

Appendix 5: City Centre and Town Centre Healthcheck Assessments

Hanley (City Centre)

Description

Hanley is the principal centre of Stoke-on-Trent, and as such is the primary economic and social destination in the city.

The main shopping areas are found along the pedestrianised routes of Lamb Street, Market Square and Tontine Street, which combined constitute the defined Primary Shopping Area. Additionally the covered, purpose-built Intu Potteries Centre acts as an anchor for the City Centre, and is the main focus for national retailers in the centre.

Areas to the south-west of the city centre core, particularly along Piccadilly are home to a number of independent retail and service operators. Hanley therefore contains a diverse and vibrant range of retailers and operators.

Using the centre boundary as identified by Experian Goad, a total of 579 units were recorded comprising a total gross floorspace of 169,850 sq.m. These figures represent an increase in the figures recorded by the previous survey, partly driven by new retail units and redevelopment of intu Potteries.

Status

Strategic Centre (as defined by the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009)



Figure 1: East-West Precinct (now demolished) is a key redevelopment site within the city centre.



Figure 2: Recent investment in the public realm within Hanley has had an overall positive effect on the city centre.



Figure 3: The temporary market within the city centre helps to draw visitors into Hanley.



Figure 4: Hope Street to the north-west of the centre displays lower levels of occupancy.

Table 1 City Centre Floorspace Composition

GOAD Category	Floorspace at 2013 (sq.m)	Floorspace at 2013 (%)	Floorspace at 2018 (sq.m)	Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	8,740	5.6	19,820	11.7	15.3
Comparison	79,230	50.5	71,360	42.0	34.6
Retail Services	6,880	4.4	7,460	4.4	6.9
Leisure Services	27,610	17.6	29,380	17.3	25.2
Financial and Business Services	11,100	7.1	9,720	5.7	7.6
Miscellaneous	0	0.0	0	0.0	0.1
Vacant	23,330	14.9	32,110	18.9	9.9
TOTAL	156,890	100	169,850	100	100

Source: Composition of City Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian Goad Report June 2018

Table 2 City Centre Unit Composition

GOAD Category	Hanley Number of Units at 2013	Hanley Units at 2013 (%)	Hanley Number of Units 2018	Hanley Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	23	4.1	33	5.7	9.1
Comparison	192	34.0	157	27.1	30.5
Retail Services	69	12.2	70	12.1	14.6
Leisure Services	105	18.6	106	18.3	24.1
Financial and Business Services	64	11.3	45	7.8	10.2
Miscellaneous	0	0.0	0	0.0	0.1
Vacant	111	19.7	168	29.0	11.3
TOTAL	564	100	579	100	100

Source: Composition of City Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian Goad Report June 2018

Table 3 City Centre Facilities

Type of Provision		Total
Key Anchor Store	Tesco Extra, Primark, Debenhams, Marks & Spencer, H&M, Poundland, TK Maxx and Cineworld	102
Other National Retailers	O2, Accessorize, Age UK, Ann Summers, B&M Bargains, Barclays, Beaverbrooks, Betfred, Body Shop, Bodycare, Bon Marche, Boots, Brighthouse, Burton, Caffè Nero, Card Factory, CEX, Chiquito's, Claire's, Clarks, Clintons, Co-operative Bank, Coral, Costa, Dorothy Perkins, Druckers, EE, Ernest Jones, Evans, Frankie & Benny's, Gala, Game, Gourmet Burger Kitchen, H Samuel, Halifax, HMV, Holland and Barrett, HSBC, Iceland, Jack & Jones, JD, Kwik-Fit, Lloyds, Lush, Max Spielmann, McDonald's, Menkind, Miss Selfridge, Monsoon, Nando's, Nationwide, Natwest, New Look, Next, Pandora, Peacocks, PerfectHome, Pizza Express, Poundland, Quiz, River Island, RSPCA, Ryman, Santander, Savers, Schuh, Shoe Zone, Smiggle, Soletrader, Specsavers, Subway, Supercuts, Superdrug, Swarovski, TK Maxx, The Carphone Warehouse, The Watch Lab, The Works, The Fragrance Shop, Thomas Cook, Thorntons, Timpsons, Topman, Topshop, Trespass, TSB, TUI, USC, Vision Express, Vodafone, Warren James, Waterstones, WH Smith, William Hill, Wilko, Yours	
Community Facilities	Two health centres, a dental surgery, a place of worship and The Potteries Museum & Art Gallery	5

Source: Composition of Hanley City Centre derived from Nexus Planning Survey of August 2018;

Table 4 Major Retailers Present

Department Stores		Clothing	
Debenhams	1	Burton	1
House of Fraser	0	Dorothy Perkins	1
John Lewis	0	H&M	1
Marks & Spencer	1	Monsoon Accessorize	1
Mixed Goods Retailers		New Look	1
Argos	0	Next	1
Boots the Chemist	1	Primark	1
TKMaxx	1	River Island	1
W H Smith	1	Topman	1
Wilko	1	Topshop	1
Supermarkets		Other Retailers	
Sainsbury's	0	Carphone Warehouse	1
Tesco	1	Clarks	1
Waitrose	0	Clintons	1
		EE	1
		HMV	1
		O2	1
		Superdrug	1
		Vodafone	1
		Waterstones	1

Source: Composition of Hanley City Centre derived from Nexus Planning Survey of August 2018; Major retailers are the 30 operators identified by Experian Goad as being the most likely to improve the appeal of a centre

Overall Composition

- There are 579 units in Hanley, which comprise a total gross floorspace of 169,850 sq.m.
- Hanley has a vacancy rate of 18.9% of floorspace and 29.0% of units. These figures are both greater than the UK national average.
- There are a diverse number of operators with a presence in Hanley, including national retail multiples, leisure service operators and convenience stores.
- The environmental quality of the centre is highly varied, with some areas benefiting from high quality public realm improvements and other areas significantly blighted by the number and presence of vacant units.
- Hanley is located at the centre of Stoke-on-Trent's public transport network and, despite lacking a train station, has a very high level of accessibility to all areas of the study area.

Convenience & Comparison

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

The comparison retail offer in the city centre is diverse, with such operators accounting for 71,360 sq.m of floorspace. This figure equates to 42.0% of total retail floorspace; by way of comparison, the national average floorspace for comparison goods is 34.6%. There are 157 comparison goods units within the city centre, a figure which represents a decline on the 192 comparison goods units recorded at the time of the previous survey in 2013. Although the comparison goods offer in Hanley remains greater than the current UK national average, there has been a decrease in comparison floorspace from 79,230 to 71,360 (representing a 10% decline). This is partly due to diversification and growth in other uses, particularly in convenience goods, and an increase in vacant units.

Comparison goods units are concentrated in and around intu Potteries, which is clearly the focus of retail in the city centre. Our survey recorded 25 of the 30 major retailers identified by Experian Good as being the most likely to improve the appeal of a centre. Consequently Hanley is well served by a range of diverse national comparison goods multiples, possibly driven by the presence of intu Potteries. The centre is anchored by Primark, Debenhams and Marks & Spencer, with a number of additional major national multiples, including H&M, TK Maxx and Next located within the city centre. There are a large number of non-fashion comparison retailers within Hanley, with these too being considered diverse and strong. Specialist retailers, including Body Shop, Waterstones, Clintons and HMV, have a strong

presence in the city centre although these too are primarily located within intu Potteries. There are also a number of value/lower-end retailers in the centre, including national multiples such as Poundland and Primark. Hanley therefore has a broad diversity of retailers, from high-end specialist retailers and value/lower-end retailers. Since the previous survey the former BHS unit at 9-15 has become vacant, with this now accounting for one of the largest vacant units in Hanley.

The convenience offer has grown considerably since the time of the previous survey. There were 30 convenience units within the survey area at the time of our site visit, which equates to approximately 19,820 sq.m of floorspace, or 11.7% of the total stock of floorspace in the city centre. Although the proportion of floorspace in this use is lower than the current UK floorspace average of 15.3%, the current figure in Hanley represents a significant increase in comparison to the 5.6% of floorspace (equating to 8,740 sq.m of floorspace across 23 units) recorded by the 2013 survey. Much of this increase is a result of the inclusion of the Tesco Extra superstore on Clough Street within the Goad survey area, which was omitted from the previous survey. This unit accounts for 10,220 sq.m of retail floorspace and is therefore the biggest factor influencing the growth in convenience floorspace in Hanley. In addition to Tesco Extra there are a number of smaller convenience stores located within the city centre, an Iceland frozen foods specialist, as well as a number of newsagents, health food stores, greengrocers and tobacconists. The convenience offer is further strengthened by Hanley Market which is located on the ground floor of intu Potteries. The market contains a range of operators, offering a variety of goods.

Despite a decrease in comparison goods floorspace, the convenience and comparison retail offer is considered to be strong and diverse. The comparison goods offer is still sufficient to support Hanley's role as a regional centre, and this is further bolstered by an offer that includes a broad range of retailers, from national multiples to specialist, independent and regional operators. It is hard to ascertain how much of the comparison offering is secured by the intu centre, however it is clear that the floorspace in the centre is favoured by national multiples as opposed to floorspace in the rest of the centre. This has consequences for the parts of the city centre not located in close proximity to intu Potteries.

Services

Services (retail, leisure and financial and business) comprise a total of 38.2% of units, and 27.4% of all floorspace in the city centre. These figures indicate that the provision in Hanley is

proportionally less than the national average level, which equates to 48.9% of units and 39.7% of floorspace.

