interest in providing additional provision in the Study Area in the foreseeable future.

9.11 As such, we do not believe that there is any requirement to plan for additional provision in the Joint Local Plan area in the period to 2033, but instead recommend that, in the event that any operator interest is apparent, proposals are judged on their own merits in accordance with relevant town centre planning policy.

#### Casinos

9.12 The Study Area accommodates two casinos, these being the Genting and Grosvenor casinos which are located in close proximity to one another on Etruria Road, to the west of the city centre. Both casinos are modern, purpose-built facilities with adjacent surface car parking. Whilst the two casinos effectively have identical catchment areas (given how close they are to one another), this type of facility is generally only found within or adjacent to larger town centres and, as such, patrons may expect to travel some distance in order to visit a casino.

9.13 The household survey results indicate that, with the exception of those who visited a casino whilst on their holidays, no respondents travelled outside the Study Area in order to visit such a facility. Our survey suggests that the Genting casino is the more popular of the two (securing 62.1% of respondents' trips), which may be partly reflective of the fact that it is nearer to Hanley centre, and therefore is the first casino one reaches in travelling from the city centre.

Table 9.3: Market Share Secured by Casinos

<b>Zon e</b>	<b>Casin o</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>1 1</b>	<b>1 2</b>	<b>1 3</b>	<b>To tal</b>
1	Gentin g, Hanle y	10 0.0	0.0	10 0.0	40 .6	43 .3	0. 0	0.0	10 0.0	0.0	10 0.0	0. 0	50 .0	0. 0	62. 1
	Grosv enor, Hanle	0.0	10 0.0	0.0	0. 0	56 .7	0. 0	10 0.0	0.0	10 0.0	0.0	0. 0	50 .0	0. 0	30. 1

Zon e	Casin o	1	2	3	4	5	6	7	8	9	10	1 1	12	1 3	To tal
	Outs ide Stud y Area	0.0	0.0	0.0	59 .4	0. 0	0. 0	0.0	0.0	0.0	0.0	0. 0	0. 0	0. 0	7.8
Total		10 0	10 0	10 0	10 0	10 0	1 0	10 0	10 0	10 0	10 0	1 0	10 0	1 0	10 0

Note: Market share derived from 2018 NEMS household survey ‘weighted and filtered’ results; table includes all destinations provided by respondents

9.14 Mintel’s Casinos and Bingo UK report identifies that there are 145 casinos across the UK, which equates to a casino for every 455,450 persons or thereabouts . As the below Table 9.4 identifies, we estimate that the Study Area could support around 1.3 casinos at 2019, increasing to around 1.4 casinos at 2033. Given that there are currently two casinos across the Study Area, we do not believe that there is any theoretical capacity to support additional provision. As a consequence, we do not believe that there is any requirement to plan for additional casino provision in the Study Area in the period to 2033; any proposals should therefore be considered on their own merits in accordance with relevant policy.

Table 9.4: Casino Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support Bingo Hall	Potential Number of Halls Supported by Study Area	Current Number of Bingo Halls	Capacity
2019	589,625	455,450	1.3	2	-0.7
2023	602,806	455,450	1.3	2	-0.7
2028	618,485	455,450	1.4	2	-0.6
2029	621,550	455,450	1.4	2	-0.6
2033	633,513	455,450	1.4	2	-0.6

Note: Typical population to support bingo hall calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to the ONS 2016 mid-year population estimates for the UK (population at 2017 has been used); casinos in Study Area are Genting and Grosvenor casinos in Hanley

## Cinemas

9.15 There are four permanent cinemas within the Joint Local Plan area (Cineworld at Intu Potteries, Odeon at Festival Park, Stoke-on-Trent Film Theatre in Stoke and

the Vue in Newcastle-under-Lyme), with a further cinema within the wider Study Area (Foxlowe Arts Centre in Leek). Collectively the provision provides for most cinema-goers needs, with the multiples cinemas catering for mainstream tastes, and Stoke-on-Trent Film Theatre having a wider remit which includes showing independent and foreign language films. The three large multiplexes in the Joint Local Plan area each provide between eight and 10 screens, and Stoke-on-Trent Film Theatre comprises a single screen.

Table 9.5: Market Share Secured by Cinemas

Zone	Cinema	1	2	3	4	5	6	7	8	9	10	11	12	13	Total
1	Cineworld, Intu	45.0	1.9	36.1	16.6	47.5	35.3	34.6	36.1	39.8	13.3	14.5	2.7	0.0	27.0
	Odeon, Festival Park	26.4	1.9	11.7	7.6	31.2	32.5	26.0	37.9	12.6	9.6	37.6	10.7	4.2	18.5
	Stoke Film Theatre	0.0	0.0	0.0	0.0	0.0	0.0	2.0	2.1	0.0	0.0	0.0	0.0	0.0	0.2
9	Foxlowe Arts Centre, Leek	0.0	0.0	0.0	0.0	0.0	9.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3
10	Eccleshall TC	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.1
12	Vue, Newcastle	28.6	78.8	37.2	74.1	21.3	23.2	35.4	23.9	21.5	55.5	22.0	81.1	58.0	43.6
Outside Study Area	Cinebowl, Uttoxeter	0.0	0.0	15.0	0.0	0.0	0.0	0.0	0.0	23.8	8.3	0.0	0.0	0.0	5.1
	Other	0.0	17.3	0.0	1.7	0.0	0.0	2.0	0.0	2.3	11.9	25.8	5.5	37.8	5.1
Total		10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0

Note: Market share derived from 2018 NEMS household survey ‘weighted and filtered’ results; table includes all destinations located within the Study Area and those outside that secure a market share of at least 3.0%

9.16 Table 9.5 demonstrates that (as would be expected), the three multiplexes secure the vast majority (89.1%) of all trips to visit the cinema that originate from within the Study Area. A limited proportion of respondents use Stoke Film Theatre,

with a further limited number visiting Foxlowe Arts Centre in Leek. Outside the Study Area, the most popular cinema is the Cinebowl in Uttoxeter which secures 5.1% of cinema trips arising within the Study Area (all of these trips originate within Zones 3, 9 and 10, which are to the east and south of the Joint Local Plan area and are therefore in relatively close proximity to Uttoxeter. The patterns of cinema use are logical and do not suggest any significant qualitative issue in respect of the spatial distribution of provision in the Study Area.

9.17 The UK Cinema Association website estimates that there were 4,309 cinema screens in the UK at 2017, which equates to one screen for every 15,326 persons or thereabouts. On this basis, we estimate that the Study Area population could support around 38.5 cinema screens at 2019, increasing to around 41.3 screens at 2033.

9.18 As Table 9.6 demonstrates, we believe that there are currently 29 permanent cinema screens within the Study and that there is theoretical capacity for a further 9.3 cinema screens at 2019, increasing to 12.3 screens at 2033. We note that a further multiplex cinema was previously proposed as part of the Former East West Precinct development in Hanley centre, but that this development will not now be brought forward. We understand that SOTCC (as landowner) is currently considering appropriate future uses for this site.

Table 9.6: Cinema Screens Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support Cinema Screen	Potential Number of Cinema Screens Supported by Study Area	Current Number of Cinema Screens	Capacity
2019	589,625	15,326	38.5	29	9.3
2023	602,806	15,326	39.3	29	10.3
2028	618,485	15,326	40.4	29	11.4
2029	621,550	15,326	40.6	29	11.6
2033	633,513	15,326	41.3	29	12.3

Note: Typical population to support a cinema screen calculated with reference to data provided by the UK Cinema Association website and to the ONS 2016 mid-year population estimates for the UK (population at 2017 has been used); permanent cinemas in Study Area are Cineworld at Intu Potteries, Odeon at Festival Park, Stoke-on-Trent Film Theatre, Vue at Newcastle-under-Lyme, and Foxlowe Arts Centre in Leek

9.19 Notwithstanding this, we do note that a number of modern boutique cinema operators, such as Everyman, Picturehouse and The Light, typically operate with a limited number of screens and seats, and have a strong focus on food and drink as

part of their offer. Whilst cinemas of this type have previously sought representation in higher order centres (or, perhaps, in centres with a more affluent catchment than Hanley), it may be worth exploring whether there is any potential to secure such an operator as part of the redevelopment of the former East West Precinct site. Such an operator would provide a slightly different experience to the existing cinema offer in the Study Area and could act as a catalyst to attract further leisure uses.

