



City of Stoke-on-Trent Council

Retail & Leisure Study

Final Report

March 2014

Address: Quay West at MediaCityUK, Trafford Wharf Road, Trafford Park, Manchester, M17 1HH

Tel: 0161 872 3223

E-Mail: planners.manchester@wyg.com

Web: www.wyg.com



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1.0 Introduction

Instruction

- 1.01 WYG Planning ('WYG') was commissioned by Stoke-on-Trent Council (SoTC) in June 2013 to undertake a City-wide Retail and Leisure Capacity Study and Health Check ('the Retail Study'). The key purpose of this study is to act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail and leisure development. The Study updates and supersedes the previous Retail and Leisure Study completed by Savills in 2005.
- 1.02 The study explores retail need and capacity over the period to 2028 and provides an up to date review of the performance of the main city and six town centres across the City. This is of particular importance given the downturn in the UK economy since the reporting of the 2005 Study which has had a notable impact on the retail and leisure sectors. The aims and objectives for the Study included consideration of the following
- Consider retailing and leisure trends and how this may influence the identification of retail capacity in the City of Stoke-on-Trent area;
 - Provide an up-to-date analysis of retail/leisure and town centre policy at the national level and consider changes in policy at a local level through the revocation of the RSS;
 - Undertake an updated assessment of quantitative need for new retail and leisure floorspace within the City of Stoke on Trent area;
 - Provide a qualitative analysis of existing and proposed retail floorspace within the City of Stoke on Trent area;
 - Complete an updated health check of Stoke City Centre, the six principle towns and the 58 local centres;
 - Consider the scope for the way in which distinctive or specialist roles could help develop retail in the towns outside of the City Centre;
 - Provide evidence and advice on the setting of a local threshold;



- Provide an overview of the levels of out of centre retailing in the City of Stoke-on-Trent and examine the changes in floorspace which have taken place since 2005; and
- Identify any gaps in provision in the Local and Neighbourhood Centres within the City of Stoke-on-Trent.

1.03 The Study includes new empirical research, with a shopping survey of 1,300 households being undertaken by NEMS Market Research Limited in July 2013. The Study Area for the survey comprises eleven zones which are based on postcode areas grouped around one or more of the existing main town and district centres. The Retail Study also draws upon current Experian population and expenditure data (published October 2013) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

1.04 Our report is structured as follows:

- Section 2 provides a context for the Retail Study by providing an analysis of key retail trends;
- Section 3 considers the up-to-date position in respect of relevant retail and town centre planning policy;
- Section 4 sets out a review of the findings of the household survey results and considers changes to local shopping patterns that have occurred since 2005;
- Section 5 sets out an overview of the vitality and viability of the City of Stoke-on-Trent's city and town centres;
- Section 6 set out an overview of the local and neighbourhood centres across the City of Stoke-on-Trent;
- Section 7 sets out current and future population and expenditure levels within the Study Area;
- Section 8 provides our assessment of the quantitative need for further convenience and comparison goods floorspace over the assessment period;
- Section 9 considers future leisure capacity over the plan period; and
- Section 10 sets out retail strategy and recommendations.

1.05 In order to ensure that the distinction between the City of Stoke-on-Trent, Stoke City and Stoke Town is clear where each of these destinations is referenced in the report, we set out a definition of each of these locations below:

- 'City of Stoke-on-Trent' relates to the Stoke-on-Trent administrative area i.e. the area which is governed by Stoke-on-Trent City Council.



- 'Stoke City' relates to Stoke city centre i.e. the area formerly known as Hanley.
- 'Stoke Town' relates to Stoke town centre.



2.0 Current and Emerging Retail Trends

Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail sector has experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and per capita convenience goods spending has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing' as well as emerging forms such 'm-retailing' and 'omni' channel retailing.
- 2.02 The retail market and the need for new development is continually evolving as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements, such as e-tailing. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending declined from 47.7% of overall spend to 39.9% of overall spend at 2012. In contrast, spending in out of centre locations has increased over the same period by 2.1% and non-store locations by 6.6%¹. These changes have had a major impact on the format and location of retail and leisure floorspace, which has led to recent Governments reaffirming their commitment to the 'town centre first' policy approach which is now outlined in the National Planning Policy Framework (NPPF) (March 2012).

Current Retail Picture

- 2.03 Recent research undertaken by Colliers² provides information on recent trends, together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and there is considerable uncertainty about the strength and durability of future growth. It is noted that whilst sales volumes and footfall were high at the start of 2011, the UK economy was close to a double dip recession in the latter months of 2011 and the retail market has since continued to fluctuate over the last 12 months. With significant reduction in Government spending impacting on economic growth, the UK unemployment rate was recorded at 7.6% in September 2013 and is now showing signs of improvement.

¹ 'UK Out of Town Retailing,' Verdict Datamonitor, April 2012

² 'National Retail Barometer: Summer 2013,' Colliers, August 2013



- 2.04 These factors have had a significant impact on the public's general confidence, thereby reducing their propensity to spend their earnings on retail goods. Since 2010 there have also been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also impact upon households' spending. Furthermore, inflation has risen to a level beyond average earnings growth and, at the time of reporting, the national inflation rate is 2.7% (August 2013). The delay in reviewing business rates is also identified in both the Portas³ and Grimsey Reviews⁴ as a key factor affecting the success of many operators, with the Grimsey Review in particular recommending that the 2015 business rates revaluation to realign property values should be reintroduced immediately and business rates should be frozen from 2014.
- 2.05 The economic conditions have resulted in significant structural changes to the high street in recent years whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing their number of stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. The Local Data Company⁵ notes in the Grimsey Report that the national vacancy rate equates to over 22,000 empty shops in the top 650 town centres. The Centre for Retail Research also predicts that overall store numbers are expected to fall by 61,930 (-22.0%) between 2012 and 2018, with the main impact to be upon non-food stores. The report also estimates that 316,000 people will become unemployed, permanently or temporarily, as a result of these store closures⁶.
- 2.06 To address this, many retailers are re-negotiating their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with several high street firms (including Monsoon and New Look) trying to ease the cash flow burden of paying rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities such as Stoke City Centre are likely to suffer less compared to smaller centres, given that they provide an enhanced choice for customers and offer the greater retail and leisure 'experience' that consumers increasingly desire. In terms of prime retail rental values, Colliers⁷ note that national rates fell by an average of -0.9% in 2011 and by a further -1.2% in 2012, with the average national prime retail rent now being £110 per sq.ft. Colliers also reports that there is a marked regional variation in the rental rates, with London the only region to

³ 'The Portas Review,' December 2011

⁴ 'The Grimsey Review – An Alternative Future for the High Street,' September 2013

⁵ 'The Grimsey Review – An Alternative Future for the High Street,' September 2013

⁶ 'Retail Futures 2018,' Centre for Retail Research, May 2013

⁷ Ibid



achieve rental growth over the 12 months to June 2012. In contrast, several other regions experienced significant reductions in their average prime rental values during the 12 month period to June 2012, notably Wales (-8.4%), the East Midlands (-5.7%), West Midlands (-3.7%), North West (-2.1%) and Yorkshire and the Humber (-1.8%). However, such reductions are a positive response to market conditions and are natural response to current market conditions.

- 2.07 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest for well located and appropriately configured floorspace in key centres. It is evident that whilst Central London, regional city centres and regional shopping malls are relatively stable as these are location that are still viable due to critical mass, a significant number of small and medium sized towns will need to implement innovative ideas in order to improve spending rates and reduce trade leakage.
- 2.08 Experian, which monitors and forecasts retail consumer expenditure in the UK, has reviewed its forecast growth rates for both convenience and comparison goods expenditure in recent years. Experian's⁸ forecast annual per capita convenience goods growth rate is now -0.6% at 2013, -0.3% at 2014 and +0.1% at 2015. Forecast annual per capita comparison goods growth rates are more positive than in previous years, with growth of +3.2% forecast at 2013, +2.3% at 2014 and +2.8% at 2015 and 2.9% thereafter. Whilst these increased forecasts are encouraging and show signs that confidence in spending is returning, it is evident that these forecast growth rates are still well below the annual growth (4% to 6%) which was recorded prior to the economic downturn but do show increased signs of stabilisation.
- 2.09 Despite the past difficulties outlined above and the general decline in the comparison goods sector, other specific types of goods continue to perform well. The market for recreational goods has, on the whole, performed well in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the manner in which such purchases are made has changed considerably, with the increasing popularity of the internet to purchase books and music having a notable impact on the composition of town centres, with such stores all but disappearing from the high street. Other businesses have experienced growth in the last two years, with a +12.4% increase (over 1,100 stores) in 'value-related retailing' outlets, including second-hand, discount and charity shops. The Grimsey Review⁹ also makes reference to the expansion of pawnbrokers, pay-day lenders and betting shops which have collectively experienced a 17% growth in the number of outlets since 2011.

⁸ Experian Retail Planner Briefing Note 11, October 2013

⁹ 'The Grimsey Review – An Alternative Future for the High Street,' September 2013



Trends in Comparison Goods Shopping

- 2.10 Whilst it is not anticipated that growth in retail spending over the next ten years will mirror that achieved after the turn of the millennium, there is expected to be some growth in comparison goods expenditure in coming years. Consequently, there is an increasing focus from retailers on achieving more efficient use of their floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing and increases in rental levels secured before 2008. As a result of the current economic climate, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floor plates enable operators to provide a greater range of goods; for example, in 2011, Primark opened one million sq.ft of new retail space.
- 2.11 International market conditions and price deflation in some key sectors have also meant that many high street names are becoming increasingly vulnerable to takeover. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing their future strategies given the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

Trends in Food Retailing

- 2.12 In the aftermath of the growth in the number of edge and out of centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws (following the publication of PPS4 and subsequently the NPPF) and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:
- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;



- Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

- 2.13 Mintel¹⁰ identifies that the recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers and more and more shoppers are assessing whether purchases represent value for money. Shoppers now realise that they are able to 'trade down' and switch to own-label ranges to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket. It is noted that as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.
- 2.14 Verdict also states that changing UK demographics are having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are 'time poor' and relatively 'cash rich'. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on small convenience stores. Verdict indicates that, as the race for space intensifies, format flexibility will be essential.
- 2.15 Verdict¹¹ estimates that the food and grocery sector will be worth £130.0 billion in 2011, equating to annual growth of 3.2%, representing 43.7% of total retail spend. The four key supermarket chains in the UK have respective market shares of 31.0% (Tesco), 17.5% (Asda), 16.5% (Sainsbury's) and 11.4% (Morrisons)¹². National multiple retailers, including the Co-operative Food (6.8%), Waitrose (4.7%) and Aldi (2.9%), represent a total grocery market share of 97.8%.

¹⁰ 'Food & Drink Retailing,' Mintel, March 2013

¹¹ Ibid

¹² 'Grocery Market Share UK', Kantar Worldpanel, 9th October 2012



- 2.16 More recently, there has been a slowdown in the growth plans of the majority of the principal supermarket operators. Tesco, for example, has indicated that its net new space growth in 2012 will be 38% lower than in 2011, with the company instead focusing on developing medium size units and investing around £1 billion on improving its current stores. Asda is the second largest supermarket retailer in the UK, with more than 500 stores nationwide. In 2011, Asda opened 22 new stores and acquired 193 Netto stores which allowed the company to increase its smaller store portfolio. However, as a result of Competition Commission laws, it was later required to sell 47 of the stores to other retailers, including Morrisons. Asda has recently focused investment on its smallest store formats (known as Asda Supermarket), with the company having aspirations to deliver 250 such stores by 2015. Morrisons intend to deliver 2.5 million sq.ft of new retail floorspace by 2013/2014, both through the continued development of large foodstore schemes and the new small scale M-Local convenience format store. Due to the success of the initial trials, Morrisons now intend to open 50 additional M-Local stores by 2013/2014. The discount supermarket chain Aldi made a pre-tax profit of £57.8m in 2011, when it opened 29 new UK stores. It is currently seeking to develop a further 40 stores by the end of 2013, thus bringing its total number of UK stores to over 500.
- 2.17 The role of supermarkets also continues to develop, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres now competing with five or more supermarkets within a two mile radius¹³. Whilst the exact impacts which will arise from the opening of a new supermarket are dependent on local circumstances, BCSC notes that there has been a significant decline in the number of independent food retailers over recent years, including a reduction of 45% between 1996 and 2007 in the number of greengrocers. Over the same time period the market share of total retail sales secured by supermarkets has increased from 38% to 42%.

Out of Centre

- 2.18 Despite the 'town centre first' planning policies which have been adopted by recent Governments, research undertaken by Verdict¹⁴ indicates that between 2007 and 2012, the amount of out of centre floorspace increased by 23%. However, in very recent years, Colliers notes that the demand for out of centre representation has been limited, with those retailers seeking to acquire stores having a pick of vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), amongst others. However,

¹³ 'What Does the Future Hold for Town Centres?', BCSC, September 2011

¹⁴ 'UK Out of Town Retailing', Verdict Datamonitor, April 2012



only five major out-of-town retailers have failed since June 2011, these being Allied Carpets, Clintons, Comet, GAME and Peacocks.

- 2.19 The national average vacancy rate in out of centre retail warehouses in 2012 is 3.9%, an increase of 0.3% since 2011. Some of the voids created by the administrations remain un-let and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, B&M, Mothercare, Next Home and TK Maxx.
- 2.20 Looking forward, Colliers indicates that whilst out of centre locations have witnessed low levels of development during the last two years, it is estimated that one million sq.ft of new space is to be completed in 2012. There are also an increasing number of retailers acquiring larger stores, including several department-store type format operators including John Lewis Home, M&S and Primark. The large out of centre Oakgate scheme which was recently approved by the City of York Council, for example, will accommodate M&S, John Lewis and Next stores.

Shopping Centre Development

- 2.21 It is evident that shopping centre retail development is starting to see signs of progress following 4 years of a virtual standstill with the British Council of Shopping Centres (BCSC) (2013) showing that 2013 has seen a significant improvement on 2012 in terms of new centres opening. Colliers suggests that the UK may never see a return to the level of shopping centre openings that was evident in recent times. The Trinity development in Leeds City Centre opened in March 2013 with 90% of the units pre-let was the most widely anticipated mall opening in 2013, however, other schemes (Whiteley Village and Jubilee Place) and extensions also opened in 2013 showing improved confidence in the retail market. In contrast to the average level of completions over the last five years (3.9 million sq.ft per annum), 2013 level of shopping centre development is by comparison very modest at 1.5 mill sq.ft. In 2008, for example, almost 8 million sq.ft of new floorspace opened across 14 new schemes nationwide. BCSC estimate that 2014 and 2015 will show an improvement on the limited level of activity seen in 2012, and by 2016 mall openings will exceed 2011 levels when delayed projects such as Bradford (Westfield), Bracknell Northern Quarter are scheduled to open, and it is expected that around 3 million sq.ft of floorspace will be delivered per year which exceeds 2011 levels, demonstrating increased confidence in delivering new floorspace.
- 2.22 Despite a more confident mood in recent times, viability is still considered to be challenging. There are three types of scheme which may be successfully delivered in the current challenging economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged



undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, Bradford and Lichfield are examples of such schemes, and from our own involvement, we can confirm that both Bradford and Macclesfield are now being actively promoted after a difficult period due to increased confidence in the retail market. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand remains strong due to increased footfall.

2.23 Proposed schemes which will conform to one of these models are considered to be few and far between, and for development to begin again in earnest, it will be necessary for marked improvements in retailer demand, a strengthening of rental levels, further improvement in the investment market and, critically, the availability of finance at viable levels to occur. For those towns without an oversupply of floorspace and with sites which can be brought forward without excessive levels of cost, some development may be able to be brought forward within the next five years. However, such opportunities may be the exception rather than the rule.

2.24 In addition to their retail offer, consumers are increasingly travelling to larger centres for their overall experience and to use the leisure facilities. Colliers notes that the largest destinations draw from a wide catchment, hence the need to retain consumers for as long as possible. In the past, it was recognised that non-retail uses typically occupied less than 10% of the space, though this has increased in recent schemes, including Westfield in Stratford where catering and leisure units occupy over 20% of the space. The Grimsey Review also noted that town centre and high street plans must seek to create a complete community hub which can incorporate a variety of units, including housing, education, and leisure uses, as well as developing day time, evening and night time cultures. Therefore successful shopping developments need to ensure they comprise a wider variety of uses which are not necessarily reliant on comparison goods floorspace, but also that the floorspace is designed with flexibility to ensure that it can respond promptly to changes in market

Growth in E-tailing ('E-commerce')

2.25 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. It is estimated that internet sales accounted for 9.7% of all UK retail spending at August 2013¹⁵ and this trend is set to continue. Experian forecast that internet sales (non store) accounted for 12.3% of all UK retail spending at 2013¹⁶ and Experian¹⁷ predicting that all non-store purchases will account for 20.5% of total retail expenditure at 2028. Experian estimates

¹⁵ 'Retail Sales', Office for National Statistics, August 2013

¹⁶ 'Retail Sales', Office for National Statistics, August 2013

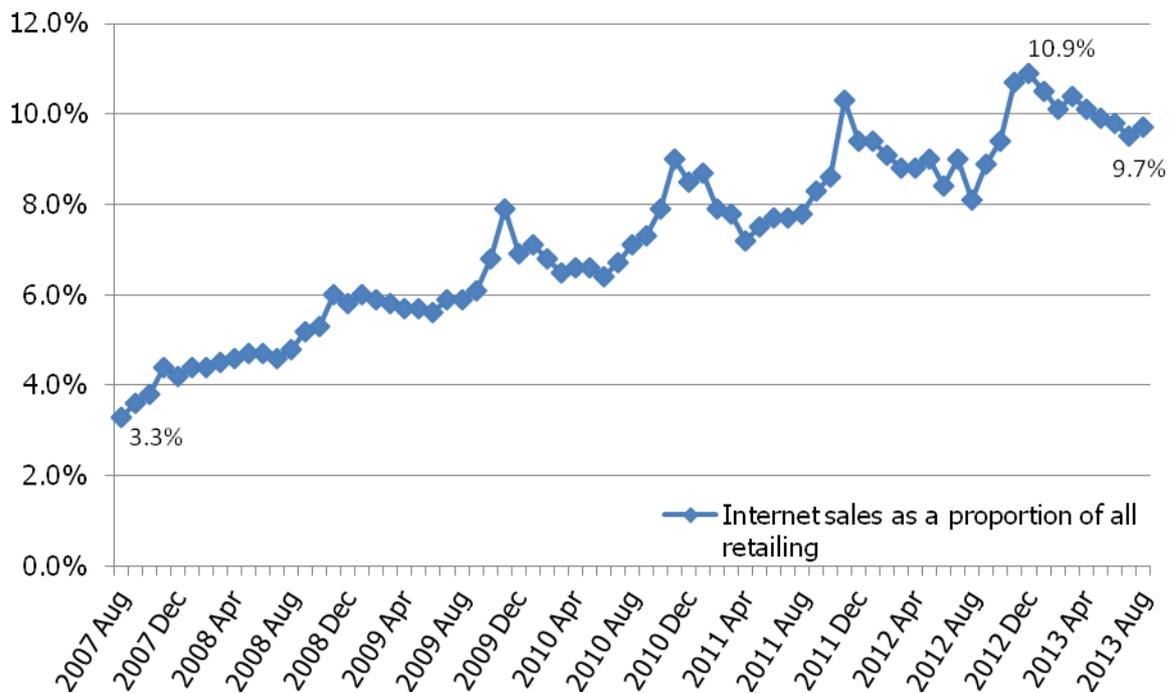
¹⁷ Experian Retail Planner Briefing Note 11, October 2013



non-store sales in the UK is estimated £39.5 billion in 2013, with internet sales at £32.1bn and non internet sales (mail order, market, catalogue) at £7.3bn.¹⁸

2.26 The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers in 2012 including Amazon UK (16%), Shop Direct (5%), and Next (4%)¹⁹. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent on the high street or at retail parks.

Figure 2.1: Internet Sales as a Proportion of All Retailing



Source: 'Retail Sales,' Office for National Statistics, August 2013

2.27 The growth in internet as a sales medium has been enabled by the increase in access to the internet by households, which has reportedly²⁰ risen from 57% at 2006, to 77% at 2011, 80% at 2012 and 83% in 2013. A total of 21 million households in Great Britain now have internet access, an increase of 7.1 million since 2006. Experian (2013) identify that there are 52.7% internet users in the UK, representing 84.1% of the population.

¹⁸ 'E-Commerce,' Mintel, July 2013

¹⁹ 'E-Commerce,' Mintel, July 2013

²⁰ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013



- 2.28 Office for National Statistics (ONS) data²¹ indicates that the number of people using the internet to purchase goods continues to rise, with 72% of the UK population purchasing products over the internet in 2013, compared to 53% in 2008. The most popular online purchases were clothes/sports goods, with 47% of internet users buying these items. In addition, 44% of users bought household goods and 21% bought food or groceries. Additional research conducted by the Interactive Media in Retail Group (IMRG) and analysts Capgemini²² indicates that British shoppers spent £5.8 billion online in August 2012, a year-on-year growth of 11%. IMRG also states that all key retail sectors experienced improvements in sales between July 2011 and July 2012, particularly in the health and beauty (+30%), electrical (+30%) and gifts (+27%) sectors.
- 2.29 In addition, the proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with access via the new 4G spectrum. The ONS states that access to the internet using a mobile phone more than doubled between 2010 and 2013, from 24% to 53%. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store is also increasing in popularity, with the service accounting for a fifth of John Lewis internet orders. Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. Such multi-channelling development strategies are actually driving demand for traditional outlets, whereby retailers are using bricks and mortar store as a showroom for their products with service locations for collection and drop off points for their online orders.
- 2.30 With regard to foodstore operators, food accounts for 20.5% of all internet sales, which equates to 3.1% of all food retailing²³. Verdict's research identifies that, with the exception of Morrisons (subject to a deal with Ocado to allow them to trade online), major retailers have seen their online business grow as online shopping has increased and, as a result, the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Colliers noting that the operator has a reported 48% online grocery market share. The grocery market is focusing on multi-channel retailing as a main driver to increased sales, with Tesco's expansion into click and collect format for its non-food items at 600 stores and Sainsbury's selling over 15,000 products online for local pick up or delivery, as well as Waitrose operating a very successful click and collect system. However, at present foodstore operators prefer to opt to distribute from stores rather than from centralised warehouses (commonly referred to as dark stores). However, this may change over time if pressure on stores becomes too much whereby

²¹ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013

²² 'IMRG Capgemini E-retail Sales Index', September 2012

²³ 'Shop Expansion and the Internet', CBRE, May 2012



operators may decide to move to centralised warehousing which would ultimately reduce demand for retail floorspace.

2.31 It is evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years. However, it will be difficult to understand the true impact as the current economic downturn is also having a significant impact on rental levels. Having said that, it would appear that the smaller the centre, the greater the impact will be felt from online retailing. Within small shopping centres (sized between 5,000 sq.m and 20,000 sq.m), including those in market towns, it is likely that the growth of online shopping could reduce turnover notwithstanding any future growth in disposable income.

2.32 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing will not replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts. For example, Ellis Bingham has installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet as well as through actual footfall. Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer this can only be achieved through a well considered multi-channelling strategy.

Conclusion

2.33 In conclusion the retail market has undergone significant changes in recent years, which has been significantly affected by the wider economic conditions facing the UK, which has led to a marked decline in established town centre as well as other retail formats. This has principally been caused by the decline in available expenditure due to suppressed disposable incomes. However, 2013 has seen an increase in confidence mainly driven by an improved economic outlook driven by improved employment and available of credit which has seen improved expenditure growth rates forecast moving forward, although still below pre-recession levels they are significantly higher than those recorded over the last 3 to 4 years. The growth in online sales has also impinged on the need for new tangible floorspace in recent years, however with improved growth forecast and improving retailing sales coupled with the retail industry embracing innovative multi-channelling strategies. This provides an opportunity for town centres to widen their audience in the future and embrace digital techniques.



To deliver this it will be critical that town centres are flexible enough to both embrace digital solutions whilst also providing appropriate and well managed retail floorspace that can showcase products and services. Only by adopting a well considered holistic strategy will the future vitality and viability be secured.



3.0 Planning Policy and Guidance Overview

Introduction

3.01 This section reviews the relevant local and national planning documentation of relevance to this Study.

'Ensuring the Vitality of Town Centres' National Planning Policy Guidance

3.02 The Ensuring the Vitality of Town Centres National Planning Policy Guidance (NPPG) replaces the previous Practice Guidance providing a more concise document; however, the objectives remain comparable whereby the NPPG promotes that local planning authorities should plan positively and support town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users. The NPPG requires LPAs to fully assess and plan to meet needs for main town centre uses by adopting a town centre first approach. Paragraphs 2 and 3 of the NPPG confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). The NPPG also confirms that any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.

3.03 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area of over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses;
- the assessment of the scale of development that a town centre can accommodate;
- the timeframe for new that new retail floorspace can be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.

3.04 Paragraph 5 identifies key indicators for assessing the health of a centre that can be monitored over time. The NPPG advises that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but can involve measurements such as improved public



realm, parking, and accessibility and other partnership mechanisms. Paragraph 7 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

- 3.05 The NPPG maintains the town centre first policy through the sequential test, with paragraph 9 requiring a thorough assessment of the suitability, viability and availability of locations when plan making with the consideration of sites linked to the forecast of future need and the type of land needed to accommodate main town centre uses. Paragraph 32 retains the requirement to consider both quantitative and qualitative need in planning to meet the need for main town centre uses.

Planning for Town Centres: Practice Guidance on Need, Impact and the Sequential Approach

- 3.06 The Practice Guidance also confirms that an up to date assessment of the need for additional or replacement floorspace to accommodate town centre uses is a fundamental component of the evidence base to underpin policy making. Paragraph 3.2 indicates that both quantitative and qualitative need will have a role to play in reaching an overall judgement about the scale and form of development which should be planned for and facilitated through development plans. Quantitative need is identified as being that which arises as a result of forecast expenditure growth (either through population growth or increases in spending), or by imbalance between the existing facilities and the current level of available expenditure in an area. Qualitative need includes that which is related to customer choice, the appropriate distribution of facilities and the needs of those living in deprived areas.
- 3.07 Paragraph 3.4 of the Practice Guidance sets out the five key stages which will underpin an assessment of quantitative retail need, these being:
- the definition of the catchment/study area;
 - the assessment of current/future spend;
 - the assessment of current shopping patterns and market shares;
 - the comparison of current and forecast turnover with existing floorspace; and
 - the identification of future expenditure capacity and need for new floorspace.



The Portas Review - An Independent Review Into the Future of Our High Streets

- 3.08 The Portas Review (December 2011) is an independent review undertaken by Mary Portas into the state of Britain's high streets and town centres. The review considers the reasons why retail spending on the high street is falling, why there has been a decline of Britain's high streets, and the benefits that can be brought about through the protection of Britain's high streets. Portas puts forward 28 recommendations including actions that Government, businesses and other organisations should take in order to create diverse, sustainable high streets where retailers can thrive.
- 3.09 The Government released a response to the Portas Review in March 2012. It acknowledges that in response to the challenges facing town centres, namely out of centre retail development and online retailing, the high street will have to offer something new and different in order to create a diverse and competitive environment. In its response, the Government accepts the majority of recommendations put forward in the Portas Review, including: the implementation of Town Teams (described as a 'visionary, strategic and strong operational management team for high streets'); the provision of funding to pilot areas judged to have the best ideas for improving their town centres and high streets; investing in Business Improvement Districts; and support for a new National Market Day. The Government's response seeks to encourage areas to think creatively about how their town centres can be improved in order to entice people back including through the redesign of high streets and promoting the evening and night time economy.

Other Relevant Reports

- 3.10 This section reviews the relevant studies and master plans which have been conducted in the City of Stoke-on-Trent, including other retail and leisure reports.

North Staffordshire Retail & Leisure Study 2005-2021

- 3.11 The joint Study was completed by Savills in August 2005, with the study area covering both Newcastle-under-Lyme and Stoke-on-Trent. It assessed the quantitative and qualitative need for convenience and comparison retail goods and leisure facilities in the period between 2005 and 2021. A telephone survey of 1,500 households was undertaken across 11 zones, as well as an in-street and business survey. It should be noted that this WYG Retail and Leisure Study will replace the 2005 Savills Study.



- 3.12 The Study identified that, overall, there was a high retention rate of food and non-food goods expenditure within the study area, with rates of 75% recorded in the clothing and footwear sector, 79% for bulky goods and 96% for non-food shopping. The primary main food shopping destinations from the household survey were identified as being in Longton town centre (including Tesco), Tunstall town centre (including Asda), Morrisons at Newcastle-under-Lyme and Morrisons at Festival Park.
- 3.13 Health check assessments were also conducted for each of the main centres and included a review of the diversity of uses, vacancy levels and shopping rental values. The Study also undertook an appraisal of the local centres within the study area and recorded the presence of several key shops and other services in these locations, namely a greengrocers store, market, ATM, newsagent, Post Office, pharmacy, hot food take away, launderette, off-licence, hairdressers and beauty salon.

Stoke Town Retail & Leisure Study

- 3.14 The GVA Study was completed in November 2011 and reviewed local shopping and leisure patterns in the town centre, as well as identifying the potential requirements for new floorspace in Stoke town. It also provided a robust evidence base which enabled the proposed development options which were outlined in the Stoke Town Masterplan document (see below) to be tested.
- 3.15 The Study concluded that, based on the assumption of a constant market share (based on the current market share performance of the town), there would be limited capacity for any new convenience floorspace in Stoke town centre to 2026. However, if there was an adjustment in market share and/or trading patterns, it identified that there could be the potential for another mainstream foodstore in Stoke Town which could complement and complete with the existing edge-of-centre Sainsbury's and the out-of-centre Tesco. The Study focused on assessing the potential for a new c. 4,000 sq.m net foodstore on the former Spode Works site in an edge-of-centre location in Stoke Town. It identified that the potential turnover of the store would be approximately £31.2m and that it would generate significant qualitative benefits and not cause any significant adverse impacts on any centre. GVA identified that an increase in the main food market share to 70% is the likely maximum retention level that Stoke Town Centre could realistically achieve. The Study also recognised that a new store in the south of Stoke Town would also deliver a number of positive benefits, for example by reducing travel distances and providing enhanced competition and choice for local residents.
- 3.16 The leisure assessment of the Study concluded that there was a good provision of facilities in the study area. The survey identified that 48.0% of local residents regularly visited the cinema, notably to the Odeon Cinema at Festival Park and the Vue Cinema at Newcastle-under-Lyme. It is acknowledged that it is likely that the proposals for a multiplex cinema at the City Sentral development in Stoke City Centre (referred to in the Study as the East/West scheme) will remove the potential prospect of



creating new cinema provision in Stoke Town Centre. The Study also recommends the development of a new centrally located gym facility in Stoke Town and that the Council should focus on managing the existing concentration of evening economy uses in the centre.

Longton Retail & Leisure Study

- 3.17 The Study was completed by GVA in November 2010 and reviewed current shopping and leisure patterns within Longton and identified potential requirements for new floorspace in the town centre.
- 3.18 The baseline capacity modelling of the Study, which assumed a constant market share, identified that there was a small convenience floorspace requirement of only 250 sq.m gross in 2018 and 580 sq.m gross in 2021. However, it is recognised that the new Tesco Extra store at Hanley is likely to attract some local residents and thereby reduce the over trading position of the existing Tesco Extra store in Longton. The Study concluded that there may be a qualitative need for a new foodstore in the town centre, though it was recognised that it would have to offer a full range of goods in order to effectively compete with the existing Tesco store. It also recognised that an alternative approach may be to enhance the existing offer in Longton, for example by improving the leisure offer and the environmental quality of the centre. The Study identified that there is a quantitative need, based on a constant market share, of 2,876 sq.m gross of new comparison floorspace by 2018 and 6,635 sq.m gross by 2026. It concluded by noting that Longton should focus on attracting new quality national multiple clothing retailers to the centre.

Stoke Town Masterplan

- 3.19 The Masterplan was completed by a team led by URBED in October 2011 and outlines a 20-year strategic vision for the regeneration of the town centre. Although the Masterplan has not been formally adopted as part of the Stoke Council statutory planning policy process, it does establish a broad framework to improve the former Spode Works site and the wider town centre. It identifies that Stoke Town is in decline and that in order to address this, it needs to adapt to a new role as the recognised station and university quarter of the City of Stoke-on-Trent. The Study makes reference to the adverse impact of the closure of the former Spoke Works in 2009, noting that it now offers an opportunity to attract people into the town and reanimate the site. It identifies that a new medium-sized foodstore could be built on the open land to the rear of the site and this would also help to fund a new footbridge over the A500. The Masterplan also emphasises the opportunities which are available to consolidate activity into the heart of the town centre and create new facilities which will attract people back into Stoke Town.



Longton Masterplan

3.20 The Masterplan was completed in October 2011 by Urban Initiatives and although it does not form part of the current Stoke-on-Trent Local Plan, it provides a long-term strategy to improve the town centre. It identifies a series of short, medium and long term objectives to help renew the town centre and identifies opportunities to enhance the wider local area. In particular, it emphasised the importance of introducing more activity in Longton, creating new employment schemes, re-using vacant buildings and improving the town's image. In terms of retail and leisure objectives, the Masterplan proposals included enhancing the shopping setting and the local environment. It identified that the owners of the indoor Longton Exchange would be encouraged to invest in the shopping centre, with the local streetscape to be improved through the resurfacing of footways and introduction of new street furniture, lighting and planting. It also identified the potential to create two new public spaces, improving connections through the town centre to the Gladstone Pottery museum and also enhancing the links from the Tesco store, indoor market and Longton Exchange.