There are 106 individual leisure service units in Hanley, accounting for approximately 29,380 sq.m of floorspace, or 17.3% of total retail floorspace in the centre. This figure is lower than the national average of leisure service floorspace of 25.2%. Although leisure service floorspace has remained relatively static since the previous survey (when it accounted for 17.6% of the total stock of commercial floorspace), the leisure service offer has diversified and strengthened since the previous study. This has been driven by the new Cineworld anchor in a formerly vacant unit at intu Potteries, a development which also supported a new range of restaurants including Nando's, Gourmet Burger Kitchen and Coast to Coast. Throughout the rest of Hanley the leisure service offer is diverse, and includes a number of other national operators including Subway, Frankie and Benny's and William Hill but also a range of independent public houses, bars, nightclubs, restaurants and cafés. Furthermore the city centre includes the Regent Theatre. Leisure services are located throughout Hanley, however are concentrated around Cineworld at intu Potteries and in the south-west of the city centre on and around Piccadilly.

Although there are fewer retail service operators in Hanley, the retail service offer is considered to be appropriate to serve the needs of the city centre. There is a total of 70 individual retail service units within the centre, accounting for approximately 7,460 sq.m of retail floorspace and equating to 4.4% of the total stock of commercial floorspace. This figure is considerably lower than the current national average for retail service floorspace, which is 6.9%. There are a number of hairdressers and beauty salons, including national operators such as Supercuts, alongside travel agents (including Tui and Thomas Cook) and more specialist operators such as The Watch Lab, Max Spielmann and Specsavers. Retail service operators are found throughout the city centre, additionally there are a number of smaller kiosks offering retail service uses within intu Potteries.

Financial and business service operators account for approximately 9,720 sq.m of floorspace, or 5.7% of the total stock of commercial floorspace. This represents a decline on the 11,100 sq.m of floorspace recorded by the previous survey. This decrease is mirrored too in the decline in the number of financial and business service operators in Hanley, from 64 in 2013 to 45.

The provision of leisure and retail service in Hanley is considered to be comprehensive, and is again indicative of its strong

regional role. Broadly speaking, the service provision in Hanley is similar to that which was apparent at the time of the previous survey both in respect of floorspace and the composition of units. The exception to this is the financial and business service sector, where there has been a decline in both the number of such operators and the amount of floorspace dedicated to the use. To some degree, the loss of such operators has been mitigated by significant improvements in Hanley's leisure offer in the form of The Hive cinema and leisure development (which, to some degree, is symptomatic of the changing role of town centres). The number of independent leisure service operators in the south-western corner of the city centre is considered to be a strength. Equally the diversity of retail operators, although lesser in proportion when compared with national averages, is considered to be good, with a sufficient range of operators in Hanley.

Vacancies

At the time of our visit there were 168 vacant units recorded throughout Hanley which equates to an exceptionally high vacancy rate of 29.0%. These units account for approximately 32,110 sq.m of floorspace, a figure which equates to 18.9% of total stock within the survey area. The vacancy rate of 18.9% represents a much greater proportion of vacant floorspace in Hanley than the national average figure of 9.9%. At the time of the previous study in 2013 there were 111 vacant units noted in Hanley, a figure which at that time represented 19.7% of all units in the city centre.

The higher figures for vacant units and floorspace represents some cause for concern. As shown on the updated Goad plan of the City Centre the units identified as vacant at the time of our survey are concentrated in three broad areas:

- The south-west corner of the city centre around Piccadilly;
- The western edge of the city centre, concentrated along New Hall Street; and,
- Hanley Shopping Centre.

The vacant units vary in terms of location and size, and pleasingly the total includes few of the larger units in the centre. The unit most recently occupied by BHS, at 9-15 Parliament Row represents one of the larger vacant units, accounting for approximately 2,090 sq.m. of floorspace, and occupying a prime frontage. Consideration should be given to addressing this and similar vacant units, with finding permanent uses for these being considered a key priority. Although there were a few vacancies noted within the intu centre, these were less pronounced than those throughout the rest of the centre due to the use of 'false

frontages'. The success of the intu centre and its attractiveness for national multiples has clearly had follow-on impacts to the remaining primary frontages in the city, particularly along Parliament Row.

It is important to note that Hanley Shopping Centre, located on the southern edge of the city centre, is currently being managed into vacancy and is viewed as being a prime redevelopment opportunity at a key entry point into Hanley. Accordingly when the units within Hanley Shopping Centre are discounted from the survey, the vacancy rate decreases by 3.5% with respect of floorspace and 4.3% for units to 15.4% of vacant floorspace and 24.7% of total units. Although these figures still represent cause for concern, they represent less of an increase in vacant floorspace since the previous survey. This suggests that, as much of Hanley Shopping Centre was vacant previously, there has only been a marginal increase in vacant floorspace throughout the rest of Hanley. This has been driven, at least in part, by the loss of BHS on Parliament Row. However, only a limited proportion of large units are vacant, which suggests that there are too many small units with too few operators to take them.

However the vacancy rate remains troubling, and Hanley Shopping Centre provides a negative aspect on entry to Hanley. Additionally the vacancy rates present cause for concern in other areas of the centre where vacant units are concentrated. As a result ongoing monitoring should occur of vacancy rates throughout Hanley and alternative uses should be found, and encouraged for currently vacant sites.

Miscellaneous

As the City Centre for Stoke-on-Trent, Hanley provides a number of important civic functions and services for the wider city and surrounding areas. There are, therefore, within the survey area a number of community facilities, including The Potteries Museum and Art Gallery and the City Central Library. Additionally there are two health centres within the City Centre, a dental surgery and a place of worship.

Pedestrian Flows

During the time of our visit moderate-high levels of footfall were noted throughout most of Hanley, with particular activity found around intu Potteries and the pedestrianised areas of the centre.

Pedestrian activity was strongest in intu Potteries, with constant and high activity in all areas of the centre. The wide variety of retail and service operators located in and around intu Potteries provides more of a draw than other areas of the city centre. It should be noted that despite the high levels of activity noted in and around intu Potteries and the pedestrianised areas of

Hanley, this did not translate into comparable levels of activity at Hanley Market which, possibly due to its ground floor location, felt isolated and hidden. Strong pedestrian flows were noted on the routes between intu Potteries and Hanley bus station, indicating that the bus station is well-used. Moderate pedestrian flows were noted along Piccadilly towards Broad Street.

Much less pedestrian activity was noted at the peripheral areas of the centre, and in areas with a high concentration of vacant units such as around Hanley Shopping Centre and the New Hall Street area. Apart from the lack of uses in these areas, a potential cause of reduced pedestrian activity may be a result of these areas being on the fringes of Hanley and presenting little reason for visitors to pass through.

Although strong pedestrian flows were noted in areas of Hanley, this activity was generally concentrated around intu Potteries and the immediate routes leading to the shopping centre. In the secondary areas, those located primarily on the edge of the city centre, considerably lower levels of activity were noted. This underscores that challenge of creating strong pedestrian flows throughout Hanley, and encouraging pedestrian activity to expand from its current north-south patterns (between intu Potteries and Hanley bus station) to areas particularly in the west of the centre.

Accessibility

Hanley is at the centre of the bus network in the city of Stoke-on-Trent, with Hanley Bus Station located on Lichfield Street on the southern edge of the centre. This is a modern, purpose built bus station with up-to-the-minute transport information which provides for straightforward travel. The network radiates throughout the remainder of the city allowing for relatively simple and convenient access from a number of destinations into Hanley, with any routes terminating at the bus station providing quick pedestrian access into the primary pedestrianised retail areas.

Stoke-on-Trent railway station is located approximately 2 kilometres to the south of Hanley, and although not located in close proximity to the city centre it can be reached by public transport (bus routes 21, 23 and 25) or via a 25 minute walk. Trains services from Stoke-on-Trent provide direct access to a number of regional destinations, and national destinations including Birmingham, Manchester and London.

The city centre is tightly bound by the A50 Potteries Way, which provides links onto the A53 and A500 and onto the wider regional and national highway network. Hanley is located

approximately 4 kilometres to the south of Tunstall (the northernmost centre in Stoke-on-Trent) and 7 kilometres to the north-west of Meir (the southernmost, and easternmost, centre in Stoke-on-Trent). Car parks are located throughout the city centre, with the largest (at intu Potteries) providing 900 spaces and charging £1.30/hour between Monday-Saturday. Additional parking facilities are located on John Street, Hinde Street, Meigh Street and Hope Street, with further on-road parking possible in some locations in the centre.

Hanley is therefore easily accessible to areas throughout the city via numerous modes of transport.

Perception of Safety

Hanley city centre has a strong sense of personal safety for the most part, particularly throughout the key shopping and pedestrianised areas. There is healthy footfall and strong active frontages which ensure a high level of natural and passive surveillance. This is bolstered by the presence of visible CCTV cameras. There was little evidence of crime or anti-social behaviour, and the public realm is generally well maintained and provides a largely attractive environment. However in areas where there are high concentrations of vacant property the perception of safety suffers considerably, with these areas feeling less secure as they benefit from less footfall.

According to the website www.crime-statistics.co.uk, 754 crimes were reported within a mile radius of Hanley city centre in August 2018. This compares with 822 crimes reported across the same area in August 2017 and 714 in August 2016.

Environmental Quality

The quality of the public realm, particularly in the pedestrianised areas of Hanley, is considered to be very high. The £7.2 million scheme that sought to improve the overall environmental quality of the city centre, through the repaving of areas including Piccadilly and Parliament Square and provision of seating have created a user friendly public space. These areas appear well maintained, as do those around intu Potteries which at the time of our visit had a number of transient uses (including a carousel, various street entertainers and pop-up market stalls) that further strengthened the quality of the centre by making an attractive environment in which to spend some time.

As with most of the centres in Stoke-on-Trent, Hanley has a number of historic buildings. These improve the character of the city centre, particularly in its core which has a distinctive and attractive architectural quality with a combination of period and modern buildings.