### Ten Pin Bowling

9.20 The Study area accommodates a single ten pin bowling alley, this being the Tenpin at Festival Park. As Table 9.7 sets out, this facility attracts nearly three-quarters (74.9%) of all shopping trips to go ten pin bowling that originate within the Study Area. As such, the proportion of trips originating within the Study Area that are directed to destinations within the Study Area is lower for ten pin bowling than it is for any of the other leisure pastimes considered above.

Table 9.7: Market Share Secured by Ten Pin Bowling Alleys

Zon e	Cinem a	1	2	3	4	5	6	7	8	9	10	11	12	13	To tal
1	Tenpin, Festiva l Park	10 0.0	46 .5	87 .4	10 0.0	10 0.0	10 0.0	10 0.0	63 .1	24 .9	0. 0	60 .9	83 .2	26 .6	74 .9
Outs ide Stud y Area	AMF Bowlin g, Maccle sfield	0.0	0. 0	0. 0	0.0	0.0	0.0	0.0	36 .9	15 .5	0. 0	39 .1	0. 0	0. 0	5. 7
	Cinebo wl, Uttoxeter	0.0	0. 0	8. 4	0.0	0.0	0.0	0.0	0. 0	54 .9	11 .7	0. 0	0. 0	0. 0	10 .5
	Tenpin, Staffor d	0.0	0. 0	0. 0	0.0	0.0	0.0	0.0	0. 0	0. 0	88 .3	0. 0	0. 0	41 .0	3. 2
	Other	0.0	53 .5	4. 2	0.0	0.0	0.0	0.0	0. 0	4. 7	0. 0	0. 0	16 .8	32 .4	5. 6
Total		10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0

Note: Market share derived from 2018 NEMS household survey ‘weighted and filtered’ results; table includes all destinations located within the Study Area and those outside that secure a market share of at least 3.0%

9.21 Mintel’s Ten Pin Bowling UK report identifies that there are 5,242 ten pin bowling lanes across the UK, which equates to a lane for every 12,598 persons or thereabouts. Accordingly, we estimate that the Study Area could support around

46.5 bowling lanes at 2018, increasing to around 50.3 lanes at 2033. This suggests a theoretical requirement for 16.5 bowling lanes at 2018, increasing to 20.3 bowling lanes at 2033. As such, we believe that there may be some potential to introduce new facilities within the Study Area across the plan period. In order to consider what the exact potential might be, it may be appropriate for the authorities to liaise with operators in the sector to understand what interest they may have in the area.

9.22 In particular, given the improved leisure offer in Hanley centre (in the form of The Hive cinema and leisure development), there may be some potential to attract a bowling alley to the centre to complement the existing offer. We are aware that Intu has promoted land at Bryan Street (opposite to The Hive) in Hanley for mixed-use development comprising main town centre uses. In addition, the former East West Precinct site could accommodate additional main town centre uses and may offer some potential. We believe that both of these sites may be able to appropriately accommodate such a use and, in doing so, help underpin the wider vitality and viability of the town centre.

Table 9.8: Ten Pin Bowling Lanes Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support One Bowling Lane	Potential Number of Bowling Lanes Supported by Study Area	Current Number of Bowling Lanes	Capacity
2019	589,625	12,598	46.8	30	16.5
2023	602,806	12,598	47.8	30	17.8
2028	618,485	12,598	49.1	30	19.1
2029	621,550	12,598	49.3	30	19.3
2033	633,513	12,598	50.3	30	20.3

Note: Typical population to support a bowling lane calculated with reference to the Mintel Ten Pin Bowling UK 2017 report and to the ONS 2016 mid-year population estimates for the UK (population at 2017 has been used)

## Food and Drink

9.23 Food and drink uses are not typically the subject of a quantitative assessment due to the difficulties in forecasting future growth in the sector over time (and an absence of data relating to how existing operators may need to increase their trading efficiency in the future in order to remain profitable). In addition, most new food and drink uses are relatively small-scale and can be readily accommodated within a centre (through the reoccupation or refurbishment of existing premises) without the need for any planning policy-led intervention.

9.24 As such, our consideration of the current food and drink offer within the Joint Local Plan area is a qualitative assessment based on the strength of the current offer and the opportunities that may exist to attract further operators in the Strategic Centres of Hanley and Newcastle-under-Lyme.

9.25 The household survey indicates that the centres of Hanley and Newcastle-under-Lyme attract a very significant proportion of trips to eat out. Table 9.9 indicates that Hanley centre secures 22.4% of trips to visit a restaurant, and Newcastle-under-Lyme town centre attracts 14.2% of such trips. Collectively, these two centres secure 36.6% of restaurant trips and more than half of such trips that originate within the central Zones 1, 4 and 12. The performance of Newcastle-under-Lyme is considered to be encouraging given that it is of a smaller scale than Hanley, and generally has a lesser offer.

Table 9.9: Market Share of Restaurant Trips

Zone	Venue	1	2	3	4	5	6	7	8	9	10	11	12	13	Total
1	Hanley CC (inc. Intu)	47.5	0.0	35.0	31.3	33.2	31.3	19.4	15.2	16.8	0.0	8.6	8.8	7.5	22.4
	Stoke-on-Trent TC	12.9	0.0	5.3	10.2	11.7	2.0	0.0	0.0	0.9	0.0	2.6	2.1	0.0	4.6
	Festival RP	1.1	0.0	4.4	0.0	10.8	3.7	1.4	0.0	2.1	0.0	0.0	0.0	1.4	2.0
3	Longton TC	2.7	0.0	6.3	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	1.3
4	Trentham LC	3.0	8.0	2.1	4.6	0.0	0.0	0.0	0.0	1.2	2.5	0.0	0.0	0.0	1.4
6	Tunstall ITC	0.0	0.0	0.0	4.7	1.2	21.8	2.7	0.0	0.0	0.0	0.0	0.0	0.0	1.3
9	Cheadle TC	0.0	0.0	2.1	0.0	0.0	5.4	0.0	0.0	11.4	0.0	0.0	0.0	1.6	2.0
	Leek TC	0.0	0.0	1.1	0.0	5.2	0.0	9.4	4.1	25.3	0.0	4.4	1.2	0.0	5.0
	Tean Village	0.0	0.0	3.0	0.0	0.0	0.0	0.0	0.0	5.1	0.0	0.0	0.0	0.0	1.1
10	Stone TC	2.5	0.0	10.5	4.1	0.0	0.0	1.3	0.0	2.1	41.8	0.0	0.0	3.2	5.0
11	Alsager TC	1.4	2.0	0.0	0.0	1.5	1.4	3.9	0.0	0.0	0.0	21.6	0.0	0.0	2.5
	Congleton TC	2.2	5.6	0.0	0.0	0.0	8.8	11.0	30.0	0.0	0.0	39.2	1.2	0.0	6.0
12	Newcastle TC	5.5	19.1	7.1	22.9	1.7	4.7	9.4	6.7	3.7	1.3	5.5	53.3	8.6	14.2

-	Other, Within Newca stle- under- Lyme	4. 6	30 .3	1. 3	3. 9	6. 5	4. 7	20 .8	0. 0	0. 0	2. 1	1. 3	14. .6	17. .1	6.2
-	Other, Within Stoke- on- Trent	2. 7	0. 0	2. 1	2. 7	10 .3	3. 7	0. 0	0. 0	1. 2	0. 0	0. 0	2. 2	1. 4	2.2
-	Other, Elsewh ere in Study Area	8. 2	3. 5	9. 0	2. 4	15 .3	9. 1	4. 9	28 .3	11 .6	23 .7	3. 0	0. 0	5. 3	8.4
Outs ide Stud y Area	Manch ester CC	0. 0	0. 0	0. 0	1. 5	1. 5	0. 0	1. 4	5. 3	2. 1	0. 0	1. 3	3. 6	0. 0	1.4
	Staffor d TC	1. 4	0. 0	7. 0	2. 9	0. 0	0. 0	0. 0	0. 0	4. 9	9. 1	0. 0	0. 0	0. 0	2.6
	Other	4. 1	31 .5	3. 5	8. 8	1. 2	3. 5	14 .3	10 .2	11 .6	18 .3	12 .4	13 .2	53 .7	10. 4
Total		10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	10 0	

Note: Market share derived from 2018 NEMS household survey ‘weighted and filtered’ results; table includes all inside and outside the Study Area that secure a market share located within the Study Area and those outside that secure a total market share of at least 1.0%

9.26 Analysis of the survey results in respect of trips to visits pubs, bars and nightclubs, indicates that respondents generally visit a wider range of venues in order to drink and socialise than they do to dine. As such, venues typically secure a lower market share of trips to pubs, bars and nightclubs compared to their market share of restaurant trips. The notable exception to this is Newcastle-under-Lyme, which secures 19.8% of respondents’ trip to pubs, bars and nightclubs across the Study Area, which is significantly higher than its recorded market share for restaurant trips (14.2%). The popularity of Newcastle-under-Lyme in respect of its pub, bar and nightclub provision is considered to be a consequence of the proliferation of a relatively large number of licensed premises along High Street and Ironmarket, the nearby student population of Keele University, and the relative ease of access to the centre from surrounding residential suburbs.