4.0 Original Market Research

Introduction

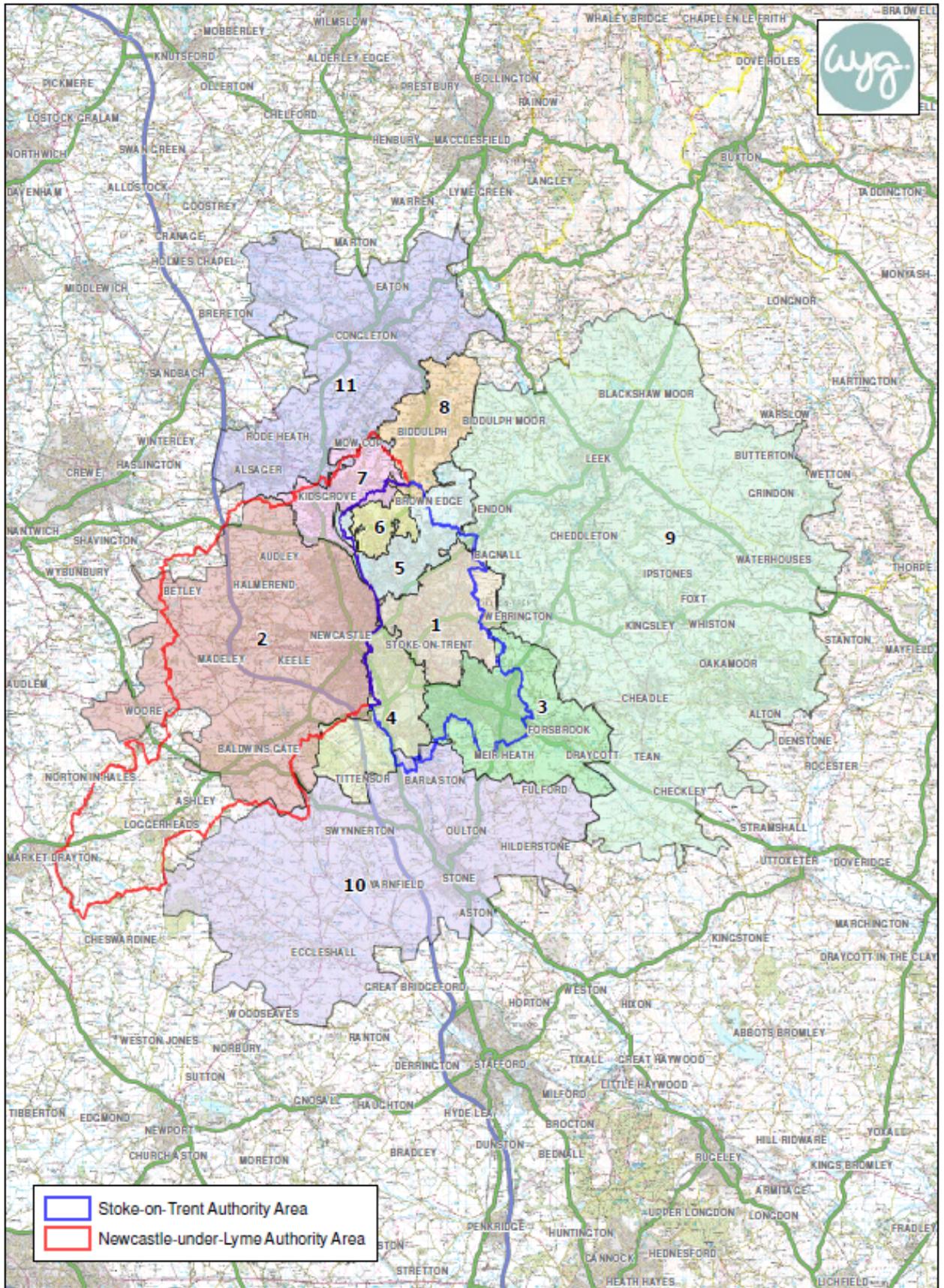
- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.
- 4.02 A key requirement of this study is the detailed understanding of shopping patterns in terms of the use of the city centre, town centres and local centres and the identification of the centre's catchment area. WYG commissioned specialist market researchers NEMS Market Researchers Limited (NEMS) to undertake a comprehensive household telephone survey to identify consumer's habits and preferences in the Study Area. WYG also reviewed the previously commissioned household survey results which were also undertaken by NEMS as part of the 2005 North Staffordshire Retail Study.

Study Area

- 4.03 Drawing on the empirical evidence that was collated for the previous Study in 2005, an important element of this Retail and Leisure Study is to review previous shopping patterns within the local area to highlight any changes which have occurred since 2005 and ascertain any impacts on behaviour which may have arisen as a result of the wider UK economy, and also as a result of retail led development in the vicinity of the Study Area.
- 4.04 WYG adopted the same Study Area as the previous 2005 Study which comprises 11 survey zones. **Table 4.1** below sets out the postcode areas which comprise each zone. A map of the catchment is provided below at **Figure 4.1** and it shows the geographical extent of the Study Area. The zones were defined according to postcode sector geography to assist in the collection of data for the purposes of a telephone based Household survey, rather than precisely representing the shopping catchment areas of the respective areas. The Study considers shopping behaviour within the wider area and in other local authorities, notably Newcastle-under-Lyme, Cheshire East, Staffordshire Moorlands and Stafford.



Figure 4.1: Study Area and Zones for Stoke-on-Trent Retail and Leisure Study



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Table 4.1: Postcodes by Survey Zone

Survey Zone	Postcode Sectors
Zone 1: Stoke City Centre	ST 1 1, ST 1 2, ST 1 3, ST 1 4, ST 1 5, ST 1 6, ST 2 0, ST 2 7, ST 2 8, ST 2 9, ST 4 2, ST 4 3
Zone 2: Newcastle-under-Lyme	CW 3 9, ST 5 0, ST 5 1, ST 5 2, ST 5 3, ST 5 4, ST 5 5, ST ST 5 6, ST 5 7, ST 5 8, ST 5 9, ST 7 8
Zone 3: Longton and Fenton	ST 3 1, ST 3 2, ST 3 3, ST 3 4, ST 3 5, ST 3 6, ST 3 7, ST11 9
Zone 4: Stoke	ST 4 1, ST 4 4, ST 4 5, ST 4 6, ST 4 7, ST 4 8
Zone 5: Burslem	ST 6 1, ST 6 2, ST 6 3, ST 6 4, ST 6 7, ST 6 8
Zone 6: Tunstall	ST 6 5, ST 6 6
Zone 7: Kidsgrove	ST 7 1, ST 7 4
Zone 8: Biddulph	ST 8 6, ST 8 7
Zone 9: East Rural	ST 9 0, ST 9 9, ST10 1, ST10 2, ST10 3, ST10 4, ST13 5, ST13 6, ST13 7, ST13 8
Zone 10: South Rural	ST12 9, ST15 0, ST15 8, ST21 6
Zone 11: North Rural	CW12 1, CW12 2, CW12 3, CW12 4, ST 7 2, ST 7 3

Household Telephone Survey

- 4.05 In July 2013 a survey of 1,300 households was undertaken within the Study Area, which comprises all of the City of Stoke-on-Trent and Newcastle-under-Lyme Council areas and also extends into several neighbouring authorities, including Cheshire East, Stafford and Staffordshire Moorlands. The household surveys by NEMS were undertaken by 150 respondents in the four study zones (these being Zones 1, 2, 3 and 9) which have a substantially greater population than the remaining seven zones, with 100 surveys undertaken in each of the remaining zones.
- 4.06 Zones 1, 3, 4, 5 and 6 cover the City of Stoke-on-Trent City administrative area, while Zones 2, 7, 8, 9, 10 and 11 are located outside the City of Stoke-on-Trent and cover neighbouring authority areas.
- 4.07 A full copy of the results of the survey is contained in **Appendix 1**.
- 4.08 A key element of this Retail Study is to obtain a detailed understanding and review of the catchment and influence of existing retail provision within the City of Stoke-on-Trent. This section considers the market share of existing facilities based on shopping trips rather than the amount of expenditure generated. The analysis of shopping patterns within each of the zones allows for detailed assessments to be undertaken for the various goods identified (e.g. main food, clothing, electrical goods, DIY, recreation, and so on). This can often assist with the identification of any qualitative deficiencies in provision. This analysis of shopping patterns (rather than expenditure flows) allows for equal weight to be given to each category. The results (where possible) of the 2005 survey are compared to the results of the current household survey in order to ascertain whether there have been any significant

changes in shopping patterns over the last eight years and to consider the reasons for any such changes.

Main Food Shopping Patterns

4.09 **Table 4.2** below indicates that all convenience stores situated within the City of Stoke-on-Trent claim a combined market share of 51.4% of all main food shopping trips. The area's market share has declined since the previous study was undertaken in 2005, at which time the main food market share was 56.8% (a decrease of 5.4 percentage points). The Study Area as a whole secures a main food shopping market share of 96.5% which compares to 96.8% in 2005.

Table 4.2: Main Food Shopping Market Share Analysis by Zone (%)

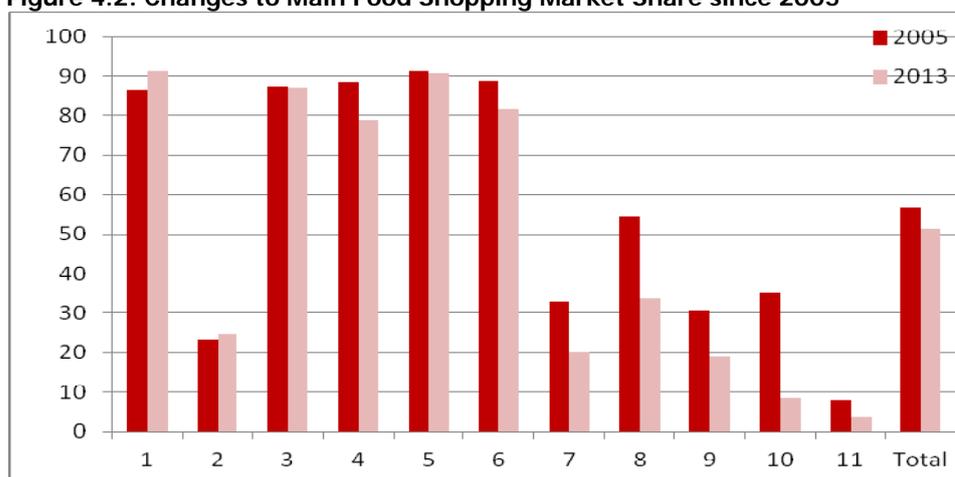
Zone	Market Share (%)		
	2005	2013	Difference
1	86.4	91.1	+ 4.7
2	23.3	24.6	+ 1.3
3	87.2	87.0	- 0.2
4	88.6	78.9	- 9.6
5	91.1	90.6	- 0.5
6	88.9	81.6	- 7.3
7	33.0	20.1	- 12.9
8	54.5	33.6	- 20.9
9	30.4	19.0	- 11.4
10	35.1	8.7	- 26.4
11	8.1	3.6	- 4.5
Total	56.8	51.4	- 5.4

Source: Table 3, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), 2005 market shares adjusted to exclude SFT

4.10 Zones 1, 3, 5 and 6 have a main food shopping market share of more than 80.0%. Each of these zones covers the City of Stoke-on-Trent. The household survey identifies that approximately 91% of respondents from Zones 1 and 5 undertake their main food shop within the City of Stoke-on-Trent. Unsurprisingly, the zones with the highest main food shopping market share are located at the core of the City of Stoke-on-Trent and include the main urban areas including Stoke City Centre. Main food shopping facilities within the City of Stoke-on-Trent attract the lowest market shares from Zones 10 and 11, where the market shares are 8.7% and 3.6% respectively. However, this is to be expected, as Zone 10 covers the north area of Stafford Borough including Stone and Zone 11 covers part of Cheshire East including Congleton. There has been an overall increase in the main food shopping market shares of Zone 1 and 2 since 2005, which could be partly attributed to improvements to convenience goods facilities in Zone 1 including the replacement Tesco store at Clough Street and the conversion of the former Netto store on Victoria Road to an Asda store. However, there has been a decrease to the market share of the majority of zones, particularly Zone 10 where the market share

has decreased by 26.4 percentage points. The Morrisons in Stone which is situated in Zone 10 attracts a substantial market share (45.9%) from this zone. This is a substantial increase since 2005, at which time the Morrisons attracted a market share of 29.9% from Zone 10. **Figure 4.2** illustrates the changes in main food shopping market shares which have taken place in each zone since 2005.

Figure 4.2: Changes to Main Food Shopping Market Share since 2005



Source: Table 3, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), 2005 market shares adjusted to exclude SFT

4.11 Since 2005, there have been improvements to the provision of convenience shopping facilities in the City of Stoke-on-Trent, notably in respect of:

- Zone 1 – A new Tesco store (6,709 sq.m net) opened on the edge of Stoke City Centre on Clough Street in November 2010. This store replaced the former Tesco store located on New Hall/Marsh Street (previously in centre);
- Zone 1 – A former Netto store on Victoria Road outside Fenton town centre was converted into an Asda (1,394 sq.m net) which re-opened in June 2011;
- Zone 5 – A new Aldi store at Leek New Road, Norton comprising a net floorspace of 1,067 sq.m;
- Zone 5 – A former Netto store on Scotia Road outside Tunstall town centre was converted into a 977 sq.m net Asda store which re-opened in June 2011; and
- Zone 6 – A new 299 sq.m net Tesco Express was opened in Great Chell local centre in 2008.

4.12 Outside of the City of Stoke-on-Trent, several former Netto stores have been converted to Asda stores including at Morris Square in Wolstanton (re-opened in August 2011), Springfield Road in Leek (re-opened in June 2011) and Ashbourne Road in Cheadle (re-opened in July 2011). In addition, a new Tesco Express has opened at Church Street in Audley and a Sainsbury's Local has opened on Crewe Road in Alsager.

Table 4.3: Main Food Shopping Market Share (%)

Foodstore	Survey Zone (%)												
	Yr	1	2	3	4	5	6	7	8	9	10	11	Total
Aldi, Leek New Road, Norton	2013	6.0	0.0	0.0	0.0	12.9	1.3	0.0	1.2	2.2	0.0	0.0	2.2
	2005	-	-	-	-	-	-	-	-	-	-	-	-
Morrisons, Festival Park, Stoke-on-Trent	2013	23.6	0.6	3.5	2.4	30.4	8.9	6.2	4.6	6.0	0.0	0.7	8.1
	2005	22.7	1.0	6.1	4.8	29.7	6.7	4.1	11.9	4.1	4.1	0.0	8.7
Sainsbury's, Etruria Road, Stoke-on-Trent	2013	6.1	1.9	0.4	9.5	3.3	3.4	0.0	0.6	0.0	0.6	1.1	2.6
	2005	7.6	1.0	0.5	2.9	8.9	1.1	0.0	0.0	2.1	0.0	0.0	2.4
Tesco Extra, Clough Street, Stoke *	2013	14.8	0.3	0.0	0.0	8.7	0.8	0.0	0.0	0.7	0.0	0.0	3.0
	2005	11.6	0.0	1.0	0.0	4.0	0.0	1.0	2.0	1.5	0.0	0.0	2.4
Tesco Extra, Longton Retail Park, Longton	2013	11.2	3.0	28.3	4.6	0.0	2.0	0.0	0.0	2.2	2.2	0.0	6.8
	2005	10.1	1.0	39.8	4.8	1.0	0.0	0.0	0.0	4.1	0.0	0.0	7.7
Aldi, Meir Retail Park, Meir	2013	3.7	0.0	11.2	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	2.1
	2005	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.1
Tesco, Meir Retail Park, Meir	2013	1.3	0.0	23.0	0.0	0.0	0.0	0.0	0.0	5.4	1.3	0.0	3.9
	2005	1.0	6.3	14.8	6.7	0.0	0.0	0.0	0.0	11.3	7.2	0.0	5.5
Sainsbury's, London Road, Stoke town	2013	0.8	0.9	0.4	25.2	0.0	0.8	0.0	0.0	0.0	0.6	0.0	2.5
	2005	2.5	0.5	2.5	0.5	26.7	0.0	0.0	0.0	1.5	1.0	0.0	2.6
Tesco, Newcastle Road, Stoke-on-Trent	2013	0.0	7.1	2.9	13.7	0.0	0.7	0.6	0.0	0.6	1.7	0.7	3.1
	2005	2.0	8.7	3.6	28.6	2.0	0.0	0.0	1.0	1.0	16.5	0.0	5.4
Asda (former Netto), Scotia Road, Tunstall	2013	2.7	2.3	0.0	0.0	11.5	28.1	9.4	13.3	0.0	0.0	0.0	3.8
	2005	1.0	0.0	0.5	0.0	2.0	1.1	0.0	0.0	0.0	0.0	0.0	0.4
Asda, Scotia Road, Tunstall	2013	2.1	0.3	0.0	0.0	13.9	22.0	2.2	11.3	0.0	0.0	0.5	2.9
	2005	7.6	1.9	1.5	1.0	28.7	74.4	19.6	36.6	1.5	2.1	0.0	12.3
Total	2013	72.3	16.4	69.5	55.4	80.8	68.0	18.4	31.1	17.9	6.3	3.0	41.0
	2005	66.2	20.4	68.9	75.2	76.2	83.3	24.7	51.5	27.8	30.9	0.0	47.5

Source: Table 3, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), 2005 market shares adjusted to exclude SFT
 *Tesco Clough Street was a replacement store to the former Tesco on New Hall Street (now reoccupied by Go Outdoors).

4.13 **Table 4.3** indicates that the foodstores with the largest market share in the City of Stoke-on-Trent are the Morrisons at Festival Park (5,265 sq.m net) and the Tesco Extra at Longton Retail Park (6,265 sq.m net) which attract market shares of 8.1% and 6.8% respectively. The market share of the Asda (former Netto) at Scotia Road, Aldi at Meir Retail Park, Tesco Extra at Clough Street and Sainsbury's at

Etruria Road have increased since 2005. Whilst the market shares of the other facilities has decreased. The Asda at Scotia Road in Tunstall has seen the greatest decrease to its market share, from 12.3% in 2005 to 2.9% in 2013 (a decrease of 9.5 percentage points).

Table 4.4: Main Food Shopping Market Shares by Centre

Centre	Market Share (%)		
	2005	2013	Difference
Stoke City Centre	3.6	3.8	+0.2
Stoke Town Centre	3.0	2.8	- 0.2
Longton Town Centre	8.8	7.9	- 1.0
Fenton Town Centre	0.0	0.1	+ 0.1
Tunstall Town Centre	12.7	2.9	- 9.8
Burslem Town Centre	0.2	0.3	+ 0.1
Meir Town Centre	0.1	0.1	0.0
Local Centres	2.6	4.1	+ 1.5
Festival Park/Etruria Road Area	11.1	10.7	-0.4
Victoria Road Area	0.4	2.1	+ 1.7
Out-of-Centre (undefined)	14.4	16.7	+ 2.3
Total	56.8	51.4	- 5.4

Source: Table 3, Appendix 5 (2013 Study) and Appendix 2 (2005 Study).

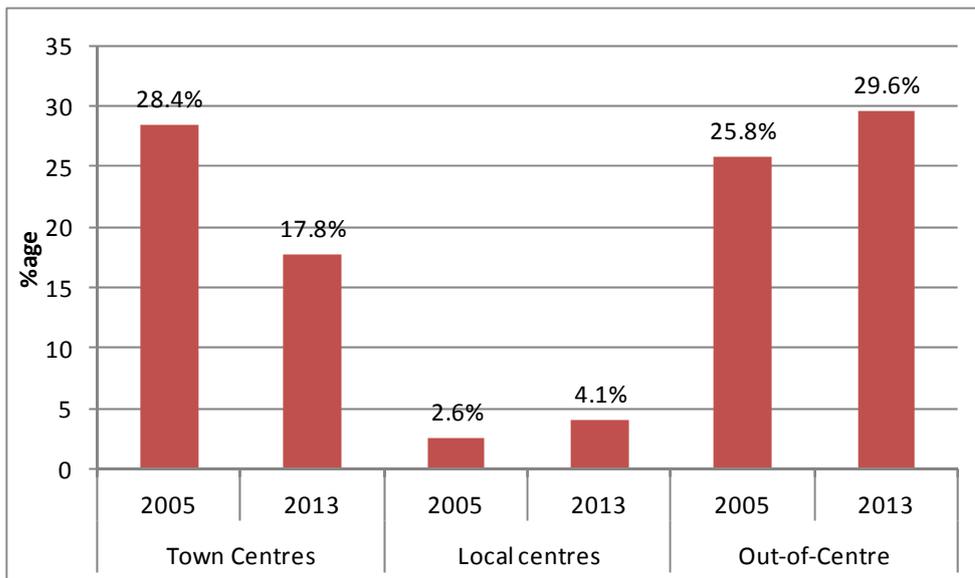
4.14 **Table 4.4** shows that the out-of-centre facilities in the City of Stoke-on-Trent are attracting a greater main food shopping market share than each defined centre in the City of Stoke-on-Trent. The Festival Park/Etruria Road area attracts a main food shopping market share of 10.7% (which is an decrease of 0.4 percentage points since 2005), facilities in the Victoria Road area attract a main food market share of 2.1% (which is an increase of 1.7 percentage points since 2005) and other out-of-centre facilities attract a market share of 16.7% (which is an increase of 2.3 percentage points since 2005). Therefore, in total, these out-of-centre facilities achieve a main food shopping market share of 29.5% (previously 25.9%). When looking at the main food market shares of the defined city and town centres, Longton town centre attracts the highest main food shopping market share of 7.9%, followed by Tunstall which attracts a market share of 2.9% and Stoke Town which attracts a market share of 2.8%. Stoke City attracts a main food market share of 3.8%, which is a slight gain on the 3.6% recorded in 2005, although this includes the now edge of centre Tesco at Clough Street. The gain is can in part be attributed to the relocation of the Tesco store from New Hall Street which is within the city centre boundary, to Clough Street which is now in a edge of centre location to the city centre. Fenton town centre and Meir town centre attract the lowest main food market shares of 0.1% each. This is due to the limited main food shopping provision in these centres. Since 2005, the centre which has seen the greatest decrease in its main food shopping market share is Tunstall, where the market



share has decreased by 9.8 percentage points. This could be attributed to the decrease in the market share of the Asda store in Tunstall, which has coincided with an increase to the market share of the out-of-centre Asda store (former Netto) on Scotia Road.

4.15 **Figure 4.3** illustrates the market shares achieved by facilities located in the city and town centres, local centres and out-of-centre locations in the City of Stoke-on-Trent. It is evident that since 2005, the cumulative main food market share of the town centres in the City of Stoke-on-Trent has decreased (by 10.6 percentage points). However, during this same period the cumulative main food market share of out-of-centre facilities has increased (by 3.8 percentage points). In terms of the cumulative main food market share of the local centres in the City of Stoke-on-Trent, the market share has increased by 1.5 percentage points.

Figure 4.3: Changes to Main Food Shopping Market Share since 2005 by Centre



Source: Table 3, Appendix 5 (2013 Study) and Appendix 2 (2005 Study). Town centres include edge of centres facilities

4.16 WYG note that from the results of the telephone household survey, we found that 86.0% of main food trips were undertaken by private car (driver/passenger), with just 5% using a local bus service, 7% walking. When we compare this to the results of 2005, the result was 86.6% showing that there has been a negligible reduction in the dependence of car usage for main food shopping trips in the Study Area, with the proportion of trips by bus and walking remaining unchanged since 2005.

Top-Up Food Shopping Patterns

4.17 **Table 4.5** below provides a breakdown of the 'top-up' food shopping market share achieved by facilities within the City of Stoke-on-Trent by Zone. The total top-up shopping market share of facilities within the City of Stoke-on-Trent is 48.6%. This is an increase of 3.4 percentage points since 2005, when the top-up market share was 45.2%.

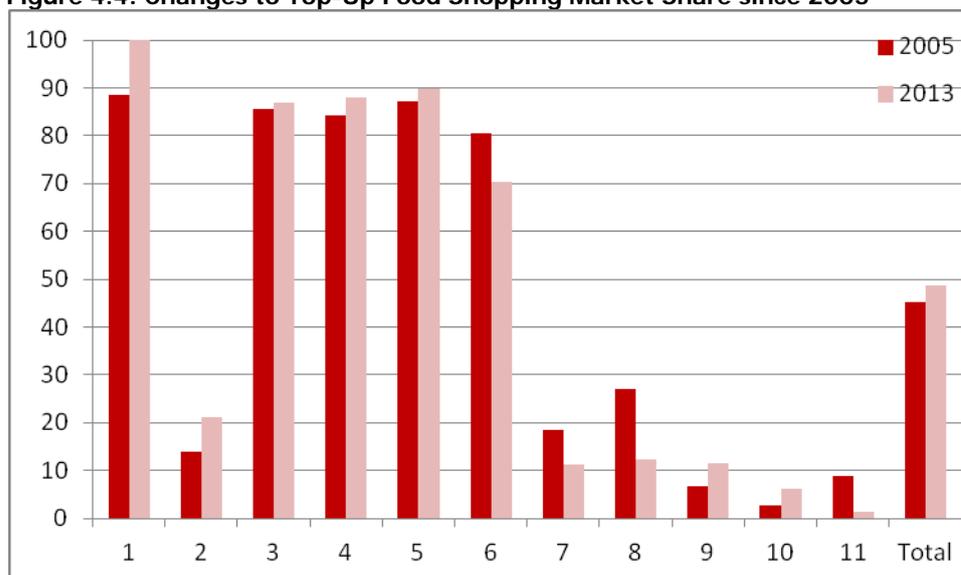
Table 4.5: Top-up Food Shopping Market Share Analysis by Zone (%)

Zone	Market Share (%)		
	2005	2013	Difference
1	88.5	100.0	+ 11.5
2	13.8	21.3	+ 7.4
3	85.7	87.0	+ 1.3
4	84.3	88.1	+ 3.8
5	87.3	89.9	+ 2.6
6	80.4	70.2	- 10.2
7	18.4	11.3	- 7.1
8	26.9	12.4	- 14.5
9	6.8	11.6	+ 4.8
10	2.7	6.2	+ 3.5
11	8.8	1.5	- 7.3
Total	45.2	48.6	+ 3.4

Source: Table 3, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

4.18 The top-up food shopping market share attracted by facilities within the City of Stoke-on-Trent is greater than 80% in Zones 1, 3, 4, and 5, which is to be expected given that these zones are located within the City of Stoke-on-Trent and include the main urban areas including Stoke City. Indeed, top-up food shopping facilities located in the City of Stoke-on-Trent attract a 100% market share from expenditure generated in Zone 1, which includes Stoke City. The zone with the lowest top-up shopping market share is Zone 11 (1.5%). This is unsurprising as this zone is located at the northern extent of the Study Area and covers Cheshire East including Congleton. **Figure 4.4** illustrates the changes to top-up shopping market shares since 2005.

Figure 4.4: Changes to Top-Up Food Shopping Market Share since 2005



Source: Table 3, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

4.19 **Table 4.6** shows the top-up food shopping market shares achieved by the city, town and local centres, as well as out of centre locations in the City of Stoke-on-Trent.

Table 4.6: Top-up Food Shopping Market Shares by Centre

Centre	Market Share (%)		
	2005	2013	Difference
Stoke City Centre	3.8	5.1	+ 1.3
Stoke Town Centre	3.0	3.1	+ 0.1
Longton Town Centre	5.7	3.5	- 2.2
Fenton Town Centre	1.3	0.7	- 0.6
Tunstall Town Centre	5.0	1.6	- 3.4
Burslem Town Centre	1.1	1.2	+ 0.1
Meir Town Centre	0.3	0.5	+ 0.2
Local Centres	15.6	16.1	+ 0.5
Festival Park/Etruria Road Area	2.5	3.1	+ 0.6
Victoria Road Area	0.4	2.5	+ 2.1
Out-of-Centre (undefined)	6.5	11.2	+ 4.7
Total	45.2	48.6	+ 3.4

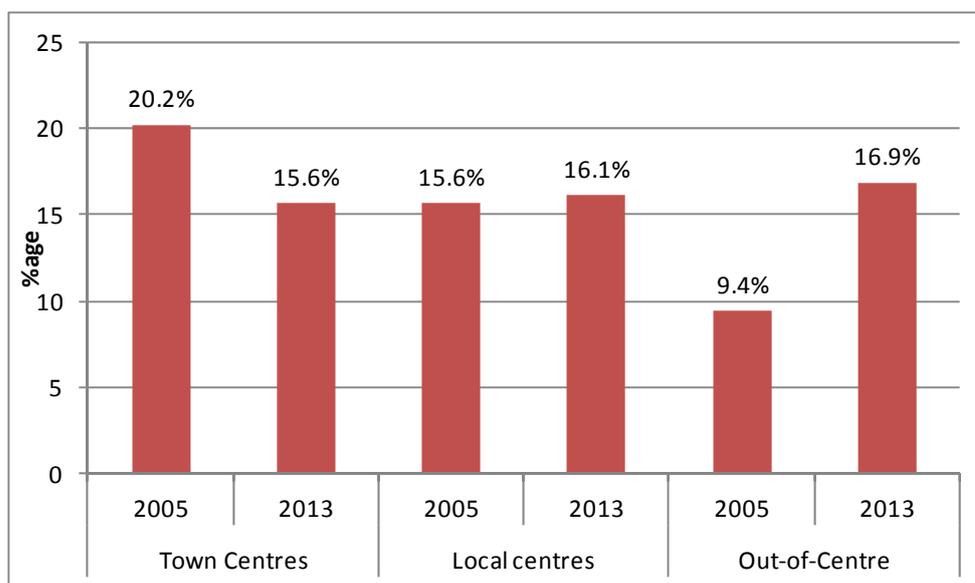
Source: Table 3, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

4.20 Of the city and town centres, Stoke City centre attracts the highest market share of 5.1%, followed by Longton town centre (3.5%) and Stoke Town (3.1%). Meir town centre attracts the lowest top-up market share of 0.5%. Cumulatively, the local centres attract a top-up shopping market share of 16.1%, which is unsurprising given their role in catering for everyday shopping needs. It is evident that out-of centre locations attract a high proportion of top-up shopping trips, with the Festival



Park/Etruria Road area achieving a market share of 3.1% (an increase of 0.6 percentage points since 2005), the Victoria Road area attracting a market share of 2.5% (an increase of 2.1 percentage points since 2005) and other out-of-centre facilities attracting a market share of 11.2% (an increase of 4.7 percentage points). **Figure 4.4b** illustrates the changes to top-up shopping market shares in the City of Stoke-on-Trent since 2005 by centre, like main food shopping trips, it shows that the top up food market share for defined town centres has declined since 2005, this is mainly due to the gains made by out-of-centre top up facilities with more limited gains from local centres.

Figure 4.4b: Changes to Top-Up Shopping Market Share since 2005 by Centre



Source: Table 3, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT. Town centres include edge of centres facilities

Summary

4.21 Whilst the City of Stoke-on-Trent has experienced an improvement in its market share of top-up food shopping since 2005 (by 3.4 percentage points), its main food market share has declined by 5.4 percentage points. Both the main food and top-up market shares of Zone 1, which covers the main urban area of the City of Stoke-on-Trent and includes Stoke City and Fenton, have increased since 2005. Zone 1's main food shopping market share is 91.1% and its top-up shopping market share is 100.0%. This shows that facilities in the City of Stoke-on-Trent retain a high proportion of expenditure generated in the central urban area of the City of Stoke-on-Trent. However, it is evident that out-of-centre facilities are attracting high market shares for both main food and top-up shopping when compared to defined centres. This can be attributed to out-of-centre stores including Morrisons at Festival Park, Sainsbury's at Etruria Road, Tesco at Meir Retail Park, Tesco at Newcastle Road and Asda (former Netto) at Scotia Road, which have the highest main food shopping market shares in the City of Stoke-on-Trent.



Linked Trips

- 4.22 By reviewing a number of questions within the household survey we have been able to review the link between specific foodstores and established town centres. Of the top eleven food destinations set out in Table 4.3, the results show that 18.2% of respondents linked their main food shop with other retail/leisure led activities, with 67.1% stating that they undertook no linked trips. Of those linked trips that were undertaken, 12.6% were to Stoke City Centre, a further 10.6% were to facilities in Longton town centre, 6.3% were to Tunstall town centre, 3.4% were to facilities in Stoke Town centre and 3.3% were to Festival Retail Park. However, only 0.6% of linked trips were to facilities in Fenton town centre and only 0.3% to facilities in Meir town centre, showing their limited wider role.
- 4.23 The results show that some stores have a better propensity for encouraging linked trips whereby the Tesco Extra store at Clough Street facilitated 27.6% of linked trips and 21.7% of shoppers at the Tesco Extra store at Longton Retail Park were undertaking linked trips. Conversely, less than 10% of shoppers using the Aldi at Leek New Road in Norton and the Tesco store at Newcastle Road in Stoke undertook linked trips. The results show that there is less propensity for linked trips from those stores which are located a greater distance from defined centres. For example, the Morrisons at Festival Park attract 13.3% of linked trips and the Sainsbury's at Etruria Road attract 12.1% of linked trips.
- 4.24 In terms of the Tesco Extra store at Clough Street, the results found of those shoppers undertaking linked trips, 76.2% undertook such trips to facilities in Stoke City Centre. Similarly, for the Tesco Extra at Longton Retail Park, of those shoppers undertaking linked trips, 76.3% visited facilities in Longton town centre. The results illustrate the benefits of encouraging foodstore development as close to town centres as possible to encourage the propensity linked trips.

Non-Food Shopping Patterns

- 4.25 The household survey also assessed shopping patterns for a variety of non-food or comparison goods. Such goods include non-bulky goods (clothing and footwear, small household goods, books, CDs and DVDS, recreational and toy goods and chemist goods) and bulky goods (electrical goods, furniture goods and DIY goods).
- 4.26 Facilities within the City of Stoke-on-Trent retain a comparison goods market share of 61.9%. It is not possible to assess the changes to the comparison goods market shares since 2005 as the Household Survey which informed the North Staffordshire Retail Study (2005) did not include directly comparable questions relating to some of the comparison goods categories. Zones 1 and 3, which include the urban areas of Stoke City Centre, Fenton, Longton and Meir town centre, have comparison goods market shares greater than 90%. The facilities within the City of Stoke-on-Trent which attract a high

proportion of comparison goods shopping trips include shops in Stoke City Centre (21.8%), facilities at Festival Retail Park (9.7%) and shops in Longton town centre (7.0%).

Table 4.7: Comparison Goods Market Shares Analysis by Zone (%)

Zone	Market Share
	2013
1	91.6
2	50.9
3	90.0
4	64.6
5	86.7
6	88.7
7	68.0
8	56.2
9	48.7
10	24.8
11	20.9
Total	61.9

Source: Table 25, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

- 4.27 The results shows that Stoke City centre is still the most popular destination in the city whereby it retains 22.3% of the trips undertaken, with the Festival Park retail area the second most popular destination at 14.9%. The third most popular destination was Longton town centre with 8.5% followed by Tunstall town centre (at 4.1%). The results show that Stoke Town, Fenton, Burslem, Meir town centres have more limited comparison goods roles.