The most significant feature detracting from the overall environmental quality of Hanley is the concentration of vacant units in areas of the centre, especially around Hanley Shopping Centre. Although this is viewed as a key redevelopment opportunity at the southern fringe of the city centre, the wholly vacant and derelict structure results in a negative gateway into Hanley. However it is viewed that in the long-term, and with the planned re-development of the site this will no longer be an issue.

Overall, the standard of cleanliness in Hanley is considered to be good. At the time of our visit there was little evidence of litter, graffiti or anti-social behaviour and despite the challenges caused by vacant units the recent improvements to the public realm has been positive to the centre.

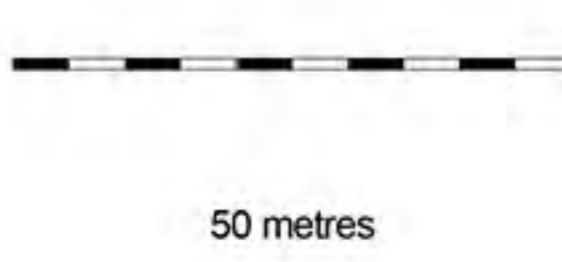
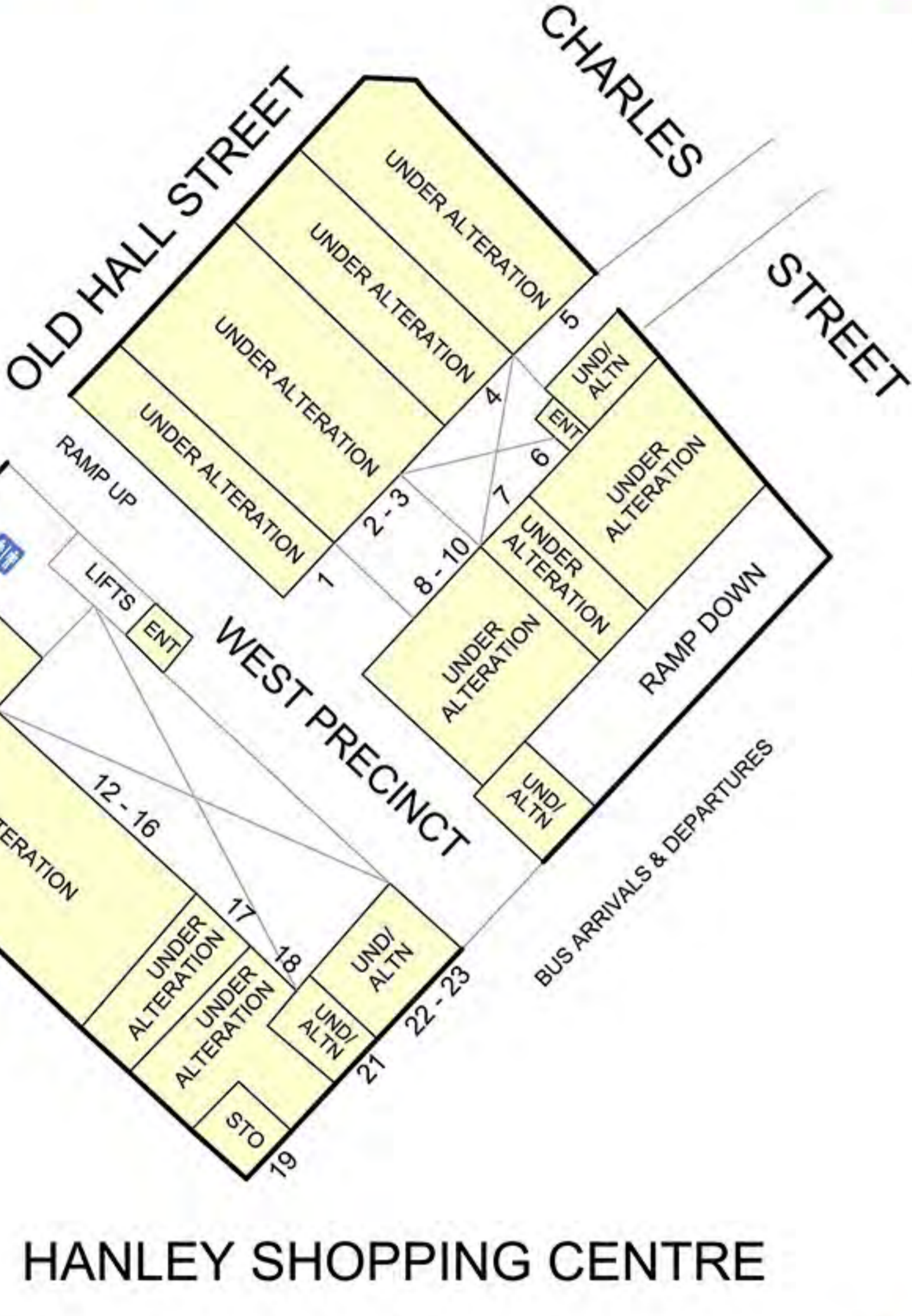
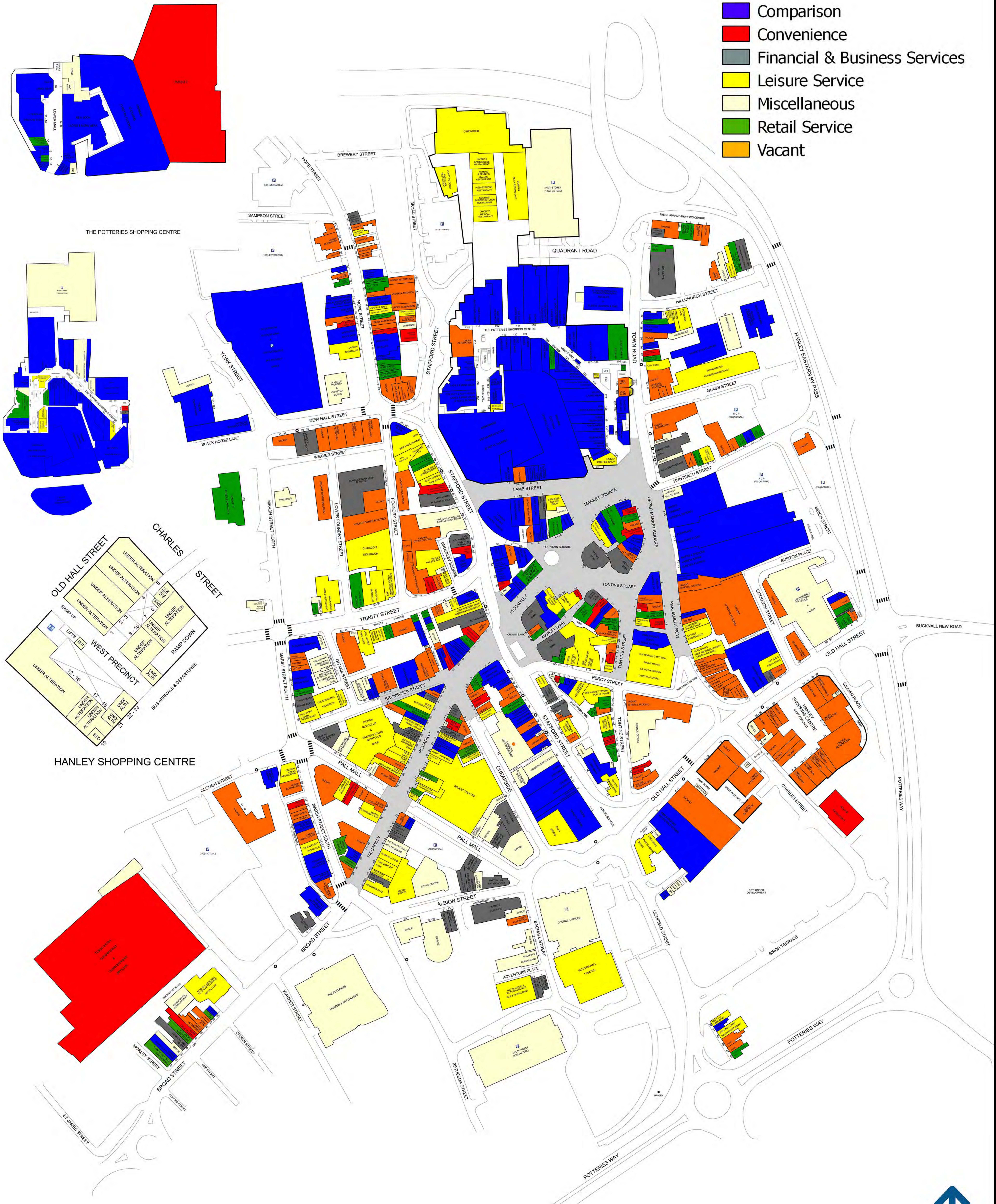
Conclusion

Hanley clearly serves a very important function in providing the principal comparison goods offer in the joint authority area, although its vacancy rate has been significantly above the national average for a number of years. Whilst some of this can be directly attributed to the cessation of leases in order to prepare for the Unity Walk development, the level of vacancies throughout most of the centre, with the exception of intu Potteries, is high.

Furthermore Hanley's comparison goods offer, whilst it remains strong does provide additional scope to attract other national multiple retailers and there may also be potential for some existing operators to take larger premises.

Notwithstanding this, Hanley is a pleasant centre and the recent public realm improvements have been of very significant benefit. In addition the centre's diverse cultural offer is considered likely to drive footfall throughout the day and into the evening.

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



Experian Goad Plan Created: 11/12/2018
Created By: Nexus Planning Ltd

Burslem Town Centre

Description

Burslem is located almost equidistant between Hanley to the south and Tunstall to the north and is the fifth largest centre in Stoke-on-Trent. Once a key industrial centre, the decline of the ceramic industry has left a legacy of vacant buildings.