Table 9.10: Market Share of Trips to Pubs, Bars and Nightclubs

Zone	Venue	1	2	3	4	5	6	7	8	9	10	11	12	13	Total
1	Fenton TC	10.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	1.0
	Hanley CC (inc. Intu)	19.2	2.3	27.0	5.1	27.5	14.6	6.4	1.8	0.0	0.0	0.0	0.0	0.0	8.4
	Stoke-on-Trent TC	11.9	0.0	5.5	43.9	8.4	2.8	2.2	1.8	0.0	0.0	4.7	0.0	0.0	5.4
3	Forsbrook Village Centre	0.0	0.0	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
	Longton TC	7.7	0.0	12.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5
4	Trentham LC	3.6	15.3	6.1	5.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	2.1
5	Burslem TC	0.0	2.3	0.0	1.9	13.6	5.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2
6	Tunstall ITC	0.0	0.0	0.0	0.0	6.1	29.4	1.9	0.0	0.0	0.0	0.0	0.0	0.0	1.5
7	Kidsgrove TC	0.0	0.0	0.0	0.0	0.0	2.0	30.4	0.0	0.0	0.0	0.0	0.0	0.0	1.5
8	Biddulph TC	0.0	0.0	0.0	0.0	0.0	0.0	9.9	30.6	0.0	0.0	0.0	0.0	0.0	1.5
9	Cheadle TC	0.0	0.0	3.6	0.0	0.0	7.7	0.0	0.0	18.1	0.0	0.0	0.0	0.0	3.5
	Leek TC	2.6	0.0	0.0	0.0	2.2	0.0	8.3	4.8	33.3	0.0	1.5	0.0	0.0	6.1
	Stanley LC	10.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	1.4	0.0	0.0	0.0	0.0	1.1
	Tean Village Centre	0.0	0.0	3.9	0.0	0.0	0.0	0.0	0.0	7.8	0.0	0.0	0.0	0.0	1.8
10	Eccleshall TC	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.2	0.0	0.0	4.9	1.8
	Stone TC	0.0	0.0	7.9	5.1	0.0	0.0	0.0	0.0	0.0	43.0	0.0	0.0	2.9	3.5
11	Alsager TC	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	0.0	37.4	0.0	0.0	4.3
	Congleton TC	0.0	0.0	0.0	0.0	0.0	2.8	14.0	34.1	0.0	0.0	46.0	0.0	0.0	7.1
12	Newcastle TC	15.8	12.9	3.3	28.0	9.7	18.6	0.0	0.0	10.0	0.0	1.5	66.8	9.9	19.8
	Wolstanton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	5.3	0.0	1.1

-	Other, Within Newcastle- under- Lyme	0. 0	52. .3	0. 0	3. 8	7. 2	0. 0	8. 6	0. 0	0. 0	0. 0	0. 0	8. 1	39. .3	4.4
-	Other, Within Stoke- on- Trent	2. 6	0. 0	9. 0	1. 9	13. .2	6. 4	0. 0	2. 6	1. 6	0. 0	0. 0	1. 5	0. 0	3.3
-	Other, Elsewh ere in Study Area	0. 0	0. 0	11. .2	2. 7	6. 4	2. 8	3. 1	17. .5	16. 0	0. 0	4. 7	3. 4	6. 6	6.8
Outs ide Stud y Area	Manch ester CC	0. 0	0. 0	0. 0	0. 0	0. 0	2. 8	0. 0	0. 0	1. 4	0. 0	0. 0	4. 0	0. 0	1.1
	Staffor d TC	0. 0	0. 0	1. 5	0. 0	0. 0	0. 0	0. 0	5. 9	17. .1	0. 0	0. 0	0. 0	0. 0	1.9
	Other	16. .2	14. .9	1. 5	2. 7	3. 9	4. 9	11. .0	6. 8	3. 9	1. 8	1. 5	9. 5	33. .5	6.3
Total		10. 0	10. 0	10. 0	10. 0	10. 0	10. 0	10. 0	10. 0	10. 0	10. 0	10. 0	10. 0	10. 0	

Note: Market share derived from 2018 NEMS household survey ‘weighted and filtered’ results; table includes all inside and outside the Study Area that secure a market share located within the Study Area and those outside that secure a total market share of at least 1.0%

9.27 Whilst Hanley is the second most popular destination for trips to pubs, bars and nightclubs, its market share of 8.4% of such trips is substantially less than its market share of 22.4% of restaurant trips that originate within the Study Area. This is perhaps reflective of Hanley’s leisure offer being tailored towards those who may be shopping in the centre or those visiting the Vue cinema.

9.28 In considering the two Strategic Centres’ food and drink offer, we note that:

- Venuescore’s UK Shopping Venue Rankings 2015/16 identifies that Newcastle-under-Lyme has a ‘foodservice orientation index’ score of 124 and that Hanley has an index score of 82. As such, Venuescore’s assessment suggests that Newcastle-under-Lyme has a relatively strong food and drink offer relative to its retail offer, and that the opposite is true of Hanley;
- Newcastle-under-Lyme’s food and drink offer comprises a relatively large number of traditional pubs and restaurants, supplemented by bars (such as

Revolution that, at least in part, cater for students) and chain restaurants (such as Pizza Hut, Burger King and Rooster's Southern Fried); and

- Hanley benefits from an improved range of mid-market restaurants, some of which (such as Nando's, Frankie & Benny's and Chiquito) are accommodated in The Hive cinema and leisure scheme, together with some modern independents (including Nom restaurant & bar, and Klay pizzeria & bar).

9.29 We also note that the proposed Ryecroft development in Newcastle-under-Lyme had the potential to accommodate significant additional leisure provision, and we believe that the town centre would benefit from further national multiple operators. Newcastle-under-Lyme's food and drink offer, whilst relatively extensive, has not necessarily evolved substantially in recent years and a number of operators (such as Nando's and Frankie & Benny's) that one may expect to find in a town benefitting from a multiplex cinema and university do not currently have representation. As such, we believe that there is the potential to further modernise Newcastle-under-Lyme's offer. The delivery of additional student accommodation in and around the centre would likely assist in securing such operators.

9.30 In Hanley, we are aware that The Hive development was fully let on opening at December 2015 (and remained fully let at the time of our survey of Hanley centre in August 2018). As mentioned above, Intu has promoted an adjacent site at Bryan Street for mixed-use development and we believe that this site has the potential to accommodate additional food and drink uses as part of what could effectively comprise a second phase of The Hive. In addition, the Former East West Precinct site also could provide an attractive environment for food and drink operators, particularly that part of the site in proximity to Old Hall Street (which benefits from being pedestrianised and has recently been improved through public realm works). The Former East West Precinct site is also extremely well located in terms of its proximity to the Regent Theatre and Victoria Hall, which may help ensure the viability of introducing additional food and drink operators in this location. Whilst Hanley already accommodates some of the operators that we would expect to be found in a centre of its size, we believe that there may be potential to attract further national multiples, along with the type of modern operators (such as craft beer bars and street food-type operators) that have become increasingly prevalent in modern city centres.

9.31 As a consequence of the above, we believe the three existing opportunity sites (Ryecroft in Newcastle-under-Lyme, and Former East West Precinct and Bryan Street in Hanley) continue to provide an opportunity to improve the food and drink offer of the principal centres. In addition, there are also sufficient vacancies in each of the town centres to provide opportunities for smaller independent businesses.

## **10.0 Summary and Recommendations**

### **Key Findings: Retail Capacity**

10.1 Whilst the capacity requirements identified in this Study are of some relevance to the determination of future planning applications, the performance of certain centres within the Joint Local Plan area is of concern and the existence of theoretical capacity is not determinative in considering planning applications for additional retail and leisure development outside of centres. Instead, there is a clear need to carefully consider the impacts arising from all such planning applications in accordance with the relevant policies of the NPPF and the development plan.

10.2 As identified at Section 8 of this report, there is an identified requirement for between 2,100 and 3,500 sq.m additional convenience goods floorspace throughout the Joint Local Plan area as a whole across the period to 2033.