Table 4.8: Comparison Goods Market Shares by Centre 2013

Location	Market Share
	2013
Stoke City Centre	22.3
Stoke Town Centre	1.6
Longton Town Centre	8.5
Fenton Town Centre	1.6
Tunstall Town Centre	4.1
Burslem Town Centre	0.7
Meir Town Centre	0.3
Local Centres	1.3
Festival Park/Etruria Road Area	14.9
Victoria Road Area	1.8
Out-of-Centre (undefined)	4.7
Total	61.9

Source: Table 25, Appendix 5 (2013 Study)

Clothing and Footwear

Table 4.9 shows that in terms of shopping for clothing and footwear, facilities in the City of Stoke-on-Trent attract 63.6% of shopping trips. The market share has decreased by 1.7 percentage points since 2005 when 65.3% of such expenditure was retained in the City of Stoke-on-Trent. Zones 1, 5 and 6 have the highest clothing and footwear market shares, which are all greater than 80%.

Notwithstanding this, the market share of each of these zones has decreased since 2005, by 8.5, 8.5 and 5.1 percentage points respectively.

Table 4.9: Clothing and Footwear Market Shares Share Analysis by Zone (%)

Zone	Market Share (%)		
	2006	2013	Difference
1	92.7	84.1	- 8.5
2	27.8	51.5	+ 23.6
3	88.8	77.8	- 11.0
4	64.1	64.3	+ 0.2
5	89.9	81.4	- 8.5
6	91.8	86.6	- 5.1
7	72.6	68.7	- 4.0
8	79.6	65.0	- 14.6
9	58.1	61.7	+ 3.6
10	33.3	27.6	- 5.7
11	25.8	26.2	+ 0.3
Total	65.3	63.6	- 1.7

Source: Table 9, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

- 4.28 **Table 4.9** shows the clothing and footwear market share achieved by each centre in Stoke City. It is evident that Stoke City Centre attracts the greatest clothing and footwear market share of 42.7% (which is an increase of 2.0 percentage points since 2005). Burslem, Fenton and Meir attract the lowest market shares of 0.1% or less. Out-of-centre facilities attract a clothing and footwear market share of 6.4%. Although the market share of the out-of-centre facilities is greater than some of the town centres in the City of Stoke-on-Trent, the market share has decreased from 18.6% in 2005 to 6.4% in 2013 (a decrease of 12.2 percentage points).

Table 4.9: Clothing and Footwear Market Shares by Centre

Centre	Market Share (%)		
	2005	2013	Difference
Stoke City Centre	40.6	42.7	+ 2.0
Stoke Town Centre	1.1	0.9	- 0.2
Longton Town Centre	1.9	7.2	+ 5.2
Fenton Town Centre	0.0	0.1	+ 0.1
Tunstall Town Centre	2.8	5.9	+3.1
Burslem Town Centre	0.0	0.1	+ 0.1
Meir Town Centre	0.2	0.0	- 0.2
Local Centres	0.0	0.3	+ 0.3
Festival Park/Etruria Road Area	17.1	5.6	- 11.5
Victoria Road Area	1.5	0.0	- 1.5
Out-of-Centre (undefined)	0.0	0.8	+ 0.8
Total	65.3	63.6	- 1.7

Source: Table 25, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

Books, CDs, DVDs

4.29 It is evident from **Table 4.10** that 55.0% of shopping trips for Books, CDs and DVDs which originate in the Study Area take place in the City of Stoke-on-Trent. Zones 1, 3, 5 and 6 have market shares greater than 80%. Zones 1 and 6 have the highest market shares, with 93% of Books, CDs and DVDs expenditure from these zones being spent within the City of Stoke-on-Trent. Zone 10 has the lowest market share of 9.2%. This low market share is unsurprising given that the majority of this zone lies outside the City of Stoke-on-Trent and covers the North Stafford area. Shops in Stoke City Centre attract a high proportion of spend on books etc from the Study Area at 36.7%, shops in Tunstall town centre attract a market share of 3.4%, a market share of 2.6% is achieved by the Tesco Extra at Longton Retail Park and a further 2.1% is achieved by shops in Longton town centre. Outside of the City of Stoke-on-Trent, local shops in Newcastle-under-Lyme attract a market share for books etc of 9.2% from the Study Area, local shops in Leek achieve a market share of 4.8%, 4.5% is drawn to local shops in Congleton, local shops in Stone attract a market share of 3.6% and a further 3.5% of expenditure is attracted to the Asda store at Wolstanton Retail Park.

Table 4.10: Books, CD and DVDs Market Shares Analysis by Zone (%)

Zone	Market Share (%)
	2013
1	93.1
2	31.4
3	82.1
4	73.7
5	80.4
6	93.9
7	45.5
8	46.4
9	41.6
10	9.2
11	17.0
Total	55.0

Source: Table 11, Appendix 5 (2013 Study)

Recreational Goods, Toys etc.

- 4.30 In terms of shopping for recreational goods, toys etc, facilities in the City of Stoke-on-Trent in 2013 attract 78.6% of shopping trips. This is the highest market share achieved by facilities within the City of Stoke-on-Trent for any of the eight non-food goods categories. Facilities within the City of Stoke-on-Trent attract over 90% of expenditure on recreational good, toys etc from Zones 1, 3, 5 and 6. The highest market shares are achieved by Zones 1 (98.2%) and 3 (98.4%) which include Stoke City Centre and Longton town centre. The lowest market shares are achieved by Zones 10 (38.1%) and 11 (33.3%). Again, this is unsurprising given that Zone 10 is located at the southern extent of the Study Area and covers rural Staffordshire and Zone 11 is located at the northern extent of the Study Area and covers a rural area of Cheshire East. The facilities in the City of Stoke-on-Trent which achieve the highest market shares for toys, recreational, goods etc include Festival Retail Park in Stoke (20.7%), shops in Stoke City Centre (17.6%), shops in Longton town centre (15.9%), Festival Heights Retail Park in Stoke (6.7%), shops in Tunstall town centre (3.9%) and Phoenix Retail Park in Longton (3.5%). Outside the City of Stoke-on-Trent, the facilities in the Study Area which attract the highest market shares for recreational goods include local shops in Newcastle-under-Lyme (5.0%) and local shops in Leek (3.0%).

Table 4.11: Recreational Goods Market Shares Analysis by Zone (%)

Zone	Market Share (%)
	2013
1	98.2
2	76.0
3	98.4
4	53.8
5	95.9
6	92.8
7	87.1
8	65.5
9	60.4
10	38.1
11	33.3
Total	78.6

Source: Table 15, Appendix 5 (2013 Study)

Chemist Goods

The facilities in the City of Stoke-on-Trent attract 49.4% of chemist goods shopping trips. This is the lowest market share of any of the eight comparison goods categories. The highest chemist goods market share is achieved by Zone 1, which includes Stoke City Centre, at 96.7%. The lowest chemist goods market share is achieved by Zone 11 at 3.8% with this zone including a rural area covering Cheshire East to the north of the City of Stoke-on-Trent. Facilities within the City of Stoke-on-Trent which attract the greatest market share for chemist goods include Stoke City Centre (12.1%), shops in Longton town centre (7.4%) and Festival Retail Park in Stoke City (6.3%). Outside of the City of Stoke-on-Trent, the facilities which attract the highest market share of chemist goods shopping trips from the Study Area include local shops in Newcastle-under-Lyme (11.8%), local shops in Congleton (5.2%) and local shops in Leek (5.2%).

Table 4.12: Chemist Goods Market Shares Analysis by Zone (%)

Zone	Market Share (%)
	2013
1	96.7
2	15.2
3	88.1
4	77.5
5	94.4
6	89.3
7	27.7
8	27.0
9	19.7
10	10.5
11	3.8
Total	49.4

Source: Table 17, Appendix 5 (2013 Study)

Small Household Goods

4.31 Facilities in the City of Stoke-on-Trent attract 58.0% of shopping trips for small household goods (including home furnishings, glass and china items) generated in the Study Area. Again, Zone 1 has the highest market share (91.8%) which is to be expected given that this zone includes Stoke City Centre and Fenton town centre. Zone 11 has the lowest market share (12.4%). The facilities within the City of Stoke-on-Trent which attract the highest small household goods market shares from the Study Area include Stoke City Centre (17.6%), shops in Longton town centre (6.6%), Victoria Road Retail Park in Fenton (4.7%), shops in Tunstall town centre (4.2%) and shops in Fenton town centre (4.1%). Outside the City of Stoke-on-Trent, local shops in Newcastle under Lyme attract the highest market share for small household goods of 8.7%.

Table 4.13: Small Household Goods Market Shares Analysis by Zone (%)

Zone	Market Share (%)
	2013
1	91.8
2	39.8
3	88.7
4	51.2
5	79.7
6	88.8
7	69.4
8	57.8
9	37.0
10	19.8
11	12.4
Total	58.0

Source: Table 13, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

Electrical Goods

4.32 In terms of shopping for electrical goods, facilities in the City of Stoke-on-Trent attract 74.2% of shopping trips undertaken by the population in the Study Area. There are four zones within the Study Area which have a market share greater than 95%. These are Zones 1, 3, 5 and 6, which are located at the centre of the Study Area and include the main urban areas of the City of Stoke-on-Trent. Again, the two zones located at the northern and southern periphery of the Study Area i.e. Zones 10 and 11 achieve the lowest market shares for electrical goods. Festival Retail Park attracts the highest market share for electrical goods of facilities within the City of Stoke-on-Trent of 26.3%. Other facilities in the City of Stoke-on-Trent which attract a substantial market share include shops in Stoke City Centre (11.6%), shops in Longton town centre (9.7%), Festival Heights Retail Park (5.5%) and shops in Tunstall town centre (4.4%). Local shops in Newcastle-under-Lyme attract the greatest market share (5.5%) of facilities which are located in the Study Area but outside the City of Stoke-on-Trent.

Table 4.14: Electrical Goods Market Shares Analysis by Zone (%)

Zone	Market Share (%)
	2013
1	97.5
2	63.4
3	99.5
4	83.9
5	95.4
6	95.6
7	76.9
8	48.4
9	62.8
10	20.9
11	31.3
Total	74.2

Source: Table 19, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

Furniture, Carpets & Floor Coverings

- 4.33 The facilities within the City of Stoke-on-Trent achieve a market share of 59.0% for furniture goods. The highest market share of 95.5% is achieved by Zone 3, which covers the south eastern extent of the City of Stoke-on-Trent and includes Longton and Meir. The lowest market share for furniture goods is achieved by Zone 9 at 17.3%; the majority of this zone lies outside the City of Stoke-on-Trent and covers the Staffordshire Moorlands area. The facilities in the City of Stoke-on-Trent which achieve the greatest market share in terms of furniture shopping trips include Festival Retail Park in Stoke City (10.8%), Stoke City Centre (9.3%), shops in Fenton town centre (7.2%) and shops in Longton town centre (4.4%). Local shops in Newcastle-under-Lyme attract the highest market share (9.2%) in relation to facilities located within the Study Area but outside the City of Stoke-on-Trent.

Table 4.15: Furniture Market Shares Analysis by Zone (%)

Zone	Market Share (%)
	2013
1	91.8
2	48.0
3	95.5
4	71.5
5	88.6
6	88.5
7	68.2
8	39.3
9	17.3
10	23.0
11	18.0
Total	59.0

Source: Table 23, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

DIY & Gardening Goods

- 4.34 In terms of shopping for DIY and gardening goods, facilities located within the City of Stoke-on-Trent attract 57.1% of shopping trips undertaken by the Study Area population. The zone with the highest market share is Zone 3 at 98.6%, which covers an urban area including Longton. In contrast, facilities within the City of Stoke-on-Trent only attract a market share of 3.9% from Zone 11. This is due to the zone's position at the northern extent of the Study Area. The B&Q at Meir Retail Park (21.0%) and the B&Q at Festival Retail Park (17.1%) attract the highest DIY goods market share of those facilities located within the City of Stoke-on-Trent, meaning that cumulatively these two B&Q stores attract 66% of the DIY and gardening goods expenditure which is retained within the City of Stoke-on-Trent. As such, there may be a need to increase competition in this sector. Outside the City of Stoke-on-Trent, notable DIY goods market shares are achieved by Homebase at Brook Lane in Newcastle-under-Lyme (6.0%), B&Q at Jamage Industrial Estate in Talke Pits (5.4%) and Homebase at Wolstanton Retail Park in Newcastle-under-Lyme (4.6%).

Table 4.16: DIY Goods Market Shares Analysis by Zone (%)

Zone	Market Share (%)
	2013
1	91.3
2	37.6
3	98.6
4	59.8
5	87.7
6	74.0
7	43.2
8	59.3
9	43.3
10	28.9
11	3.9
Total	57.4

Source: Table 21, Appendix 5 (2013 Study) and Appendix 2 (2005 Study), adjusted to exclude SFT

Market Share Retention by Zone

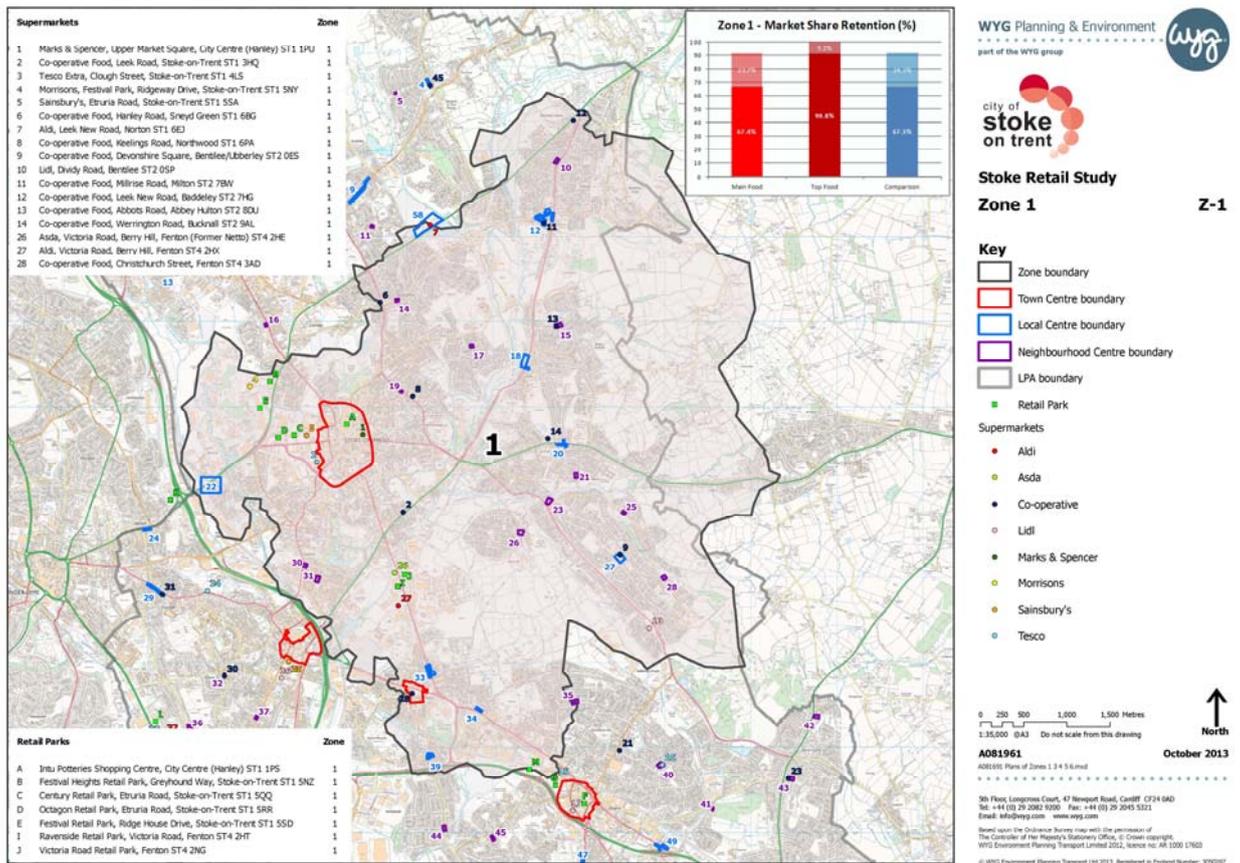
- 4.35 We have undertaken further analysis of the market shares of the zones located within the City of Stoke-on-Trent i.e. Zones 1, 3, 4, 5 and 6, in order to understand the level of expenditure retained within each of these zones and within the City of Stoke-on-Trent.

Zone 1

- 4.36 Zone 1 is located at the centre of the City of Stoke-on-Trent and includes Stoke City Centre and Fenton town centre. As detailed at **Figure 4.5**, there is a high retention of top-up food shopping trips in this zone, with the zone retaining a market share of 90.8% of top-up food shopping trips generated in this zone. The retention of main food shopping trips is slightly less (67.4%), however, this is still considered to be a good level of retention. Facilities outside of Zone 1 to which a notable proportion of main food goods shopping trips are leaked include the Tesco Extra store at Longton (11.2%), the Asda store (former Netto) at Kyme (4.0%), the Asda store at Wolstanton Retail Park (3.8%) and the Aldi store at Meir Retail Park (3.7%). 67.3% of comparison goods shopping trips originating in Zone 1 are retained in this zone. This is the highest comparison goods market share retention of any of the zones in the City of Stoke-on-Trent and can be attributed to the strong representation of national multiple comparison goods retailers in Stoke City. There is a notable proportion of comparison goods expenditure leakage out of Zone 1 to facilities in Longton (14.9%) (Zone 3), Newcastle-under-Lyme (3.4%) (Zone 2), Stoke Town (2.7%) (Zone 4) and 2.2% to OOC facilities in Meir (Zone 3). The results found that there nominal (4.3%) leakage of comparison goods to facilities outside the Study Area.



Figure 4.5: Zone 1 – Market Share Retention



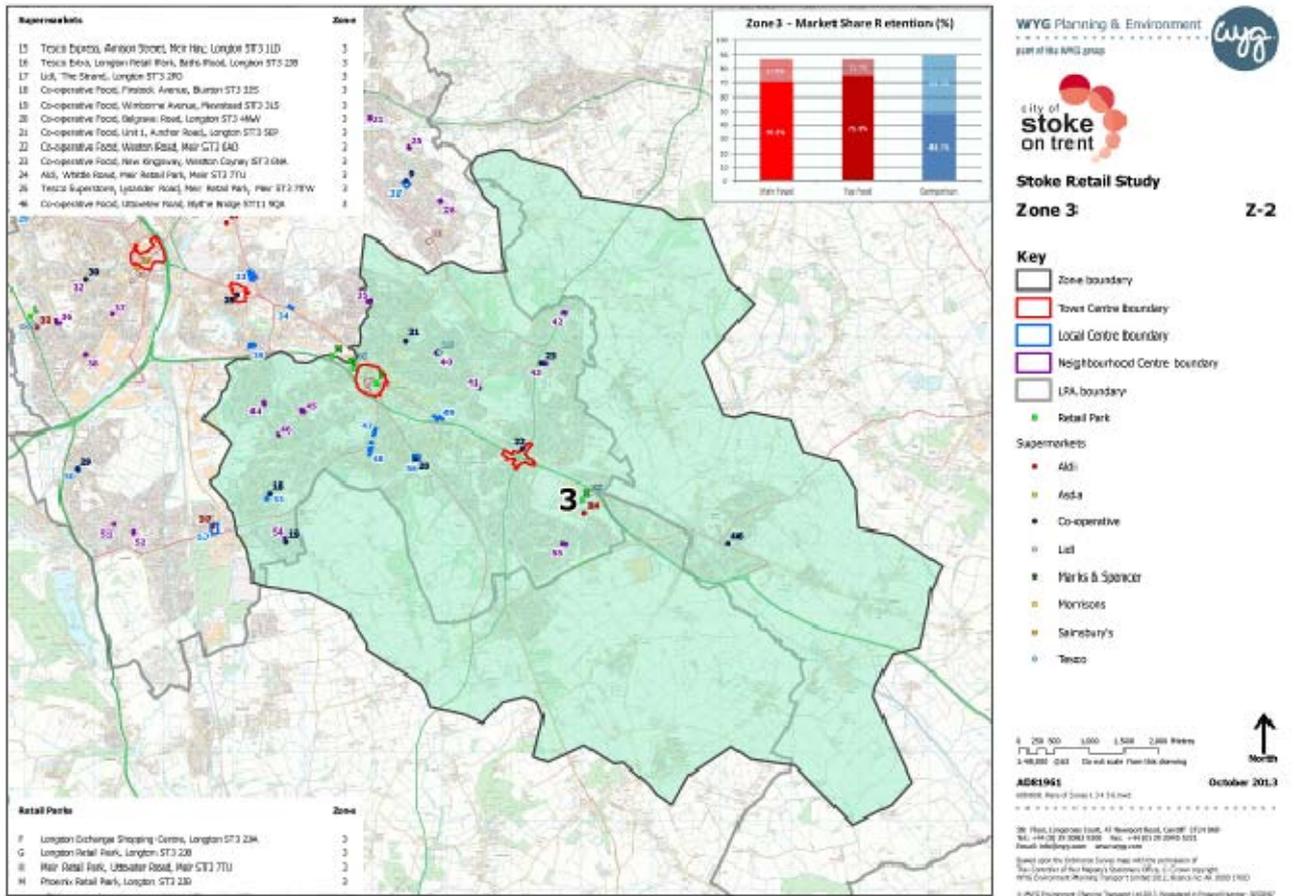
Source: Appendix 5, Table 3 and Table 25a

Zone 3

4.37 Zone 3 covers the south eastern area of the City of Stoke-on-Trent and contains the town centres of Longton and Meir. This zone has the highest main food shopping market share retention of the zones located in the City of Stoke-on-Trent at 70.2%. A further 17.0% is retained at other facilities in the City of Stoke-on-Trent, showing that together 87.2% of main food trips are retained within the City of Stoke-on-Trent. This can be attributed to the high proportion of main food shopping trips generated in Zone 3 which are undertaken at Tesco Extra at Longton Retail Park (28.3%), Tesco at Meir Retail Park (23.0%) and Aldi at Meir Retail Park (11.2%). The top-up food market share retention rate of Zone 3 is slightly higher at 75.3%, which is to be expected given that consumers will be more inclined to undertake top-up shopping trips in the local area, with a further 11.7% being spent at other facilities in the City of Stoke-on-Trent. A notable proportion of main food goods leakage from Zone 3 is directed to Asda at Wolstanton (6.9%) (Zone 2), Aldi at Trentham (5.2%) (Zone 4) and Morrisons at Newcastle-under-Lyme (3.6%) (Zone 2) and Morrisons at Festival Park (3.5%) (Zone 1). In terms of comparison goods, Zone 3 retains a market share of 48.7%, with popular facilities in the zone including shops in Longton town centre (26.2%) and B&Q at Meir Retail Park (7.1%). Comparison

goods expenditure leakage from Zone 3 takes place to Stoke City Centre (21.0%), Festival Retail Park (8.0%) and the Victoria Road area (4.2%). We note that there is only 6% leakage of comparison goods to facilities outside the wider Study Area with a further 4.1% being spent at facilities elsewhere in the Study Area (but outside the City of Stoke-on-Trent), showing that 90% of comparison goods spend is retained in the City of Stoke-on-Trent, demonstrating strong and sustainable trade retention locally.

Figure 4.6: Zone 3 – Market Share Retention



Source: Appendix 5, Table 3 and Table 25a

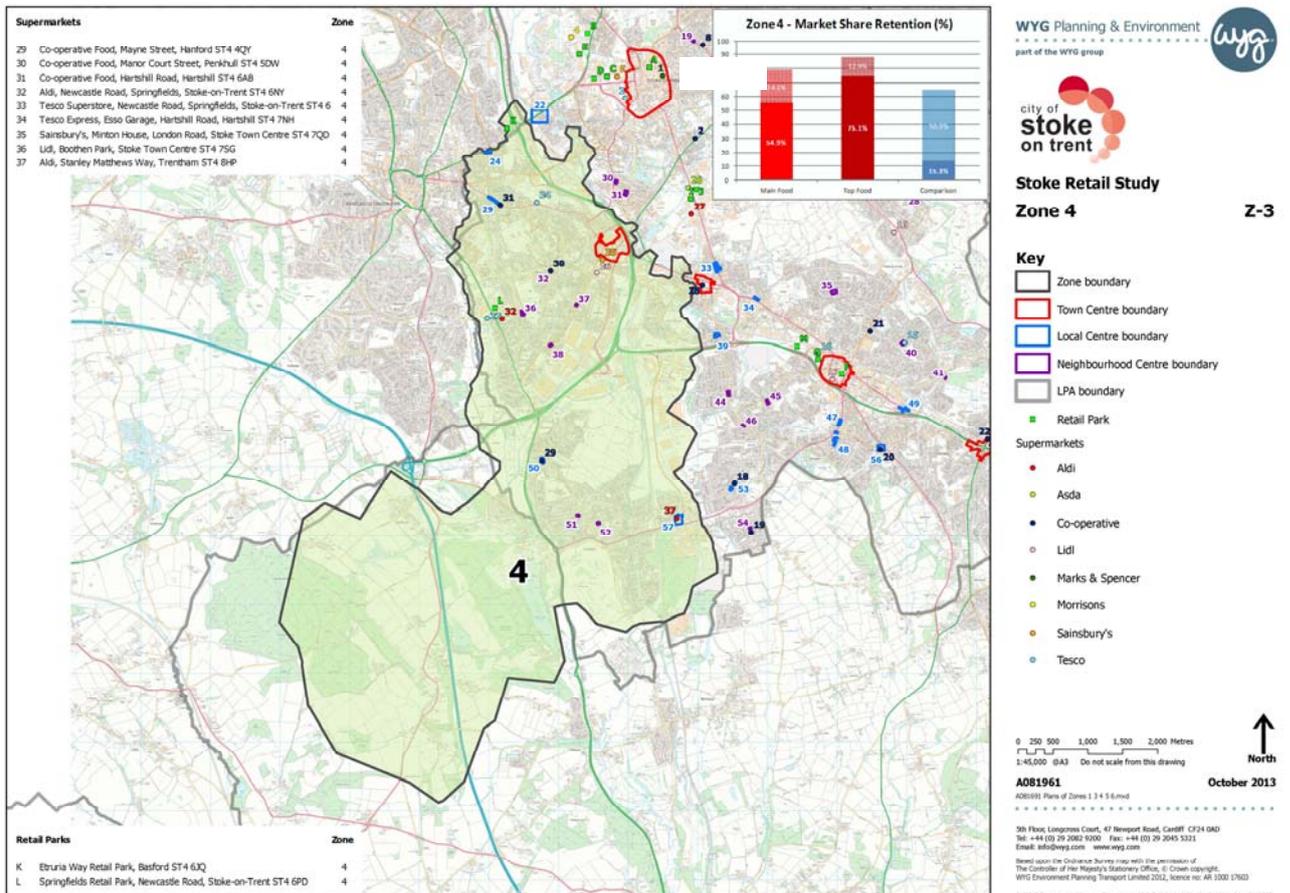
Zone 4

4.38 Zone 4 covers the south western extent to the City of Stoke-on-Trent and includes Stoke Town centre. The main food shopping market share retention of Zone 4 is 54.9%. Facilities within Zone 4 which attract the highest proportion of main food shopping trips generated in this zone are Sainsbury's at London Road (25.2%), Tesco at Newcastle Road (13.7%) and Aldi at Newcastle Road (8.8%). Again, the top-up food shopping market share retention of Zone 4 is higher at 75.1%. The leakage of main food goods expenditure from Zone 4 is being directed to Sainsbury's at Festival Park (9.5%),

Morrisons at Newcastle-under-Lyme (6.4%) and Asda at Wolstanton (5.2%). In terms of comparison goods, Zone 4 has a much lower market share retention of just 13.7%, with shops in Stoke Town centre (7.1%) and the Tesco at Newcastle Road (1.7%) and facilities at Trentham Lakes (2.8%) attracting most of the shopping trips retained in the zone. Notwithstanding the low (13.9%) comparison goods market share retention of Zone 4, a further 50.9% of comparison goods shopping trips generated in Zone 4 are retained within the City of Stoke-on-Trent. Of those comparison goods shopping trips which are not retained in the zone, 20.2% are directed to Newcastle-under-Lyme town centre, 19.6% are directed to Stoke City Centre and 14.3% are directed to Longton town centre.

4.39 There is only 6.5% leakage of comparison goods to facilities outside the wider Study Area but 28.9% is being spent at facilities elsewhere in the Study Area (but outside the City of Stoke-on-Trent), showing that 64.5% of comparison goods spend is retained in the City of Stoke-on-Trent, demonstrating that Zone 4 has the lowest market share of the principal Stoke Zones, heavily influenced by the draw of facilities within Newcastle under Lyme.

Figure 4.7: Zone 4 – Market Share Retention



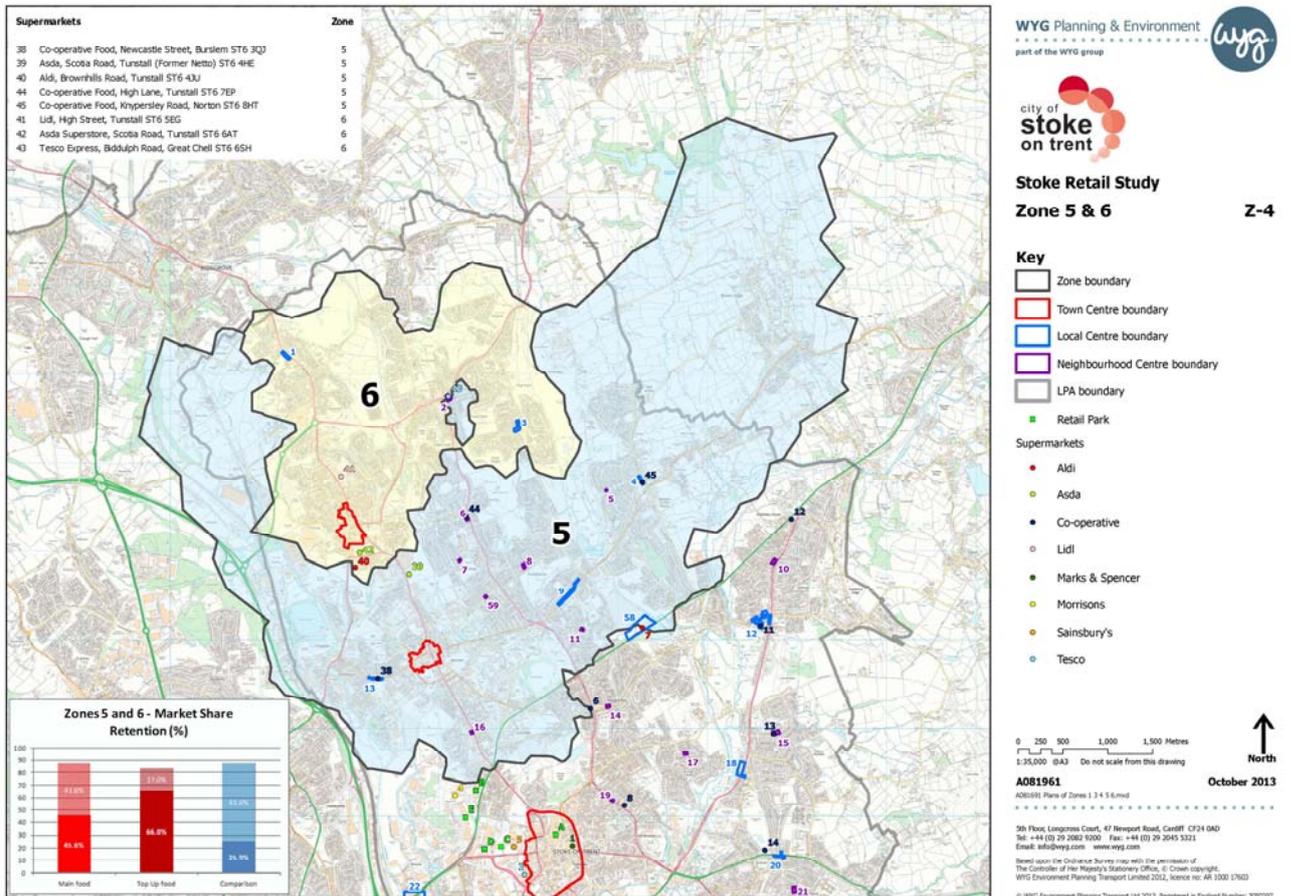
Source: Appendix 5, Table 3 and Table 25a



Zones 5 and 6

4.40 Zones 5 and 6 cover the northern extent of the City of Stoke-on-Trent and include the town centres of Burslem and Tunstall. As the zones sit closely together their market share retention is considered in combination. The main food shopping market share retention of Zones 5 and 6 is the lowest of the zones which cover the City of Stoke-on-Trent at 45.6%. The facilities located within Zones 5 and 6 which attract the highest proportion of shopping trips from these two zones are the Asda at Scotia Road (22.0% from Zone 6) Asda (former Netto) at Scotia Road (11.5% from Zone 5), the Aldi at Brownhills Road (4.9% from Zone 5). A further 41.6% of main food shopping trips generated in Zones 5 and 6 are undertaken within the City of Stoke-on-Trent. Therefore 87.2% of main food trips are retained in the city as a whole, but shows that people within Zones 5 and 6 are likely to travel to facilities outside the immediate area to other parts of the city to satisfy their main food shop. The top-up food shopping market share retention rate of Zones 5 and 6 is higher at 66.0%, with a further 17.0% retained within the Study Area. The comparison goods market share retention rate of Zones 5 and 6 is just 25.9%. The facilities in Zone 5 which attract the greatest proportion of shopping trips from this zone are local shops in Burslem (5.2%) and the facilities in Zone 6 which attract the greatest proportion of shopping trips from this zone are local shops in Tunstall (23.5%) and the Asda store at Scotia Road (5.4%). Although the comparison goods market share retention of Zones 5 and 6 are quite low (25.9%), a further 61.6% of comparison goods shopping trips originating from Zones 5 and 6 are retained within the City of Stoke-on-Trent.

Figure 4.8: Zones 5 and 6 – Market Share Retention



Source: Appendix 5, Table 3 and Table 25a

Special Forms of Trading (SFT)

4.41 The household survey identifies that 10.1% of respondents currently undertook food shop using the internet. This is an increase from 2005, when 5.9% undertook their food shopping via the internet. In terms of clothing and footwear, 48.5% currently purchase goods via the internet, which is a substantial increase of 36.6 percentage points since 2005. Clothing and footwear are the type of goods most often purchased from the internet. For small household goods, 11.1% currently purchase such goods using the internet, this compares to 11.5% for recreational goods. In terms of books, CDs and DVDs, 45.0% of respondents purchase such goods via the internet (compared to 21.8% in 2005) and in terms of electrical goods, 44.8% of respondents purchase such goods via the internet (compared to 19.2% in 2005). DIY and furniture products are the type of goods which are least often purchased via the internet, with 6.4% purchasing DIY products (an increase of 0.5 percentage points since 2005) and 6.9% purchasing furniture via the internet (a decrease of 2.7 percentage points since 2005).