There have been considerable efforts in recent years to improve the centre’s public realm and provide for the regeneration of Burslem as a cultural centre. However, the centre still plays an important role for the local community with respect to convenience and comparison uses, with large format B&M and Home Bargains stores noted in the centre.

Status

Significant Urban Centre (as defined by the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009)



Figure 1: Market Place is a busy junction for vehicles.



Figure 2: Car parking provision is good throughout Burslem.



Figure 3: Queen Street has a good environmental quality, with recent investment evident.



Figure 4: B&M store on Waterloo Road to the south of the centre.

Table 1 Town Centre Floorspace Composition

GOAD Category	Burslem Floorspace at 2013 (sq.m)	Burslem Floorspace at 2013 (%)	Burslem Floorspace at 2018 (sq.m)	Burslem Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	1,110	3.2	2,020	5.8	15.2
Comparison	8,240	23.4	8,050	23.2	35.5
Retail Services	1,710	4.9	1,990	5.7	6.8
Leisure Services	11,190	31.8	9,170	26.4	24.7
Financial and Business Services	3,750	10.7	2,040	5.9	7.9
Miscellaneous	0	0.0	0	0.0	0.1
Vacant	9,180	26.1	11,480	33.0	9.3
TOTAL	35,180	100	34,750	100	100

Source: Composition of Burslem Town Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Table 2 Town Centre Unit Composition

GOAD Category	Burslem Number of Units at 2013	Burslem Units at 2013 (%)	Burslem Number of Units 2018	Burslem Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	7	4.0	8	4.8	8.7
Comparison	39	22.2	26	15.6	31.6
Retail Services	17	9.7	21	12.6	14.2
Leisure Services	43	24.4	43	25.7	23.6
Financial and Business Services	24	13.6	12	7.2	10.5
Miscellaneous	0	0.0	0	0.0	0.2
Vacant	46	26.1	57	34.1	11.2
TOTAL	176	100	167	100	100

Source: Composition of Burslem Town Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Overall Composition

- There are 167 retail and service units in Burslem which account for a total of 34,750 sq.m of floorspace.
- Burslem has a vacancy rate of 33.0% of floorspace and 34.1% of units. These figures are both greater than the UK national average.
- There are a number of national operators with a presence in Burslem, including Home Bargains, B&M Bargains, KFC, Coral and Post Office.
- The service offer lacks suitable variety and therefore lacks a diverse service offer capable of meeting all the day-to-day needs of local residents.
- The environmental quality of the centre is highly varied, with some areas benefiting from high quality public realm improvements and other areas significantly blighted by the number and presence of vacant units.
- Like all centres throughout Stoke-on-Trent, Burslem is well integrated into the public transport network and therefore benefits from a high level of accessibility.

Convenience & Comparison

The convenience and comparison offer in Burslem is considered to be somewhat limited. There are eight convenience operators in Burslem, including two specialist food stores, two convenience stores, Farm Foods, a bakery, a butchers and a tobacconist. These account for 2,020 sq.m of floorspace which equates to 5.8% of commercial floorspace in the centre. Although an increase on the amount of convenience floorspace recorded at the time of the previous survey, the 5.8% of floorspace is far lower than the national figure of 15.2%. Consideration should therefore be given to opportunities to grow and diversify the convenience offer in Burslem.

There are 26 comparison operators in Burslem which account for 8,050 sq.m of floorspace (equating to 23.2% of commercial floorspace in the centre). Although there are a diverse range of commercial operators in the centre, which includes Home Bargains and B&M Bargains, the comparison floorspace is far lower than the national average figure of 35.5%.

Broadly the amount of convenience and comparison operators in Burslem has remained the same since the time of the previous survey in 2013, although the proportion of convenience and comparison floorspace is far less than the national average (29.0% compared to 50.7%). It would therefore be advantageous to diversify and broaden the offer in Burslem.

Services

There are 84 service operators located in Burslem which can be provided into 43 leisure service operators, 21 retail service operators and 12 financial and business service operators.

In total there are 43 leisure service operators in Burslem, the same as recorded in 2014. These units account for 9,170 sq.m of floorspace (equating to 26.4% of commercial floorspace), a figure slightly smaller than the amount recorded previously. The 43 operators include 13 public houses, 11 hot-food takeaways, six restaurants, four bars, two amusement arcades, the Queens Theatre and a betting office. The leisure service offer can therefore be considered to be diverse, and capable of supporting the increased 'cultural' offer that Burslem is seeking to provide.

The 21 retail service operators include eight hairdressers, three beauty salons, a Post Office, a travel agent and a cobblers. These operators account for 1,990 sq.m of floorspace (which equates to 5.7% of commercial floorspace in Burslem). There are 12 financial and business service operators in the centre, including five accountancy firms, three solicitors and two employment agencies. These uses account for 2,040 sq.m of floorspace (5.9% of commercial floorspace in Burslem) and represent a significant

decline from the 3,750 sq.m of financial and business service floorspace recorded in 2014.

Since the previous survey there has been a substantial decline in the number of financial and business service operators in Burslem and the variety of leisure and retail operators is not particularly diverse. Burslem therefore, despite the number of leisure and retail service operators, lacks a diverse service offer capable of meeting all the day-to-day needs of local residents.

Vacancies

At the time of our survey there were 57 vacant units surveyed. Although vacant units were noted throughout Burslem, vacant units were concentrated along Queen Street and on Waterloo Road. Vacant units currently equate to 34.1% of all units in the centre and 11,480 sq.m of floorspace. This represents an increase in the number of vacant units in Burslem as 46 vacant units and 9,180 sq.m of floorspace were recorded at the previous survey in 2013.

The vacancy rate has also significantly increased since the undertaking of the previous health check assessment. The level of vacancies is considered to be symptomatic of a real issue in respect of operator demand in Burslem and has an appreciable impact on its vitality and viability. Therefore Burslem may simply have 'too much floorspace' and other uses may need to be considered (including residential) in order to consolidate the centre's offer).

Miscellaneous

Burslem contains a variety of community and miscellaneous facilities within its defined boundaries. City College's Haywood Sixth Form Academy is located at Market Place in the centre of Burslem. Additionally, there are two places of worship, two advice centres, a dental surgery and Burslem Police Station. Burslem therefore contains a vast number of community and civic facilities.

The Burslem School of Art on Queen Street and a number of historical landmarks associated with the ceramic and pottery industries attract a diverse range of visitors through Burslem.

Pedestrian Flows

Pedestrian flows in Burslem were concentrated around Market Place and along Wedgwood Street, however activity was noted as being far more reduced throughout the remainder of the centre. This is likely a reflection of the concentration of vacant units throughout Burslem in away from Market Place and that many uses in the centre, for instance around St John's Square' are more associated with the 'night time economy' and are therefore more likely to attract visitors in the evenings or at weekends. However

at the time of our visit generally low levels of pedestrian activity were noted throughout Burslem.

Accessibility

Located at the junction on the A50, Burslem benefits from a good level of accessibility to areas throughout Stoke-on-Trent. As with all town centres in the city, Burslem also has a high level of accessibility on the public transport network. Bus routes 3 and 3A is accessible from Swan Square in the east of the centre and provides up to six services per hour to Tunstall and to Hanley bus station, which can be reached in approximately 15 minutes.

There are three surface car parks within the centre, located at Home Bargains, the B&M and Chapel Lane. There is also a small amount of car parking available at St John's Square.

Perception of Safety

At the time of our visit we noted considerable natural and passive surveillance in Burslem, particularly around Market Place and the A50 Wedgwood Street. This ensures that the perception of safety in these areas was good, and a lack of obvious anti-social behaviour was also noted. A lack of activity in secondary areas, particularly along Queen Street, decreased the perception of safety with the number of vacant units reducing the amount of passive surveillance in this area. Were operators found for these units it is likely that the overall perception of safety in Burslem could be greatly improved.

Despite the centre being located at a busy junction, pedestrian safety was also considered to be good, with large pavements lining all units in the centre. Pedestrian crossings throughout the centre ensures that Burslem is a safe environment for pedestrians.