10.3 However, as set out in the below Table 10.1, there is a very limited amount of localised convenience goods capacity in Newcastle-under-Lyme at the end of the reporting period, which we estimate corresponds to a requirement for between 400 sq.m and 700 sq.m of net convenience goods floorspace at 2033. This identified requirement is less than that which would be typically provided by a discount foodstore. Our assessment is predicated on all relevant commitments being delivered in practice, including the largest commitment, which provides for a discount foodstore at Linley Trading Estate, to the south west of Kidsgrove. We are aware that this planning permission was granted in 2015 and remains unimplemented and that Lidl is currently seeking to bring forward a different site at Hardingswood Road in Kidsgrove.

10.4 Furthermore, we have identified a more substantial requirement for between 1,700 and 3,000 sq.m of convenience goods floorspace within the Stoke authority area up to 2033.

Table 10.1: Quantitative Need for Convenience Goods Floorspace Across Joint Local Plan Area

Area		2019 (sq.m)	2023 (sq.m)	2028 (sq.m)	2029(sq.m)	2033 (sq.m)
Joint Local Plan area	Minimum Convenience Goods Requirement	-1,900	-1,500	100	500	2,100
	Maximum Convenience Goods Requirement	-3,300	-2,600	100	900	3,500

Newcastle-under-Lyme	Minimum Convenience Goods Requirement	-900	-700	-200	-100	400
	Maximum Convenience Goods Requirement	-1,500	-1,300	-400	-200	700
Stoke-on-Trent	Minimum Convenience Goods Requirement	-1,100	-800	300	600	1,700
	Maximum Convenience Goods Requirement	-1,800	-1,300	600	1,100	3,000

Source: Table 6d of Appendix 7

10.5 There is a need to monitor commitments and, if such development is not delivered in practice, there will be an identified capacity.

10.6 In respect of qualitative deficiencies in convenience goods provision, the single area where existing facilities collectively perform well in excess of company average benchmark is Kidsgrove. As such, there may be some potential to deliver further convenience goods floorspace in or around this centre to provide for improved customer choice (subject to no unacceptable impacts arising from any such proposal).

10.7 Any other areas of localised need generally relate to an absence of top-up convenience goods shopping facilities in lower order centres. Proposals for convenience store provision in such centres should generally be supported.

10.8 In terms of comparison goods, as Table 10.2 demonstrates, we estimate that there is capacity to support between 11,000 sq.m and 18,900 sq.m of additional comparison goods floorspace across the Joint Local Plan area at 2028, increasing to between 14,500 sq.m and 24,800 sq.m at 2029, and to between 32,000 sq.m and 54,800 sq.m at 2033. It is important to reiterate that this is theoretical capacity, based on Experian's forecasts in respect of expenditure growth and the proportion of future growth that will need to be claimed by existing retailers in order for them to remain viable propositions. In the current economic climate, we recommend that the capacity for further comparison goods floorspace is subject to regular review, as further additional floorspace in out of centre locations may well result in unacceptable impacts at arising existing centres (some of which are particularly fragile).

Table 10.2: Quantitative Need for Comparison Goods Floorspace Across Joint Local Plan Area

Area		2019 (sq.m)	2023 (sq.m)	2028 (sq.m)	2029 (sq.m)	2033 (sq.m)
Joint Local Plan area	Minimum Comparison Goods Requirement	-2,200	-200	11,000	14,500	32,000
	Maximum Comparison Goods Requirement	-3,800	-300	18,900	24,800	54,800
Newcastle-under-Lyme	Minimum Comparison Goods Requirement	-500	-100	2,400	3,100	6,900
	Maximum Comparison Goods Requirement	-900	-100	4,000	5,300	11,800
Stoke-on-Trent	Minimum Comparison Goods Requirement	-1,700	-100	8,700	11,400	25,100
	Maximum Comparison Goods Requirement	-3,000	-200	14,800	19,500	42,900

Source: Table 26d of Appendix 7

10.9 It is also important to recognise that there is a clear need for future growth to be directed to existing centres in order to provide for the reuse, refurbishment or redevelopment of existing stock. There is a very significant problem with the vacancy rate in nearly all principal centres across the Joint Local Plan area. Our survey work has identified that there is a total of 88,561 sq.m of vacant floorspace across the nine principal centres in the Joint Local Plan area. The amount of vacant floorspace throughout the Joint Local Plan area is therefore more than double the maximum comparison goods floorspace requirement identified in the above assessment.

10.10 As such, the headline finding from the comparison goods capacity assessment is not that there is a need for 'additional' retail floorspace. Instead, it is evident that there is currently too much stock. Whilst future retail development should be directed to town centres in order to bring about the re-occupation or redevelopment of some of these vacant units, it is evident that others will likely have a future of non-commercial uses (including residential, where the market supports it). Key Findings: Leisure Capacity

10.11 In terms of the leisure sector, we identify capacity which could support around 9.3 cinema screens in the Joint Local Plan area at 2018, increasing to around 12.3 screens at 2033. Whilst this requirement could theoretically support a further multiplex cinema, it is important to recognise the importance of the Vue at Newcastle-under-Lyme and the relatively new Cineworld at Hanley in underpinning those centres. In addition, we are aware that a new six-screen multiplex is currently being implemented in Stafford (just to the south of the Study Area). As such, it may appropriate for these new developments to fully ‘bed in’ before consideration is given to further multiplex provision. However, it may be worth exploring whether any smaller cinema operators have any interest in providing more of a ‘boutique’ offer in Hanley, which could in turn act as a catalyst in attracting further leisure uses.

10.12 In addition, our assessment identifies capacity to support additional ten pin bowling lanes across the Study Area (a requirement for 16.5 lanes in 2018, increasing to 20.3 lanes at 2033). Should any ten pin operator be interested in securing representation in the area, then we would recommend that this is directed to Hanley, where such provision would complement Cineworld and further diversify the offer of the centre.

10.13 We do not believe that there is any requirement for additional bingo and casino provision within the Joint Local Plan area.

Key Findings: Principal Centres<sup>1</sup>

## Hanley

10.14 Hanley is the largest centre within the Joint Local Plan area and, as a consequence, is able to attract the greatest concentration of national multiple retailers, many of which are accommodated within the Intu Potteries shopping centre. Whilst Hanley remains the dominant centre for comparison goods retailing in the area, its retail offer competes against Festival Retail Park, Festival Heights Retail Park and Wolstanton Retail Park for comparison goods expenditure. Indeed, the analysis of market share at Section 5 indicates that overall, the level of clothing and footwear market share from the majority of zones to Hanley city centre has reduced since the previous studies were undertaken in each respective authority area.

10.15 Whilst a number of retailers have been decanted from the south eastern part of the centre in order to assemble the Former East West Precinct redevelopment site, it is evident that, even if account is made for this, Hanley’s vacancy rate has increased substantially in recent years. At the time of our survey of the city centre in August 2018, 18.9% of all floorspace and 29.0% of all units were vacant.

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10.16 Whilst such a high vacancy rate is problematic and impacts on visitors' perception of the centre, there have been appreciable improvements in the quality of the centre's public realm in recent years, which ensure that the centre is generally attractive. The Former East West Precinct site is currently in the process of being demolished and consideration is being given to the potential for the site to be redeveloped as a multi-use venue and conference centre, Youth Zone and other complementary town centre uses, such as hotel, food and beverage operators. Whilst the Council's consideration of appropriate uses for the Former East West Precinct site is being undertaken separately to this Study, we believe that it is necessary for the site's redevelopment to support additional uses which help broaden Hanley's offer and do not merely replicate uses available elsewhere in the city centre. This will help increase the use of the centre as a whole and not merely result in key operators moving from one part of the centre to another.

10.17 Whilst the Former East West Precinct site is the most central redevelopment opportunity in the centre, we are also aware that Intu has promoted land at Bryan Street (adjacent to The Hive leisure development) as a site to accommodate additional main town centre uses. Whilst the Bryan Street site is located within our recommended town centre boundary for Hanley, we believe that the Former East West Precinct site is the more significant opportunity given its scale and proximity to a range of key existing attractions (shops, theatres, the bus station and so on).

Newcastle-under-Lyme

10.18 Whilst the comparison goods offer accommodated within Newcastle-under-Lyme town centre has decreased in recent years , the centre has a generally balanced offer and benefits from a relatively strong leisure sector for a town of its size. In this regard, the Vue cinema, together with a good cluster of bars and restaurants on Ironmarket and High Street, helps underpin Newcastle-under-Lyme's retail offer. As a consequence of the above, the in-street survey demonstrated that a relatively high proportion of respondents (one fifth) primarily visited the centre on the day of the interview in order to go to a café, restaurant or pub.