4.42 It is evident from the household survey results that the purchase of food and comparison goods over the internet is generally becoming increasingly more popular in the City of Stoke-on-Trent, which reflects wider national trends, although bulky goods items are less likely to be sold through the internet.

Table 4.17: Special Forms of Trading (SFT)

	SFT (%)		
	2005	2013	Difference
Main Food Shopping	5.9	10.1	+ 4.2
Clothing & Footwear	11.9	48.5	+ 36.6
Small Household Goods	-	11.1	-
Books, CDs, DVDs	21.8	45.0	+ 23.1
Recreation Goods, Toys etc	-	11.5	
Electrical Goods	19.2	44.8	+ 25.6
DIY Goods	5.9	6.4	+ 0.5
Furniture	4.2	6.9	- 2.7

Source: NEMS Household Survey 2013 (not weighted and adjusted to exclude don't know/can't remember responses) Question 34 (Which goods or services do you currently purchase electronically). 2005 data from NEMS Household Survey (Q17 Do you ever use the internet to buy..?)

4.43 This trend towards increased use of the internet to purchase both convenience and comparison goods is reinforced by the responses to question 33 of the household survey, which asks **Do you make use of electronic home shopping (i.e. internet or TV shopping)?**. The results confirm that 64.7% of respondents use the internet to shop, 8.0% use portable internet (i.e. mobile phone) and 4.5% undertake TV home shopping. The proportion of respondents not using electronic home shopping is 34.8%.

Conclusions

4.44 The City of Stoke-on-Trent attracts a market share of 51.4% of main food shopping and 48.6% of top-up shopping originating within the Study Area. Those zones located at the centre of the Study Area i.e. the zones that cover the City of Stoke-on-Trent (Zones 1, 3, 4, 5 and 6) and include the main urban areas attract higher market shares (over 70% for both main food and top-up shopping). The market share retention is particularly strong in the most central zones (Zones 1 and 5). However, it is considered that there is some scope for the market share for both main food and top-up shopping to be improved in Zone 4 and Zone 6 where it is evident that some convenience goods expenditure is leaking to surrounding areas. In relation to comparison goods, the market share retained by the City of Stoke-on-Trent is higher at 61.9%. The market share of Zones 1, 3, 5 and 6 is greater than 85% showing that the retention rate of these central areas is strong. It is evident that the City of Stoke-on-Trent's comparison goods sector is performing well in attracting trips. This is likely to be due to the range of comparison goods units and representation from a high proportion of national multiple



retailers in Stoke City and the surrounding Retail Parks. These facilities are attracting customers from outside the City of Stoke-on-Trent area but from the wider Study Area including residents in Newcastle-under-Lyme and other parts of Staffordshire and the former Cheshire area. The lower overall market share for convenience goods shows that convenience goods facilities are not attracting as many people from the Study Area as comparison goods facilities.

- 4.45 It is however evident that in terms of convenience goods, out-of-centre facilities (this excludes edge-of-centre facilities) are attracting high market shares compared to facilities in defined centres in the City of Stoke-on-Trent. In terms of main food shopping, out-of-centre facilities are attracting a market share of 32.6%, while the city and town centres in combination attract a main food market share of just 14.8%. Similarly in terms of top-up shopping, out-of-centre facilities attract a market share of 19.1%, while the city and town centres in combination attract a market share of 13.4%. Since 2005, the cumulative market share of city and town centres, in terms of both main food and top-up food shopping, has decreased. However, during this period the market share of out-of-centre facilities has increased. This highlights that there has been a shift in convenience goods shopping patterns from in-centre facilities to out-of-centre facilities.



5.0 Health Check Assessments of the Key Centres

5.01 The National Planning Policy Framework (NPPF) (March 2012) states that local authorities should set out policies for the management and growth of centres over the plan period. The NPPF requires local authorities to recognise town centres as the heart of their communities and to pursue policies to support their viability and vitality. It is recognised that competitive town centre environments should be promoted in order to ensure customer choice, a diverse retail offer and to reflect the individuality of town centres.

5.02 The NPPF does not provide a list of indicators to be used to assess the health of a centre. However, the former Planning Policy Statement (PPS) 4: Planning for Sustainable Economic Growth (December 2009) set out a number of key indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time. Although PPS4 has been superseded by the NPPF and no longer forms part of national planning policy guidance, the key indicators included in PPS4 remain of relevance. In the absence of guidance at the time of writing this report in the NPPF with regard to key indicators, the former PPS4 indicators are therefore a useful tool in assessing the health of centres (these are to be updated to reflect guidance in the National Planning Practice Guidance BETA). The performance indicators outlined in the former PPS4 comprise of the following:

- **Diversity of main town centre uses (by number, type and amount of floorspace)**
Data on the diversity of uses in each of the city and town centres was collated during WYG's town centre surveys in August 2013.
- **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations** - Consideration has been given to the scale of out-of-centre retail provision in the vicinity of the centres.
- **The potential capacity for growth or change** - Our surveys of the centres have had particular regard to the proliferation of vacant land and premises and the opportunities which may exist for future growth.
- **Retailer representation and retailer demand** - Information on the current strength of centres, retailer representation and retailer requirements has been derived from Venuescore's UK Shopping Venue Rankings and from other published sources.
- **Shopping rents – the average Zone A rents paid in centres** - Zone A rental data has been sourced from EGi, which is a widely recognised source of such data.
- **Proportion of vacant street level property** - Vacant properties were identified during the undertaking of the centre surveys.
- **Pedestrian flows** - General footfall was again noted during the undertaking of the centre surveys.



- **Accessibility** - Consideration of access to and around each centre is informed by our surveys and by the findings of the in-street visitor surveys.
- **State of town centre environmental quality** - Consideration of the quality of the buildings and public realm in each of the centres has also been informed by our 'on-the-ground' observations and by the findings of the in-street visitor survey.

5.03 The commentary below provides an overview of our analysis of the health of Stoke City Centre and the town centres of Burslem, Fenton, Longton, Meir, Stoke Town and Tunstall. The commentary is supplemented by a more detailed appraisal of available data relating to the centres' performance and of WYG's observations in surveying each centre. The comprehensive appraisal provides full details of published data sources, including Venuescore and Estate Gazette. The commentary provided below summarises our key findings in respect of the centres, with the full versions of the health check analysis being provided at **Appendix 3**.

5.04 **Table 5.1** provides a summary of the total number of units and floorspace within each centre. This is based on each of the six Goad categories: convenience, comparison, retail services, leisure services, financial/business services and vacancies. The Experian Goad defined centre boundaries, with the exception of Fenton and Meir, have been utilised for the health check analysis, this allows an extensive area and to allow a direct comparison with the national average figures (which are calculated using Experian Goad's assessment of the boundary of each venue).

Table 5.1: Summary of the Centres

Centre	Total No. of Outlets	Quantum of Floorspace (sq.m)
Stoke City Centre	564	156,890
Burslem Town Centre	176	35,180
Fenton Town Centre	39	9,619
Longton Town Centre	228	60,020
Meir Town Centre	70	8,366
Stoke Town Centre	187	45,950
Tunstall Town Centre	206	48,290

Source: Site Visits, August 2013 – Experian Goad

Note: The figures are based on the centre boundaries as defined by Experian Goad (with the exception of Fenton and Meir).

Sub-Regional Retail Hierarchy

5.05 Table **5.2** illustrates the position of the principal centres within the hierarchy of centres based on the Venuescore's UK Shopping Venue Rankings (2013 - 2014). The index ranks 2,711 retail venues within



the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. Venuescore allocates each centre within a tier, reflecting its level of retail provision. The eight tiers comprise (highest to lowest): 'Major City'; 'Major Regional'; 'Regional'; 'Sub-Regional'; 'Major District'; 'District'; 'Minor District' and 'Local.' The rankings in the table represent the position of the centres at the time of the most recent Rankings, from 2013, as well as competing surrounding destinations. A more detailed tabulation of retail rankings data is also provided which shows the historic performance of the centres in the preceding 2006 and 2010 Rankings.

Table 5.2: The Sub-Regional Shopping Hierarchy

Centre	Score	Grade	Rank 2013	Rank 2010	Rank 2006	Change '06 – '13
Chester City Centre	277	Major Regional	35	32	22	↓ - 13
Stoke City Centre	200	Regional	70	71	53	↓ - 17
Crewe	118	Sub-Regional	197	188	144	↓ - 53
Macclesfield	100	Sub-Regional	236	223	159	↓ - 77
Newcastle-under-Lyme	74	Major District	338	257	218	↓ - 120
Longton Town Centre	67	Major District	382	404	336	↓ - 46
Festival Retail & Leisure Park	39	District	681	673	552	↓ - 129
Freeport Talke Outlet Mall	31	Minor District	864	1,071	988	↑ +124
Stone (Stafford)	21	Local	1,263	1,176	1,034	↓ - 229
Tunstall Town Centre	21	Local	1,263	1,176	618	↓ - 645
Springfield Retail Park	18	Local	1,452	1,138	1,715	↑ + 263
Alsager	10	Local	2,428	3,293	2,071	↓ - 357
Burslem Town Centre	-	-	-	-	1,076	-
Meir Town Centre	-	-	-	-	882	-
Stoke Town Centre	-	-	-	-	-	-

Source: Venuescore (2013-2014)



Stoke City Centre

- 5.06 Stoke City Centre is located in Zone 1 of the Study Area, approximately 3km to the north of Stoke Town centre and 4km to the east of Newcastle-under-Lyme. It is the largest centre (both in terms of the number of units and amount of floorspace) in the Study Area and it performs a regional role in the shopping hierarchy. It is also an important leisure and business location and acts as the main focus for economic, educational and cultural activities within the local area.
- 5.07 Experian Goad's survey of Stoke City Centre from November 2012 was updated by WYG during our visit to the centre in August 2013 in order to provide an up to date source for our analysis. The survey identified that there was a total of 564 units within Experian Goad's definition of the city centre, comprising a gross floorspace of 156,890 sq.m.
- 5.08 The defined primary shopping areas in Stoke City Centre are concentrated along the pedestrianised routes of Market Square and Lamb Street, with additional retail and service provision located on Stafford Street and in the indoor Intu Potteries Centre. There are also several large out-of-centre retail and leisure parks off Etruria Road and Cobridge Road which accommodate a high number of national and bulky goods operators, including B&Q, Currys and Next Home.
- 5.09 There is a clear shortage of convenience stores in Stoke City Centre in comparison to the national average, with the lack of supermarkets within the centre boundary also identified in the previous 2005 Study. Many of the current facilities are also only likely to meet the day-to-day shopping top-up needs of visitors, rather than enabling them to undergo their main food shopping there. The largest national foodstore operators are instead located outside of the defined Stoke City Centre boundary, including the Sainsbury's on Etruria Road, the Morrisons store at Festival Park and the Tesco Extra store on Clough Street. Stoke City also benefits from having a strong comparison and service sector which reflects its role as a key regional centre, with a high proportion of high street retailers accommodated there, including Debenhams, Next and Primark.
- 5.10 The previous 2005 Study identified that there was a total of 100 vacancies in the city centre, comprising 18.2% of the units and 9.7% of the total floorspace in Stoke city. Since then, there has been a noticeable increase in the level of vacancies, with 111 vacant units and 23,330 sq.m of vacant floorspace recorded by WYG in August 2013. Although there has been a slight improvement in the level of vacancies since the previous Experian Goad survey in November 2012 (when 116 vacancies were recorded), there has been several recent closures of national retailers in the city centre, including the Republic and Disney stores in the Intu Potteries Centre and the Blacks outdoor shop on Old Hall Street. There are also pockets of long-term vacancies throughout Stoke city, notably along



the peripheral areas (outside the primary and secondary shopping areas) on Hope Street, New Hall Street and Marsh Street South which makes these parts of the city centre appear run-down and neglected.

- 5.11 However, there are two key development proposals which it is envisaged may address the current issue of vacancies in the southern area of the city, notably the Council-led Central Business District (CBD) scheme and the Realis Estates Limited-led City Sentral proposal. In addition, planning permission was granted in January 2012 for the reconfiguration of the existing multi-storey car park to the north of the Intu Potteries Centre for a new leisure scheme. These schemes will enable the redevelopment of currently largely vacant sites into active mixed-use areas and demonstrates a strong level of private sector confidence in Stoke City.

Summary

- 5.12 Overall, it is evident that Stoke City is a vital and viable centre which plays an important role as the largest retail destination in the North Staffordshire and South Cheshire area. Whilst there is a shortfall in the amount of convenience stores within the city centre boundary, the large retail parks to the west of the centre do cater for the main food shopping needs of shoppers in the area. It has a strong provision of retail (comparison goods) facilities, with the presence of Top 30 national multiple operators reinforcing the view that it is performing well. In addition, the major level of investment as part of the CBD, City Sentral and Intu Potteries Centre schemes will also help to secure additional businesses and reinforce Stoke City Centre's existing strong comparison and service goods sector.

Burslem Town Centre

- 5.13 Burslem town centre is located in Zone 5 of the Study Area, approximately 2.5km to the north of Stoke City Centre and 2km to the south of Tunstall town centre. It is a medium-sized town, with the 176 units in the Experian Goad-defined centre boundary comprising a total floorspace of 35,180 sq.m gross. Burslem was historically at the heart of the local region's ceramic industry, with the adopted Core Strategy identifying that it plays a key role as a historic and cultural destination, in addition to providing local convenience shopping and services. WYG considers that Burslem performs the role of a lower order centre and is particularly vulnerable particularly due to the high level of vacancies in the town.
- 5.14 There is a shortfall in the provision of convenience, comparison and retail service stores in Burslem, with a particular deficit in the amount of convenience floorspace. This sector currently performs a limited top-up service for residents, with the existing provision including two convenience stores (including a Lifestyle Express), a bakers, butchers, Farmfoods store and greengrocers. The B&M Bargains and Home Bargains stores also sell a variety of food goods, though they are classed as



comparison retailers by Experian Goad. Other comparison operators in Burslem include Boots and Poundstretcher, with the majority of the businesses local independent retailers. Burslem does have a good provision of leisure service and financial and business services in comparison to the national average figures, with facilities including the Queens Theatre on Wedgwood Street and the George Hotel on Swan Square. The centre also accommodates several national businesses, including Lloyds TSB, NatWest and the Nationwide banking services.

- 5.15 The level of vacancies in Burslem, in terms of the number of units and the amount of floorspace, are both considerably above the respective national average rates. There has, however, been a slight improvement since the previous Experian Goad survey in November 2011, with a reduction of 3 vacant units and 1,760 sq.m of vacant floorspace. Despite this, there is still a significant concentration of longer-term large vacant buildings in the centre, notably on William Clowes Street, Queen Street and Brick House Street.
- 5.16 The majority of the town centre is within a defined Conservation Area and it incorporates several landmark buildings including the Wedgwood Institute and the Town Hall building. A total of 17 listed buildings are located in Burslem, including two Grade II* listed features. The historic core of the centre is concentrated on Queen Street, with many of the early 19th Century buildings making a positive contribution to the character and appearance of Burslem. However, it is evident that the run-down and boarded-up appearance of many of these units does detract from the overall environmental quality of the town centre. To address this, the Burslem Townscape Heritage Initiative has received £8m of funding to help renovate some of the historic buildings, including the former MK One premises on Queen Street. WYG found that the off street parking charges in Burslem seemed disproportionate to the scale and function of the centre, with the parking charges marginally lower than those charged in Stoke City Centre.

Summary

- 5.17 Although Burslem has a good provision of leisure service and financial & business services, there is a clear shortfall in terms of the level of convenience, comparison and retail service facilities. Whilst the majority of units in the town centre are operated by local independent traders, the presence of the B&M Bargains, Boots and Home Bargains stores is likely to attract additional shoppers to Burslem. The level of vacancies in the centre is more than double the national average and this makes several areas of the town appear to be extremely run-down and neglected. WYG believe that Burslem is currently in a vulnerable condition and the Council should therefore look at potential fiscal intervention opportunities which could be used to improve its vitality and viability. WYG also consider that Burslem does not perform the function of a town centre (based on the definition in the former PPS4) as it



provides a limited service role in the local area. It is therefore recommended that the Council should consider re-defining the centre within the retail hierarchy during the Local Plan process.

Fenton Town Centre

- 5.18 Fenton town centre is located in Zone 1 of the Study Area, approximately 2.5km to the south of Stoke City Centre and 1km from Stoke Town centre. Fenton is the smallest town in the authority area with only 39 units and it serves a much more localised catchment area than the other larger centres in Stoke-on-Trent. It has a limited role as a retail and service centre, with the adopted Core Strategy recognising that it derives its town centre designation because of its historic role, rather than its retailing provision which is more characteristic of a local centre.
- 5.19 The centre is concentrated along City Road, Christchurch Street and Baker Street, with the Fenton Health Centre and a Lloyd's pharmacy unit located immediately adjacent to the centre boundary on Glebedale Road. There is a limited provision of convenience stores in the centre, with the largest stores, namely the Co-operative Food and Lifestyle Express only likely to perform a limited top-up role for the majority of visitors to the centre. Other facilities in Fenton include several furniture/DIY stores, three public houses, two take aways, Coral betting shop, a hairdressers and a Post Office on Christchurch Street.
- 5.20 The previous Study in 2005 had identified that Fenton had a low proportion of vacant street level property, with only three vacancies recorded. The level of vacancies in the town centre is now significantly above the national average rate, both in terms of the proportion of outlets (28.2% compared to 11.5%) and floorspace (44.2% compared to 9.3%). The largest vacant units are the doctor's surgery, library and magistrates court on Baker Street which all closed between 2011 and 2012. It should be noted that if these three units were excluded from the overall figures (given their last non-retail use), 8.8% of the floorspace in Fenton would be classed as vacant. The site visit in August 2013 also identified that there were several vacancies along City Road (5 units) and Christchurch Street (3 units).
- 5.21 A main town centre car park which is operated by the Council is located on City Road, to the rear of the Co-operative Food store. The low level of pedestrian movement in the centre indicates that the town performs a limited role as a shopping destination. We are surprised by the scale of car parking charges for Fenton given its limited scale and role as a retail destination. This may be attributed to its location close to the Ravenside and Victoria Road Retail Parks which are located approximately 1.5km to the north of Fenton, along the A50. These are a number of national operators at the Retail Parks including Poundstretcher, Gala Bingo, Aldi, Wickes, Pure Gym, Dunelm Mill and Asda.



Summary

- 5.22 Fenton does accommodate a variety of retail and service outlets, including a Co-operative Food and Post Office. Although it does exhibit some signs of being a healthy centre (for example by the presence of several national operators), the high level of vacancies and poor environmental quality of Fenton indicates that it has performed poorly and would benefit from new inward investment. WYG also propose that the Council should consider re-defining the centre during the Local Plan process as WYG do not consider that Fenton contains an adequate provision of facilities to justify it being allocated as a town centre.

Longton Town Centre

- 5.23 Longton is located in Zone 3 of the Study Area and is situated 2.5km to the north west of Meir, 2.5km to the south east of Fenton and 5.5km to the south east of Stoke City. It serves as a key retail destination to the southern part of the conurbation and is the second largest centre in the authority area, both in terms of the number of units (228) and the amount of floorspace (60,020 sq.m gross).
- 5.24 The main shopping area of Longton is focused on The Strand and Market Street including The Longton Exchange, a pedestrianised shopping precinct situated between these two thoroughfares. Further retail units are located to the west of The Strand at Longton Retail Park, which provides large format retail units including a Tesco Extra store, Next and Argos. Phoenix Retail Park is located approximately 350m to the west of the town centre and provides four large format comparison goods units and a leisure service unit.
- 5.25 The centre is well provided for in terms of its convenience goods offer, which is anchored by the Tesco Extra store, with other convenience goods retailers including Lidl, Farmfoods and Iceland. The centre is less well provided for in terms of comparison goods and although some national multiple retailers are present in the town centre, including the Matalan at Heathcote Road and the Wilkinson at Kingscross Road, the majority of units are occupied by independent operators. Longton Market at Times Square provides additional convenience and comparison goods provision. The centre is reasonably well represented in terms of retail service and financial services provision. However, the centre is lacking in terms of leisure service provision.
- 5.26 Longton is suffering from a high proportion of vacant retail units. WYG's site visit in August 2013 recorded 52 vacant units in the centre, comprising 10,740 sq.m floorspace. The vacancy rate in the town centre has increased since the North Staffordshire Retail Study was undertaken in 2005, with the proportion of vacant units increasing from 18.2% to 22.8%. It is evident that there are a number of long term vacant units in the centre, which are concentrated on Uttoxeter Road, the eastern portion of the Longton Exchange and Market Street.



- 5.27 It was evident from WYG's site visits of Longton that the centre is popular, with good levels of footfall witnessed within the western part of the Longton Exchange, along the Strand and at Longton Retail Park. The centre has favourable transport links, with Longton Interchange located at the northern end of the town centre.
- 5.28 Longton's environmental quality is varied. There is a mix of both modern and traditional buildings present in the town centre, many of which are well maintained, however there are also a number of units in need of refurbishment. The Longton Exchange Shopping Centre appears outdated and in need of modernisation. The study has found that the car parking charges in Longton appear high especially when consider against the charges applied at Stoke City, and they are disproportionate to the role and function of the centre and may need to be reviewed to encourage visitors to the centre over the plan period.

Summary

- 5.29 Longton performs an important role in catering for the local shopping needs of residents from the southern part of the City of Stoke-on-Trent. The centre is well provided for in terms of convenience goods units, but is under-represented in terms of comparison goods retailers and leisure service uses. The recently developed Phoenix Retail Park has introduced four large format comparison goods units to the west of the town centre. Overall, whilst Longton does appear to be a vital and viable centre, it is vulnerable due to the a high vacancy rate in the town, with a concentration of vacancies in the eastern part of the Longton Exchange, Market Street and on Uttoxeter Road. In addition, although good levels of pedestrian footfall were noted in the Longton Exchange, the precinct appears out-dated and is in need of modernisation. This indicates that further inward investment and intervention is required to ensure that the town does not decline any further.

Meir Town Centre

- 5.30 Meir town centre is located in Zone 3 of the Study Area, approximately 10.5km to the south east of Stoke City Centre and 2.5km from Longton town centre. It is the second smallest centre in Stoke-on-Trent in terms of its number of units (70) and it is the smallest town based on its amount of commercial floorspace (8,366 sq.m). It performs a small role as a centre for residents in the local area; with the adopted Core Strategy identifying that it provides services for the eastern gateway of Stoke-on-Trent and serves a small localised catchment for the surrounding communities.
- 5.31 Meir town centre is located at the roundabout junction of the A50 (Uttoxeter Road) and the A520 (Sandon Road and Weston Road). There is a row of terraced commercial units on Weston Road, with other stand alone stores including a Co-operative Food, library and health centre. Meir Park, an

industrial and retail warehousing facility is located 1km to the east of the town and accommodates an Aldi, B&Q and Tesco Superstore.

- 5.32 There is a good variety of commercial and services units in the town centre, with several national operators accommodated there, including Britannia bank, Co-operative Food, Coral betting and a Post office. Other convenience businesses in Meir comprise the four CTN's, three bakers, a Nisa Local and an off-licence. The majority of the comparison operators are located within the row of terraced units on Weston Road, including two pharmacies and several clothing stores. A KFC fast food restaurant was also opened in 2012 on a former car park site on Pickford Place within the centre boundary. WYG are surprised that given the role and function of Meir a car parking charging mechanism is applied at both on and off street car parking.
- 5.33 The level of vacant properties in Meir (10.0%) is marginally below the national average rate (11.5%), whilst the proportion of vacant floorspace (14.6%) is above the UK average figure (9.3%). There is also a concentration of vacancies in the units directly adjacent to the Co-operative Food store on Weston Road. Since the previous Study in 2005, the former Kings Arms public house has been demolished to make way for a new £11m health centre and pharmacy which opened in 2011 on Weston Road. As a result, the former health centre on Saracen Way has now closed and is currently being marketed for sale.

Summary

- 5.34 Overall, Meir is exhibiting signs of being a healthy town, particularly as it has the lowest vacancy levels of any of the largest centres in the authority area. It performs a key role as a commercial and service centre in the south eastern corner of the local authority area. However, as a result of its small size, it is orientated to providing a more day-to-day type of shopping service for local residents. WYG therefore believe that it only performs a district centre role and it could therefore be re-defined during the Local Plan process.

Stoke Town Centre

- 5.35 Stoke Town centre is located in Zone 4 of the Study Area and is situated 3km to the south of Stoke City, 4km to the north west of Longton and 4km to the west of Newcastle-under-Lyme. The Core Strategy describes Stoke as playing a number of key roles as the city's administrative centre, a university town, a nationally important destination for ceramics factory shopping and providing local convenience shopping and the conurbations primary railway station. There are a total of 187 units and 45,950 sq.m gross of commercial floorspace within the Experian Goad defined centre boundary.



- 5.36 The main shopping area in Stoke Town centre is focused on Church Street, Campbell Place and London Road. The centre is reasonably well provided for in terms of its convenience goods provision. This sector is dominated by edge of centre Sainsbury's store on London Road, with an additional offer provided by the Lidl and Iceland at Bootham Park, as well as Stoke Market. The centre is less well provided for in terms of comparison goods units with the proportion of comparison goods units and floorspace below the respective national average figures. The majority of comparison goods units in the centre are small to medium in scale and there are only a limited number of national multiple comparison goods retailers present in the centre, with the majority of units occupied by independent operators. The retail service sector is also under-represented in the town centre.
- 5.37 There are a high proportion of vacant units located in the town centre, with 58 vacant units present at August 2013 comprising 9,340 sq.m floorspace. Since 2005, the proportion of vacant units in the town centre has increased from 29.5% to 31.0% and the proportion of vacant floorspace has increased from 17.3% to 20.3%. A high proportion of the vacant units were also vacant in 2011, demonstrating that there are some long-term vacancies in the town centre. Vacant units are present throughout the town centre. However, there is a particular concentration in the north western part of the town centre, along Liverpool Road. A number of the long term vacant units appear run down and in need of maintenance, which detracts from the environmental quality of the town centre.
- 5.38 Reasonable levels of footfall were witnessed along London Road and Church Road, particularly in the vicinity of the Sainsbury's store and Stoke market. However, at the northern extent of the town centre, pedestrian footfall was low, with only limited pedestrian activity witnessed along Liverpool Road and Hartshill Road. The centre is accessible by a variety of means of transport; with Stoke mainline railway station located to the east of the town centre, dedicated bus access to the town centre and a number of car parks throughout the centre. The study has found that the car parking charges in Stoke appear high especially when they are comparable to larger centres such as Longton and Tunstall, and therefore appear to be disproportionate to the role and function of the centre and may need to be reviewed to encourage visitors to the centre over the plan period.

Summary

- 5.39 Stoke Town centre is reasonably well provided for in terms of its convenience goods offer. However, the centre is under-provided for in terms of comparison goods and retail service units. The majority of units in the centre are operated by independent retailers, with only a limited number of national multiple retailers present in the centre. There are a high proportion of vacant units present in the centre, including a number of long term vacancies. The vacant units are dispersed throughout the centre; however there is a particular concentration at the northern periphery of the town centre along Liverpool Road. It is evident from our review of the centre that Stoke is vulnerable and intervention



measures will be required to prevent the health of the centre declining further over the plan period, particularly as a result of the re-location of the Council offices to Stoke City Centre. Despite these issues, we recognise that it still plays an important role in the area and contains an adequate level of facilities which indicates that it should remain allocated as a town centre.

Tunstall Town Centre

- 5.40 Tunstall is located in Zone 6 of the Study Area and is situated approximately 2km to the north west of Burslem, 4.5km to the north west of Stoke City and 4.5km to the south east of Kidsgrove. Tunstall is described in the adopted Core Strategy as serving a wide catchment to the north of the urban area, with an expanding offer by virtue of large scale retail developments to the south and east of the town centre. It is the third largest of the seven key centres in the City of Stoke-on-Trent both in terms of the number of units (206) and amount of floorspace (48,290 sq.m).
- 5.41 The main shopping area in Tunstall is focused on High Street which forms a traditional linear shopping street and around Tower Square. A number of large format stores are situated at the south eastern extent of the town centre to the rear of the retail units on High Street, including at Jasper Square.
- 5.42 Tunstall is well represented in terms of the amount of convenience goods floorspace in the centre. The majority of such floorspace is provided by the Asda store on Scotia Road, with additional provision provided by the Aldi on Brownhills Road, as well as Tunstall Market. The centre is less well provided for in relation to its comparison goods, leisure service and financial and business service offer. There are some national multiple retailers present in the centre, including the two largest comparison goods units in the centre, Matalan and Next. However, the majority of units are occupied by independent retailers.
- 5.43 The proportion of vacant units in the town centre is above the national average. The 48 vacant units in the centre comprise 7,340 sq.m floorspace. Since 2005, there has been an increase in the proportion of vacant units in the centre, from 21.8% in 2005 to 23.3% in 2013. However, during this period the proportion of vacant floorspace has decreased from 18.9% to 15.2%. Since 2011, the number of vacant units has increased by 11 units and the amount of vacant floorspace has increased by 2,790 sq.m. The vacant units are dispersed throughout the town centre. The majority (60.0%) of the vacant units at August 2013 were also vacant in November 2011. The vacant units detract from the environmental quality of the town centre, with a number of units in need of refurbishment.
- 5.44 Reasonable levels of pedestrian footfall were noted along the central section of High Street, at Tower Square and in the vicinity of the large format retail units in the eastern part of the centre, during WYG's visit to the centre. However, low levels of footfall were witnessed at the periphery of the town



centre at the northern and southern ends of High Street, Roundwell Street, The Boulevard and Brownhills Road. As with Longton the car parking charges in Tunstall appear high and disproportionate to the role and function of the centre.

- 5.45 Planning permission has been granted (LPA ref: 40048/FUL) for the development of Highgate Retail Park to the south-west of the town centre, off Brownhills Road. The Retail Park will provide 10 units in total, providing 12,110 sq.m floorspace and will be anchored by a Morrisons foodstore (6,689 sq.m). In August 2013 the site had been cleared, but development had not commenced on the site.

Summary

- 5.46 Tunstall is well represented in terms of convenience goods floorspace, with the Asda store dominating this sector. The centre is less well represented in terms of the comparison goods, leisure service and financial and business service offer. The majority of the retail offer is provided by independent retailers, though there are some national multiple retailers located in the large format units in the eastern part of the town centre. In addition, permission has been granted for the development of Highgate Park to the south-west of the town centre and it is envisaged that this private sector-led scheme will also help to improve the town centre's wider retail offer. However, the centre is in a vulnerable position due to the high level of vacancies, and the noticeable increase in the amount of vacant units and floorspace which has taken place since 2011. Vacancies are also dispersed throughout the town centre which does detract from the overall environmental quality of the centre. WYG considers that Tunstall still functions as a key centre in the local area and contains an adequate provision of facilities for it to remain defined as a town centre during the plan process.

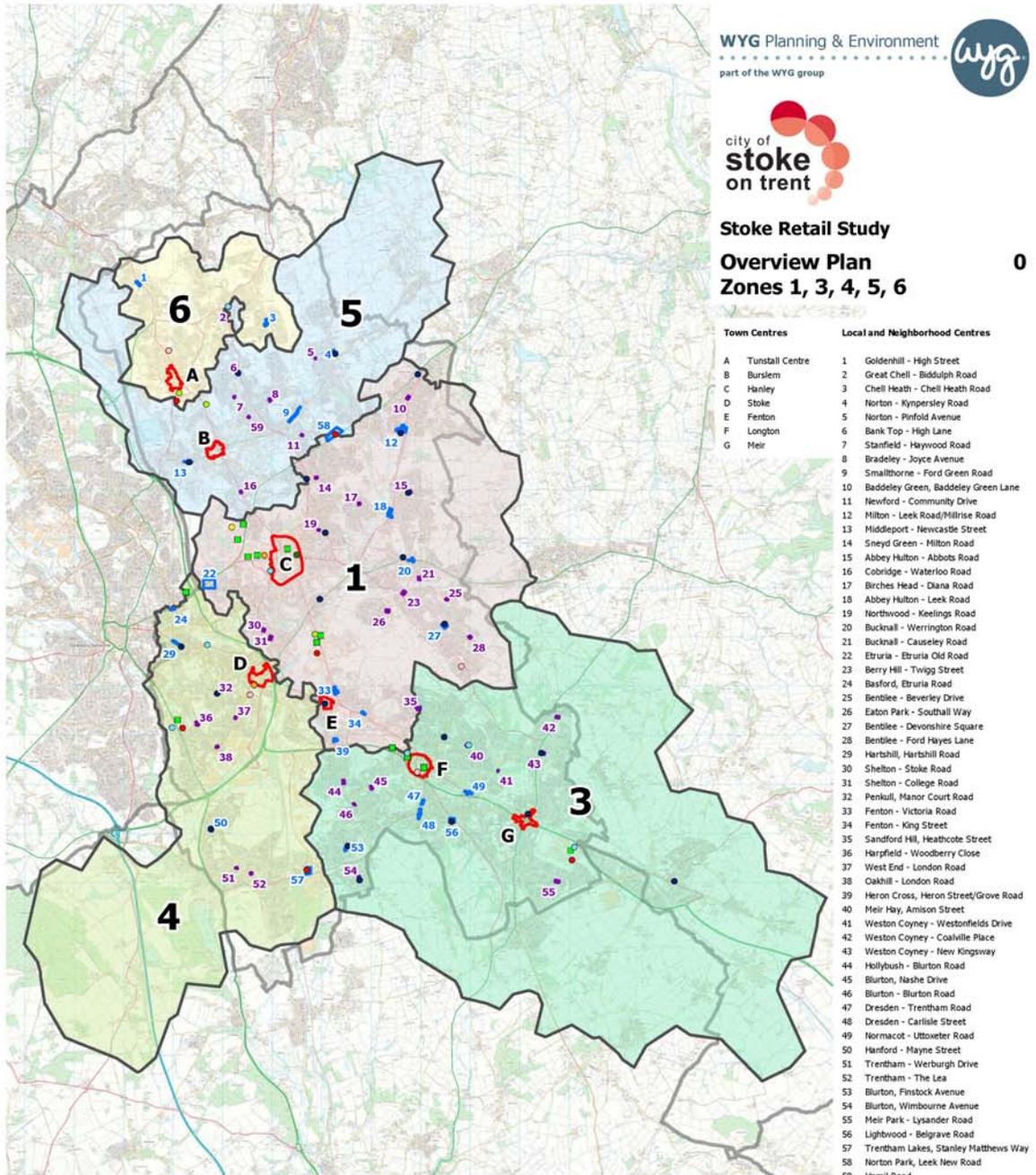


6.0 Local and Neighbourhood Centres Analysis

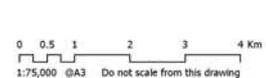
- 6.01 The NPPF emphasises the need for local authorities to monitor the health of their centres and determine how they are changing over time. It notes in Annex 2 that the term 'centre' is applied to city, town, district and local centres, but that it 'excludes small parades of shops of purely neighbourhood significance.' The former Planning Policy Statement (PPS) 4: Planning for Sustainable Economic Growth (December 2009) noted that 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.'
- 6.02 The commentary below provides an overview of the analysis by WYG of the health of both the local and neighbourhood centres in the City of Stoke-on-Trent which is detailed in Appendix 2, 3 and 4. It draws on the information which has been gathered from the site surveys and has been supplemented by desk-based research and the findings from the household survey.
- 6.03 The previous North Staffordshire Study (2005) undertook a review of the retail provision and overall health of 55 of the centres in the City of Stoke-on-Trent. The recommendations from the Study were used to inform the adopted Core Strategy (2009), with an additional three centres (namely Lightwood - Belgrave Road, Trentham Lakes - Stanley Matthews Way and Norton Park - Leek New Road) added to the centres designations which were outlined in Appendix 5 of the Strategy. It should be noted that although the Hamil Road centre is indicated on the accompanying Proposals Map, it is not included within the list of centres of the Core Strategy, whilst the Etruria Old Road centre is listed in Appendix 5 but it is not included on the Proposals Map. The Core Strategy also did not distinguish between the local and neighbourhood centres, though the Proposals Map does indicate that there are a total of 22 local centres and 36 neighbourhood centres.