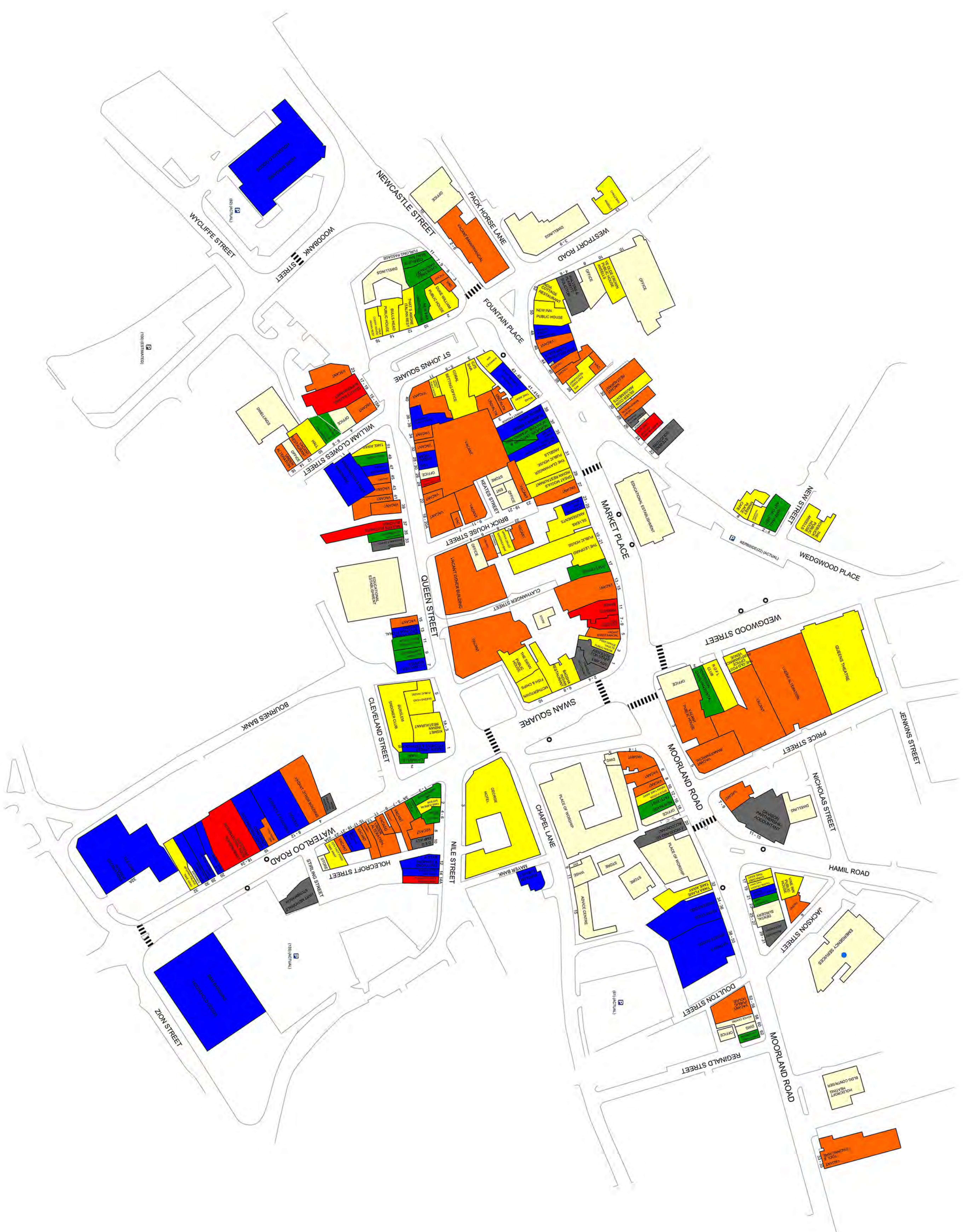
Environmental Quality

The centre of Burslem is within a Conservation Area and consequently many of the buildings in the centre have a distinct and pleasant character that is beneficial to the overall appearance of Burslem. The environmental quality throughout the centre was generally considered to be good, with evidence of recent public realm improvements and some seasonal planting noted with no evidence of graffiti or litter.

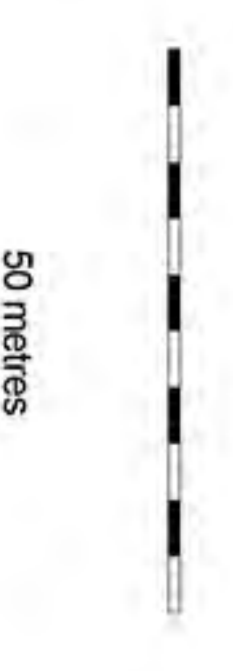
Despite these efforts to improve environmental quality in Burslem the concentration of vacant units on Queen Street significantly detract from the overall quality of the centre. These vacant units cause the area around Queen Street and William Clowes Street to appear neglected, and although removed from the 'primary' routes through the centre do impact negatively on Burslem.

Conclusion

Although Burslem benefits from high accessibility and a generally good standard of environmental quality, the range of retail and service operators is compromised by the number of vacant units noted in the centre. The high proportion of vacant units question the viability and vitality of the centre, however efforts to diversify Burslem as a 'cultural' destination are clearly having some success and may offer a long-term solution to the issues noted above.



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



Fenton Town Centre

Description

Located between Longton and Stoke, approximately 2 kilometres from both centres, Fenton is one of the smaller town centres, both in terms of the quantum of floorspace and the number of operators it accommodates. It is surrounded by a combination of residential and employment uses, and is located along a major arterial route (the A5007 City Road). This increases the centre's accessibility, but reduces the perception of pedestrian safety. Recent improvements have been made to the public realm of the centre but have only impacted the southern half of the district around the Albert Square conservation area. Fenton lacks the mix of operators found in other centres and is considered able to meet the needs of the immediate residential areas only.

Status

Significant Urban Centre (as defined by the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009)



Figure 1: Albert Square conservation area forms a pleasant environment in which to spend time.



Figure 2: Co-operative Food on Christchurch Street is the largest unit within Fenton.



Figure 3: A number of units in the centre appear poorly maintained and in need of investment.



Figure 4: City Road is a busy arterial route into the city.

Table 1 Town Centre Floorspace Composition

GOAD Category	Fenton Floorspace at 2013 (sq.m)	Fenton Floorspace at 2013 (%)	Fenton Floorspace at 2018 (sq.m)	Fenton Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	886	9.2	628	10.1	15.2
Comparison	2,639	27.4	1,874	30.4	35.5
Retail Services	429	4.5	1,698	27.6	6.8
Leisure Services	1,169	12.2	1,025	16.6	24.7
Financial and Business Services	244	2.5	0	0.0	7.9
Miscellaneous	0	0.0	0	0.0	0.1
Vacant	4,251	44.2	937	15.2	9.3
TOTAL	9,618	100	8,568	100	100

Source: Current composition of Fenton Town Centre derived from Nexus Planning Survey of August 2018; 2013 data sourced from Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Table 2 Town Centre Unit Composition

GOAD Category	Fenton Number of Units at 2013	Fenton Units at 2013 (%)	Fenton Number of Units 2018	Fenton Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	5	12.8	3	8.8	8.7
Comparison	10	25.6	8	23.5	31.6
Retail Services	4	10.3	9	26.5	14.2
Leisure Services	7	17.9	5	14.7	23.6
Financial and Business Services	2	5.1	0	0.0	10.5
Miscellaneous	0	0.0	0	0.0	0.2
Vacant	11	28.2	9	26.5	11.2
TOTAL	39	100	34	100	100

Source: Current composition of Fenton Town Centre derived from Nexus Planning Survey of August 2018; 2013 data sourced from Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Overall Composition

- There are a total of 34 units within the Town Centre, accounting for a total of 6,158 sq.m of total floorspace. Fenton is therefore one of the smaller town centres in Stoke-on-Trent.
- Fenton has a vacancy rate of 15.2% of floorspace or 26.5% of units. These figures are both greater than the UK average.
- There are few national operators with a presence in Fenton, including Co-operative Foodstore and Coral.
- The environmental quality of Fenton is varied, with some areas benefiting from recent public realm improvements and other areas blighted by poorly maintained units and increased vacancy rates.
- Fenton is well connected to the surrounding residential areas with a generally good level of accessibility, however the main roads running through the centre impede pedestrian activity.

Convenience & Comparison

There are three convenience units located within Fenton town centre, comprising a Co-operative Foodstore, a butcher and a small newsagent. The Co-operative Foodstore dominates the convenience offer in Fenton. Since the previous survey two convenience operators on City Road have ceased operation. Accordingly the amount for convenience floorspace has decreased from 886 sq.m of floorspace to 628 sq.m recorded at the time of our survey, but due to a decrease in the overall amount of floorspace recorded, the proportion of convenience floorspace has increased to 10.1%, a figure lower than the national average of 15.2%.

There are eight comparison operators within Fenton, which account for 1,874 sq.m of floorspace or 30.4% of total commercial floorspace in the centre. Whilst this represents a decrease in total comparison floorspace compared to the previous survey, there has been a slight increase in the proportion of floorspace in comparison goods use. Comparison goods operators include two pet stores, two furniture stores, a DIY store and a florist.

Fenton lacks the diversity of comparison and convenience retailers found in other town centres throughout Stoke; consequently the centre likely only serves the immediate residential area. In this regard, the key anchor tenant in the centre is a small format Co-op foodstore, which is emblematic of Fenton's role and function. The lack of diversity in convenience and comparison goods operators suggests a requirement to diversify Fenton's offer in order that it performs a role more commensurate to its town centre designation.

Services

At the time of our visit there were five leisure service units and nine retail service units. Retail service operators are diverse and include three hairdressers, a car rental, a Post Office and an upholsterer. Leisure service operators include two public houses, two hot-food takeaways and a gym. Additionally there is a free-to-use ATM located at the Co-op Foodstore on Weston Road.

Retail service operators account for 1,698 sq.m of floorspace or 27.6% of the total stock of commercial floorspace in Fenton. At the time of the previous survey in 2013, 429 sq.m of floorspace was identified as being in retail service use, equating to 4.5% of total floorspace at that time. Leisure service operators account for 1,025 sq.m of floorspace or 16.6% of total floorspace in the town centre. This compares with 1,169 sq.m of floorspace (equating to 12.2% of total floorspace) being in leisure service use in 2013.

Fenton does not accommodate any financial service uses, which is particularly unusual given its town centre designation.

Vacancies

At the time of our visit there were nine vacant units in Fenton town centre, providing a total of 937 sq.m of floorspace. This equates to 15.2% of floorspace and 26.5% of units. The vacancy rate is therefore above their respective national averages of 9.3% and 11.2%. It should be noted that the previous survey recorded a vacancy figure of 44.2% of total floorspace, a figure which is much greater than that surveyed at the time of our visit. The principal reason for this substantial increase is the re-classification of the former Magistrates Court and buildings along Gimson Street as non-retail units.

Miscellaneous

Fenton includes a number of community facilities within, or just beyond, the defined boundaries of the centre. These include three places of worship, the Fenton Health Centre and Our Lady's Catholic Primary School. Fenton therefore contains a range of additional uses, which may encourage linked trips within the centre.