10.19 In addition, whilst we are aware that the market has lost traders in recent years, it remains an important part of the town centre offer and helps differentiate Newcastle-under-Lyme from competing retail destinations.

10.20 Whilst Newcastle-under-Lyme town centre benefits from a generally good level of activity as a consequence of the above, its retail offer has declined in recent years and a number of areas – most notably York Place and the Roebuck Shopping Centre – have particular issues with vacant units. Whilst the Roebuck Shopping Centre links with the Midway multi-storey car park, its configuration is such that it does not form part of a logical retail circuit and fewer shoppers appear to have reason to visit subsequent to the closure of Argos in 2017. However, whilst the

recorded vacancy rate at August 2018 is of concern (equating to 13.3% of floorspace and 18.1% of units), the problem is not as pronounced as in many other centres in the area.

10.21 Although there has been an evident reduction in the centre's comparison goods offer (with Newcastle-under-Lyme very much playing a secondary role to Hanley), the centre remains a generally attractive destination. Whilst the development site at Ryecroft has the potential to further diversify the centre's offer, the 2017 scheme which benefits from a NULBC resolution to grant planning permission (through planning application reference 17/00637/FUL) has stalled and will now not be progressed. The previous scheme provided for a mixed-use development comprising retail (Class A1), leisure (Class A3, A4, A5, D1 and D2), and financial and professional services.

10.22 We are aware that this scheme was considered by Members at NULBC Cabinet on 7 November 2018, with a resolution that the scheme will not be progressed as it is not deliverable due to current and foreseeable market conditions. As a consequence, NULBC is currently engaging with consultants to understand the type of commercial development that would be viable on the site in the future, and the ability for short-term interim uses to generate additional footfall for the benefit of Newcastle-under-Lyme town centre as a whole.

10.23 Ryecroft therefore remains an important opportunity to drive footfall in the north of the town centre and modernise the centre's offer. In addition to delivering the redevelopment of this site, there is also a need to address the vacancy rate as a matter of urgency and to further consider how the market can evolve in order to remain a key asset for the town. However, notwithstanding this, Newcastle-under-Lyme remains a generally pleasant town to visit, albeit it is in need of further investment in order to remain relevant and competitive.

#### Other Principal Centres

10.24 With the exception of Kidsgrove, each of the town centres across the Joint Local Plan area is characterised by a vacancy rate which is significantly in excess of the national average level. Whilst the situation is most problematic in Burslem (which has 33.0% of floorspace and 34.1% of units vacant) and Stoke (which has 26.2% of floorspace and 35.2% of units vacant), there is a need to try and address the vacancy rate across all of Stoke-on-Trent town centres.

10.25 In addition to the typically high vacancy rate, the five smaller town centres in Stoke-on-Trent are also generally struggling in respect of: attracting comparison goods retailers (particularly national multiples); attracting footfall; the quality of the environment (largely as a consequence of a lack of investment in the stock of accommodation; and, developing a modern offer which is both competitive and distinct.

10.26 The one smaller centre which is performing well is Kidsgrove in Newcastle-under-Lyme, which has a vacancy rate of just 3.6% in respect of floorspace and 6.4% in respect of units. Kidsgrove is a relatively small town centre (accommodating around 10,000 sq.m of commercial floorspace across 78 units), which provides a blend of small-scale independent retailers and service operators, supported by proximate national multiples selling groceries (including the Tesco superstore and Aldi, which are both located just outside the centre at opposite sides of Liverpool Road). Many of the units at Kidsgrove are relatively small, which may assist in reducing costs and helping to allow independent businesses to establish themselves.

Recommendation: Principal Centres Strategy and Opportunity Sites

10.27 Paragraph 5.4 of the Joint Local Plan Preferred Options document sets out the authorities' objectives to grow and strengthen the strategic roles of Stoke-on-Trent city centre and Newcastle town centre in order to attract more visitors to the area, and to support job growth. In addition, the same paragraph indicates that growth and investment across a network of smaller centres will also be encouraged.

10.28 Paragraph 5.6 of the Preferred Options then goes on to confirms that a 'town centre first' approach will be supported within the urban area.

10.29 This is consistent with paragraph 85 of the NPPF (which indicates that planning policy should support the role of town centres at the heart of local communities), paragraphs 86 and 87 (which set out the sequential approach to development), and paragraph 89 (relating to the impact test).

10.30 The findings of this Study indicate a clear need to attract further investment, operators and activity to the principal centres in the Joint Local Plan area. The current vitality and viability of most of the principal centres is of significant concern and planning policy must be applied carefully in order to help return them to better health and deliver regeneration opportunities.

10.31 In this regard, we note that paragraph 017 of the Town Centres PPG indicates that proposals for edge and out of centre retail and leisure developments should be considered with reference to the health of centres that would be impacted upon. In this regard, paragraph 017 states that:

'A judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances. For example in areas where there are high levels of vacancy and limited retailer demand, even very modest trade diversion from a new development may lead to a significant adverse impact.'

10.32 In this case, the vacancy rates in most of the principal centres are exceptionally high. In addition, significant investment into the town centres in recent years has been generally limited , and there is a clear need to support the

regeneration of opportunity sites in order to help the offer of centres to broaden and modernise.

10.33 We believe it to be clear from this Study that the growth in out of centre development across the Joint Local Plan area and beyond has had consequences for the health of the principal centres.

10.34 As a consequence, we believe that it is important for the forthcoming Joint Local Plan to clearly identify that there is an issue with the current performance of principal centres and that it is necessary to bring about an improvement in these centres in order that they remain relevant and are able to appropriately serve residents' needs.

10.35 We recommend that the authorities seek to ensure that the forthcoming Joint Local Plan sets out town centre sequential and impact tests that can be applied in a robust manner to provide for future centres that are fit for purpose. Whilst non-retail uses will be an increasingly important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers and additional retail floorspace within defined town centres wherever possible.

10.36 We believe that the future health of principal town centres will likely be undermined should:

- the vacancy rates in the worst performing principal centres not be the subject of a substantial improvement; and
- the centres not attract future investment in order to accommodate modern operators and formats.

10.37 In terms of the second of the above matters, it is imperative that appropriate developments are brought forward to secure the re-use of the Former East West Precinct site in Hanley and the Ryecroft site in Newcastle-under-Lyme in a timely manner. We recommend that the two sites are identified and prioritised as town centre development opportunities in the emerging Joint Local Plan. As such, any competing development outside of town centres which could prejudice the delivery of these two important opportunities should be resisted. The importance of Former East West Precinct and Ryecroft relates not just to the need to broaden the offer of Hanley and Newcastle-under-Lyme and create additional attractors, but also due to the prominence of the two sites and their potential to drive footfall across each of the two centres.

10.38 Planned investment which provides for the redevelopment of these sites (and other town centre developments) should be safeguarded wherever possible.

10.39 In this regard, we note that paragraph 016 of the Town Centres PPG indicates that:

'Where wider town centre developments or investments are in progress, it will also be appropriate to assess the impact of relevant applications on that investment. Key considerations will include:

- the policy status of the investment (i.e. whether it is outlined in the Development Plan)
- the progress made towards securing the investment (for example if econtracts are established)
- the extent to which an application is likely to undermine planned developments or investments based on the effects on current/forecast turnovers, operator demand and investor confidence.'

10.40 Given the above, and as a consequence of how the NPPF impact test has been applied in practice, we recommend that both SOTCC and NULBC continue to work to bring forward the respective sites and that each is able to demonstrate that progress continues to be made in a challenging market. Whilst the exact mix of uses to be brought forward at each of the two sites has not yet been finalised, we recommend that the sites, their potential and the benefits of providing for their regeneration are identified in the emerging Joint Local Plan.

10.41 In addition, we are aware that there have been a number of planning applications in the Joint Local Plan area in recent years which provide for specialist retail provision (often catering for particular ethnic groups). Some of these applications relate to proposals in the Shelton area. It is important to affirm that the sequential and impacts tests will be applied to such proposals, reflecting the local circumstances on each occasion.

10.42 In respect of the sequential test, we recognise that paragraph 011 of the Town Centres Practice Guidance identifies that:

'Use of the sequential test should recognise that certain main town centre uses have particular market and locational requirements which mean that they may only be accommodated in specific locations. Robust justification must be provided where this is the case, and land ownership does not provide such a justification.'

10.43 In considering the above, it is important to recognise that developments that provide main town centre use development will look to locate within the residential catchment area that they provide for. This ensures that the proposals can meet the needs that they are designed to meet, and generally be accessed in a sustainable manner. As a consequence, if a proposal seeks to meet particular needs which arise within a specific geographic area, this will clearly impact on the area within which the proposal could be sited in practice. However, it does not provide a reason to circumnavigate the sequential test entirely.