Figure 6.1 Current Distribution of Local and Neighbourhood Centres



- Key**
- Study Zones
 - Town Centre boundary
 - Local Centre boundary
 - Neighbourhood Centre boundary
 - LPA boundary
 - Retail Park
- Supermarkets**
 - Aldi
 - Asda
 - Co-operative
 - Lidl
 - Marks & Spencer
 - Morrisons
 - Sainsbury's
 - Tesco



A081961
Overview Zones 1 3 4 5 6.mxd

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5th Floor, Longcross Court, 47 Newport Road, Cardiff CF24 0AD
Tel: +44 (0) 29 2062 9200 Fax: +44 (0) 29 2045 5321
Email: info@wyg.com www.wyg.com

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Methodology

- 6.04 This Study therefore reviewed the role and health of the 59 centres (including Hamil Road); with **Figure 6.1** illustrating that the centres are distributed throughout the authority area. A comprehensive and detailed evidence review has been undertaken by WYG, with site visits conducted to each of the centres to determine their current role and scale. WYG have also appraised the existing fascia and floorspace composition of the units to ensure that the most up-to-date information could be collected and analysed. In addition to obtaining the diversity of use figures, the site visits also enabled WYG to undertake a 'mini' health check assessment of each of the centres, using several of the indicators outlined in the PPS4. The current NPPF does not provide a list of indicators to be used to assess the health of a centre, however the former PPS4 set out a number of key indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time (These are to be replaced by the emerging National Planning Practice Guidance on BETA in 2014). WYG also reviewed the findings from the household surveys to calculate the expenditure levels, retention rates and trade draw patterns of the centres. WYG has produced a matrix which provides details of these findings and which also outlines the policy and boundary recommendations based on this analysis.
- 6.05 WYG used a scoring system to determine how the centres should be allocated. This was 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. It should be noted however that this quantitative analysis was also supplemented by a qualitative appraisal of each of the centres. The final categorisation of the centres may therefore not reflect the total score as shown in the centres matrix. Some of the neighbourhood centres, for example, Eaton Park – Southall Way were ranked highly in the analysis but have only been recommended for retention as neighbourhood centres due to its scale, location and trade retention levels. The commentary below is based on the more detailed matrix of the relevant available information for each of the centres, alongside diversity of use plans, which are provided in **Appendix 4**.
- 6.06 Based on our site visits and our subsequent assessment, it is evident that overall, the centres are performing well and, with several exceptions, vacancy levels are low. Most centres provide a variety of key facilities and services including convenience stores, ATMs, Post Offices and pharmacies, as well as other community facilities, such as doctor's surgeries and health centres. Despite this, WYG recommend that there is a need to re-classify or remove a total of 15 of the local and neighbourhood centres, with suggestions also given of the need to amend the extent of the existing centre boundaries.



Local Centres

- 6.07 WYG undertook a review of the 22 local centres and identified that they varied in size from Milton (Leek and Millrise Road) which comprises 30 units to Hanford (Mayne Street) and Norton Park (Leek New Road) which has just two units. The overall provision and quality of the retail and service facilities in each of the centres also varies significantly with five of the existing local centres not even accommodating a convenience store. The collective vacancy rates within these local centres (7.8%) is below the national local centres average figure (10.7% - July 2013), with nine of the 22 centres accommodating no vacant units.
- 6.08 Based on the findings, WYG recommend that seven of the existing local centres be re-defined as neighbourhood centres as they do not contain an adequate provision of facilities (notably because they may not accommodate a convenience store, pharmacy and/or a Post Office), perform a limited role and are likely to attract residents from a more confined local catchment area. These centres are as follows:
- No. 3 - Chell Heath – Chell Heath Road;
 - No. 4 - Norton – Knypersley Road;
 - No. 20 - Bucknall - Werrington Road;
 - No. 39 - Heron Cross - Heron Street/Grove Road;
 - No. 47 - Dresden - Trentham Road;
 - No. 48 - Dresden - Carlisle Street; and
 - No. 56 - Lightwood - Belgrave Road.
- 6.09 It should be noted that whilst six of the existing centres accommodate a maximum of only one of the three commercial facilities, these have been retained as local centres as WYG consider that they have significance beyond a purely neighbourhood role and still perform an important function in the wider area. For the purposes of the NPPF, we recommend that there should be 15 local centres within the hierarchy.

Neighbourhood Centres

- 6.10 The neighbourhood centres (or local parades of shops) are more likely to meet the everyday need of the community for food and other services within their immediate catchment area. It should be noted that although the NPPF identifies that the term 'centres' should 'exclude small parades of shops of purely neighbourhood significance,' WYG recognise that the neighbourhood centres do still form an



essential part of the network of shopping and service provision in the Stoke-on-Trent authority area. Therefore, despite these centres not affording any policy 'protection' under the NPPF, WYG propose that the neighbourhood centres could still be recognised in the hierarchy of centres in the Local Plan.

- 6.11 The 36 neighbourhood centres vary significantly in size, from the largest centre at Shelton (College Road) which has 12 units, to Weston Coyney (Coalville Place) which has no commercial units as they have been removed as part of a wider residential development scheme on the site. Several of the centres accommodate a variety of units, for example Eaton Park – Southall Way has only four units but it scored highly in the analysis as it contained a convenience store, pharmacy and Post Office. The level of vacancies is also higher than that found in the local centres at 10.5%, though this may be attributable to the small scale of the centres which means that the proportion of vacant units will have a greater impact on the overall results.
- 6.12 WYG have also determined that eight of these neighbourhood centres should be de-allocated and removed from the centres list as these do not contain the requisite facilities required to meet the definition of a centre. It was evident from the site visits that many of these presently comprise standalone retail or service outlets which WYG considers does not constitute the group of commercial units which the NPPF refers to. These centres are outlined below:
- No. 7 - Stanfield - Haywood Road;
 - No. 11 - Newford - Community Drive;
 - No. 16 - Cobridge - Waterloo Road;
 - No. 21 - Bucknall - Causeley Road;
 - No. 22 - Etruria - Etruria Old Road;
 - No. 37 - West End - London Road;
 - No. 42 - Weston Coyney - Coalville Place; and
 - No. 59 - Hamil Road.
- 6.13 WYG have also undertaken a walk-time analysis from each of the centres in order to review the current distribution of the centres and illustrate their current catchment area. This also helped to establish if there would be any impact on the local communities if these centres were removed from the hierarchy. WYG believe that as an acceptable walking distance to local convenience facilities



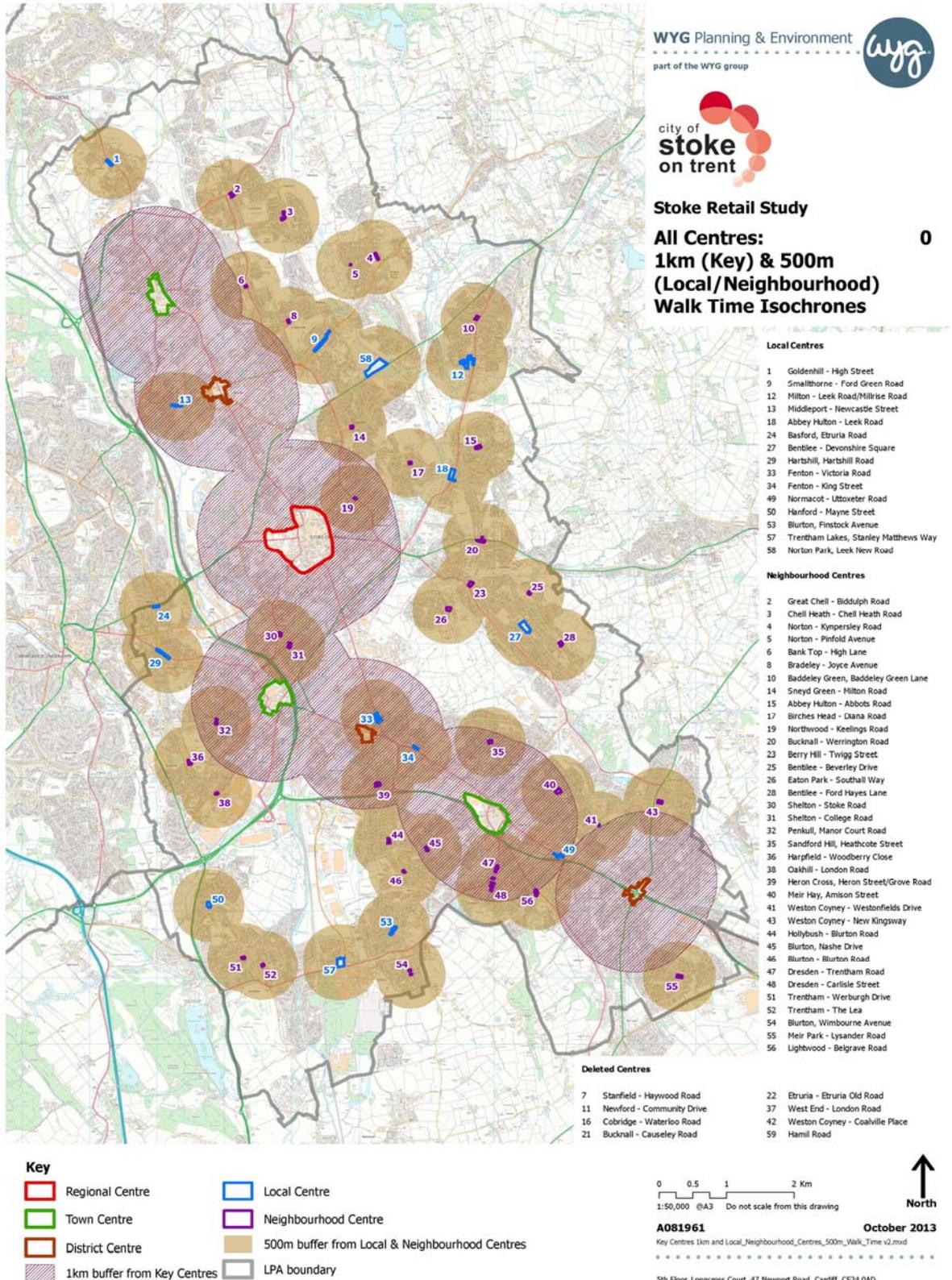
should ideally be 500 metres and should not exceed 1 km²⁴, a walk time catchment area was extended to 1km from the main centres and 500m from the local and neighbourhood centres.

- 6.14 It was evident, after reviewing **Figure 6.2** that with the exception of centre nos. 22 (Etruria Old Road) and 42 (Coalville Place), the removal of these existing neighbourhood centres from the hierarchy would not result in a deficiency in the provision of facilities in the area for local residents. WYG recommend that Etruria Old Road and Coalville Place should still be de-listed regardless of this as they lack adequate provision of facilities which we deem necessary to be classed as neighbourhood centres.

²⁴ The Institute of Highways & Transportation (IHT) in Guideline for Journey on Foot (2010) (Table 3.2) state that an acceptable walking distance for shopping is 400 metres with a preferred maximum of 800 metres. WYG believe that the adopted 500 metres for the purposes of this assessment is based on a point between the two IHT thresholds



Figure 6.2: Retail Hierarchy Accessibility across the City





Conclusions

- 6.15 The assessment by WYG to determine the role and function of each of the local and neighbourhood centres in the City of Stoke-on-Trent has indicated that the majority of these remain vital and viable centres. They still perform a key role serving local residents, whilst also continuing to complement the established principal centres and out-of-centre retail parks.
- 6.16 WYG have recommended that seven of the existing local centres should be re-defined as neighbourhood centres and that eight of the existing neighbourhood centres should be de-designated. We also propose that the boundaries of some of the centres are amended to reflect the current provision of retail and service units, as outlined in Appendix 4.

Table 6.1: WYG Recommended Retail Hierarchy

Local Centres	Abbey Hulton - Leek Road	Basford - Etruria Road
	Bentilee - Devonshire Square	Blurton – Finstock Avenue
	Fenton - King Street	Fenton - Victoria Road
	Goldenhill – High Street	Hanford - Mayne Street
	Hartshill - Hartshill Road	Middleport - Newcastle Street
	Milton - Leek Road/Millrise Road	Normacot - Uttoxeter Road
	Norton Park - Leek New Road	Smallthorne - Ford Green Road
Trentham Lakes – Stanley Matthews Way		
Neighbourhood Centres	Abbey Hulton - Abbots Road	Baddeley Green - Baddeley Green Lane
	Bank Top - High Lane	Bentilee - Beverley Drive
	Bentilee - Ford Hayes Lane	Berry Hill - Twigg Street
	Birches Head - Diana Road	Blurton - Blurton Road
	Blurton - Nashe Drive	Blurton - Wimborne Avenue
	Bradeley - Joyce Avenue	Bucknall - Werrington Road
	Chell Heath – Chell Heath Road	Dresden - Carlisle Street
	Dresden - Trentham Road	Eaton Park - Southall Way
	Great Chell – Biddulph Road	Harpfield - Woodberry Close
	Heron Cross - Heron Street/Grove Road	Hollybush - Blurton Road
	Lightwood - Belgrave Road	Meir Hay - Amison Street
	Meir Park - Lysander Road	Northwood - Keelings Road
	Norton – Knypersley Road	Norton - Pinfold Avenue
	Oakhill - London Road	Penkhull - Manor Court Road
	Sandford Hill - Heathcote Street	Shelton - College Road
	Shelton - Stoke Road	Sneyd Green - Milton Road
	Trentham - The Lea	Trentham - Werburgh Drive
Weston Coyney - New Kingsway	Weston Coyney - Westonfields Drive	



7.0 Population and Expenditure

7.01 This section of the report assesses the current population and available expenditure (for both convenience and comparison goods) within the Study Area. **Figure 4.1** indicates the extent of the Study Area and its 11 zones.

Study Area Population

7.02 The population within each postal code sector has been calculated using Experian Micromarketer G3 data (2011 estimate, which was issued in September 2012). The baseline population data takes into consideration the findings of the recent 2011 Census release which has then been projected forward by Experian (using growth rates derived from ONS population projections).

7.03 For the purpose of this Study, population and expenditure has been calculated at five year intervals from 2013 (the base date) to 2028 in accordance with the emerging local plan and the NPPF (i.e. 2013, 2018, 2023 and 2028)..

7.04 On this basis, the defined Study Area is estimated to contain a resident population of approximately 557,909 people at 2013 rising to 600,057 people at 2028. This represents an increase in population within the Study Area of 42,148 people (equating to an increase of 7.6%) between 2013 and 2028. However, if we consider the City of Stoke-on-Trent that is covered by Zones 1, 3, 4, 5 and 6 then the population is estimated at approximately 267,800 (rounded) at 2013 and is estimated to increase to 289,800 or 22,000 persons by 2028 an increase of 8.2%.

7.05 WYG advise that these population figures represent a baseline position, and do not provide an analysis of the emerging Mandate for Change strategy and therefore we would recommend that once this mandate has been agreed, further analysis will need to be undertaken to understand the implications on the retail sector across the City of Stoke.

7.06 **Table 7.1** provides a detailed breakdown of the forecast population change within each survey zone in each of the reporting periods to 2028.



Table 7.1: Study Area Population by Survey Zone (2013 to 2031)

Zone	2013	2018	2023	2028
1	82,810	85,674	88,249	90,494
2	98,279	100,489	102,855	105,399
3	75,576	77,521	79,209	80,830
4	44,609	45,999	47,096	48,053
5	41,170	42,358	43,357	44,254
6	23,608	24,455	25,365	26,126
7	25,862	26,685	27,274	27,976
8	20,987	21,497	22,041	22,507
9	64,233	65,463	66,877	68,111
10	30,816	31,587	32,265	32,893
11	49,959	51,145	52,376	53,414
Total	557,909	572,873	586,964	600,057

Source: Experian Micromarketer G3 data

Retail Expenditure

- 7.07 In order to calculate per capita convenience and comparison goods expenditure, WYG has again utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.
- 7.08 The base year for the Experian expenditure data is 2011. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 11, which was published in October 2013. For the purposes of this study, the following annual growth forecasts have been applied.

Table 7.2: Expenditure Growth Forecasts

Year	Convenience	Comparison
2012	-0.6	+3.1
2013	-0.6	+3.2
2014	-0.3	+2.3
2015	+0.1	+2.8
2016	+0.6	+2.9
2017	+0.9	+2.9
2018	+0.8	+3.1
2019	+0.9	+3.1
2020	+0.9	+3.0
2021	+0.9	+3.0
2022	+0.9	+2.9
2023	+0.9	+2.9



Year	Convenience	Comparison
2024	+0.9	+2.9
2025	+0.8	+2.9
2026	+0.7	+2.8
2027	+0.7	+2.9
2028	+0.8	+2.9

Source: Retail Planner Briefing Note 11 (October 2013)

7.09 The latest growth forecasts suggest that the current downturn in the economy will continue to impact upon future expenditure, at least in the short term. However, over the medium to long term it is expected that the forecast levels of growth will increase as the economy recovers. In terms of convenience goods, Experian forecasts relatively modest annual changes ranging between -0.6% and +0.1% between 2013 and 2015, before identifying increased anticipated growth of between +0.6% to +0.9% per annum or greater between 2016 and 2028. However, growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. The growth in comparison goods spend ranges between 2.3% and 3.1% through the plan period. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long are reflective of any changes that may occur in the future.

7.10 Experian Retail Planner Briefing Note 11 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. We have 'stripped out' any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.

In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations. Indeed, since the non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated from the point of view of those interested in physical retail outlets, particularly for convenience goods.' Appendix 3 of Experian Retail Planner Briefing Note 11 states that:

'Many stores sell online but source sales from regular stores rather than warehouses, implying an increase in required store floorspace to cater for rising internet sales.'

- 7.11 Due to this 'over-statement', in making an allowance for expenditure committed via special forms of trading, we adopt Experian's adjusted figure (provided at Appendix 3 of the Briefing Note) which accounts for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at **Table 7.3** is 'stripped out' of the identified expenditure as it is not available to stores within the Study Area.

Table 7.3: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2013	2.5%	10.8%
2018	3.8%	14.5%
2023	4.8%	15.9%
2028	5.4%	16.0%

Source: Experian Retail Planner Briefing Note 11 (October 2013)

- 7.12 Using the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2013, 2018, 2023 and 2028. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

- 7.13 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2013, the resident population of the Study Area generates some £1,006.0m of convenience goods expenditure²⁵. This is forecast to increase to £1,167.7m at 2028, which represents an increase of £161.7m (or 16.1%) between 2013 and 2028. In the immediate five year interval to 2018, the convenience goods expenditure is estimated to increase to £1,042.0m, which represents an increase of just £36.0m, which represents a 3.6% increase.

Table 7.4 Total Available Study Area Expenditure – Convenience (£m)

2013	2018	2023	2028	Growth 2013-2018	Growth 2013-2023	Growth 2013-2028
1,006.0	1,042.0	1,104.3	1,167.7	36.0	98.3	161.7

Source: Table 2a, Appendix 5

Main Food and 'Top-Up' Shopping

- 7.14 It has been assumed that the proportion of convenience goods expenditure directed to each respondent's main food shopping destination equates to broadly 72% of their overall convenience

²⁵ Expressed in 2011 prices, as is every subsequent monetary value



shopping expenditure. The remaining 18% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' 'top-up' convenience shopping destination. This ratio reflects the respective expenditure committed during main food and top-up shopping trips as identified by the household survey (Q5 and Q15) for each zone.

7.15 By applying these estimates to the identified resident population of the Study Area, convenience goods expenditure at 2013 committed through 'main food' shopping trips is estimated to be £798.3m and through 'top up' shopping trips is estimated to account for be £207.7m.

Comparison Goods Expenditure

7.16 At 2013, it is estimated that the resident population of the Study Area generates £1,406.6m of comparison goods expenditure, which is forecast to increase to £2,182.7m at 2028. This represents an increase of £775.5m (or 55.1%) between 2013 and 2028. Whilst this increase is clearly significant, it is more modest than that which has previously been achieved due to the more circumspect level of comparison goods growth which is forecast over the short and medium term in particular. Indeed, the identified comparison goods expenditure growth of £184.3m within the Study Area between 2013 and 2018 represents just a 13.1% increase.

Table 7.5 Total Available Expenditure Study Area – Comparison (£m)

2013	2018	2023	2028	Growth 2013-2018	Growth 2013-2023	Growth 2013-2028
1,406.6	1,590.9	1,852.8	2,182.7	184.3	446.2	775.5

Source: Table 8, Appendix 5

7.17 For the purposes of this study, comparison goods expenditure has been divided into eight sub-categories: 'Furniture', 'DIY', 'Electrical' (these four categories collectively being referred to as bulky goods), 'Clothing & Footwear', 'CDs, DVDs and Books', 'Small Household Goods', 'Toys, Games, Bicycles and Recreational Goods' and 'Health and Beauty/Chemist Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zone by zone basis.

Inflow (Visitor/Tourism) Expenditure to the City of Stoke-on-Trent

7.18 The City of Stoke-on-Trent is recognised as an important destination in the West Midland's tourism economy, principally due to the historical context of the ceramic and pottery industry. WYG has sought to establish the level of shopping expenditure that is attracted to the area from visitor and tourist spend. WYG has drawn from data contained in the Stoke-on-Trent Tourism Economic Impact



Assessment (TEIA) prepared by Research Solutions. TEIA data confirms that the total 'shopping' expenditure by visitors in Stoke is £82.0m in 2011²⁶. The TEIA also confirms that £72.3m is spent on food and drink, which we understand includes eating out at destinations such as restaurants, pubs, cafes etc. TEIA identify that other (£52.6m) expenditure is spent in Stoke City on accommodation, recreation and transport.

- 7.19 The TEIA does state that the majority of spending takes places in attractions. Indeed, drawing on information contained within the Stoke on Trent Visitor Survey 2011, the results showed that many trips were undertaken at pottery or china outlets rather than necessarily established town centres. The TEIA does not break down the shopping spend into comparison or convenience goods items nor does it provide any meaningful information in relation to destinations of where visitors undertake any shopping, although 23% stated that they visited the City of Stoke-on-Trent for shopping trips (including shopping for gifts, souvenirs and excludes food shopping). With limited data, WYG has assumed that around £30.0m is spent at facilities in the city on comparison goods retail only, we do not expect there to be any inflow for convenience goods shopping as the city's tourism is based on day visitors and overseas visitors mainly staying at hotel accommodation who are unlikely to spend money on food items. This is further reduced by the extensive Study Area. We have assumed that a total of around £30.0m is spent in the city as a whole, which represents an inflow of around 3.4% of all goods when compared to the £901.8m retained in the local area (see section 7). From experience we believe this is a level of reasonable inflow towards established centres.

Market Share of Expenditure of the Main Provision

- 7.20 Having estimated the level of expenditure which is generated by the resident population within the defined Study Area, it is necessary to identify the 'sphere of influence' of each of the defined centres and each centre's claimed market share of available expenditure. We have also considered other important destinations including local centres and other major retail parks (such as Festival Park, Victoria Road and Meir Park as well other standalone retail category effectively being 'undefined' in planning terms). This Study has involved the completion of 1,300 household telephone interviews within the defined Study Area. By analysing the results of the survey, it is possible to estimate the levels of expenditure which are directed towards each principal centre's shopping facilities. The market shares for the various expenditure categories were identified in Section 5. **Table 7.6** below summarises differing market shares achieved for each of the main retail destinations across the city, and shows that the main destinations for undertaking shopping trips is Stoke City Centre (14.5%) and the wider Festival Park retail area (12.3%). Of the network of town centres (Longton, Stoke Town, Fenton, Tunstall, Burslem and Meir), Longton is the third most important destination (7.8%) in the city with Tunstall also identified as an important destination (3.4%). The other four town centres together

²⁶ TEIA data is in 2011 price base and is consistent with the price base of this Statement (taken from Table 11).



have a comparable market share combined (at 3.9%) showing their more limited shopping role cumulatively. The retail provision at both Meir Retail Park and Victoria Retail Park are popular destinations with 3.8% and 1.9% market shares respectively. We note that 5.4% of trips are undertaken to other (undefined in planning policy terms) locations across the city. Overall the facilities within the city retain approximately 56.7% of all local expenditure generated in the Study Area, with a further 33.9% going to facilities in the rest of the Study Area, therefore the Study Area as a whole retains 90.6% of locally generated expenditure which is considered sustainable, with just outflow of 9.5% to destination outside the wider Study Area. This is considered a sustainable level of retention, demonstrating that there is limited outflow of expenditure.

Table 7.6: Stoke City Market Shares by Location

Destination	Market Shares by Category (%)										TOTAL [^]
	Convenience Goods		Comparison Goods								
	Main Food	Top-up Food	Furniture	DIY	Electrical	Clothing & Footwear	CDs, DVDs, books	Small H/hold	Recreation	Chemist	
Stoke City Centre	3.8	5.1	9.3	2.6	12.5	42.7	37.9	18.3	19.0	12.5	14.5
Stoke Town centre	2.8	3.1	3.2	0.6	1.5	0.9	1.7	2.5	1.2	2.7	2.1
Longton town centre	7.9	3.5	4.4	2.9	13.0	7.2	4.9	7.9	19.0	9.6	7.8
Fenton town centre	0.1	0.7	7.2	0.8	0.3	0.1	0.3	4.1	0.5	0.5	1.0
Tunstall town centre	2.9	1.6	2.3	0.4	5.1	5.9	4.1	4.8	3.9	4.3	3.4
Burslem town centre	0.3	1.1	2.4	0.4	0.7	0.1	0.2	1.7	0.3	1.3	0.6
Meir town centre	0.1	0.5	0.7	0.2	0.8	0.0	0.3	0.1	0.0	0.9	0.2
Local Centres	4.1	16.1	5.1	2.1	1.0	0.3	0.5	1.9	1.7	7.1	3.4
Festival Park Area	10.7	3.1	16.3	19.3	32.7	5.6	1.7	8.7	28.0	7.9	12.3
Victoria Road Area	2.1	2.5	4.6	2.1	1.5	0.0	0.3	5.9	0.4	0.2	1.9
Meir Retail Park Area	6.1	2.4	1.8	21.3	0.6	0.3	2.3	0.7	0.0	1.5	3.8
Other (undefined)	10.6	8.8	1.7	4.6	0.7	0.1	0.7	1.5	1.1	0.7	5.4
City Sub-Total	51.4	48.6	59.0	57.4	74.2	63.6	55.0	58.0	78.6	49.4	56.6
Other Study Area	44.8	49.3	27.6	31.5	17.6	18.8	35.5	27.1	13.7	46.9	33.9
Leakage Outside Study Area	3.8	2.1	13.4	11.2	8.2	17.6	9.6	14.9	7.7	3.7	9.5

Source: Stoke Household Shopping Survey (2013)

[^] Based on cumulative market share of all categories (convenience goods and comparison goods) (any edge of centre facilities are included within the adjacent town centre above (not as out-of-centre)



Forecast Growth in Expenditure Attracted to Study Area

- 7.21 With forecast growth in convenience goods expenditure predicted to increase at an average of 0.4% per annum²⁷ across the whole of the period from 2013 to 2028, and with the Study Area population expected to grow from around 557,900 to 600,100 people over the same period, it is estimated that the Study Area will experience an increase in convenience goods expenditure of approximately £161.7m at 2028. Assuming a constant Study Area market share of 49.2%, this equates to an increase in retained (within the City of Stoke-on-Trent) convenience goods expenditure of approximately £79.6m at 2028. In the short term the convenience good expenditure growth to 2018 is estimated at £36.0m and based on the existing market share would equate to £17.7m.
- 7.22 The significant forecast increase in expenditure on comparison goods (an average of 2.5% per annum²⁹ increase in the period 2013 to 2028) would result in a further £775.5m of comparison goods expenditure being generated within the Study Area by 2028. Assuming a constant comparison goods market share of 61.9%, existing facilities within the City of Stoke-on-Trent will capture around an additional £480.0m of comparison goods expenditure by 2028. In the short term (to 2018) the forecast increase in expenditure is just £184.3m and again assuming the City of Stoke captures its existing market share over the plan period, this equates to £114.1m.
- 7.23 This baseline analysis is based on 'rolling forward' the current market share within the Study Area for each category of goods. This approach of rolling forward existing market share is in line with standard practice and does not take into account the desirability or need to 'claw back' leakage between expenditure directed to centres elsewhere, which might be achieved through improvements in retail provision or offer. However, in this regard it should be noted that the current comparison goods market share of the Study Area is considered reasonably healthy (at 61.9% for the City of Stoke-on-Trent facilities and 86.2% for all facilities in the wider Study Area), demonstrating that there is already a high retention of local (comparison goods) expenditure and relatively limited expenditure leakage (13.8%) to facilities beyond the adopted Study Area.
- 7.24 In order for the Study Area (and the City of Stoke-on-Trent) to capture the significant future growth in retail expenditure which is forecast (particularly for comparison goods), it is likely that there will be a need to enhance future retail provision, thereby ensuring that this growth is not lost to competing centres and that the Study Area retention rate does not decline in the future.

²⁷ Growth rates taken from Appendix 3 of Experian Retail Planner Briefing Note 11 (October 2013), and are adjusted to take into consideration SFT allowances.



7.25 If an excess of comparison or convenience goods expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The current capacity and efficiency of retail floorspace within the established centres and elsewhere.



8.0 Capacity in Existing Centres

- 8.01 WYG has examined the need for new convenience and comparison goods floorspace over five year reporting periods to 2028 to coincide with the lifespan of any future Local Plan. At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified need or capacity identified beyond 2018 should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.
- 8.02 A complete series of quantitative capacity tables are provided at **Appendix 5** to provide further detail in terms of the step-by-step application of the study methodology.

Capacity Formula

- 8.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).
- 8.04 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
- Growth in population;
 - Growth in expenditure per person per annum; and
 - Special Forms of Trading (e.g. catalogue shopping / internet).
- 8.05 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales density for all major multiple retailers.
- 8.06 **Surplus / Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will suggest an under provision of retail facilities within the



Study Area (which, all things being equal, would suggest that additional floorspace is required), whereas a deficit would suggest an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).

- 8.07 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required to meet identified needs. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, electrical retailers such as Currys (which is considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as B&Q, and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

Capacity for Future Convenience Goods Floorspace

- 8.08 In order to ascertain the likely need for additional convenience goods floorspace across the City of Stoke-on-Trent, it is first necessary to consider the current provision. For each centre, it is assumed that future expenditure available to the centre will be based upon its existing market share. Given that the City of Stoke-on-Trent is already relatively well provided for with a variety of foodstore operators, it is assumed that the future convenience goods expenditure available to the City of Stoke-on-Trent will be commensurate to its current market share of 49.2%. We should note that the market share appears low (and is lower than that achieved for comparison goods shopping); this is mainly due to extensive nature of the Study Area. However, in assessing the Zones that cover the City of Stoke-on-Trent, we found that retention levels are extremely high, for example in Zone 1, 93% of convenience goods expenditure is retained at facilities in the City of Stoke-on-Trent, in Zone 3, 87% of convenience goods expenditure is retained by existing facilities, and in Zone 4, 81%, Zone 5 retains 90% of expenditure and 79% in Zone 6. The current market share is calculated by examining the trading performance of stores in the wider Study Area.
- 8.09 The analysis of the market share of facilities in the City of Stoke-on-Trent indicates that the current level of trade passing through food facilities originating from inside the Study Area is £495.0m. Given the TVIA information we consider that there is unlikely to be any significant inflow of convenience goods expenditure from outside the Study Area to existing facilities.
- 8.10 For each destination, the survey-derived turnover is compared to a 'benchmark' turnover that indicates the level of turnover that the store would generally be expected to attract, based on company average trading levels. A judgement can then be made on the trading performance of existing facilities based on the comparison of the survey-derived turnover with the expected turnover (based on nationally published trading information from Mintel and Verdict) of existing provision.