Pedestrian Flows

Despite being surrounded by residential areas, there were few pedestrians noted throughout Fenton at the time of our visit. This indicates that, despite its accessibility noted below, Fenton town centre may not be that well used. This may be influenced by the proximity of two other centres, Stoke and Longton.

Accessibility

Fenton benefits from direct bus services into Hanley and east towards Longton and Meir. There are a number of bus stops throughout the town centre, with at least two services per hour taking approximately 16 minutes to reach Hanley bus station and around 13 minutes to Longton. The town centre is therefore well connected by public transport.

There is also a considerable amount of car parking available within the defined town centre boundary. There is also a small amount of on-street car parking available around Albert Square. At the time of our visit the car park on City Road was considerably underused, suggesting that the level of parking provision is more than adequate to serve Fenton.

Although there is a pedestrian crossing at the junction of City Road and Glebedale Road, the A5007 City Road acts to impede accessibility through Fenton. Overall, we consider that Fenton is highly accessible.

Perception of Safety

The centre is located along a major road and, as such, the number of vehicles reduces the feeling of safety, particularly for pedestrians. However, a pedestrian crossing on the City Road allows safe crossing. The linear nature of the site and passing

traffic does provide some form of natural surveillance, however areas away from City Road lack natural surveillance decreasing the perception of safety. This situation is exacerbated by security features on the units, including rolling shutters and metal cages and bars covering windows.

These features, in addition to a lack of pedestrians at the time of our visit, mean that the perception of safety is relatively poor and most of the centre appeared to have limited natural or passive surveillance. The installation of visible CCTV on units and securing a wider diversity of operators could help to improve this situation. However, at the time of our visit no anti-social behaviour or loitering was noted.

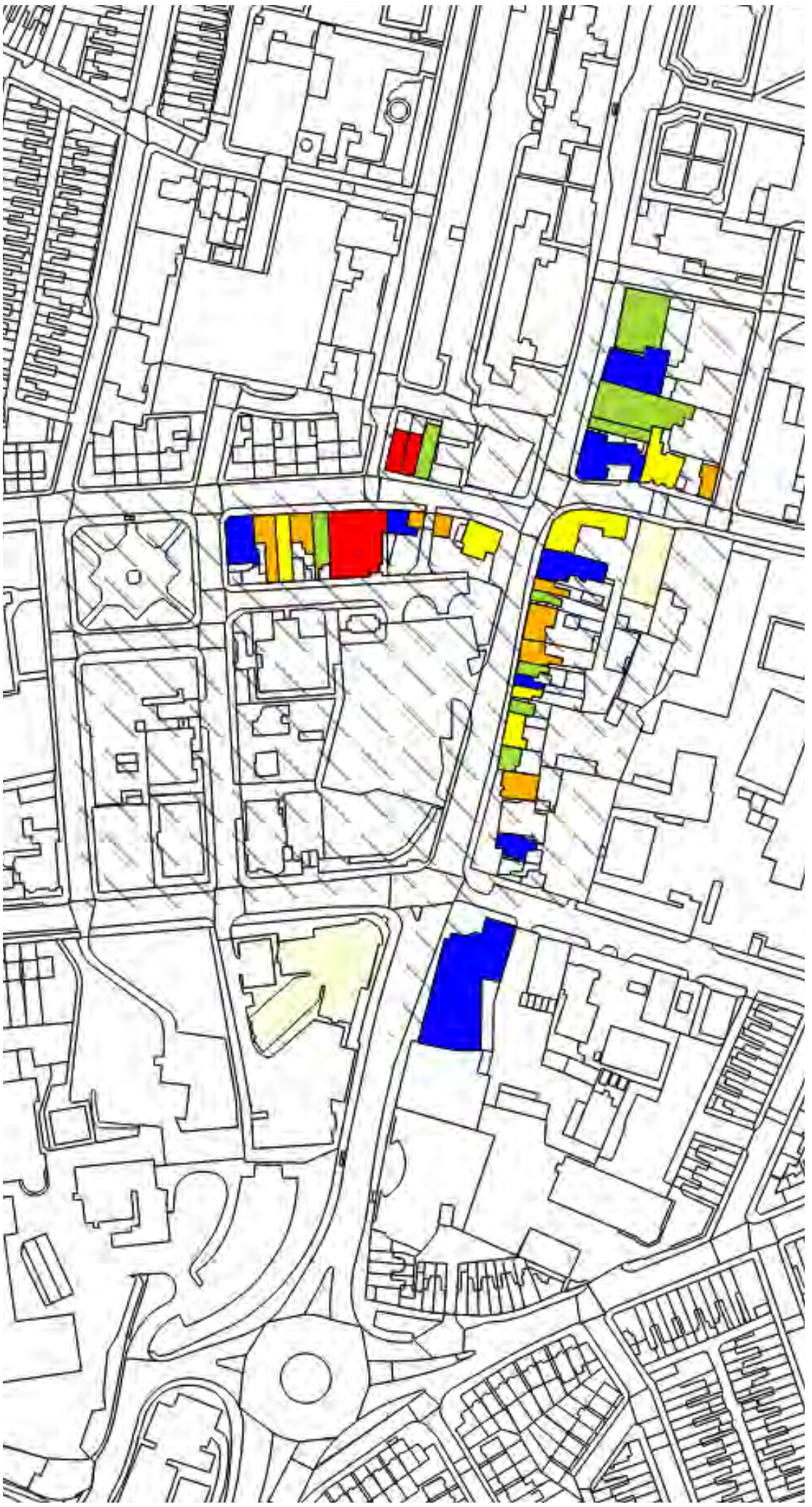
Environmental Quality

The environmental quality of Fenton is varied throughout the centre. The area around Albert Square is located within a conservation area and in the vicinity of a number of locally listed buildings (including the former Magistrates Court) is well maintained, with planting and landscaping creating a pleasant environment. This contrasts with the portion of Fenton that is located along the A5007 City Road, which generally has a poorer environmental quality. A number of units in this area are in a poor state of repair and are negatively impacted by their proximity to the A5007 running through Fenton. At the time of our visit, there was little evidence of graffiti or litter throughout the centre. Although the environmental quality of the site is varied throughout Fenton, the impression of the centre from the A5007 City Road is relatively poor and impacted by the road itself and the number of vacant units.

Conclusion

Our survey indicates that Fenton likely performs a limited role as a commercial and service centre. Whilst the Co-operative Foodstore serves an important local function, Fenton has a lesser convenience, comparison and service offer than would be expected in a town centre. The proportion of vacant properties has decreased in the centre since the previous survey; whilst this is partly a result of re-classification of some units, the vacancy rate remains problematic. Furthermore the environmental quality, although of a high standard around Albert Square, is generally poor. In conclusion, although Fenton performs a role of support to the surrounding residential areas its function is somewhat limited and as such consideration should be given to its appropriate position in the retail hierarchy.

NEXUS PLANNING



Clients

Stoke-on-Trent City Council and
Newcastle-under-Lyme Borough
Council

Project

Stoke-on-Trent and Newcas-
tle-under-Lyme Retail Study

Date

December 2018

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

Fenton Stoke-on-Trent

Longton Town Centre

Description

Longton is the third largest retail centre in the study area and is located approximately 5.5 kilometres to the south east of Hanley. Longton is focused around three main areas: The Strand, Market Street and Longton Exchange with additional retail provided to the west of the centre at Longton Retail Park. The strength of the centre is demonstrated in the number of national multiples with a presence in Longton.

Longton has a functional, if somewhat poor, environmental quality that could be improved by relatively minor intervention.

Status

Significant Urban Centre (as defined by the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009)



Figure 1: Longton benefits from a number of frequent public transport connections.



Figure 2: Longton is a well-used, if essentially functional centre



Figure 3: A number of units in the centre are under-used and would benefit from investment



Figure 4: Vacancy, although little changed since 2013, remains a concern.

Table 1 Town Centre Floorspace Composition

GOAD Category	Longton Floorspace at 2013 (sq.m)	Longton Floorspace at 2013 (%)	Longton Floorspace at 2018 (sq.m)	Longton Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	15,520	25.9	15,590	27.4	15.2
Comparison	20,000	33.3	19,400	34.1	35.5
Retail Services	3,460	5.8	3,070	5.4	6.8
Leisure Services	5,620	9.4	4,570	8.0	24.7
Financial and Business Services	4,680	7.8	3,820	6.7	7.9
Miscellaneous	0	0.0	0	0.0	0.1
Vacant	10,740	17.9	10,520	18.5	9.3
TOTAL	60,020	100	56,970	100	100

Source: Composition of Longton Town Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Table 2 Town Centre Unit Composition

GOAD Category	Longton Number of Units at 2013	Longton Units at 2013 (%)	Longton Number of Units 2018	Longton Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	20	8.8	19	8.4	8.7
Comparison	69	30.3	70	30.8	31.6
Retail Services	32	14.0	37	16.3	14.2
Leisure Services	26	11.4	28	12.3	23.6
Financial and Business Services	29	12.7	20	8.8	10.5
Miscellaneous	0	0.0	0	0.0	0.2
Vacant	52	22.8	53	23.3	11.2
TOTAL	228	100	227	100	100

Source: Composition of Longton Town Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Overall Composition

- There are 227 units within Longton which account for 56,970 sq.m of floorspace.
- At the time of our survey there were 53 vacant units (23.3% of the total) which equates to 10,520 sq.m of vacant floorspace. The vacancy rate, in terms of floorspace and number of units, is higher than the national average.
- There are a number of national multiples with a presence in Longton, including Next, Matalan, Boots, B&M and Wilko.
- There are 85 service operators in Longton which account for 11,460 sq.m of floorspace (equating to 20.1% of commercial floorspace) and there are 89 convenience and comparison operators which account for 34,990 sq.m of floorspace (equating to 61.4% of commercial floorspace).
- The centre lacks a distinctive character and has a generally poor environmental quality, however it does benefit from a high level of accessibility.