10.44 Whilst each proposal will need to be judged on its own merits, the need to apply the sequential test to specialised retail formats has been confirmed by the Planning Inspectorate.

10.45 In this regard, we note the dismissed appeal decision of December 2015, relating to the proposed development of two commercial units (one Class A1 and one Class A2) at 283 Waterloo Road in Cobridge .

10.46 Paragraph 18 of the appeal decision indicates that the NPPF:  
‘...refers to the need for sites to be suitable and the PPG says that in judging the suitability of a site it is necessary to have a proper understanding of what aspects of the need are intended to be met by the site and that a balanced judgement based on the specific circumstances of the case in question is required.’

10.47 In terms of the trade draw of the application proposal, paragraph 20 of the appeal decision states that:

‘The market is said to be the Burslem and Cobridge area and Burslem town centre is conveniently located within that area.’

10.48 Due to the number of vacancies within Burslem town centre, paragraph 22 of the decision concludes that there are likely to be ‘in centre’ sites to accommodate the proposal, and finds that it fails to accord with the sequential approach to development as a consequence.

10.49 We believe that the Cobridge appeal decision is broadly reflective of the manner in which the sequential test should be applied to proposals for specialist operations, and the need to apply both the impact and sequential tests in a robust manner should inform both authorities’ approach to such applications.

Recommendation: Principal Centres Boundaries

10.50 Paragraph 85 of the newly published revised NPPF required local planning authorities to ‘define the extent of town centres and primary shopping areas’, with there now being no specific requirement to identify primary and secondary frontages.

10.51 The Ministry for Housing, Communities and Local Government has confirmed that the deletion of this requirement is to encourage a more positive and flexible approach to planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. However, the removal does not preclude local planning authorities from identifying primary and secondary shopping frontages where their use can be justified. We consider there to be no benefit in defining primary and secondary frontages in the defined centres in the Joint Local Plan area and that future flexibility should be applied to enable the take-up of vacant units by wider mix of uses.

10.52 Annex 2 of the new NPPF indicates that a primary shopping area is the ‘Defined area where retail development is concentrated.’

10.53 Annex 2 also identifies that a town centre is the ‘Area defined on the local authority’s policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area.’

10.54 Notwithstanding the above, we believe that the offer in most of the Principal Centres is generally varied and that the retail uses are not typically located in a manner which lends itself to the identification of a primary shopping area ('PSA').

10.55 As such, for the centres of Burslem, Fenton, Longton, Meir, Stoke, Tunstall and Kidsgrove, we do not believe that there is any requirement to differentiate between a PSA and a wider town centre boundary. The larger centres of Hanley and Newcastle-under-Lyme have a more concentrated retail offer, and for these centres we do provide a recommendation in respect of the extent of the PSA.

### **Stoke-on-Trent Boundaries**

10.56 The current boundaries of Principal Centres located within Stoke-on-Trent are identified by the City of Stoke-on-Trent Local Development Framework Proposals Map. With reference to these boundaries, our principal recommended revisions to the boundaries are set out below.

#### **Burslem**

10.57 The boundary of Burslem largely remains as currently adopted, the exception to this being a minor extension to the boundary at the south-western corner of the town centre. The boundary has been extended across Woodbank Street to include the Home Bargains on Newcastle Street. Therefore, the new western edge of the boundary is formed by the Home Bargains and its associated car park.

#### **Fenton**

10.58 There is one proposed amendment to the currently adopted boundary, namely the inclusion of the Fenton Health Centre and its associated car park. This is due to this feature performing a role likely to draw users through Fenton.

#### **Hanley**

10.59 The recommended centre boundary remains largely as adopted, with the northern, eastern and southern extents being defined by Potteries Way. On the

western edge, the only amendment is a redrawing of the boundary along Erturia Road and Marsh Street North to exclude the units including the Quality Hotel and Kwik Fit Plus. The city centre boundary therefore includes the area covering the primary shopping area, and the surrounding main town centre uses.

10.60 The recommended primary shopping area covers the area of the city where retail uses are concentrated. In this regard, its northern extent is formed by the northern edge of intu Potteries with the eastern boundary running along the rear of units fronting Town Road/Parliament Road. The southern boundary is then defined by Old Hall Street and Albion Street to Marsh Street South where the boundary runs north to Brunswick Street before running north along Stafford Street and Quadrant Road to the north of the intu Potteries Shopping Centre.

### **Longton**

10.61 Broadly, the boundary of Longton has been extended to include the Tesco Extra at Longton Exchange as it was evident that this unit functions as part of the town centre, supporting a number of linked trips. The western edge of the proposed boundary is therefore formed by Baths Road. The eastern boundary of the town centre is proposed to be formed by Commerce Street between The Strand and Market Street/Uttoxeter Road due to the reduced number of town centre uses in this location. Furthermore, the boundary has been amended to include Longton train station at the north of the centre.

### **Meir**

10.62 We recommend that the town centre boundary for Meir is reduced so that it aligns more with Weston Road and Sandon Road. Accordingly, the Methodist Church on Pickford Place and the former Meir Health Centre on Saracen Way (now converted to residential uses) are proposed to be excluded from the new boundary, particularly given that they are not main town centre uses under the NPPF definition. Equally, the boundary will no longer run east-west along Uttoxeter Road, and has been tightened to only include the areas which principally comprise main town centre uses.

### **Stoke**

10.63 The recommended amendments to Stoke's town centre boundary include an expansion to the south to include the Sainsbury's foodstore and associated car park, with the site's southern boundary forming the southern boundary of the town centre.

10.64 The Sainsbury's is included due to its strong integration with the core of the centre. Elsewhere, the western boundary of the centre is reduced from Liverpool Road to Trade Street/Poulson Street.

### **Tunstall**

10.65 The town centre boundary for Tunstall largely remains as adopted. A substantial amendment is the proposed inclusion of the Alexandra Retail Park to the east of Scotia Road, as it is evident that this area performs an important role in providing for main town centre uses within the town centre.

10.66 The proposed boundary runs to the rear of the retail units (including Home Bargains and the Tunstall Primary Care Centre) and then runs along Beaumont Road to re-join Scotia Road at the junction with Woodland Street.

### **Newcastle-under-Lyme Boundaries**

10.67 The current boundaries of Newcastle-under-Lyme and Kidsgrove are identified by the Newcastle-under-Lyme Local Development Framework Proposals Map 2006-2026. Having reviewed these boundaries, we set out our recommendations below.

### **Newcastle-under-Lyme**

10.68 The town centre boundary for Newcastle town centre is recommended to be amended to include the area within Lower Street/Ryecroft and Barracks Road. The revised boundary includes the areas within Newcastle which cover the main town centres. The recommended boundary represents a substantial reduction to the previous town centre boundary, which included a number of non-town centre uses.

10.69 The proposed primary shopping area includes units on High Street between Church Street and Friars' Street/Hassell Street (including the Roebuck Shopping centre), Castle Walk and Ironmarket. This area comprises predominantly retail uses, in accordance with the NPPF guidance.

### **Kidsgrove**

10.70 We recommend that the northern boundary of the adopted town centre boundary is reduced from the current extent of Kinnersley Street/Back Heathcote Street/Queen Street/Whitehall Avenue to include the areas within Kidsgrove which principally comprise main town centre uses. As such, the recommended boundary runs along the northern boundary of Home Bargains and its associated car park on Heathcote Street, and excludes the car parks to the east of King Street.

10.71 The previously adopted town centre boundary for Kidsgrove included a relatively extensive area of residential and other non-main town centre uses to the north, which we have recommended is removed to accord with the NPPF definitions.

10.72 The exact extent of our proposed Principal Centre boundaries is set out in the plans provided at Appendix 9.

### **Key Findings: Lower Order Centres**

10.73 Many of the lower order centres perform strongly, which reflects the fact that they meet day to day needs (focused around food retail, household goods and key services), which residents tend to purchase close to home. As such, we do not believe that the district, local, neighbourhood and rural centres are subject to the same structural problems as the town centres within the Joint Local Plan area.

10.74 Notwithstanding this, we do have concerns that some of the lower order centres fail to provide a sufficient concentration of retailers and service operators to perform the role of a defined centre (we return to this matter below).

10.75 The extent of lower order centre in Newcastle-under-Lyme has not previously been defined and we identify the extent of a logical boundary for each in the plans at Appendix 6 of this Study.