- 8.11 **Table 8.1** below indicates the current trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2028 assuming that the identified market share remains constant. The 'benchmark' turnover differs for each operator based on its average turnover per square metre (or 'sales density') throughout the country. Although robust up to date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).
- 8.12 Furthermore, as this assessment is based upon a 'goods based' approach which disaggregates expenditure by category type, it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator²⁸ has been applied to the estimated net floorspace of each foodstore. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.
- 8.13 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and understate the role of smaller stores and independent retailers, however, we have put measures into the survey design to reduce this bias.
- 8.14 **Table 8.1** indicates that, across the main convenience goods provisions considered together, the expected turnover of existing convenience goods shopping provision is £498.6m per annum, which is very similar to the collective survey-derived turnover of £495.0m per annum. This suggests that, cumulatively, convenience goods floorspace is effectively 'under trading' by just -0.7% (or -£3.6m). Whilst overall the trading performance of existing provision appears to be generally satisfactory, there are occasions where certain facilities are trading well or below expected levels and this needs to be considered. For example, the results show that facilities in Zone 1 (Stoke City/Fenton) are collectively trading 6% below their expected benchmark turnover of £197.2m compared to a derived of £186.0m; whereas facilities in Zone 3 (Longton/Meir) are trading above benchmark (£130.5m) with a derived turnover of £138.8m (or 4.2%). Conversely in Zone 4 (Stoke Town) the survey found that the derived turnover is estimated at £84.2m, compared to an expected benchmark of £95.8m. In Zone 5 (Burslem) facilities had a derived turnover of £54.0m compared with a benchmark turnover of just

²⁸ Taken from Verdict Food & Grocer Retailers (2011)



£26.5m so are over trading by around 100%. In Zone 6 (Tunstall), the derived turnover is estimated at £32.0m compared to a benchmark of £48.6m, so under trading by -35.0%.

8.15 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how this collective over trading may be affected by future growth in expenditure. Accordingly the next series of tables set out the anticipated increases in expenditure which will be available to the city’s convenience goods retail facilities, assuming that the current market share is maintained. It is also assumed that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner 11. Following this exercise, we then consider the effect extant planning commitments will have in addressing any identified convenience shopping needs.

8.16 **Table 8.1** indicates that, through increases in both population and expenditure applied to the current trading position, there is a -£3.6m convenience goods expenditure deficit identified at 2013. By 2018 after increase population and expenditure figures coupled with increases in productivity, we estimate that there will be a surplus expenditure of £23.5m at 2018, increasing to £52.7m at 2023, and up to £81.5m at 2028 (based on the existing market share (49.2%) being retained).

Table 8.1: Baseline Quantitative Need for Convenience Goods Floorspace in the City of Stoke-on-Trent (Global)

Year	Benchmark Turnover (£m) ¹	Available Derived Expenditure (£m) ²	Surplus Expenditure (£m)
2013	498.6	495.0	-3.6
2018	489.2	512.7	23.5
2023	490.6	543.4	52.7
2028	493.1	574.6	81.5

Source: Table 6 (Table 1a) Appendix 5

8.17 **Table 8.1a** below shows the level of tangible convenience goods floorspace that could be accommodated by the identified expenditure surplus through to 2028. The results show in the short term to 2018 the surplus of £23.5m could accommodate between 2,000 sq.m (net) and 3,400 sq.m (net), the £52.7m surplus identified at 2023 realises a capacity of between 4,500 sq.m (net) and 7,700 sq.m (net). Then moving forward into the longer term to 2028, the surplus is estimated to increase to £81.5m which could support between 6,900 sq.m (net) and 11,800 sq.m (net). These capacity figures make no allowance for extant planning permissions that may be approved across the city.

Table 8.1a: Estimated Capacity for Convenience Goods Facilities in the City of Stoke-on-Trent (without planning permissions)

Year	Surplus Expenditure (taken from Table 8.1)	Floorspace Requirement (sq.m net)	Floorspace Requirement (sq.m net)
	(£m)	Min ^{1*}	Min ^{1*}
2013	-3.6	-300	-500
2018	23.5	2,000	3,400
2023	52.7	4,500	7,700
2028	81.5	6,900	11,800

Source: Table 6 (Table 1b) of Appendix 5

8.18 WYG understand there is 3,300 sq.m (net) of convenience good floorspace proposed across the City of Stoke-on-Trent (in the form of extant planning permissions). WYG estimate that the proposed floorspace will have an estimated turnover of £40.0m once all are trading at 2018, and we estimate that £39.4m of this will be derived from the Study Area. In addition, and drawing on information from adjoining Newcastle under Lyme, there are also a number of extant planning permissions which will influence any capacity in the City of Stoke-on-Trent, we understand that there is new (989 sq.m (net)) convenience goods floorspace proposed in the new M&S store at Wolstanton Retail Park, WYG estimate that £4.0m of this is likely to be drawn from the City of Stoke-on-Trent. We therefore estimate that a total of £43.4m of extant planning permission's turnover will absorb any identified capacity. As shown in **Table 8.2**, extant permissions effectively negate any need for major new convenience goods development in the short term to 2018, based on the existing market share being retained (i.e. the status quo). Most of the quantitative capacity will be absorbed by the three main extant planning permission which involve the WM Morrisons supermarket at Highgate (LPA Ref: 54248) near Tunstall town centre and the two foodstore developments at City Sentral (48935/OUT) and Wolstanton Retail Park (11/00611/FUL).

Table 8.2: Quantitative Need for Additional Convenience Goods Floorspace in the City of Stoke-on-Trent – After Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	-3.6				
2018	23.5	43.4	-19.8	-1,700	-2,900
2023	52.7	43.5	9.2	800	1,300
2028	81.5	43.7	37.7	3,200	5,500

Source: Table 6 (Table 1c) of Appendix 5



- 8.19 The results show that, given the quantum of convenience goods floorspace which would be provided by extant planning permissions, there is limited residual capacity over the short to medium-term, and based on a continuation of the current market share. Capacity is likely to be available in the later part of the plan period (beyond 2023) and is estimated to be between 3,200 sq.m (net) and 5,500 sq.m (net) depending on the end operator at 2028, and we would recommend that subject to the implementation of the above three extant planning permission that this may need to be monitored and reviewed again at 2018.
- 8.20 The assessment will now consider the estimated capacity for each of main centres within the City of Stoke-on-Trent in more detail.

Stoke City/Fenton (Zone 1)

- 8.21 In order to appraise the need for additional convenience goods retail floorspace in the main urban area around Stoke City and Fenton, we have considered the trading performance of existing facilities in Zone 1 which forms the main urban area around Stoke City Centre. The area includes facilities that are located in around Stoke City Centre and Fenton town centre, and 20 local (and neighbourhood) centres as well as other undefined locations (including standalone (edge and out of centre) stores and local parades). The results found that existing facilities in Zone 1 retain 93.1% of the available expenditure generated within the zone with no leakage to facilities outside the study area demonstrating that the retention levels are sustainable and unlikely to be significantly increased. Facilities in Zone 1 retain 72.4% of local generated in Zone 1. However, there is a notable level (approximately 15%) of locally generated expenditure in Zone 1 being spent at facilities in Zone 3 (Longton/Meir) with a further 6.5% spent at facilities in Zone 2 (Newcastle under Lyme).
- 8.22 Drawing on information contained in Table 5 of **Appendix 1**, it is evident that convenience goods facilities within Zone 1 when considered together, have an expected benchmark turnover of £197.2m per annum, which compares to a survey-derived turnover of £186.0m per annum. This is comparable to the result found for the City of Stoke-on-Trent at large, where cumulatively, convenience goods floorspace are 'trading below the expected levels'. With the exception of the Morrisons at Festival Park and the two Aldi's one at Berry Hill, Fenton and the other at Leek New Road in Norton, stores in Zone 1 are generally under trading. Local shops in the city centre are cumulatively over trading, but this is principally driven by the significant under trading found at the Tesco store at Clough Street.
- 8.23 **Table 8.3** indicates that, at 2013, an expenditure deficit of -£11.2m (below the expected benchmark turnover) is attributed to facilities in the Zone 1. This deficit is largely caused by Zone 1 expenditure



being spent at facilities in Zone 3 (Longton/Meir). The Tesco Extra store at Longton Retail Park influences local shopping patterns and retains 9% of the expenditure generated in Zone 1.

8.24 Accepting the caveat provided at paragraph 7.13, the survey indicates that a number of stores are performing particularly strongly in and around the main town centres and local centres. In particular in Zone 1, facilities in Stoke City were performing well (except Tesco at Clough Street) above expected levels, and facilities in Fenton town centre were performing in line with expected levels. In terms of the network of local centres in Zone 1, the results found that cumulatively the facilities were trading well above expected levels, however, this was principally due to the significant over trading found at the Aldi store at Norton (derived turnover of £18.7m compared to benchmark of £6.5m). In terms of out-of-centre stores in Zone 1, the result show a contrasting picture, whereby the Aldi at Berry Hill in Fenton is significantly over trading (£16.0m derived compared to £5.6m benchmark), whereas the Asda store (Berry Hill) and Tesco Extra at Clough Street are trading well below expected levels. The Sainsbury's at Etruria Road is trading at 90% of expected levels and the Morrisons at Festival Park is trading nearly 19% above expected levels. However, when considering the collective performance of facilities in Zone 1 we found that generally existing facilities are trading below (6%) expected levels. The individual performance of each of the main convenience goods facilities are shown in Table 5 of the Appendices.

8.25 **Table 8.3** provides a breakdown of the capacity for additional convenience goods floorspace in monetary terms. Assuming existing convenience goods facilities maintain their existing market share of 18.5%, after taking into account floorspace efficiencies, it is assumed that a deficit of -£11.2m at 2013 will decrease to -£0.8m at 2018, with a surplus of £10.1m at 2023 increasing to £20.9m at 2028.

Table 8.3: Baseline Quantitative Need for Convenience Goods Floorspace in the Stoke City/Fenton (Zone 1)

Year	Benchmark Turnover (£m) ¹	Available Derived Expenditure (£m) ²	Surplus Expenditure (£m)
2013	197.2	186.0	-11.2
2018	193.5	192.7	-0.8
2023	194.1	204.2	10.1
2028	195.1	215.9	20.9

Source: Table 6 (Table 2a) Appendix 5

8.26 We understand that there is a further (circa) 640 sq.m (net) of convenience good floorspace proposed in Stoke City Centre through the City Sentral proposal. In addition there is floorspace proposed elsewhere in the city, and we estimate that the consented floorspace will have a turnover of £43.4m if trading at 2018, of which we estimate 30% or £13.0m will be drawn from residents in Zone 1. As shown in **Table 8.4**, after account is made for extant planning permissions, there is no identifiable

quantitative need for further convenience goods development before 2023, based on the existing market share being retained (i.e. the status quo) with some limited capacity at 2028. In light of the current extant permission at the City Sentral scheme there may be scope to provide more convenience goods floorspace within the scheme and this would meet the identified capacity for Zone 1 for the plan period.

Table 8.4: Quantitative Need for Additional Convenience Goods Floorspace in Stoke City/ Fenton – After Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	-11.2				
2018	-0.8	13.0	-13.8	-1,200	-2,000
2023	10.1	13.1	-2.9	-300	-400
2028	20.9	13.1	7.7	700	1,100

Source: Table 6 (Table 2c) of Appendix 5

Longton/Meir (Zone 3)

8.27 **Table 8.5** sets out Zone 3's collective survey derived convenience goods turnover (£138.8m) and compares this within the expected collective benchmark turnover (£130.5m) of the existing provision, showing that existing facilities are over trading (+6%) against expected levels. The results show that the Tesco Extra store on the edge of Longton town centre is trading at circa 94% expected levels at around £56.6m, with other facilities in the town centre also trading above expected levels. Contrastingly facilities in Meir town centre perform well below expected levels, principally because of the strong performance of facilities at Meir Retail Park which are trading cumulatively 17% above expected. However, the results show that the Aldi at Meir Retail Park is significantly over trading (derived £17.5m against a benchmark of £4.5m) whilst the Tesco at Meir Retail Park is trading at 92% of benchmark levels. The results indicate that existing facilities in Zone 3 retain approximately 71.1% of all convenience goods expenditure generated by residents within Zone 3, with a further 8.9% spent at facilities in Zone 1 (Stoke City) and 8.6% spent at facilities in Zone 4 (Stoke Town). With 87.1% of the available convenience goods expenditure in Zone 3 spent at facilities within the wider City of Stoke-on-Trent area, with 8.9% being spent at facilities in Zone 2 (Newcastle-under-Lyme), showing sustainable levels of trade retention. Existing facilities in Zone 3 have a market share of 13.8% within the Study Area, which is the second highest market share of the zones within the City of Stoke-on-Trent, representing 28% of the convenience goods trade retained in the city.

8.28 Based on this over trading, there is currently an expenditure surplus of £8.2m identified at 2013, increasing to £15.7m by 2018, to £23.9m at 2023, which then increases to £32.0m at 2028.

Table 8.5: Baseline Quantitative Need for Convenience Goods Floorspace in the Longton/Meir (Zone 3)

Year	Benchmark Turnover (£m) ¹	Available Derived Expenditure (£m) ²	Surplus Expenditure (£m)
2013	130.5	138.8	8.2
2018	128.1	143.7	15.7
2023	128.4	152.3	23.9
2028	129.1	161.1	32.0

Source: Table 6 (Table 3a) Appendix 5

8.29 As previously advised, there are number of extant planning consents in the City of Stoke-on-Trent, however, there are none located within Zone 3. We estimate that given the distance of the proposed floorspace it will draw just 15% of turnover from residents in Zone 3 based on current shopping patterns. We therefore estimate that approximately £6.5m of the turnover of extant planning permissions will be drawn from residents in Zone 3 and this will absorb some of that capacity identified in Zone 3 as trade is clawed back from the over trading stores in Zone 3. This would absorb circa 40% of the identified capacity based on the existing market share being retained.

8.30 As shown in **Table 8.6**, after taking account of extant planning permissions, there is a residual capacity of £9.2m for new convenience goods floorspace up to 2018 based on the existing market share being retained (i.e. maintenance of the status quo). This net capacity would increase to £17.4m by 2023. We estimate that this could accommodate between 1,500 sq.m (net) and 2,500 sq.m (net) at 2018 increasing to between 2,200 sq.m net and 3,700 sq.m net at 2028.

Table 8.6: Quantitative Need for Additional Convenience Goods Floorspace in Longton/Meir (Zone 3) – After Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	8.2				
2018	15.7	6.5	9.2	800	1,300
2023	23.9	6.5	17.4	1,500	2,500
2028	32.0	6.6	25.4	2,200	3,700

Source: Table 6 (Table 2c) of Appendix 5

Stoke Town (Zone 4)

- 8.31 **Table 8.7** sets out Zone 4's collective survey derived convenience goods turnover (£84.2m) and compares this within the expected collective benchmark turnover (£95.8m) of the existing provision, indicating that existing facilities are under trading (by -£11.6m) against expected levels. The results identify that Stoke Town centre facilities are trading well below expected benchmark levels, this is mainly due to the poor trading performance of the Sainsbury's store at Minton House. The Iceland and Lidl stores are also undertrading but not to the same degree as the Sainsbury's. For example the Sainsbury's store is undertrading by £17.6m (£39.7m benchmark turnover against a derived turnover of £22.1m) whereas the other two stores are undertrading by just £2.2m. The Sainsbury's store is trading at 45% of its expected levels. The results also found that facilities within local centres are collectively undertrading, despite the trading strength of the Aldi store at Stanley Matthews Way. However, despite the underperformance of Stoke town the results show that there is significant over trading occurring at the Aldi and Tesco stores along Newcastle Road at Springfield, which together are over trading by £11.1m.
- 8.32 The results indicate that existing facilities in Zone 4 retain approximately 59.0% of all convenience goods expenditure generated by residents within Zone 4, with a further 12.4% spent at facilities in Zone 1 (Stoke City) and 8.5% spent at facilities in Zone 3 (Longton/Meir). With 80.8% of the available convenience goods expenditure in Zone 4 spent at facilities within the wider City of Stoke-on-Trent area. The largest level of leakage is to facilities in Zone 2 (Newcastle-under-Lyme) whereby 18.4% of Zone 4 residents shop at facilities in Zone 2, mainly to the two main Asda stores (Wolstanton) and the two Morrisons stores (Newcastle). The market share of the existing facilities in Zone 4 is 8.4% from the Study Area and is lowest of survey Zones covering the City of Stoke-on-Trent area.
- 8.33 Based on this collective undertrading, there is currently an expenditure deficit of -£11.6m identified at 2013, which decreases to -£6.8m at 2018, decreasing to -£1.8m at 2023, turning to a surplus of £3.0m at 2028.

Table 8.7: Baseline Quantitative Need for Convenience Goods Floorspace in Stoke Town (Zone 4)

Year	Benchmark Turnover (£m) ¹	Available Derived Expenditure (£m) ²	Surplus Expenditure (£m)
2013	95.8	84.2	-11.6
2018	94.0	87.2	-6.8
2023	94.2	92.4	-1.8
2028	94.7	97.7	3.0

Source: Table 6 (Table 3a) Appendix 5

8.34 There are no planning commitments for new convenience goods retailing in Zone 4, however as set out in **Table 8.8**, and based on existing trade draw of existing facilities, we have assumed that some of the turnover of proposed developments in Zones 1 and 5 will be derived from residents in Zone 4. We note that a new Morrisons M convenience store has opened in the former Blockbuster unit in the town centre in late 2013 and since the empirical evidence was completed. We therefore estimate that the proposed floorspace will derive £6.5m from residents in Zone 4 at 2018. This would increase any deficit within the Zone based on the retention of Zone 4's existing market share. In reality if approved, these commitments are likely to affect the trading performance of Zone's 4 stores further. Based on the extant planning permission being realised outside Zone 4 there is unlikely to be any quantitative need within Zone 4 based on existing market shares being retained through to 2028. WYG would recommend that this position is monitored over the next five years as the performance of existing facilities may be affected through increased competition elsewhere.

Table 8.8: Quantitative Need for Additional Convenience Goods Floorspace in Stoke Town (Zone 4) – After Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	-11.6				
2018	-6.8	6.5	-13.3	-1,100	-1,900
2023	-1.8	6.5	-8.3	-700	-1,200
2028	3.0	6.6	-3.5	-300	-500

Source: Table 6 (Table 2c) of Appendix 5

Burslem and Tunstall (Zones 5 & 6)

8.35 Given the proximity (approximately 1.8km) of Burslem and Tunstall town centres in Zones 5 and 6 to one another, both towns sit within overlapping catchment with clear interrelationships whereby residents in both Zones are heavily influenced by facilities in either zone, therefore for the purposes of this capacity exercise we have sought to amalgamate Zone 5 and 6 and consider the capacity across both zones.

8.36 Table 8.9 sets out Zones 5 and 6 collective survey derived convenience goods turnover (£86.0m) and compares this within the expected collective benchmark turnover (£75.1m) of the existing provision, showing that existing facilities across both Zones are over trading against expected levels. However, the results show varying signs of performance within existing facilities. For example whilst facilities in Burslem town centre collective are performing above expected levels, as are facilities in Tunstall town centre (collectively). However, the edge of centre Asda store on Scotia Road is significantly



undertrading (£23.7m derived against £37.4m benchmark). Local centres in both Zones are trading within 10% of expected levels. In terms of out-of-centre facilities, the results indicate that they are all over trading with the exception of two (Lidl at Tunstall and the Co-Operative Food at High Lane), whereby the Asda (former Netto) on Scotia Road and the Aldi at Brownhill Road are significantly over trading.

8.37 The results indicate that existing facilities in Zones 5 and 6 retain 45.6% of main food shopping trips and 66.0% of top up food trips in Zones 5 and 6. The results also show that 50.1% of convenience goods trade draw of existing facilities in Zones 5 and 6 is from residents who live in the two Zones, with 35.5% trade draw from facilities in Zone 1 and 3.9% from facilities in Zone 2, with nominal levels (less than 1%) from facilities in Zones 3 and 4. In terms of the city as a whole, Zones 5 and 6 retains 87.2% of convenience goods trade and retains 99.6% within the wider Study Area, showing 12.4% leakage to neighbouring authorities such as Newcastle-under-Lyme, Staffordshire Moorlands and Cheshire East.

8.38 Based on this cumulative over trading (and after deductions due to undertrading), there is currently an expenditure surplus of £10.9m identified at 2013, increasing to £15.5m by 2018, to £20.6m by 2023, to £25.6m by 2028. The results indicate that existing facilities in Zones 5 and 6 retain approximately 8.6% of all convenience goods expenditure within the Study Area.

Table 8.9: Baseline Quantitative Need for Convenience Goods Floorspace in the Burslem & Tunstall Town (Zones 5 & 6)

Year	Benchmark Turnover (£m) ¹	Available Derived Expenditure (£m) ²	Surplus Expenditure (£m)
2013	75.1	86.0	10.9
2018	73.7	89.1	15.5
2023	73.9	94.4	20.6
2028	74.3	99.9	25.6

Source: Table 6 (Table 3a) Appendix 5

8.39 As previously identified, there is an extant planning permission for a new Morrisons store to the south of Tunstall town centre on the edge of Zones 5 and 6 boundaries, which comprises a net floorspace of approximately 2,648 sq.m. As set out in **Table 8.10**, and based on existing trade draw of existing facilities, we have assumed that 50% of new store turnover will be derived from residents in Zones 5 and 6 with the rest clawed back the trade currently spent at the Morrisons at Festival Retail Park with the rest drawn from existing facilities or from residents within Zones 1 and 2. This would absorb all of the identified capacity based on the retention of Zones 5 and 6 existing market share at 2018. Indeed, if implemented the Morrisons will absorb most of the capacity over the plan period and will reduce the current cumulative over trading currently occurring within Zones 5 and 6. However, WYG have been



advised that there have been some recent difficulties in the implementation of the Morrisons store at Highgate; notwithstanding these, we would still recommend that any new operator should be promoted in this location to address the quantitative need.

Table 8.10: Quantitative Need for Additional Convenience Goods Floorspace in Burslem & Tunstall (Zones 5 & 6) – After Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	10.9				
2018	15.5	17.4	-1.9	-200	-300
2023	20.6	17.4	3.2	300	500
2028	25.6	17.5	8.1	700	1,200

Source: Table 6 (Table 2c) of Appendix 5

8.40 As shown in **Table 8.10**, after taking account of extant planning permissions, there is a surplus capacity of £3.2m at 2023 for new convenience goods floorspace in Zones 5 and 6. This could accommodate between 300 sq.m and 500 sq.m (net), based on the existing market share being maintained. At 2028, the identified surplus will increase to £8.1m and will support 700 sq.m to 1,200 sq.m of additional convenience goods floorspace. At this stage we believe that Morrisons at Highgate will deal with the local needs in the short to medium term and there is no need to positive plan for new provision in this specific area over the next 5 years.

8.41 To summarise the above convenience goods capacity **Table 8.11** sets out the capacity across the main five zones which cover the City of Stoke-on-Trent.

Table 8.11: Summary of Convenience Goods Capacity by Zone

Year	Convenience Goods								
	2018			2023			2028		
	Residual (£m)	Min (sq.m)	Max (sq.m)	Residual (£m)	Min (sq.m)	Max (sq.m)	Residual (£m)	Min (sq.m)	Max (sq.m)
Zone 1	-13.8	-1,200	-2,000	-2.9	-300	-400	7.7	700	1,100
Zone 3	9.2	800	1,300	17.4	1,500	2,500	25.4	2,200	3,700
Zone 4	-13.3	-1,100	-1,900	-8.3	-700	-1,200	-3.5	-300	-500
Zone 5 & 6	-1.9	-200	-300	3.2	300	500	8.1	700	1,200

Capacity for Future Comparison Goods

- 8.42 As highlighted in Section 4 (and within **Appendix 5**) of this report, the City of Stoke-on-Trent contains a varied range of comparison goods floorspace, including both high street multiples, and independent retailers across both city, town and local centre, as well as edge and out of centre retail warehousing provision and major comparison goods floorspace within the major supermarkets distributed across the city. Stoke City Centre has by far the highest level of comparison goods floorspace, equating to nearly 55,500 sq.m (net). Facilities in and around Festival Park has the second highest level of comparison goods floorspace in the city with 31,500 sq.m (net) and is closely followed by out-of-centre facilities in the Victoria Road area near Fenton which together accommodates approximately 14,300 sq.m (net).
- 8.43 Longton town centre has the fourth largest amount of comparison goods floorspace (approximately 15,200 sq.m net) (including Longton Retail Park and Tesco Extra), and is followed by facilities at Meir Retail Park which has approximately 11,500 sq.m (net) of comparison goods floorspace. Tunstall town centre has approximately 13,000 sq.m (net) of comparison goods. The area around Springfield Retail Park (Newcastle Road) benefits from approximately 7,000 sq.m (net) of comparison goods floorspace which is comparable to that found in Stoke Town centre. With Burslem with the least level of comparison goods floorspace at approximately 5,700 sq.m (net) In terms of the local centres there is a relatively limited level (4,200 sq.m (net)) of comparison goods floorspace across 40 centres that were recorded as destinations in the household survey, demonstrating that on average each centre has approximately 100 sq.m of comparison goods floorspace. The results show that there is now more comparison goods floorspace in the existing three retail warehouse parks (Festival Retail Park, Victoria Road and Meir Retail Park) than in Stoke City Centre, although this is due to the large format nature of the retail warehousing units.
- 8.44 Our analysis of the market share of facilities in the City of Stoke-on-Trent indicates that the level of trade passing through comparison goods facilities originating from inside the Study Area is £870.6m at 2013. This represents a market share 61.9% of the total comparison goods expenditure generated from within the defined Study Area. We estimate that an extra £30.0m is drawn to the City of Stoke-on-Trent from inflow. The total trade passing through existing facilities is therefore estimated at £900.6m at 2013. **Table 8.12** below provides a breakdown of the comparison goods market share by different shopping destinations across the City of Stoke-on-Trent.

Table 8.12: Comparison Goods Market Share and Turnover within the Stoke City (2013)

Destination	Market Share (%)	Survey Estimate Turnover (£m)*
Zone 1		
Stoke City Centre	22.3	329.3
Fenton town Centre	1.6	23.0
Local Centres	0.7	9.5
<i>Edge of Centre / Out of Centre</i>		
Festival Park	14.9	209.9
Victoria Road Area	1.8	25.7
Sub-Total (Zone 1)	41.3	597.4
Zone 3		
Longton Town Centre	8.5	124.7
Meir town centre	0.3	3.5
Local Centre	0.1	1.9
Other (out-of-centre)	3.8	53.0
Sub-Total (Zone 3)	12.6	183.1
Zone 4		
Stoke Town centre	1.6	27.7
Local Centres	0.3	2.0
Other (out-of-centre)	0.9	12.6
Sub-Total (Zone 4)	2.6	42.3
Zone 5		
Burslem town centre	0.7	10.1
Local Centres	0.2	3.0
Other (out-of-centre)	0.0	0.3
Sub-Total (Zone 5)	1.0	13.4
Zone 6		
Tunstall town centre	4.1	60.3
Local centres	0.0	0.4
Other (out-of-centre)	0.3	4.2
Sub-Total (Zone 6)	4.4	64.5
TOTAL	61.9	900.6

Notes: Based on findings of the Stoke Household Survey (2013), taken from Tables 25 and 25a of Appendix 5
Based on market share of expenditure (comparison goods) after inflow allowances made
At 2011 prices

- 8.45 Despite the total combined level of comparison goods floorspace within the three main retail parks exceeding that in Stoke City Centre, the city centre is still the most popular destination for comparison goods shopping, retaining just over a fifth (22.3%) of available expenditure within the wider Study Area. The three retail parks together retain just under a fifth (19.5%) of all available expenditure, with



facilities in and around Festival Park area being the most popular of the three parks. Longton town centre (including edge of centre facilities) has a strong comparison goods retail role in the wider city with a market share of 8.5% and Tunstall with a market share of 4.1%. The other town centres (Stoke Town, Fenton, Burslem) have limited comparison goods market shares (less than 2%). The network of local centres generally has a limited role (1.2%) in terms of the provision of comparison goods which reflects the dominance of convenience and service operators in these centres.

- 8.46 Given the fragmentation and range of multiple and independent retail tenants in existing town and local centres and retail warehouse parks, unlike the approach adopted in the convenience goods assessment it is difficult to consider a generic benchmark sales density for existing floorspace provision for individual units, utilising published sales densities in a similar manner.
- 8.47 On this basis, WYG has 'rolled forward' the City of Stoke-on-Trent's current 61.9% market share to examine the likely level of comparison goods floorspace required to maintain its current role and function and position within the hierarchy.

Comparison Goods Quantitative Need in the City of Stoke-on-Trent (City Wide) – Baseline

- 8.48 Accordingly, given the increases in forecast comparison goods expenditure, rises in Special Forms of Trading and projected increases in the Study Area population, WYG estimates that between 2013 and 2018, an additional £20.4m originating from the Study Area will be spent on all comparison goods (bulky and non-bulky) within the City of Stoke-on-Trent. This identified surplus is relatively modest due to the limited increases in comparison goods spending and increases in the level of expenditure committed via special forms of trading (forecast by Retail Planner Briefing Note 11) over the short term. However, **Table 8.13** identifies that the expenditure surplus is then forecast to increase to £82.0m by 2023 and to £177.9m by 2028.

Table 8.13: Estimated Capacity for Comparison Goods Facilities in the City of Stoke-on-Trent

Year	Benchmark Turnover - £m ¹	Derived Available Expenditure - £m ²	Surplus Expenditure
2013	900.6	900.6	0.0
2018	998.2	1,018.6	20.4
2023	1104.3	1,186.3	82.0
2028	1219.2	1,397.1	177.9

Source: Table 27 (Table 1a) of Appendix 5

- 8.49 Table 8.13a below shows the level of tangible comparison goods floorspace that could be accommodated by the identified expenditure surplus through to 2028. The results show in the short term to 2018 the surplus of £20.4m could accommodate between 3,700 sq.m (net) and 6,100 sq.m

(net), after 2018 and as estimated growth rates improved and SF allowances mature then the £82.0m surplus identified at 2023 realises a capacity of between 13,400 sq.m (net) and 22,300 sq.m (net). Then moving forward into the longer term to 2028, the surplus is estimated to increase to £177.9m which could support between 26,300 sq.m (net) and 43,800 sq.m (net).

Table 8.13a: Estimated Capacity for Comparison Goods Facilities in the City of Stoke-on-Trent (without planning permissions)

Year	Surplus Expenditure (taken from Table 8.13)	Floorspace Requirement (sq.m net)	Floorspace Requirement (sq.m net)
	(£m)	Min ^{1*}	Min ^{1*}
2013	0.0	0	0
2018	20.4	3,700	6,100
2023	82.0	13,400	22,300
2028	177.9	26,300	43,800

Source: Table 27 (Table 1b) of Appendix 5

8.50 Drawing on information from Stoke Retail Returns data (2012) there is 78,300 sq.m (gross) of comparison good floorspace currently proposed across the City of Stoke-on-Trent (through extant consents). This is significantly higher than that set out in Table 8.12a above. We also understand there is significant floorspace proposed in neighbouring Newcastle under Lyme where approximately 8,300 sq.m of floorspace is proposed. WYG estimate that all the proposed floorspace will have a turnover of £271.3m if all extant consents are implemented and trading at 2018, of which we estimate that £201.6m will be drawn from the City of Stoke-on-Trent. Most of the floorspace (40,200 sq.m net)²⁹ is allocated as part of the East West (City Sentral) redevelopment in Stoke City Centre. As shown in **Table 8.14** and after taking account of extant planning permissions, these commitments will negate any need for major new comparison goods development over the plan period based on the existing market share being retained (and based on current economic forecasts).

Table 8.14: Quantitative Need for Additional Comparison Goods Floorspace in the City of Stoke-on-Trent – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013					
2018	20.4	201.6	-181.3	-32,700	-54,500
2023	82.0	221.1	-139.1	-22,700	-37,800
2028	177.9	241.7	-63.9	-9,400	-15,700

Source: Table 27 (Table 1c) of Appendix 5

²⁹ WYG has assumed that 60% of the proposed mixed use (A1/A2/A3/A4/A5) will be used for A1 comparison goods retail purposes



- 8.51 In conclusion, due to limited estimated comparison goods expenditure growth, ongoing increases in Special Forms of Trading spend, and the significant quantum of floorspace which is already earmarked through extant planning permissions, WYG estimates that there is no capacity at 2028 based on the baseline position. The limited capacity is mainly driven by the significance of the City Sentral scheme that on its own has an estimated turnover of £201.2m at 2018 which accounts for 74% of the total commitments recorded and 72% of the proposed extant comparison goods floorspace in the Study Area. The level of available expenditure is now significantly lower than that previously available when the City Sentral concept was being justified back in 2008³⁰. Given the change in both local and wider economic circumstances we would expect that the parameters of the City Sentral scheme may need to be revised to account for more up to date expenditure information. However, we recommend that any capacity (or no capacity in this specific case) identified in the period beyond 2018 should be considered with a degree of caution as a number of assumptions may change in the future which could ultimately change this capacity and should therefore be reviewed. We note that these figures do not allow for the potential re-use of existing vacant commercial floorspace, however, as set out in the vitality and viability assessment, a high proportion of vacancies are located in more secondary locations, and such space is generally not appropriate to meet modern operator requirements and therefore alternatives beyond retailing will need to be considered for this floorspace.
- 8.52 In order to justify the current City Sentral scheme to be delivered over the plan period, then a market share of circa 65% would need to be achieved; this would present a 3.1 percentage point increase over a 15 year period (2013 to 2028), which would represent nearly a 5% increase on the current market share level. We note that in 2005 the City of Stoke-on-Trent had a clothing and footwear market share of 65% (now 63.6%) so we believe that this figure is achievable especially given the level of clothing and footwear expenditure that is spent at facilities in Greater Manchester (Trafford Centre, Manchester City Centre, Handforth Dean) area; however, any gains are also likely to be taken from existing edge and out-of-centre retail facilities, similar to those gains experienced through qualitative improvement to Tunstall and Longton town centres since 2005 and therefore carefully consideration need to be had on the impact of the scheme on Tunstall and Longton town centres.
- 8.53 In addition, the scale of City Sentral reflected the economic position of the City of Stoke-on-Trent at a point in time (2008), with the current economic position, we have sought to consider a new scenario, which considers the capacity for the city centre both including and excluding the current extant planning permission for City Sentral as set out in Tables 8.13 above.

30 East West Centre Redevelopment, Stoke-on-Trent City Centre – Retail and Leisure Assessment (and Addendum) December 2008, prepared by Drivers Jonas (now Deloitte)

8.54 **Table 8.14a** shows that based on increased market share of 65% across the Study Area, the city's surplus expenditure would increase to £71.5 at 2018 (previously £20.4m), to £141.5m (previously £82.0m) at 2023 and then increasing to £248.0m at 2028 (previously £177.9m). This shows that over the plan period an extra £70.1m could be available through claw back of expenditure that would otherwise be spent either outside the study area or at other destinations with the Study Area. This level of surplus expenditure could support between 36,600 sq.m (net) and 61,100 sq.m (net) of new comparison goods floorspace up to 2028. This represents a significant level of new floorspace that would represent between a 20% and 34% increase on the current level³¹ of comparison floorspace found across the city administrative area.