Convenience & Comparison

Convenience and comparison operators dominate the floorspace in Longton. A total of 89 convenience and comparison operators account for 34,990 sq.m of floorspace which equates to 61.5% of total commercial floorspace in the centre.

There are 19 convenience operators in Longton which account for 15,590 sq.m of floorspace and equate to 27.4% of commercial floorspace in Longton. Both the proportion of floorspace dedicated to convenience goods uses and the number of units occupied by convenience goods retailers are above national average level (this is reflective of Longton's role in meeting day to day retail and service needs). Convenience operators in Longton include four bakeries, three convenience stores, three tobacconists and a confectioners. National operators include a Tesco superstore, Lidl, Iceland, Farm Foods and Heron Foods. Longton also includes the covered Longton Market which is open on Wednesdays, Fridays and Saturdays between 9am and 5pm.

Comparison operators are very diverse and include 11 charity shops, eight clothes shops, eight household shops, four chemists, three gift shops, two household appliance shops, two discount shops, two florists, two footwear shops and two furniture shops. National comparison operators include Next, Matalan, Burton and Dorothy Perkins. The 70 comparison operators account for 19,400 sq.m of floorspace and equate to 34.1% of commercial floorspace in the centre, a figure which is reflective of the 35.5% of current UK average floorspace.

The range of convenience operators noted in Longton at the time of our survey is considered to be diverse, and the range of comparison goods retailers is fairly typical for a town centre of Longton's nature.

Services

The service offer in Longton is considered to be diverse, although representing a smaller proportion of units and floorspace than the UK national average. There is a total of 85 service operators in Longton which account for 11,460 sq.m of floorspace and equate to 20.1% of total commercial floorspace. There are 37 retail service operator, 28 leisure service operators and 20 financial and business service operators.

Retail services account for 3,070 sq.m of floorspace which equates to 5.4% of commercial floorspace in Longton. This figure is broadly similar to that recorded at the time of the previous survey (5.8%) and the current UK average (6.8%). Operators include 15 hairdressers, four opticians (including Specsavers), three travel agents (including TUI), Post Office, Tesco Petrol Filling Station and a watch repair shop.

There are 28 leisure service operators in Longton which account for 4,570 sq.m of floorspace and equate to 8.0% of commercial floorspace. This figure represents a substantially smaller amount of floorspace than the current UK average floorspace of 24.7%. Operators include 11 hot-food takeaways, six cafés (including Costa), two restaurants (including Pizza Hut), two bars, two amusement arcades and two betting offices (Ladbrokes and William Hill). The 20 financial and business service operators account for 3,820 sq.m of floorspace which equates 6.7% of commercial floorspace in Longton. This figure is broadly similar to the current average floorspace of 7.9%. Operators are diverse and include six estate agents, five banks (Natwest, Lloyds, Barclays, TSB and Halifax) and four solicitors.

Whilst there has been some change in Longton's service offer subsequent to the previous study reporting, we believe that the centre accommodates a diverse range of operators and uses; and that the range of uses remains strong.

Vacancies

Our survey recorded 53 vacant units in Longton (23.3% of all units in Longton). These units account for 10,520 sq.m of floorspace which equates to 18.5% of commercial floorspace in the centre. This figure represents a slight increase in the amount of vacant floorspace in Longton than the 17.9% that was recorded in the previous survey. The current rate of vacant floorspace and units is considerably higher than the UK average, indicating that the centre is facing challenges and is struggling to some extent.

It was noted that vacant units are concentrated around Longton Exchange, with vacant units including the now long-vacant former Woolworths at 28-32 Market Street. This indicates that Longton has faced difficulties in attracting and retaining operators, and that the centre lacks vitality.

Miscellaneous

As one of the larger towns in the city, Longton has a range of civic services including Longton Town Hall, the Methodist Central Hall, Job Centre Plus and Next Step Health Centre. In addition to this there are a number of offices, stores and warehouses. Longton Train Station, which provides services to a number of destinations, is located within the boundaries of Longton Town Centre.

Pedestrian Flows

Pedestrian access within and around the main shopping areas of The Strand and Longton Exchange is generally good, however the width of footpath and the amount of traffic on Market Street and the lack of a defined 'retail circuit' between The Strand and Market Street do not encourage pedestrian footfall throughout the centre.

Pedestrian movement is focussed around the pedestrianised Longton Exchange, with lower levels of footfall evident particularly along Market Street and in a southerly direction along The Strand. A high level of footfall was noted around Longton Transport Interchange and on the western side of Longton Market, possibly indicating the occurrence of linked trips from the retail units and Tesco superstore to the west of Longton Town Centre.

Accessibility

Longton Transport Interchange is located to the north-west of the centre and is the primary transport hub in the south-east of Stoke-on-Trent. It is located immediately adjacent to Longton railway station which is situated on the Derby to Crewe railway line and provides regular services to Stoke, Kidsgrove and Uttoxeter.

There are frequent bus services provided to a range of destinations throughout Stoke-on-Trent, including Hanley which can be accessed on bus route 6 or 6A in approximately 21 minutes. There is also a considerable amount of surface level car parking throughout Longton, including to the south of Longton Exchange and adjacent to the retail units to the west of the centre. Longton therefore benefits from a high level of accessibility.

Perception of Safety

Although most of Longton benefits from a high level of natural or passive surveillance due to pedestrian activity, there is little natural surveillance moving southerly down Market Street or at Transport Lane, to the rear of Longton Exchange. Pedestrian activity along Transport Lane is particularly limited, as there is little in the way of natural surveillance.

The entrances to Longton Exchange, particularly from Market Street, feel enclosed which reduces the overall perception of safety at these locations. This is exacerbated by the number of vacant units in this area in particular, and instances of loitering that were noted at the time of our visit. One solution to this issue may be the installation of visible CCTV that may improve users' perception of safety.

Environmental Quality

The environmental quality of Longton is considered to be essentially functional, if lacking a distinctive character with scope to improve the centre's public realm.

The area of the centre around Longton Market and Longton Town Hall is considered to have a distinctive quality, however the overall quality of the centre reduces along The Strand and is particularly poor around Longton Exchange. The upper floors of Longton Exchange are in a particularly poor state of repair and the vacant units throughout the Centre impact environmental quality. The

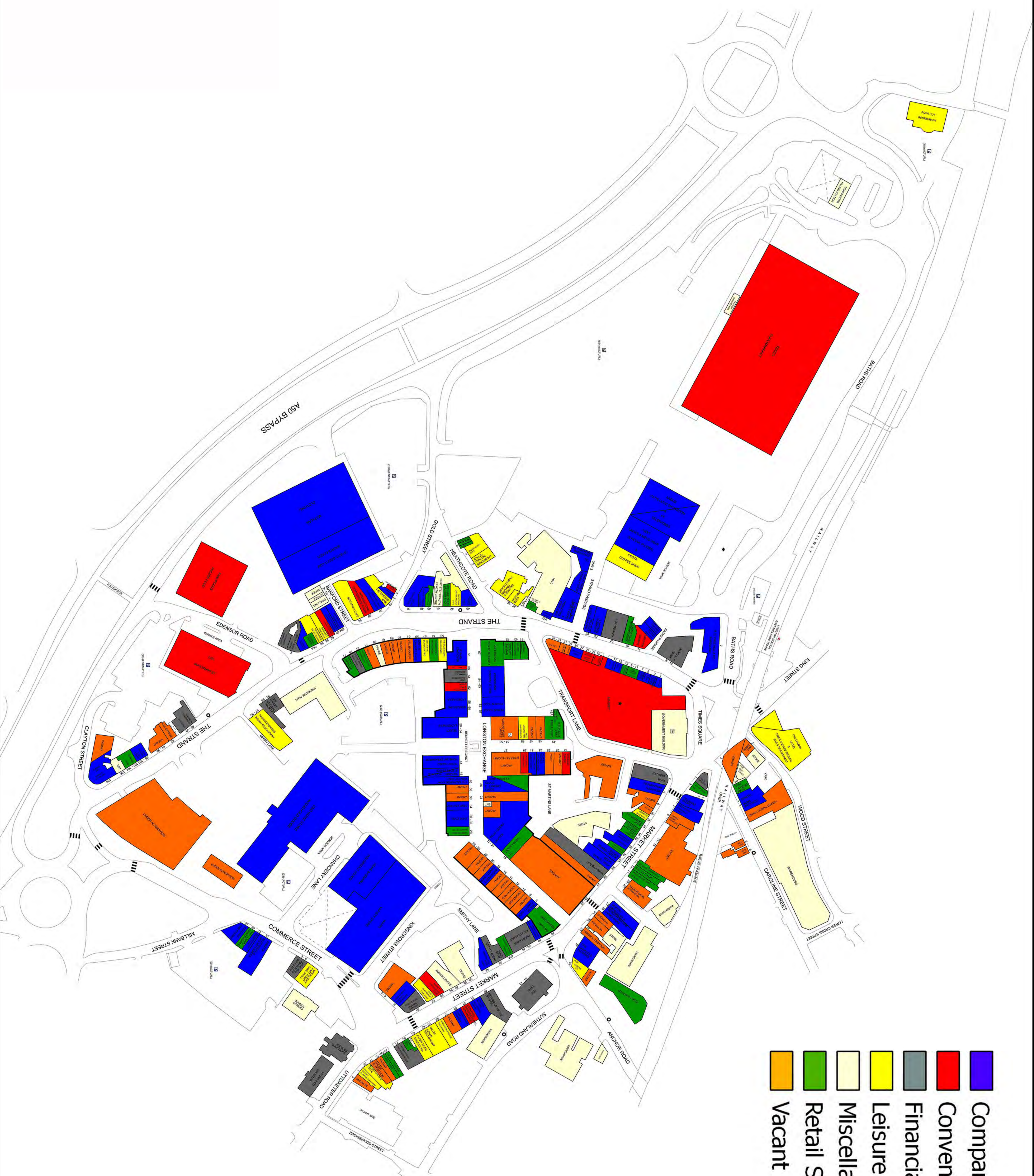
current works being carried out along Market Street and around Longton Town Hall also impact negatively on environmental quality.