10.76 We also provide plans which reflect the extent of the existing boundary of Stoke-on-Trent's lower order centres, and identify where there may be a need to change any of these boundaries to better reflect the accurate extent of the boundary in the commentary provided for each centre at Appendix 6. In addition and as we go on to consider below, we believe that there are a number of smaller concentrations of shops and services which have such a limited offer that consideration should be given to removing any formal 'centre' designation. We consider this issue below at paragraph 10.64 and table 10.3.

### **Recommendations: the Future Identification of Additional Centres**

10.77 It is recognised that the targeted urban extension to the west of Newcastle is proposed to be planned for within the Joint Local Plan. The Joint Local Plan Preferred Options Consultation Document states at paragraph 2.72 that: 'in order to support the Joint Local Plan's economic strategy there is a proposal to release land from the Green Belt to the west of Newcastle-under-Lyme centre and create a western urban residential community which includes provision for both academic and non-academic staff in a location that would support strong interface with Keele University'. It is likely that this will result in opportunities to provide additional local retail and service provision to cater for the day to day needs of communities.

10.78 In considering the future potential to identify and plan for such opportunities, it will be again necessary for any designated centres to accord with the broad definitions provided by Annex 2 of the NPPF, accepting the direction that ‘References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance’.

10.79 Appropriate account has been taken of the scale of planned growth in setting out our findings in respect of the scale of future quantitative retail need. Accordingly, it may be that some of the quantitative capacity which we identify in this report is directed to locations which can serve the potential extension. It is envisaged that any such centres are likely to be small in scale in order to support and complement the existing town centre hierarchy.

10.80 Whilst the appropriate scale and location for additional retail facilities to serve local needs arising from the urban extension will need to be determined with reference to location, proposed dwelling density and existing retail and service provision, we note that anticipated number of dwellings to be delivered is approximately 2,500. If it is to be assumed that an average of around two people will occupy each property, then the population will be approximately 5,000 people.

10.81 In Nexus’ experience, Local Centres need to be supported by a catchment population of around 5,000 people and District Centres (including a food superstore) by a significantly greater population (often approaching 20,000 people).

10.82 Accordingly, it may be that the urban extension will be able to support a range of shops, services and facilities which could fulfil the role and function of a defined Local Centre.

### **Recommendation: Centres Hierarchy**

10.83 Paragraph 85 of the NPPF indicates that local planning authorities should define a network and hierarchy of town centres. However, very little detail is provided in this regard and, notably, neither the NPPF nor the Town Centres PPG provide define different types of town centre with reference to the role they serve.

10.84 The most recent definitions provided by the Government were contained within Planning Policy Statement 4: Planning for Sustainable Economic Growth ('PPS4'), which was originally published in December 2009, but was then subsequently superseded by the publication of the NPPF in March 2012

10.85 Whilst PPS4 needs to be considered on this basis (i.e. it is not up to date practice guidance), in the absence of any other definitions, it is of some relevance to the consideration of a retail centres hierarchy.

10.86 Annex B of PPS4 identifies that:

'City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. In London the 'international' and 'metropolitan' centres identified in the Mayor's Spatial Development Strategy typically perform the role of city centres.'

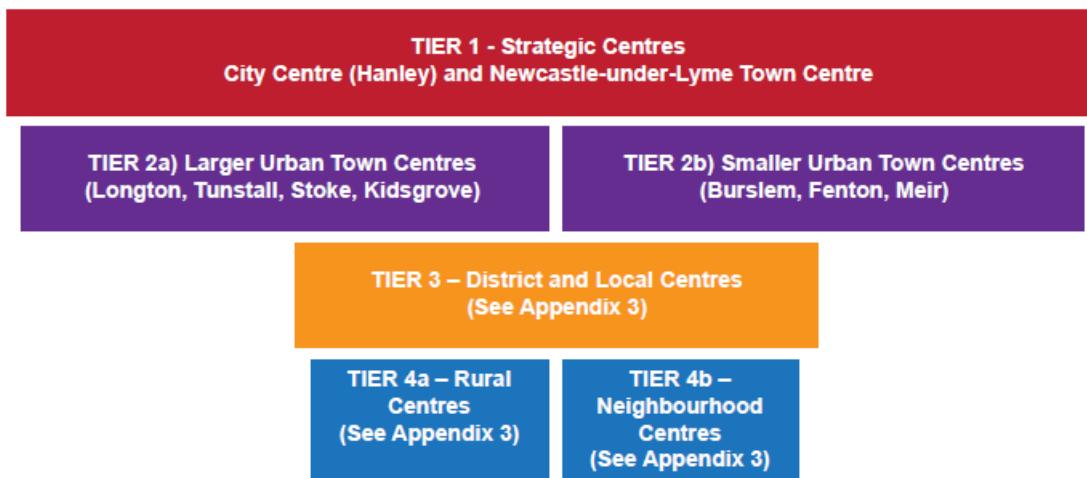
Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.'

10.87 The draft proposed centres hierarchy is set out at page 34 of the Joint Local Plan Preferred Options and is presented below as Figure 10.1.

Figure 10.1: Proposed Hierarchy of Defined Centres from the Joint Local Plan Preferred Options



10.88 On the basis of the most recently available definitions provided by the Government, we have the following observations in respect of the proposed Joint Local Plan Preferred Options hierarchy:

- whilst Hanley is the largest centre in the Joint Local Plan area (and draws trade from a wider area than Newcastle-under-Lyme), both Hanley and Newcastle-under-Lyme have important roles to fulfil in meeting a range of retail and service needs. As such, it is considered appropriate for both to be ‘top tier’ Strategic Centres;
- the larger Urban Town Centres and the Smaller Urban Town Centre of Burslem are, in our view, of a scale that is consistent with the definition of a town centre provided by Annex B of PPS4. However, the Smaller Urban Town Centres of Fenton and Meir in our view perform a role that is commensurate with the district centre definition provided by Annex B of PPS4; and
- the definition of Tier 4b Neighbourhood Centres appears inconsistent with the recommendation at Annex B of PPS4 that parades of shops of neighbourhood significance should not be afforded formal status as a defined centre.

10.89 Given the above, we believe that there may be merit in reviewing whether there is a requirement to include Tier 4b centres within the retail hierarchy.

10.90 However, should this tier of centres continue to be formally recognised within the retail hierarchy, we recommend that they are designated in the manner set out below at Table 10.3. In our view, the role and scale of Rural Centres is comparable to a Local Centre and our recommended hierarchy reflects this.

Table 10.3: Recommended Centres Hierarchy Based on Five Tier Structure

Tier	Local Authority Area	Centres
Tier 1: Strategic Centres	Stoke-on-Trent	City Centre (Hanley)
	Newcastle-under-Lyme	Newcastle-under-Lyme

Tier 2: Town Centres (or Larger Town Centres in Stoke-on-Trent)	Stoke-on-Trent	Burslem; Longton; Tunstall; and, Stoke
	Newcastle-under-Lyme	Kidsgrove
Tier 3: District Centres (or Smaller Town Centres in Stoke-on-Trent)	Stoke-on-Trent	Fenton; and, Meir
	Newcastle-under-Lyme	Chesterton, London Road; Silverdale, High Street; and, Wolstanton, High Street
Tier 4: Local and Rural Centres	Stoke-on-Trent	Goldenhill – High Street; Chell Heath – Chell Heath Road; Heron Cross; Dresden – Trentham Road; Dresden – Carlisle Street; Smallthorne – Ford Green Road; Milton – Leek Road/Millrise Road; Middleport – Newcastle Street; Abbey Hulton – Leek Road; Basford – Etruria Road; Bentilee – Devonshire Square; Hartshill – Hartshill Road; Fenton – Victoria Road; Fenton – King Street; Normacot – Uttoxeter Road; Hanford – Mayne Street; Blurton – Finstock Avenue; Trentham Lakes – Stanley Meadows; and, Norton Park – Leek New Road
	Newcastle-under-Lyme	Loggerheads, Eccleshall Road; Madeley, Newcastle Road; Baldwin's Gate, Newcastle Road; and, Audley, Church Street;