Table 8.14a: Enhanced Capacity for Comparison Goods Facilities in the City of Stoke-on-Trent (without planning permissions)

Year	Surplus Expenditure (at 65%) (£m)	Floorspace Requirement (sq.m net) Min ^{1*}	Floorspace Requirement (sq.m net) Min ^{1*}
2013	0.0	0	0
2018	71.5	12,900	21,500
2023	141.5	23,100	38,500
2028	248.0	36,600	61,100

Source: Table 28 (Table 1b) of Appendix 5

8.55 **Table 8.14b** below sets out a revised capacity based on the assumption of an increased market share of 65% over the plan period but excludes other extant planning permissions (but not City Sentral). The revised figures shows that the City of Stoke-on-Trent could accommodate between 15,800 sq.m (net) and 26,300 sq.m (net) at 2023 (depending on a sales density range) increasing to between 29,400 sq.m (net) and 49,000 sq.m (net). These figures are only illustrative and demonstrate that a significantly reduced scale of development is likely to be more appropriate over the plan period based on current economic forecasts and taking into account gains made on SFT allowances. However, we would warn that any scheme in the future at City Sentral will need to ensure that does not simply replicate or transfer the existing retail offer of the city centre as the approach may lead to a impact on the vitality and viability of other parts of the city centre, which would be counter intuitive. Therefore any new floorspace at City Sentral would ideally need to bring new tenants operators to the city that is currently not represented.

³¹ Total net comparison goods floorspace figure taken from Table 26 of Appendix 5



Table 8.14b: Enhanced Quantitative Need for Additional Comparison Goods Floorspace in the City of Stoke-on-Trent – Excluding other extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013					
2018	71.5	40.7	30.8	5,600	9,300
2023	141.5	44.6	96.9	15,800	26,300
2028	248.0	48.8	199.2	29,400	49,000

Source: Table 28 (Table 1c) of Appendix 5

8.56 In the following sections we will review the capacity for comparison goods retailing in Zone 1 (covering Stoke City Centre and Fenton areas) and Zone 3 (covering Longton and Meir) as the key principal locations for such development. Given the more limited role of comparison goods retailing in Zones 4, 5 and 6, we have not provided detailed commentary in the main report but have undertaken capacity assessment within Appendix 5, which set out any new floorspace requirement in these Zones. We have not undertaken any capacity assessment for Burslem town centre given its very limited role for such goods. The results show that there is no capacity in either Zones 4 and 5 beyond existing planning permissions and therefore there is no quantitative need to plan for further floorspace in these zones over the plan period.

Stoke City Urban Area (Zone 1)

8.57 Similar to the approach for convenience goods, and in order to appraise the need for additional comparison goods retail floorspace in Zone 1, we have considered the trading performance of existing facilities in the Zone. The area includes facilities located in and around Stoke City Centre; Fenton town centre, local centres; as well as other out of centre locations (including the Festival Park and Victoria Road areas). The household survey indicates that existing facilities in Zone 1 retain 41.3% of the available expenditure generated within the Study Area. When the retention of comparison goods spend in Zone 1 is considered, it is evident that existing facilities retain two thirds of all comparison goods spend in the city as a whole, which is considered an extremely high level, demonstrating the dominance of facilities in Zone 1. As found in section 4, nearly 40% residents in Zone 2 (Newcastle under Lyme) shop at facilities in Zone 1. As set out in section 4, 67.2% of Zone 1 residents undertook their comparison goods shopping at facilities in Zone 1, with 24.4% shopping at other facilities in the city from the Study Area, demonstrating that 91.6% of all comparison goods trips were undertaken to facilities within the City of Stoke-on-Trent. This is comparable to the level of main food shopping trips showing the high level of retention locally and the strength of existing facilities.

- 8.58 Our analysis indicates that the comparison goods facilities in and around Zone 1, retain £581.2m of comparison goods expenditure (excluding inflow), equating to 41.3% of all available expenditure generated within the Study Area. WYG estimate that there is inflow of circa 3% from outside the Study Area, which represents £16.2m, increasing the derived turnover to £597.4m.
- 8.59 Assuming this market share is maintained and 'rolled forward'; we estimate that by 2018 an additional £13.5m originating from the Study Area will be spent on comparison goods (both bulky and non-bulky) in Zone 1. After allowing for increases in the turnover efficiencies of existing floorspace, a surplus of £54.4m is available at 2023 to support additional comparison goods floorspace. This identified surplus is forecast to increase to £118.0m at 2028.

Table 8.14: Estimated Capacity for Comparison Goods Facilities in Zone 1

Year	Benchmark Turnover - £m ¹	Derived Available Expenditure - £m ²	Surplus Expenditure
2013	597.4	597.4	0.0
2018	662.1	675.6	13.5
2023	732.5	786.8	54.4
2028	808.7	926.7	118.0

Source: Table 27 (Table 2a) of Appendix 5

- 8.60 As identified earlier there is over 56,000 sq.m (net) of extant planning permission across the city (including Newcastle under Lyme). The majority (75%) of which is located in Stoke City Centre, including City Sentral and the CBD District proposals. WYG estimate that Zone 1 will draw 70% of the turnover of extant planning permissions (or £141.1m) if trading at 2018. As with the city wide capacity this would leave no residual capacity based on the existing market share remaining constant at 41.3% across the plan period. We estimate to be able to deliver the floorspace proposed then the market share in Zone 1 would need to increase from 41.3% to around 44% or a 2.8 percentage point increase (or a 7% increase).

Table 8.15: Quantitative Need for Additional Comparison Goods Floorspace in Zone 1 – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2018	13.5	141.1	-127.6	-23,000	-38,400
2023	54.4	154.8	-100.4	-16,400	-27,300
2028	118.0	169.2	-51.2	-7,600	-12,600

Source: Table 27 (Table 2c) of Appendix 5

8.61 The long term estimates should be used with a degree of caution as these could ultimately change following new population and expenditure growth forecasts, and depending on what planning commitments are built out. These estimates are based on information available at the time of reporting, and we would therefore recommend that these are regularly monitored to ensure the Council's preferred strategy is realised. Additionally, as with the enhanced market share scenario set out in Table 8.13a for the city as a whole, if Zone 1's market share was increased to around 44% (currently 41.3%) representing a comparable increase to that adopted for the global City wide figure, and excluded the current extant planning permission at City Sentral it would provide you with a indication of the quantum of new floorspace that could be justified in Stoke City Centre (as the principal centre in Zone 1). We estimate that in such a scenario between 23,000 and 38,000 sq.m (net) of floorspace could be delivered by 2028.

Eastern (Longton/Meir) Urban Area (Zone 3)

8.62 Facilities in Zone 3 has the second highest level of comparison goods floorspace with nearly 30,400 sq.m (net) within the Zone, most of this is located at Longton town centre (including the edge of centre Longton Retail Park and Tesco Extra) with a further 3,100 sq.m (net) located at the Phoenix Retail Park. In addition there is a further 11,500 sq.m (net) of comparison goods located at Meir Retail Park which includes the large B&Q store (10,265 sq.m net). As set out in section 5, Meir town centre has a limited comparison good offer with just 1,600 sq.m (net), with more limited provision found in a number of local centres. The level of comparison goods floorspace in Zone 3 represents 17% of that within the City of Stoke-on-Trent has the second highest level of comparison goods floorspace behind that found in Zone 1. As set out in Section 4, the household survey indicates that facilities in Zone 3 achieve a market share of 90% from the Study Area, of which 48.7% is derived from Zone 3, with facilities drawing trade mainly from residents in Zone 1 (Stoke City / Fenton).

8.63 Our analysis indicates that comparison goods facilities in Zone 3 retain £177.6m of comparison goods expenditure (excluding inflow), equating to 12.6% of all available expenditure generated within the Study Area. WYG estimate that there is inflow of 3% from outside the Study Area, which represents £5.8m, increasing the derived turnover to £183.1m.

Table 8.16: Estimated Capacity for Comparison Goods Facilities in Zone 3 (Longton / Meir)

Year	Benchmark Turnover - £m ¹	Derived Available Expenditure - £m ²	Surplus Expenditure
2013	183.1	183.1	0.0
2018	202.9	207.1	4.1
2023	224.5	241.1	16.7
2028	247.8	284.0	36.2

Source: Table 27 (Table 2a) of Appendix 5



8.64 It is assumed that this market share is maintained and ‘rolled forward’ in the future and, on this basis, increases in forecast comparison goods expenditure and projected increases in population will result in an estimated surplus of £4.1m being spent on comparison goods in Zone 3 by 2018. After allowing for increases in the turnover efficiency of existing floorspace, a surplus of £16.7m is available at 2023 to support additional floorspace, rising to £36.2m at 2028.

8.65 From review of extant planning permission, we can confirm that there are no permissions in Zone 3 at the time of this report. However, notwithstanding this, we note that other planning permissions in other Zones within the Study Area, if implemented are likely to affect the capacity identified as they will draw trade from Zone 3 (similar to that achieved by existing facilities). Given the distribution of planning commitments in the city, we estimate that 10% of the turnover of extant planning permissions will be drawn from any capacity identified in Zone 3. As shown in **Table 8.17** below, the extant permission would meet the identified need for further comparison goods development up to 2023, based on the existing market share being retained. In the long term (2028) we estimate that between 1,800 sq.m (net) and 3,000 sq.m (net) could be accommodated within the Zone. However, WYG would recommend that this should be reviewed in 2018 to establish whether any extant planning permissions have been implemented or other changes that may occur. We would recommend that these capacity figures are for Zone 3 only and this capacity would need to be shared between the two main town centres located in the Zone, however, given the role and functionality of Longton, we would recommend that the vast majority of any identified capacity should be focused towards Longton town centre.

Table 8.17: Quantitative Need for Additional Comparison Goods Floorspace in Eastern Area (Zone 3) – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2018	4.1	20.2	-16.0	-2,900	-4,800
2023	16.7	22.1	-5.4	-900	-1,500
2028	36.2	24.2	12.0	1,800	3,000

Source: Table 27 (Table 3c) of Appendix 5

8.66 **Table 8.18** below sets out a summary of Tables 8.13 to 8.17 above and shows the capacity for each zone both with and without extant planning consents, this includes the City Sentral scheme. However the Table also includes the enhanced market share results including none extant planning permissions (excluding City Sentral) and without any extant planning permissions. The results show that without City Sentral allocated as a commitment, then the capacity in the long term (2028) for the city is between 26,300 sq.m (net) and 43,000 sq.m (net) based on existing market shares being retained,

with an increase in market share this would increase to 36,600 sq.m (net) and 61,100 sq.m (net).

After allowing for other planning consents this figure would reduce to between 29,400 sq.m (net) and 49,000 sq.m (net).

Table 8.18: Summary of Comparison Goods Capacity by Zone (with and without planning permissions)

Zone	Extant Planning Consent	Comparison Goods								
		2018			2023			2028		
		Surplus (£m)	Min (sq.m)	Max (sq.m)	Surplus (£m)	Min (sq.m)	Max (sq.m)	Surplus (£m)	Min (sq.m)	Max (sq.m)
1	Without	13.5	2,400	4,100	54.5	8,900	14,800	118.0	17,400	29,000
	With	-127.6	-23,000	-38,400	-100.4	-16,400	-27,300	-51.2	-7,600	-12,600
3	Without	4.1	700	1,200	16.7	2,700	4,500	36.2	5,300	8,900
	With	-16.0	-2,900	-4,800	-5.4	-900	-1,500	12.0	1,800	3,000
4	Without	1.0	200	300	3.8	600	1,000	6.3	1,200	2,100
	With	-9.1	-1,600	-2,700	-7.2	-1,200	-2,000	-3.7	-600	-900
5 & 6	Without	1.5	300	400	5.9	1,000	1,600	12.7	1,900	3,100
	With	-28.8	-5,200	-8,700	-27.3	-4,500	-7,400	-23.5	-3,500	-5,800
Total	without	20.4	3,700	6,100	82.0	13,400	22,300	177.9	26,300	43,800
	With	-181.3	-32,700	-54,500	-139.1	-22,700	-37,800	-63.9	-9,400	-15,700
Enhanced		71.5	12,900	21,500	141.5	23,100	38,500	248.0	36,600	61,100
		30.8	5,600	9,300	96.9	15,800	26,300	199.2	29,400	49,000

1. Without figures taken from Table 27 (Tables 1b, 2b, 3b, 4b and 5b)

2. With pp taken from Table 27 (Tables 1c, 2c, 3c, 4c and 5c)

3. Enhanced market shares from Table 28 (Tables 1b and 1c) but for City as a whole (this excludes any allowances for City Sentral).

May not add up due to rounding

Qualitative Need

8.67 The above analysis provides an assessment of quantitative capacity based, for the most part, on the current market share achieved by existing facilities in a particular centre being maintained. As found in both Sections 4 and 5, the results show that Stoke city has a high retention of both convenience goods and comparison goods shopping patterns, with limited outflow of trade to other competing centres. However, as found and slightly unique is that the comparison goods market share of the city is higher than that achieved for convenience goods. This is mainly as a result of the strength of the comparison goods provision in the City of Stoke-on-Trent mainly around Stoke City Centre and the Festival Park/Etruria Road area, which alone attract 38% of the comparison goods trips retained at facilities within the city or 42.5% of trips within the wider Study Area.



8.68 In terms of convenience goods retailing, we have identified that main food market shares in the City of Stoke-on-Trent's principal areas (Zones 1, 3, 4, 5 and 6) are extremely high (between 78% and 91%) with limited outflow of expenditure. However, the results show that the level of main food trade retention has also decreased notably since 2005 in Zones 4 and 6 as a result of supermarket provision being introduced outside the city area. The decline in Zone 4 is mainly due to the introduction of Morrisons at Goose Street in Newcastle and improvements at the Asda at Wolstanton Retail Park (Zone 2). The recorded decline in Zone 6 relates to a number of improvements to facilities in Zone 7 (including improvement of market share for Tesco store at Liverpool Road in Kidsgrove and the introduction of Aldi also on Liverpool Road). There have also been market share improvements due to the introduction of Sainsbury's at Biddulph in Zone 8 and through advances made on the Morrisons in Leek in Zone 9, which all together have lead to a decline in Zone 6's market share which was previously 89% and is now just 82%. However, the biggest contributor to the reduction of Zone 6's market share is the rebranding of the Netto store to Asda at the Scotia Road located in Zone 5 as well as the improved market share at the Aldi store at Brownhill Road in Tunstall. In light of these changes, WYG would suggest that there is a qualitative need to improve the convenience goods offer in both Stoke Town centre (Zone 4) and Tunstall (Zone 6) to rebalance local shopping patterns and to increase the retention of trade in these two particular zones.

8.69 Notwithstanding the above potential qualitative improvements, the results suggest that convenience goods shopping patterns are generally sustainable. The results have shown that the level of top up food trade retention is strong in the City of Stoke-on-Trent's core zones, and has improved in Zones 1, 3, 4 and 5 since 2005. The household survey indicates that, the overall main food market share has decreased since 2005 within the Study Area from 56.8% to 51.4% for main food, but has increased for top up for shopping over the same period (from 45.2% to 48.6%). The results show that the market share for both main and top food shopping in Tunstall town centre have both significant declined since 2006. During the same period the results show that Longton has seen its main food and top food share decline moderately. Stoke City Centre has seen its main food market share increase. However, this is principally due to the enlarged Tesco store at Clough Street despite relocating from an in centre location to an edge of centre location. Stoke Town centre has seen a 0.2 percentage point reduction in its main food market share, this is despite its market share in Zone 4 increasing marginally, and its influence outside Zone 4 has diminished in most zones (Zones 1, 3, 7, 9 and 10). WYG note that introduction of a new Morrison M convenience store in the former Blockbuster unit in Stoke Town may help local top up food shopping retention but is unlikely to reverse decline in the main food market share experienced since 2005. The results clearly show that there has been an increase in the market share of out-of-centre facilities since 2005 with improvement made at facilities in Festival Retail Park/Etruria Road area, Victoria Road area and other out-of-centre locations, whereby 29.6% of all main food trips are undertaken to these out-of-centre locations, previously just



25.8% in 2005. The increase in out-of-centre facilities market share has been at the expense of town centres, whereby the combined town centre (main food) market share has decreased from 28.4% in 2005 to just 17.8%, a decline of 10.6 percentage points (or 37% decrease) by 2013. WYG consider that this is a significant decline for town centres which has affected the wider vitality and viability of the more secondary town centres. WYG therefore recommend in light of decline recorded that any qualitative need should be addressed through the improvement to the Stoke Town and Tunstall's town centre's convenience goods provision as a regeneration priority. This qualitative need could be addressed through the Highgate scheme in Tunstall and through the redevelopment of the Spode site in Stoke Town in accordance with the Stoke masterplan.

- 8.70 In terms of comparison goods retailing, the results show that facilities in the City of Stoke-on-Trent retain a significant level of local expenditure with 61.9% of all spend retained. With 24.3% of trips being undertaken at other destinations within the Study Area we do not consider this to unsustainable given the distribution of population across the Study Area. In fact facilities in the City of Stoke-on-Trent have a significant influence on residents within the Study Area which is principally due to the strength of provision in its centres and retail parks. Unfortunately due to the differences in methodology it is difficult with any certainty to explore how the comparison goods market has changed since 2005. Notwithstanding this the results show that there is still some leakage of comparison goods trade to facilities outside the Study Area, with 13.8% of available expenditure being spent outside the Study Area. Given the juxtaposition of the City of Stoke-on-Trent between the key regional shopping hubs of Manchester and Birmingham there remains outflow to such destinations within these conurbations that could be clawed back if an improved and attractive retailing environment is promoted.
- 8.71 WYG would also note that the findings of this Study found that trading performance of existing retail parks outstrips the performance of traditional town centres, for example facilities at Festival Retail Park cumulatively over trade (derived) against their expected benchmark levels (see Table 26, Appendix 5) and therefore there is significant scope for any improvements to the city centre retail offer to divert or claw back trade from any over trading experienced in these out-of-centre locations rather than depending on claw back of spend from beyond the Study Area. Furthermore, the results show that the City Centre has a derived sales density of circa £5,800 per sq.m whereas facilities at Festival Park are trading at circa £6,700 per sq.m, which is 15% higher.
- 8.72 There may also be scope for some limited improvement in Stoke Town in Zone 4 that has by far the lowest trade retention within its local area with residents travelling to Stoke City Centre or Newcastle under Lyme Town Centre. As explored in section 4 we found that following introduction of modern retail accommodation in both Longton and Tunstall there was a marked increase in their trade



retention (especially clothing and footwear) in both town centres. This was at the expense of trade retention at Festival Retail Park/Etruria Road. We therefore believe that there is a qualitative need to improve the comparison goods retailing in Stoke town to help rebalance the need of residents to travel, however, given the constraints of the historical built environment it is difficult to ascertain whether a suitable site opportunity is available to deliver such qualitative improvements, if not then such improvements should be focused towards Stoke City Centre.



9.0 Leisure Capacity

- 9.1 The approach to the assessment of quantitative need in the leisure market is less well developed than that in the retail sector, due to a number of reasons, including the fragmentation of the market and the limited availability of information. However, for the purposes of this Study, we consider key sectors where up to date information is available and review commercial leisure capacity in relation to the cinema, bingo and bowling sectors.
- 9.2 The results of the household survey have been used to determine the participation rate and the market share achieved by the different categories of leisure activity. The relevant tables are set out in **Appendix 6**. As the household survey which informed the North Staffordshire Retail Study (2005) did not include comparable leisure related questions to the existing household survey it has not been possible to compare the participation rates and market shares to those in 2005.

Cinema

- 9.3 The Study Area benefits from a 10 screen cinema Odeon cinema at Festival Park in Stoke City (Zone 1) and an eight screen Vue cinema at Newcastle-under-Lyme (Zone 2), there is also a cinema at the Film Theatre at Staffordshire University (College Road).
- 9.4 Drawing on research by Mintel (2012)³², WYG can confirm that the cinema industry has continued to perform well over the last five years. Between 2007 and 2012, UK cinema revenues increased from £1,149m at 2007 to £1,405m at 2012 (an increase of £256m). During this period, there has been a steady growth in the average spend per head, which increased from £7.07 at 2007 to £8.17 at 2012 (an increase of £1.10 per person). During this period admissions increased from 162.5m at 2007 to 172.0m at 2012 (an increase of 9.5m). The increased spend can principally be attributed to increased ticket prices, and has occurred despite a reduction in the contribution made from 3D films. Mintel anticipate that growth in the cinema market will continue to grow by a further 17.9% by 2017. In terms of the leading cinema operators in the UK, Cineworld, Odeon and Vue dominate the market with these operators accounting for 60.5% of screens in the UK.
- 9.5 As set out in Table 4 of **Appendix 6**, WYG has assessed the cinema capacity in the Study Area based on the population growth estimates, as set out in Section 6, and the results of the new household survey.

³² The UK Cinema Market (Mintel) (2012)



- 9.6 WYG estimate that the total available expenditure for cinema trips in the Study Area at 2013 is £5.8m, increasing to £8.1m at 2031. The household survey shows that the participation rate for visiting the cinema is 47%. At 2013, the Study Area's market share for cinema visits was 92%, with 39% of respondents visiting the Odeon Cinema at Festival Park and 52% of respondents visiting the Vue Cinema in Newcastle-under-Lyme. Based on a participation rate of 47% and the market share of 92% of all cinema trips, we estimate that, at 2013, there are likely to be 262,700 cinema goers from the Study Area. WYG estimate that this will increase to 282,500 people by 2028. Based on latest cinema admissions per capita from Mintel (2012) and applied to the Study Area population, WYG consider that the Study Area will be able to accommodate around 36 cinema screens by 2028. This is based on an average of 2.7 admissions per customer at 2013 increasing to 2.8 admissions at 2028 (based on Mintel 2012 data), which is comparable to Dondora Research (2009) that found that there were 2.7 admissions per customer in 2009.
- 9.7 This estimated capacity (32) at 2013 is above the current cinema provision (18) and would tend to suggest that there is under provision (by 14 screens) of cinemas in the Study Area. However, this is purely a quantitative analysis and WYG consider that there may be a qualitative need for additional cinema provision in Stoke City Centre in order to improve the night time economy. The existing cinema at Festival Retail is located in an out-of-centre position and therefore does not help to create activity in Stoke City Centre in the evening. An additional cinema in the city Centre is likely to help boost the night time economy and encourage people into the city in the evenings and/or increase dwell times. Therefore, although WYG believe that there is no quantitative capacity to increase the cinema offer over the plan period, there may be a qualitative need to strengthen the city centre's leisure economy.
- 9.8 Given the lack of quantitative need, we do not consider that there is any need for the City of Stoke-on-Trent to consider any positive policy approach to deliver new cinema provision in the City over the plan period as the current provision is adequately meeting local demand. However, should operators consider that the delivery of a cinema in Stoke City Centre will be commercially viable; the delivery of such provision should be encouraged due to the benefits that could be delivered in terms of the night time economy.
- 9.9 We understand that two planning permissions have been granted for cinema developments in Stoke City Centre. An application (LPA ref: 53703) for the creation of a new leisure extension of the Intu Potteries Shopping Centre was granted in January 2012. Planning permission for minor material amendments (LPA ref: 55564/VAR) to the original permission was granted in September 2013 allowing the capacity of the proposed cinema to increase to 1,123 seats across 9 screens. Outline planning permission (LPA ref: 489635/OUT) for a cinema as part of the City Sentral scheme was also



granted in February 2011. WYG consider that if either of these cinemas is delivered that this would respond to the quantitative and qualitative need identified. We also note that an improved cinema offer in the city centre is likely to increase the city's current participation rate from 47% as well as potentially increase the Study Areas market share (92%) retention.

Bowling

- 9.10 There are currently 30 bowling lanes within the City of Stoke-on-Trent which are all located at the Tenpin bowling alley at Festival Park in Stoke City.
- 9.11 Drawing on latest information from Mintel³³, the UK tenpin bowling sector has contracted in value in recent years. At 2006, the value of this sector was £271m and by 2011 this had decreased to £225m (a decrease of £46m). Mintel estimates that the sector will be valued at just £226m in 2016 and predict that the tenpin bowling industry will experience further contraction followed by some positive growth closer to 2016. In the UK the number of tenpin bowling facilities has declined from 325 in 2004 to 321 in 2011. The success of tenpin bowling will be driven by retention of visitor volumes through customer loyalty and discounted fees with claw back of revenue through increases in ancillary purchases associated to the main bowling experience.
- 9.12 The household survey found that the participation rate for bowling is 20% and the Study Area retains a market share of 78%. In calculating whether there is any quantitative need for additional bowling facilities, we have again assumed that this market share will remain constant over the plan period. WYG estimate that the Study Area could theoretically support 51 lanes at 2013 rising to 55 lanes by 2028. Given that there are now only 30 lanes in one facility in the Study Area, the theoretical residual capacity is 21 lanes at 2013 rising to 25 lanes at 2028.
- 9.13 If we consider that modern tenpin facilities usually accommodate between 25 and 30 lanes, then the City of Stoke-on-Trent is likely to be able to support a further tenpin bowling facility. Given the uncertainties within this market sector, WYG do not believe that there is scope to positively plan to accommodate such provision in the short to medium term, but that any business opportunities that may be presented in a appropriate location should be responded to positively especially if located within a central position within one of the defined centres ideally Stoke city, in order to strengthen the leisure sector in the centre and create a more dynamic evening and leisure economy.

³³ Tenpin Bowling – UK (November 2011)



Bingo

- 9.14 There are currently four national multiple bingo facilities in the Study Area, namely a Gala Bingo in Stoke City, a Gala Bingo in Fenton, a Mecca Bingo at Octagon Retail Park and a Top Ten Bingo in Tunstall. There are also a number of independent facilities operated through social clubs.
- 9.15 Mintel ³⁴ has found that UK wide consumer expenditure on bingo totalled £668m in 2012. This is a decrease of £272m since 2007 at which time consumer expenditure on bingo totalled £940m. It is evident that the bingo sector remains in a period of sustained decline and this is a trend which Mintel anticipate will continue. It is estimated that by 2016 expenditure will have decreased to £522m. The decrease in consumer expenditure has coincided with a decline in club admissions, with admissions decreasing from 68.0m in 2007 to 45.5m in 2011. The number of bingo clubs in the UK declined by 149 between 2007 and 2011 as a result of the reductions in spending. The decline is attributable to a number of reasons, including the smoking ban in public venues, restrictions of gaming machines in clubs, and the rise of on-line versions of the game which have had a significant influence on falling admissions. There has also been a tax burden on operators, which has led to falling revenue and prize monies. It is expected that operators will continue to diversify their businesses to provide a wider social offer, including foods, drinks and entertainment, in the hope of reversing the trend of decline.
- 9.16 The household survey shows that the participation rate for bingo is currently 7%. The Study Area's market share for bingo is 93%, with 53% of respondents visiting the Gala Bingo at Victoria Road in Fenton, 18% visiting the Gala Bingo at Albion Square in Stoke City Centre and 2% visiting the Top Ten Bingo at High Street in Tunstall. Based on these figures, WYG found that there is no residual capacity to support any additional bingo facilities between 2018 and 2028, assuming that the current market share will remain constant over the plan period. Indeed, WYG estimate that there will be a surplus of 0.4 bingo clubs in the Study Area at 2028. Therefore, given the lack of quantitative need for additional bingo facilities, WYG would recommend that the City of Stoke-on-Trent should seek to support existing bingo facilities, rather than plan for new facilities in the City of Stoke-on-Trent over the plan period. However, if a viable operator-led opportunity arises, then this should be considered on its own merits in accordance with relevant planning policy.

Health and Fitness and Evening Economies

- 9.17 WYG have assessed the qualitative need for additional health and fitness and evening economy facilities using the results of the household survey, which allows us to consider the participation rate and the market share of such facilities.

³⁴ Mintel: Casinos and Bingo (June 2012)



- 9.18 The results of the household survey show that there is a 20.1% participation rate for health and fitness activities and a 19.0% participation rate for leisure centre activities. This compares favourably to the participation rate for private health and fitness clubs at April 2013 identified by Mintel of 15%. The Study Area's market share for these activities is 96.0%. The Mintel³⁵ (2013) report shows that the health and fitness club industry has grown in recent years. At 2007, the sector had a market value of £2,500m which increased to £2,660m by 2012. During this period the number of health and fitness club members has increased from 5.18m to 5.34m, demonstrating a growing market despite the wider economy.
- 9.19 The household survey found that the participation rate for visiting restaurants is 61.6%, with the Study Area attracting a market share of 84.3% for this activity. In terms of visiting pubs and nightclubs and social clubs, the household survey recorded participation rates of 50.5%, 5.6% and 8.0% respectively. The aggregated market share of the Study Area for such activities is 90.2%.
- 9.20 The participation rate for visiting the theatre and concert halls identified by the household survey is 41.8% and in terms of visiting galleries and museums, the participation is 36%. The combined market share of the Study Area for visits to theatres, galleries and museums is 78.4%. Of those respondents visiting theatres, galleries and museums outside the Study Area, 6.2% visit facilities in Manchester city centre, 1.3% visit Birmingham city centre and 1.2% visit Liverpool city centre.

Conclusion

- 9.21 Based on the market share analysis drawn from the 2013 household survey and data on recent trends for commercial leisure facilities, it would appear that there is no quantitative need for additional cinema or bingo provision. However, there is a quantitative requirement for an additional bowling facility in the Study Area. Given the uncertainties relating to the bowling market sector, WYG do not consider that there is a need to plan positively for the delivery of an additional facility in the Study Area. However the Council should respond positively to any business opportunities that are presented in appropriate locations. Although there is no quantitative need for additional cinema provision, given that the sole cinema provision in the City of Stoke-on-Trent is located in an out-of-centre location, WYG consider that there may be a qualitative need for additional cinema provision in Stoke City Centre in order to improve the and diversify the evening economy, which will have a positive impact on the retail function of the centre. Therefore, we would recommend that if a commercially viable in-centre scheme for additional cinema provision comes forward during the plan period that such provision should be considered favourably. WYG consider that if either the Intu or City Sentral cinema proposal are delivered then these will respond to the identified qualitative need.

³⁵ Health and Fitness Club – June 2013 (Mintel)



9.22 In conclusion, WYG would recommend that the Council take a pragmatic view on any opportunities for additional leisure provision that may arise during the plan period, based on the location of such proposals, and the qualitative and economic benefits which may arise from development.



10.0 Future Retail Planning Policy Recommendations

Introduction

10.01 The NPPF requires LPAs as part of their Local Plan to set out a strategy for the management and growth of centres over the plan period. As part of their strategy, LPAs should, inter alia:

- Recognise town centres as the heart of their communities and pursue policies to support the viability and vitality;
- Define a network and hierarchy of centre this resilient to change to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on clear definition primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centre that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable site to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;
- Allocate appropriate edge of centre sites for main town centre that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre site cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and
- Set policies for the consideration of proposal for main town centre uses which cannot be accommodated in or adjacent to town centres.

10.02 Each of the above requirements is considered where relevant below in relation to the City of Stoke-on-Trent and its principal city, town and local centres below:



Retail Strategy

- 10.03 Since 2005, the retail landscape across the UK has dramatically changed, whereby expenditure growth forecasts have been significantly suppressed (especially in the short term). This has been coupled with the increasing popularity of special forms of trading (specifically online sales). In addition to the above wider economic conditions, the retail landscape across the City of Stoke-on-Trent has changed since 2005 which has implications for the future strategy. For example, a number of new foodstore of varying scales have been implemented as well as the rebranding through various acquisitions. Despite such improvements we have seen a decline in the main food market share in the Study Area since 2005 mainly due to increased competition in Newcastle-under-Lyme (Zone 2) and in the northern zones beyond Tunstall and Burslem. However, conversely the city has experienced an increase in the retention of top-up food shopping spend since 2005. Whilst there have been some changes to trade retention, the Study has found that there have some dramatic changes within town centres since 2005 which require intervention if the future vitality and viability of certain centres is to be secured over the plan period. As set out in Section 4, we found that there has been a dramatic shift in the level of both main and top-up food shopping trips to town centres, whereby these have moved to either smaller local centres or to out-of-centre facilities. With the exception of Burslem, Fenton and Meir, the other four town centres have seen a decline in their main food market share since 2005, with particularly marked decline in market share found in Stoke City, Longton and Tunstall. The Study has found that nearly a third of all main food expenditure is spent at out-of-centre facilities.
- 10.04 In relation to the quantitative and qualitative assessment, WYG recommend that the Council's preferred approach for convenience goods retailing should be to focus on the implementation of the Morrisons (or another operator) at Highgate to help deal with the cumulative over-trading experienced in Zones 5 and 6 and help claw back expenditure currently spent further afield in Zones 1, 7 and 8. Although Stoke town centre is well anchored by the existing Sainsbury's store we believe that there is scope to strengthen Stoke town centre through introduction of a new foodstore to help claw back expenditure (as well as activity) that is currently spent at Wolstanton, Newcastle-under-Lyme (both Zone 2), Longton (Zone 3), Festival Park (Zone 1) and Springfield Retail Park (Zone 4). The introduction of an additional foodstore will help strengthen the role of the existing centre as a convenience goods destination as well as reduce the reliance on out-of-centre retailing and bring shopping orientated activity back to the town. The future strategy should be to deliver two new foodstores - one at Tunstall and the second in Stoke Town, whilst resisting new facilities in out-of-centre locations elsewhere. We have also confirm that there is scope for improved convenience goods provision in Stoke City Centre and this could form an element of the City Sentral scheme if reconfigured in the future.