Tier 5: Neighbourhood Centres	Stoke-on-Trent	Norton – Knypersley Road; Bucknall, Werrington Road; Bucknall – Causeley Road; Lightwood – Belgrave Road; Hamil Road; Great Chell – Biddulph Road; Norton – Pinfold Avenue; Bank Top – High Lane; Bradeley – Joyce Avenue; Baddeley Green – Baddeley Green Lane; Sneyd Green – Milton Road; Abbey Hulton – Abbots Road; Birches Head – Diana Road; Northwood – Keelings Road; Berry Hill – Twigg Street; Bentilee – Beverley Drive; Eaton Park – Southall Way; Bentilee – Ford Hayes Lane; Shelton – Stoke Road; Shelton – College Road; Penkhull – Manor Court Road; Sandford Hill – Heathcote Street; Harpfield – Woodberry Close; Oakhill – London Road; Meir Hay – Amison Street; Weston Coyney – Westonfields Drive; Weston Coyney – New Kingsway; Hollybush – Blurton Road; Blurton – Nashe Drive; Blurton – Blurton Drive; Trentham – Werburgh Drive; Trentham – The Lea; Blurton – Wimborne Avenue; and, Meir Park – Lysander Road
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	Newcastle-under-Lyme	Bradwell, Hanbridge Road; Butt Lane, Congleton Road; Chesteron, Barbridge Road; Clayton, Cambridge Drive; Cross Heath, Liverpool Road; Kidsgrove, Whitehill Road; Knutton, Knutton Lane; May Bank, High Lane; Rookery, High Street; Newcastle Town, George Street; Parksite, Bath Street; Porthill, Watlands View; Seabridge, Tyne Way; and, Thistleberry, Paris Avenue
Destinations which no longer perform a 'centre' function	Stoke-on-Trent	Stanfield Road – Haywood Road; Newford – Community Drive; Corbridge – Waterloo Road; Etruria – Etruria Old Road; West End – London Road; and, Weston Coyney – Coalville Place
	Newcastle-under-Lyme	Halmer End, High Street; Chesterton, Birch House Road; May Bank, Oxford Road; and, Wolstanton, Dimsdale Parade East

Note: We understand that it is SOTCC's preference to refer to its Tier 2 centre as 'Larger Town Centres' and its Tier 3 centres as 'Smaller Town Centres'

### **Recommendation: Local Impact Thresholds**

10.91 Paragraph 89 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test (all planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test ).

10.92 The purpose of applying an impact threshold within the development plan which deviates from the national threshold of 2,500 sq.m, is to allow the Council to retain appropriate control in respect of the potential for development to impact on the future health of defined centres within the two authority areas. By applying a lower threshold, applications for developments which could potentially have a harmful effect on the overall vitality and viability of a defined centre, will need to be supported

by a proportionate impact assessment which sets out the potential trade diversion impact assumptions.

10.93 Paragraph 16 of the Town Centres PPG provides specific guidance in relation to floorspace thresholds and states:

'The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:

- scale of proposals relative to town centres
- the existing viability and vitality of town centres
- cumulative effects of recent developments
- whether local town centres are vulnerable
- likely effects of development on any town centre strategy
- impact on any other planned investment.'

10.94 Using the above guidance, we set out the justification to support our view that a lower threshold should be applied across the hierarchy of centres within the two authority areas of Newcastle and Stoke. To note, the current adopted policy does not provide a locally set threshold for impact assessments. However, the Joint Local Plan Preferred Options Consultation document (February 2018), proposes to adopt the following thresholds:

- For Tier 1 centres – development proposals providing greater than 1,500 sq.m (gross);
- For Tier 2a centres – development proposals providing greater than 1,000 sq.m (gross); and
- For Tier 2b centres and below – development proposals providing greater than 300 sq.m (gross).

10.95 We agree with the broad approach as set out in the Preferred Options document that applying a single threshold to apply to all types of centre in the two authority areas is not appropriate, given the different scale and nature of each of the centres. Indeed, we agree with the justification as set out at paragraph 5.27 of the Preferred Options document that the proposed thresholds are considered to reflect the relatively small size of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative 'out-of-centre' provision.

10.96 As such, we also recommend a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of a particular centre.

10.97 In considering the setting of a local impact threshold, it is important to give consideration to the type of development (relating to convenience and comparison goods retail uses, and leisure uses) which would, in practice, provide space for key operators who could act to 'anchor' a centre. Should one of these anchor units or

operators leave a centre, there will likely be the potential for a significant adverse impact to arise.

10.98 Where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre, or potentially remove a key tenant from that centre, there will likely be a requirement to consider the impacts arising from the proposal in detail.

10.99 In respect of lower order centres, the introduction of even a small convenience store nearby (of the type operated by Sainsbury's Local or Tesco Express) may have the potential to impact on the ongoing viability of key operators. Small convenience stores operated by national multiple grocers can generate a relatively substantial turnover. If this is diverted from existing retailers in defined centres, the impact on the overall vitality and viability through the loss of spend and footfall, could be of a significant adverse magnitude.

10.100 Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre the proposed development is proximate to. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice. We provide our analysis below in respect of the two authority's town, district and local centres. City and Town Centre Thresholds (Nexus's Tiers 1 and 2)

10.101 We believe that city centre and town centre anchor units will typically provide at least 500 sq.m of gross floorspace. Such a unit could potentially accommodate an operator of importance, which is capable of attracting shoppers to a centre, thus increasing the potential for linked trips.

10.102 We note that there are a relatively limited number of units greater than 500 sq.m in the four town centres and that the vacancy rates vary throughout the defined centres. In summary:

- Hanley city centre – less than 10% of the total stock of commercial units measure greater than 500 sq.m, which includes the large format nightclub units at Pall Mall and Foundry Street. The vacancy rate within the city centre is substantially above average, both in respect of the proportion of units and floorspace.
- Burslem, Fenton, Longton, Meir, Stoke and Tunstall town centres – in each case, less than 12% of the total stock of units in the town centres measure less than 500 sq.m. For the smaller centres of Fenton and Meir, the proportion is in fact lower. Vacancy rates in the centres vary, but in all cases are above the national average.
- Newcastle-under-Lyme and Kidsgrove town centres – in both cases, the proportion of units measuring greater than 500 sq.m again falls below 12%. Whilst the vacancy rate in Kidsgrove is lower than the national average, the proportion in Newcastle-under-Lyme town centre is above average. In any event, Kidsgrove is a

substantially smaller centre and competing developments on the edge or outside of the centre's boundary could materially impact the performance of the centre.

10.103 In this context, we recommend that the impact threshold of relevance to the centres within our recommended Tiers 1 and 2 (the city and town centres) is set at 500 sq.m for both retail and leisure proposals. This threshold would effectively be the default to be applied authority-wide across both authority areas, should a proposal not fall within the criteria set out below which we recommend is applied to development in proximity to district and local centres.

10.104 The above recommendation is also reflective of the town centre vacancy rates and the potential for out of centre retail developments to become even stronger in the future at the expense of centres' vitality and viability. The out of centre commercial destinations within Stoke and Newcastle-under-Lyme all offer a range of convenience and comparison goods, which traditionally would have been sold from town centres. As such, the recommendation is reflective of the need to safeguard against out of centre retail destinations becoming even stronger at the expense of the health of defined centres.

District, Local, Rural and Neighbourhood Centres Thresholds (Nexus's Tiers 3, 4 and 5)

10.105 Due to the smaller scale of the district, local, rural and neighbourhood centres, and the relatively modest size of most of their commercial units, we consider it appropriate for a lower impact threshold of 200 sq.m to apply to potential development proximate to these centres. This is in keeping with their more localised role and function but demonstrate the potential implications out of centre developments could have on these centres.

10.106 Furthermore, the district and local centres are generally anchored by a national multiple convenience store (typically operated by Co-op, Marks & Spencer, Sainsbury's or Tesco). These operators underpin the function of such smaller centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined. There are relatively few units substantially larger than 200 sq.m in any of the district, local and neighbourhood centres; as such, to lose an occupier of this magnitude could have a significant adverse impact on the centre as a whole.

10.107 Accordingly, in the local context, 200 sq.m constitutes a significant unit for the district, local, rural and neighbourhood centres. The setting of a lower threshold for the lower tier of centres within the hierarchy will ensure that schemes which have the potential to result in significant adverse impacts are appropriately assessed, in order that appropriate consideration is given to the centres' vitality and viability in considering the acceptability of future development.

10.108 For the purpose of drafting future planning policy, it is important to qualify the area to which each local impact threshold will apply. We recommend that the threshold of relevance to the authority's district, local and neighbourhood centres (i.e. 200 sq.m) would be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 500 sq.m to apply authority-wide (i.e. beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts arising from retail, leisure and office development.

#### Recommended Policy Approach

10.109 Based on the above, we are of the view that an impact assessment will be necessary to accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre where:

- the proposal provides a gross floorspace in excess of 500 sq.m gross; or
- the proposal is located within 800 metres of the boundary of a district, local or neighbourhood centre (Tiers 3, 4 and 5) and is in excess of 200 sq.m gross.

10.110 In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 90 of the NPPF.

10.111 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

End of document

Appendices are Bound Separately

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