- 10.05 In terms of comparison goods retailing, the study has found that Stoke City Centre remains the principal destination for such goods, however, we have found that facilities in Festival Park/Etruria Road are the second most popular destination behind the city centre and that both Longton and Tunstall through positive intervention in their retail offer have made marked improvements on their popularity. Given the importance of Stoke City to the wider city region, the strategy approach for the city should be to focus and direct new comparison goods floorspace towards the city centre as first preference. Stoke City Centre benefits from the City Sentral commitment, which at the time it was approved (2008) was seen as the logical extension to the city centre. However, the scale of the proposed floorspace whilst appropriate at the time of its determination is significantly in excess of that now required to meet identified quantitative need for the city principally driven by the more suppressed availability of comparison goods expenditure found over the plan period. WYG would therefore recommend that it may be appropriate time to reconsider the scale of City Sentral to reflect current and forecast market conditions. As indicated by the results of the Study, there is limited qualitative scope to consider claw back of expenditure from destinations outside the Study Area, therefore it is likely that if the current level of proposed floorspace is promoted it will impact on existing facilities within the authority area, including Stoke City Centre and other town centres, (namely Longton, Tunstall and Newcastle-under-Lyme) as the required level of expenditure growth simply isn't available to support the proposed development. However, there is scope to claw back expenditure that is currently spent at the surrounding retail parks, especially at those at Festival Park and Etruria Road area of the city that are trading extremely well.
- 10.06 Bearing this in mind, WYG has concern in relation to the proposed new M&S store at Wolstanton Retail Park (LPA Ref: 11/00611/FUL) as we understood that City Sentral was previously to be anchored by a new M&S store and therefore we find it difficult to see that both proposals could be supported in Stoke City and therefore there is a real danger that M&S could close their existing store once the new store at Wolstanton is operational in 2015. In addition, and subject to securing M&S, we would recommend that the proposed floorspace at City Sentral should be comprehensively reviewed; this could include consideration of introducing other uses (convenience, leisure and commercial) to substitute some of the comparison goods floorspace and to widen the diversification of the development.
- 10.07 The City Sentral scheme also includes an element of leisure uses (cinema, hotel, and food and beverage). As found in Section 8, we found that there is no quantitative need based on existing market share being retained, although we believe that a qualitative need exists to reduce the dependence of the out-of-centre Festival Park Odeon. Notwithstanding this, given the extant planning permission (LPA Ref: 53703) for a new nine screen cinema at the Intu Potteries Shopping Centre, it is unlikely that both cinemas can be sustained. WYG can confirm that new modern and managed



shopping developments generally aspire to secure as a minimum 15% food and beverage uses within any major commercial scheme in order to maximise occupation and create an attractive environment in which to allow customers/visitors to shops. Such leisure uses help create a complete destination environment which increases dwell times and interest to customers rather than relying on shopping facilities, therefore any review of City Sentral may require further consideration of expanded food and beverage offer coupled with other leisure uses.

- 10.08 We have identified a potential redevelopment site to the west of the Asda store in Tunstall. There are a number of vacant and rundown buildings present on this site which is bounded by High Street, Lambert Street, Washington Street and Williamson Street. We consider that the redevelopment of the site would provide an opportunity to improve the environmental quality of this area of the town centre and for improved links to be created between the Asda store and the remainder of the town centre.
- 10.09 In relation to Stoke Town, we have recommended that the former Spode factory site is allocated as a potential redevelopment site. We consider that this site represents an opportunity for further retail development (convenience-led) in the town centre and that the identification of the site as a redevelopment opportunity will help to encourage investment in this part of the town centre. We have included a number of the properties located along Church Street within this area to facilitate an appropriate active frontage and to allow for the integration of the site with the wider town centre. The approach is consistent with the Stoke Town masterplan; however, we do have concerns in relation to the commercial viability of the site due to limited visual prominence of the site by strategic A500 through traffic and the development costs related to this historical site. WYG would also recommend that given the limited capacity for traditional comparison retailing in the future that the Council may wish to consider promoting a 'unique' themed retail destination in Stoke Town (or other towns) that is related to the historical ceramic and pottery industry and that can build on the high level of related visitors to the city as a whole, such a strategy could help diversify and build related business opportunities for the city.
- 10.10 We have recommended that two areas within Longton town centre are identified as potential intervention areas. The first area covers the eastern portion of the Longton Exchange Shopping Precinct and a number of units along Market Street. Our health check of Longton found a concentration of vacant properties, lower levels of footfall and need for environmental improvements in this locality. It is considered that this is as a result of the core of the town centre shifting to the west. As such, we have recommended that this area is identified as a potential intervention/redevelopment site in order to encourage investment in this specific area of the centre, in order to bring back activity to this part of the centre. A second potential redevelopment site has been identified on an area bounded by The Strand to the west, Berry Lane to the north, Commercial Street



to the south and the large format retail units at Chancery Lane to the east. A large vacant building and surrounding vacant land is currently present on the site and we consider that the site presents an opportunity for retail redevelopment.

- 10.11 In Fenton, we have identified a potential development site on land bounded by City Road, Glebeland Road and Baker Street. The Site includes the Council owned City Road car park, the vacant former doctor's surgery, a community centre, a residential unit and a solicitors. It is considered that the redevelopment of this site would provide an opportunity to improve the retail and service offer of Fenton or to provide other social or community uses that can encourage new activity back to the centre.
- 10.12 Notwithstanding the above retail strategy, which in the case of Longton and Stoke Town reflects the findings of existing master plans, it is clear that the retail landscape has dramatically changed since 2005 and traditional retailing needs of the 21st century have changed with the advancement of different technologies. Therefore, if the city is to sustain a network of vital and viable town centres then a different approach needs to be adopted. Whilst the digital influence on local shopping patterns is a growing sector it is expected that tangible floorspace still has an important role to play in the future as retail operators and businesses will seek to utilise a variety of different multi channel trading platforms to ensure they reach a wide customer audience.
- 10.13 With increased floorspace trading efficiencies and less spend available to tangible retail destinations, there is likely to be increased pressure to consolidate the existing portfolio and retail floorspace in the longer term, and therefore in the future, new retail floorspace is not necessarily the panacea to improve town centre trading conditions. Town centres need to reinvent themselves providing a broader offer beyond traditional retailing, through the strengthening of social, civic and community functions as well as improved place making. Central locations should be the focus of new enterprise activity in and around existing centres. The introduction of the PCT in Meir is a good example of diversifying activity and land use within a centre which then supports and strengthens overall vitality. Therefore we agree that Policy SP2 of the Joint Core Strategy should be retained to ensure that diverse and different land uses are secured in addition to traditional retailing uses.
- 10.14 However, to achieve this, the Council need to consider more holistic land use and economic development strategies which seek to attract differing land uses to more central positions well connected to existing centres. This requires a collective and holistic vision by key stakeholders, to ensure initiatives are channelled to ensure wide range of land uses are promoted to central locations. However any holistic approach will need to be co-ordinated through local leadership through an appropriate local authority in partnership with other key organisations to leading, planning and



implementing change. This will require strong and well organised leadership to set up a inter-related regulatory context to facilitate and manage new development as well as providing the vision and implementation plan to progress forward, this can be in the form of either a masterplan or through a development prospectus which provides the 'visioning framework' to shape the future of each town centre.

- 10.15 Any visioning, is difficult to be achieved through the planning system on its own and an integrated and holistic approach needs to be considered which looks at matching both land use strategies with fiscal incentives with an emphasis on 'soft management' solutions such as town centre management systems, BIDS, LEPS, Area Action Plans and economic strategies. This report has already identified that there is a lack of a comprehensive car parking charging schedule as car parking charges appear disproportionate to the scale of some of the centres. For example, parking charges at off-street parking at the smaller town centres are comparable to those charged within Stoke City Centre. Although we recognise that car parking charges may be an important funding stream to the Council, we would recommend consideration of a comprehensive and innovative overhaul of parking changes, to allow a more even playing field against out-of-centre facilities (which offer ample free car parking to their customers). Reduced parking charges at public parking areas will help encourage people to visit and shop at established town centres, which over time may have a positive knock on effect on investment decisions in established centres which will allow other fiscal levies to be sought (business rates) through occupation of space which would offset any reduction in parking receipts in the longer term. The use of upfront pay and display can also restrict dwell times, whereby customers are mindful of the parking time restriction and may leave a centre early in fear of parking fines, a more appropriate mechanism as promoted by managed mall operators is pay on exit, which helps removes the conscious time constraints placed on a customer when visiting a destination.
- 10.16 Any strategy will need to look beyond retailing as the panacea to create thriving town centre, but vitality and viability can also be achieved through the encouragement of increased residential or employment development both in and around established town centre or in upper floors above commercial units. Town centre initiatives should seek to increase both footfall and activity which will both help to increase spend, this will require diverse support from all types of services and facilities and not just retail on its own.
- 10.17 A number of initiatives have been taken forward at other retail destinations in the UK to help support centre viability. For example in Chester, in order to address declining footfall during the afternoon trading period, the Council introduced a 'free after three' strategy whereby two city centre car parks were made free of charge, which has lead to increased patronage. A similar scheme 'Alive after Five' has been pursued in Newcastle-upon-Tyne (in response to the MetroCentre to provide free parking



after five o'clock in the evening and has helped increased visiting numbers by 2 million shoppers in two years. In Altrincham and Sale town centres in Trafford (Greater Manchester) the Council introduced the 10 pence per hour initiative, in order to reduce the cost of parking to boost local trade, this has seen car parking patronage double in two years. Therefore, we recommend that the Council look toward innovative car parking strategies to help boost local trade. However, any future strategies should not consider parking charges in isolation but also as part of a wider package of measures. Other recent initiatives include the £8m fund available by the Technology Strategy board announced by the Science and Universities Minister to seek innovative technology solutions retail and service provision, logistics and travel and traffic which will help boost and digitise the high street. Notwithstanding the above, other fiscal incentives available to the City of Stoke-on-Trent may involve consideration of business rate relief to certain businesses to encourage investment and take up of long term vacancy units or new investment in specific centres. This should look to some of the measures identified in the Chancellor of the Exchequers Autumn Statement to provide discount business rates to help reduce the cost to existing businesses as well as encouraging new enterprise³⁶. We understand that the Council is considering a Preliminary Draft Community Infrastructure Levy (CIL) Charging schedule under the Community Infrastructure Regulations 2010 (as amended 2011 and 2012). The preliminary CIL charging schedule seeks to charge £100 per sq.m for new A1 to A5 floorspace. With the recent announcements by the DCLG, consideration may need to be considered as to how this is administered across the city's network of centres and to differing scales of development. One approach may be for eligible development that is located within defined centres to be exempt from CIL charges and conversely development that is out-of-centre (or even edge of centre) is charged at a specific rate. The CIL regulations allow Council's to have discretion to differentiate between location and scale of floorspace. This could be a useful tool to incentivise landowners and developers to focus on key priority planning interventions. Such use of both planning and fiscal policy tools can help to deliver wider economic objectives around creating viable and vital town centres.

Hierarchy

- 10.18 The current retail strategy for the City of Stoke-on-Trent is set out by the joint Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, which was adopted in October 2009. The hierarchy of centres is set out at paragraphs 3.27 to 3.36 of the Core Strategy and the centres in Stoke City are designated as follows:

³⁶ Bradford City Council have achieved business rates relief which reduces rates based on new employment generation to incentivise investment in a centre, and can be funded through the Regional Growth Fund.



- Stoke City Centre is identified as the largest retail destination in North Staffordshire and South Cheshire. It is stated that the city centre has a primary role at a sub-regional level in attracting large scale shopping development.
- Longton town centre is identified as the third largest retail centre in North Staffordshire serving the southern part of the conurbation.
- Tunstall town centre is identified as serving a wide catchment to the north of the urban area and it is stated that its offer is expanding by virtue of large scale retail developments to the south and east of the town centre.
- Stoke Town centre is identified as playing a number of key roles as the city's administrative centre, a university town, a nationally important destination for ceramics factory shopping, as well as providing local convenience shopping and the conurbation's primary station.
- Burslem town centre is identified as historically being at the heart of the region's ceramics industry. It is stated that Burslem now plays a key role as a historic/cultural destination in addition to providing local convenience shopping and services.
- Fenton is identified as a town centre due to its historic role rather than its retailing provision which is more characteristic of a local centre.
- Meir centre is identified as providing the eastern gateway of Stoke-on-Trent and serving a small localised catchment in the surrounding communities.

10.19 Policy SP1 of the Core Strategy states that retail and office development will be focused towards the Stoke City Centre and Newcastle town centre, with the development in order centres to be of a nature and scale appropriate to their respective position and role within the hierarchy of centres.

10.20 The new research undertaken during the course of this Study reaffirms that Stoke City Centre is an extremely important retail centre which caters for a substantial proportion of the City of Stoke-on-Trent's population's comparison goods needs, as well as cultural and leisure needs. Accordingly, it is considered that future retail policy must emphasise Stoke City Centre's role as a regional city, which should be a focus for significant additional main town centre uses and build on the existing infrastructure.



10.21 WYG consider that the existing hierarchy of centres is appropriate in identifying Longton, Tunstall and Stoke Town as town centres. It is evident that as the third largest shopping destination in the City of Stoke-on-Trent (behind Festival Park), that Longton performs an important role in catering for the needs of the population residing in the south eastern part of the City of Stoke-on-Trent. Similarly, Tunstall town centre has a key role in providing for the population residing in the northern part of the City of Stoke-on-Trent. Both centres provide a range of convenience and comparison goods provision, as well as a providing an important service function. Although Stoke Town centre has a more limited offer in terms of its convenience, comparison and service provision, when compared to Longton and Tunstall, Stoke Town centre offers a reasonable convenience goods provision, with the Sainsbury's, Iceland and Lidl stores serving those residing at the centre of the City of Stoke-on-Trent. As explained in the Core Strategy, Stoke Town also plays a key role as a university town and in providing 'the City of Stoke-on-Trent's' primary railway station.

10.22 In accordance with the findings of this Study, we recommend that the Council considers the reclassification of Burslem, Fenton and Meir within the retail hierarchy. Our assessment has found that the role of these three centres is mainly limited to providing for more localised needs. There is a clear shortage of convenience goods provision in Burslem and the majority of comparison and service units are occupied by local traders. Although Fenton has a good level of convenience goods provision, it is evident that the centre caters largely for top-up shopping needs. The centre is small in scale, with the majority of units occupied by independent operators. Meir has been identified as showing good signs of being a vital and viable centre, the centre is small in scale and only accommodates a limited range of goods and services. It is considered that Burslem, Fenton and Meir perform a lower order (but important) role than their current town centre classification and we would recommend that the Council considers re-designating these centres as district centres in planning terms. WYG recognises that these are historically considered as town centres as part of the 'six towns' in the City of Stoke-on-Trent conurbation; however, in pure retail planning purposes, these centres should be classified as district centres that support the city centre and the three larger town centres.

10.23 As explained in detail in Section 6, WYG would also advise that the Council consider the reclassification of seven of the 22 local centres identified within the Core Strategy as neighbourhood centres. Following our review of the health of each of the local centres, we consider that the following centres perform a more limited role in catering for the needs of residents in a more confined catchment due to their restricted provision of facilities and services:

- No. 3 - Chell Heath – Chell Heath Road;
- No. 4 - Norton – Knypersley Road;
- No. 20 - Bucknall – Werrington Road;



- No. 39 - Heron Cross – Heron Street/Grove Road;
- No. 47 - Dresden – Trentham Road;
- No. 48 - Dresden – Carlisle Street; and
- No. 56 - Lightwood – Belgrave Road.

10.24 From our review of the 36 neighbourhood centres, we recommend that seven of the neighbourhood centres should be de-allocated as they do not appropriately meet the role of neighbourhood centres in meeting the everyday top-up shopping and other service needs of their immediate catchment. The neighbourhood centres which we recommend that the Council should consider de-allocating are:

- No. 7 - Stanfield – Haywood Road;
- No. 16 - Cobridge – Waterloo Road;
- No. 21 - Bucknall – Causeley Road;
- No. 22 - Etruria – Etruria Old Road;
- No. 37 - West End – London Road;
- No. 42 - Weston Coyney – Coalville Place; and
- No. 59 – Hamil Road.

10.25 **Figure 10.1** below illustrates the recommended retail hierarchy for the City of Stoke-on-Trent, which shows Stoke City Centre as the regional centre, which is supported by the three town centres of Tunstall, Longton and Stoke Town. Below the three town centres are three district centres, including Meir, Fenton and Burslem. Supporting the city, town and district centre is an extensive network of 15 local centres. Whilst we have reviewed 36 neighbourhood centres, these are not afforded any protection in policy terms within the NPPF, however, if such centres are deemed an important local asset worth of protection then the Council may require consideration of a development plan policy which seeks to protect, retain and enhance where appropriate. **Figure 10.2** below shows the geographical distribution of the retail hierarchy across the city.

Figure 10.1: Recommended Retail Hierarchy

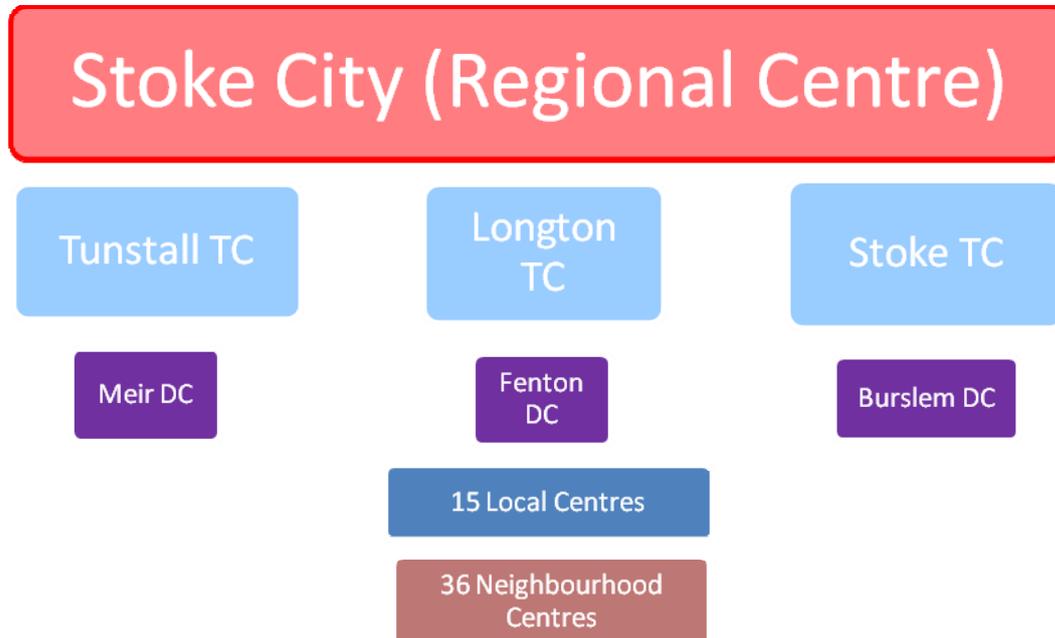
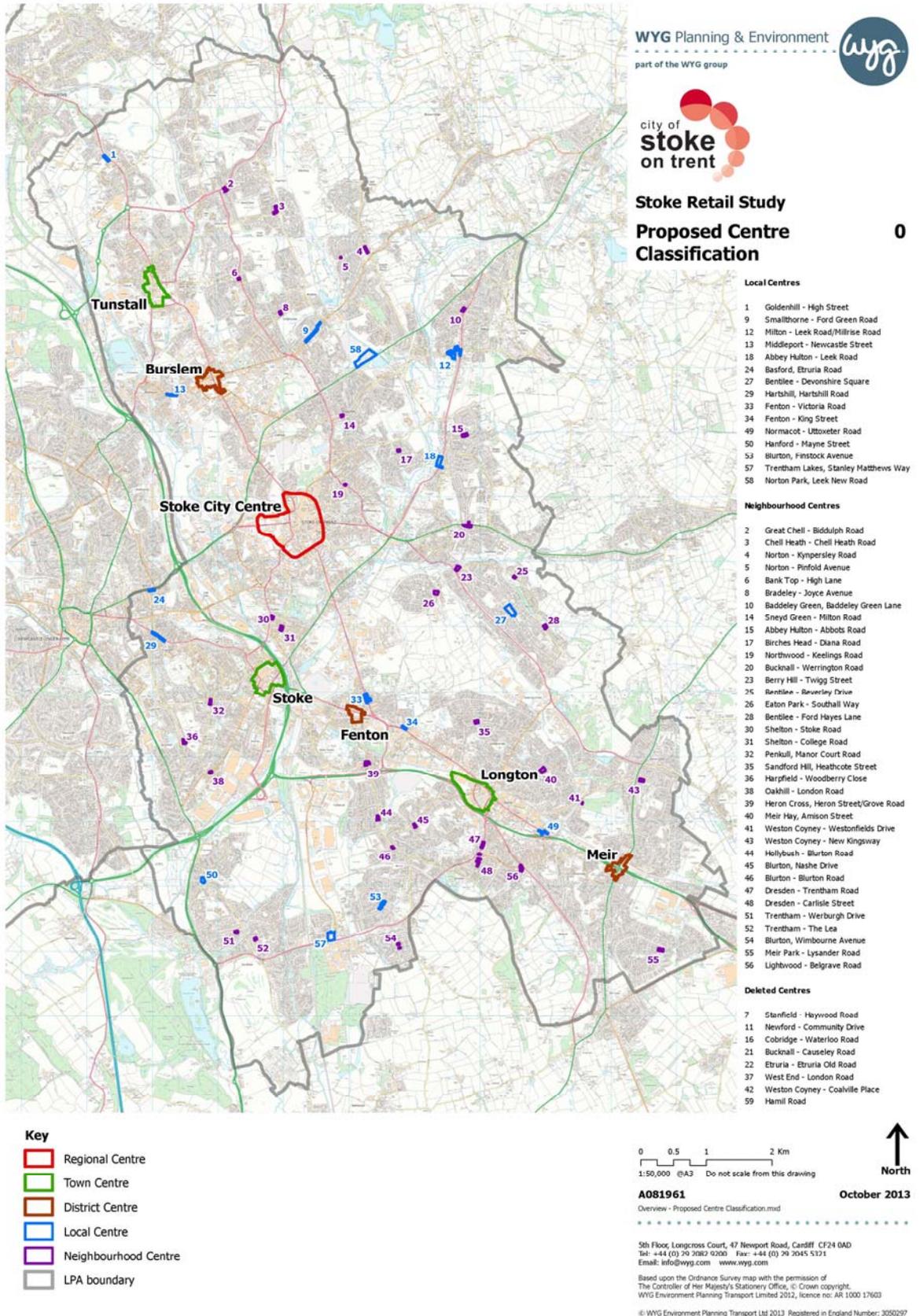




Figure 10.2: Retail Hierarchy



Primary Shopping Area

10.26 As indicated at paragraph 9.01 above, it is necessary for LPAs to identify the primary shopping area of existing centres as this forms the basis in terms of the application of the sequential approach to retail development. In this respect, Annex 2 of the NPPF provides the following definitions for the primary shopping area (PSA) as follows:

Primary Shopping Area

'Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).'

10.27 The city, town and local centre boundaries are defined in the Local Development Framework City of Stoke-on-Trent Proposals Map. PSAs is not defined on the proposals map for each of the centres. However, Policy ASP1 does provide a strategy in relation to Stoke City Centre, stating that:

'The primary shopping area will be expanded between Lichfield Street/Stafford Street/Bryan Street and the Potteries Way to the north, east and south. An additional magnet of attraction will be created by the retail led redevelopment of the East and West Precincts to complement the developing retail focus of the Potteries Shopping Centre.'

10.28 WYG recommend that the city centre boundary for Stoke City Centre should be extended from the boundary shown on the Proposals Map to include the Tesco Extra on Clough Street and the Sainsbury's at Etruria Road. It is evident from our analysis of linked trips at Section 4 that there is a propensity for linked trips between the Tesco and Sainsbury's stores and the city centre, and therefore these stores act as part of the city centre offer. We have also recommended that the casino on Etruria Road, as a main town centre use, is included in the city centre boundary, along with the adjacent carpet showroom and the land to the west where the development of a hotel is proposed. We have also included the large format stores at Century Retail Park within the boundary. These units already have open A1 planning consent. The proposed north western section of the city centre boundary follows the proposed route of the Potteries Way Extension. It is considered that the ring road will form a logical city centre boundary. The units at Festival Retail Park, including the Morrisons store, have not been included in the town centre boundary as we do not consider that these stores perform an important role as part of the wider city centre. These out-of-centre units are considered to be detached from the main core of Stoke City Centre.

10.29 We propose that a PSA is introduced which is bounded by Quadrant Road, Town Road, Meigh Street, Burton Place, Goodson Street, Old Hall Street, Albion Street, Marsh Street South, Trinity Street and



Foundry Street. We consider that the proposed PSA defines the area where retail development is most concentrated and includes the Intu Potteries Centre along with the pedestrianised shopping streets of Lamb Street, Market Square and Tontine Street. In addition, we have identified a proposed future expansion area to the south of the PSA, where the City Central development is proposed.

- 10.30 We have also provided our recommendations as to the appropriate extent of the town centre boundaries and PSA for Longton, Stoke Town and Tunstall town centre on plans provided in Appendix 7.
- 10.31 In terms of Longton, we have recommended that the town centre boundary is extended to cover Longton Retail Park to the west, which we consider functions as part of the town centre, with linked trips occurring between the retail park and facilities within the wider town centre. The proposed PSA includes the Tesco Extra at Longton Retail Park, units along the Strand and Market Street, Longton Exchange Precinct and the large format stores at Chancery Lane and off Edensor Road.
- 10.32 The proposed town centre boundary for Stoke Town has been extended to the north to include the former Spode factory buildings to encourage investment in this part of the town centre. The proposed boundary has also been extended to the south to include the Sainsbury's supermarket which we consider forms part of the town centre's retail offer. The proposed PSA for Stoke Town is tightly defined and include retail units along London Road (including the Sainsbury's supermarket) and Church Street. We consider that due to the high level of vacant units present in Stoke Town centre along the arterial road in to the town, a tightly defined PSA will help to consolidate retail activity in the core of the centre. It is considered that these now peripheral units are not fit for purpose and these areas should be considered for alternative land uses including residential, to help introduce and increase density in and around the main town centre to strengthen activity and vibrancy.
- 10.33 In terms of Tunstall, we recommend that the town centre boundary is extended to the south to include the Asda store, Tunstall Community Centre and all units at Jasper Square. Three additional units to the north east of the existing boundary off High Street have also been included. The proposed PSA for Tunstall includes the retail units which form a continuous frontage along High Street and Tower Square, along with the large format units at Jasper Square. We do not consider that the Asda store should be included within the PSA, as the store lacks clear visual and physical linkages with the wider town centre.
- 10.34 In relation to Burslem, Fenton and Meir, as explained above, we consider that these centres only perform a district centre role and we recommend that the Council should re-classify these within the retail hierarchy. Baring this in mind and due to the scale of these centres, we do not consider that it is



necessary for a PSA to be defined for Burslem, Fenton and Meir. In terms of Burslem, we consider that a district centre boundary should be defined which reflects the existing town centre boundary, but which extends further to the south to include the retail units along Waterloo Road as far as B&M Bargains at the southern extent. We propose that the western extent of the boundary is contracted slightly to exclude the site at Woodbank Street which has been cleared.

10.35 We recommend that a district centre boundary is defined for Meir which corresponds with the existing town centre boundary, but excludes the sections of Uttoxeter Road to the east and west. In terms of Fenton, we recommend that the district centre boundary should reflect the existing town centre boundary.

10.36 Although the NPPF also identifies that primary and secondary shopping boundaries should be defined, WYG consider that, given the current economic position of the wider economy and the current high vacancies experienced in most of the existing town centres, such definitions can be too restrictive and can act to discourage new investment, and changes of use. Traditionally, such tools have been used to guard against the introducing an inappropriate number of non retail uses. Although well intentioned, the application of such frontage policy can often be counter-productive in terms of fostering activity and growth through other land uses, which still often add to the vitality of a town centre. Therefore, WYG recommend that a defined PSA in the case of Stoke City, Longton, Stoke Town and Tunstall, and a defined district centre boundary in terms of Burslem, Fenton and Meir should be the principal tool to direct future retail development.

10.37 In terms of boundary changes to the local and neighbourhood centres, we recommend some relatively nominal changes which are set out in Appendix 7. These include changes to :

Golden Hill – High Street,

Great Chell – Biddulph Road,

Norton – Knypersley,

Bank Top – High Lane,

Smallthorpe – Ford Green Road,

Milton – Leek Road/Millrise Road,

Sneyd Green – Milton Road,

Abbey Hilton – Leek Road,

Northwood – Keelings Road,

Bucknall – Werrington Road,

Berry Hill – Twigg Street,

Hartshill – Hartshill Road,

Shelton Road - Stoke Road,

Oakhill – London Road,

Weston Coyney – Westonfields Drive,

Weston Coyney – New Kingsway,

Dresden – Trentham Road,

Dresden – Carlisle Street,



Hanford – Mayne Street,

Trentham – Werburgh Drive,

Blurton – Finstock Avenue,

Lightwood – Belgrave Road.

Thresholds

- 10.38 In accordance with best practice, it is appropriate to identify thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment. WYG does not consider that a blanket threshold is suitable for all types of centre across an administrative area. For example, a 500 sq.m convenience store (which could be operated by Tesco Express or Sainsbury's Local) will likely have a greater impact on a small centre than a similar facility would on Stoke City Centre. Therefore, in developing the policy in the future, it is more appropriate to have a range of thresholds, depending upon which centre the development applies to.
- 10.39 Accordingly, policy could advocate 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 the particular centre.
- 10.40 For a centre of the size of Stoke City Centre, performing the role that it does, it is recommended that development proposals providing greater than 1,500 sq.m gross floorspace for main town centre uses in an edge or out-of-centre location should be the subject of an impact assessment. However, any future policy should allow the local planning authority some degree of discretion on requesting a retail impact assessment. It is considered appropriate to reduce the thresholds for Longton, Stoke Town and Tunstall to development proposals greater than 1,000 sq.m gross, for district centre development proposals that are greater than 300 sq.m and for local centre development proposals that are also greater than 300 sq.m gross. 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. The above thresholds have had consideration to the Sunday trading limit of trading floorspace of 280 sq.m (net). These thresholds should equally apply to variation of condition applications for existing floorspace whereby the nature of the goods to be sold may change which would ultimately change local trading patterns and have an effect on established centre. For example the average gross floorspace of a local centre is approximately 1,500 sq.m therefore a development which represents a fifth of this is more likely to impact on its future trading. Similarly in terms of district centres, we estimate that 300 sq.m (gross) would represent between 3% and 10% of existing retail floorspace in those centres and therefore there is a susceptibility that such centres could be impacted upon by such a scale of development.



10.41 The proposed thresholds at city, town, district and local centre level are considered to reflect the relatively small size of some of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative 'out-of-centre' provision. In WYG's experience a 300 sq.m (gross) operation located outside but in proximity to a defined local or district centre may well impact on its performance. However, in practice, it is envisaged that a proposal of just greater than 300 sq.m adjacent to a local centre would generally only require an Impact Assessment of very limited length (i.e. for development of such a scale, impact may be able to be dealt with as part of the covering letter accompanying the application). Where an application proposal is above the stated impact threshold we would recommend that the applicant discusses and agrees the scope of any retail impact assessment which is appropriate to the scale and nature of the proposed development, and identifies any specific local issues that may be evident.



GLOSSARY OF TERMS

- Capacity -** Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
- Study Area -** This represents the household survey area, which is based on postal sectors.
- Experian (MMG3) -** The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
- Comparison Goods -** Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods (Annex A, PPS4 Practice Guidance).
- Furniture Goods -** *Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, etc. – as defined by MapInfo – Explanatory Volume 2005 Expenditure*
- DIY Goods -** *Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, etc.*
- Electrical Goods -** *All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, etc.*
- Clothing & Footwear –** *All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, etc.*



- Household Goods –** *Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, etc.*
- Recreational Goods –** *All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, etc.*
- Chemist Goods -** *All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, etc.*
- Convenience Goods -** Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Annex A, PPS4 Practice Guidance).
- Expenditure per Capita -** This is the average spend of each person within the defined Study Area on a variety of retail goods.
- Expenditure -** Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
- Expenditure Forecasts -** This assessment has been undertaken using the 'goods based' approach as prescribed in PPS4 Practice Guidance, the information on consumer retail expenditure forecasts have been derived from Experian (2011).

Forecasts based on the anticipated increase in expenditure per annum for a both convenience and comparison goods as identified by Experian Table 4a and 4b of Retail Planner Brief 10.1.
- Gross Floorspace -** This represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, etc).
- Net Floorspace -** This entails the level of internal area devoted to the sale of goods.



Market Share -	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple -	This is a retail or service operator which is or part of a network of nine or more outlets.
Price Base -	The price base for the Study is 210; all prices are or have been adjusted to 2010 in order to be consistent.
Rates of Productivity -	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density -	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading -	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Trade Draw -	This refers to the level of trade attracted to a particular facility/centre.
Turnover -	The turnover figure relates to the annual turnover generated by existing facilities.
Prime A Rents -	Zone A rents (the rental value of the first six metres depth of floorspace in retail outlets from the shop window). It provides a comparable indicator of the strength of individual outlets. As retailers consider rent to reflect the margin between turnover and operational costs (plus profit), the better the trading prospects the higher the rent that the operator will be willing to pay.



- Yield -** A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage.
- GOAD Plans -** Provide accurate retail information on town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Provides information on fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.
- GOAD Reports -** Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
- Convenience (GOAD) -** GOAD defines this category as land uses including bakers, butchers, CTN, fishmongers, convenience store, frozen foods, greengrocers, grocers and delicatessens, health foods, markets, off licences, shoe repairs, supermarkets,
- Comparison (GOAD) -** GOAD defines this category as antique shops, art and art dealers, booksellers, carpets and flooring, catalogue showrooms, charity shops, chemist and drugstores, children's and infants wear, clothing general, crafts, gifts, china and glass, cycles and accessories, department and variety stores, DIY and home improvement, electrical and other durable goods, florists, footwear, furniture fitted, furniture general, gardens and equipment, greeting cards, hardware and household goods, jewellery, watches and silver, ladies and menswear and acc., ladies wear and accessories, leather and travel goods, menswear and accessories, music and musical instruments, music and video recordings, newsagents and stationers, office supplies, other comparison goods, photographic and optical, second-hand goods, books, etc., sports, camping and leisure goods, telephones and accessories, textiles and soft furnishings, toiletries, cosmetics and beauty products, toys, games and hobbies, vehicle and motorcycle sales and vehicle accessories
- Retail Service -** GOAD defines this 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 -	GOAD defines this category as 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 Service -	GOAD defines this category as 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.
Town	Town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of 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.
District -	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	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.
Town centre	Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. 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. Unless they are identified as centres in Local Plans, existing out-of-centre developments comprising or including main town centre uses, do not



constitute town centres. (Annex 2, NPPF)

Primary Shopping Area	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage) (Annex 2, NPPF).
Primary Frontage	Primary frontages are likely to include a high proportion of retail uses, which may include food, drinks, clothing and household goods. (Annex 2, NPPF).
Secondary Frontage	Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses. (Annex 2, NPPF).
Edge-of-centre	<p>For retail purposes, a location that is well connected to and up to 300 metres of the primary shopping area.</p> <p>For all other main town centre uses, a location within 300 metres of the town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances. (Annex 2, NPPF).</p>
Out-of-centre	A location which is not in or on the edge of a centre but not necessarily outside the urban area. (Annex 2 NPPF).
Out-of-town	A location out of centre that is outside the existing urban area (Annex 2, NPPF).