Consideration should therefore be given to improvements to Longton's environmental quality, particularly around Longton Exchange and its vacant units. This could include 'fake shop fronts' to brighten up areas where vacancy is particularly concentrated, improvements to the access into Longton Exchange and consideration to seasonal planting along The Strand and around Longton Town Hall.

Conclusion

Longton provides a good range of convenience, comparison and service operators, although the vacancy rate and particularly the long-term vacancy rate present cause for concern. These reduce the overall vitality of the centre, and have negative impacts with respect to environmental quality.

However it is clear that Longton provides an important role as evidenced by the high levels of pedestrian activity and diversity of operators noted. In order to maintain its viability as a centre, efforts must be made to improve the poor environmental quality of Longton Exchange and address the high vacancy rate.



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



Meir Centre

Description

Meir is located at the south-eastern edge of the Stoke-on-Trent authority area approximately 2 kilometres to the south east of Longton immediately adjacent to the A50 corridor. It is a largely linear centre based along Weston Road and Sandon Road and the roundabout at Uttoxeter Road. It is a smaller centre but has an adequate provision of services easily capable of meeting the day-to-day needs of the area.

Although environmental quality is impacted somewhat by the proximity of major roads, its location does ensure that the centre benefits from a high level of accessibility and is generally convenient for its catchment population.

Status

Significant Urban Centre (as defined by the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009)



Figure 1: Meir has a low vacancy rate and evidently serves key local needs.



Figure 2: The centre is dominated by Meir Interchange, and vehicle movements.

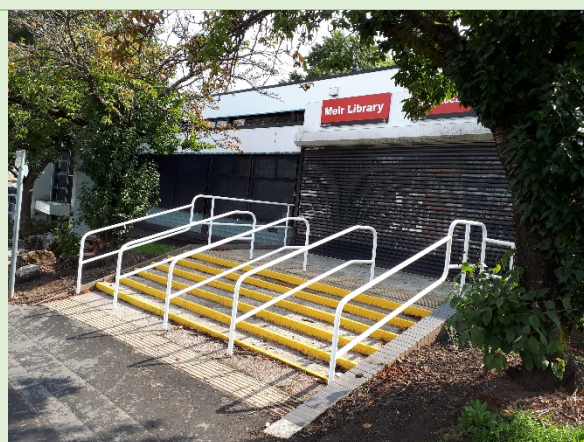


Figure 3: Meir Library is a key attraction for the centre.



Figure 4: Pedestrian accessibility is good, although Weston Road acts as a barrier.

Table 1 Town Centre Floorspace Composition

GOAD Category	Meir Floorspace at 2013 (sq.m)	Meir Floorspace at 2013 (%)	Meir Floorspace at 2018 (sq.m)	Meir Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	1,656	19.5	1,893	21.6	15.2
Comparison	2,277	27.2	1,754	20.0	35.5
Retail Services	986	11.8	1,569	17.9	6.8
Leisure Services	1,744	20.8	1,711	19.6	24.7
Financial and Business Services	483	5.8	432	4.9	7.9
Miscellaneous	0	0.0	0	0.0	0.1
Vacant	1,220	14.6	1,391	15.9	9.3
TOTAL	8,366	100	8,750	100	100

Source: Current composition of Fenton Town Centre derived from Nexus Planning Survey of August 2018; 2013 data sourced from Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Table 2 Town Centre Unit Composition

GOAD Category	Meir Number of Units at 2013	Meir Units at 2013 (%)	Meir Number of Units 2018	Meir Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	9	12.9	10	14.7	8.7
Comparison	18	25.7	9	13.2	31.6
Retail Services	13	18.6	16	23.5	14.2
Leisure Services	18	25.7	15	22.1	23.6
Financial and Business Services	5	7.1	2	2.9	10.5
Miscellaneous	0	0.0	0	0.0	0.2
Vacant	7	10.0	16	23.5	11.2
TOTAL	70	100	68	100	100

Source: Current composition of Fenton Town Centre derived from Nexus Planning Survey of August 2018; 2013 data sourced from Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Overall Composition

- There are a total of 70 retail and service units within the existing centre boundary, accounting for a total of 8,366 sq.m of floorspace.
- National operators with a presence in Meir include Co-operative Foodstore, Coral, KFC and Premier Convenience.
- The amount of retail service and vacant floorspace (17.9 and 15.9 respectively) is greater than the national average.
- The quality and maintenance levels of some units in Meir reduce the attractiveness and vitality of the centre, however overall quality is most compromised by the major arterial routes running through the centre.
- The increase in the number of vacant sites since the previous study indicates that the centre is facing challenges.
- However, Meir benefits from a large number of community facilities that may help drive residents into the centre.

Convenience & Comparison

Although the convenience and comparison offer in Meir is not particularly extensive, it is considered to be sufficient to serve the surrounding residential area. There are a total of 19 convenience and comparison operators, accounting for 3,647 sq.m of floorspace. These figures represent 41.7% and 27.9% of the totals in Meir respectively.

The nine comparison operators in Meir account for 1,754 sq.m of floorspace, this contrasts with 18 comparison operators recorded at the time of the previous survey. Comparison operators account for 1,754 sq.m of floorspace, accounting for 20.0% of total floorspace in Meir and include three pharmacies, two charity shops and a gift shop.

There are 10 convenience operators in Meir, including five convenience stores, two bakers, two newsagents and a butcher. These units amount to 1,893 sq.m of floorspace and account for 21.6% of all floorspace in the centre. The convenience offer includes a number of national multiples such as Co-op Foodstore, Premier Convenience and Nisa Local.

The comparison and convenience offering is considered to be appropriate to serve the surrounding residential area and support the function of the centre and the current provision is considered appropriate and more than able to serve local 'top-up' shopping needs.

Services

There are a total of 33 service units within Meir, these account for 3,711 sq.m of floorspace. Respectively these figures represent 42.4% and 48.5% of the totals in Meir. The retail service offer consists of 16 operators, including nine hairdressers, one optician and Co-operative Funeralcare. These units account for 1,569 sq.m of floorspace (accounting for 17.9% of the total stock of floorspace).

Leisure service operators account for 15 units in Meir (22.1% of all units in the centre) and account for 1,711 sq.m of floorspace. Operators include 12 hot-food takeaways, two restaurants and a Coral betting office. Additionally there are two financial and business service operators, both of which are occupied by Solicitors. These account for 432 sq.m of floorspace, approximately 4.9% of the total floorspace in the centre.

The service use offering is considered suitable to serve Meir with the three sectors well represented in the centre. The centre has a healthy service offer and is considered capable of meeting the day to day needs of local residents.

Vacancies

At the time of the previous survey in 2013 a vacancy rate equivalent to 14.6% of floorspace and 10.0% of total units was recorded. Our 2018 survey identified a vacancy rate of 15.9% of floorspace and 23.5% of total units. This represents an increase in the total number of vacancies in Meir, and figures higher than the respective national averages of 9.3% and 11.2%.

Clearly, the very significant increase in the proportion of vacant units is of concern; most of these vacancies are along Weston Road in the northern part of the centre. Since the previous survey, the former Meir Health Centre has been demolished, with an application for residential development well progressed on the site.

Miscellaneous

Meir is well served by a number of community facilities, including Meir Library, Meir Primary Care Centre and Weston Coyney Medical Practice and Broadway Methodist Church. These facilities are all located within the defined boundaries of Meir and help to improve the diversity and vitality of the centre.

Pedestrian Flows

Meir centre benefited from a high, constant level of pedestrian activity at the time of our visit. These were concentrated around the major routes through Meir and were aided by a number of pedestrian crossings throughout the centre.

It should be noted that, despite the number of pedestrian crossing throughout the centre, passing traffic acts as a significant barrier to pedestrian movement. Despite this, pedestrian flows throughout Meir at the time of our visit were considered to be strong.

Accessibility

The A50 Uttoxeter Road runs through Meir centre and divides the centre into two distinct north/south sections. This has the impact of acting as a barrier to pedestrian movement. Accordingly it is well connected to locations throughout Stoke-on-Trent and to the wider national highway network. The linear nature of the centre ensures it is well integrated into the surrounding residential areas.

There is a considerable amount of surface level car parking throughout Meir and the centre benefits from frequent bus services that connect Meir to Hanley and other areas throughout Stoke-on-Trent. There are around three services per hour to Hanley bus station, which can be reached in approximately 25 minutes on bus route 6A. The centre is therefore accessible to a wide catchment area throughout the south-east area of the conurbation, with good provision of car parking and access to public transport.

Perception of Safety

Dominated by a purpose-built parade of shops and major roads, Meir benefits from a high perception of safety, with good natural surveillance provided by surrounding residential areas and users. Furthermore, there is CCTV throughout the neighbourhood centre. These features help to make the centre feel secure and no anti-social behaviour or loitering was noted at the time of our visit.

Although pedestrians are well-catered for in respect of a larger number of crossing points throughout the centre, the large amount of passing traffic does negatively impact the overall perception of safety in Meir.

Environmental Quality

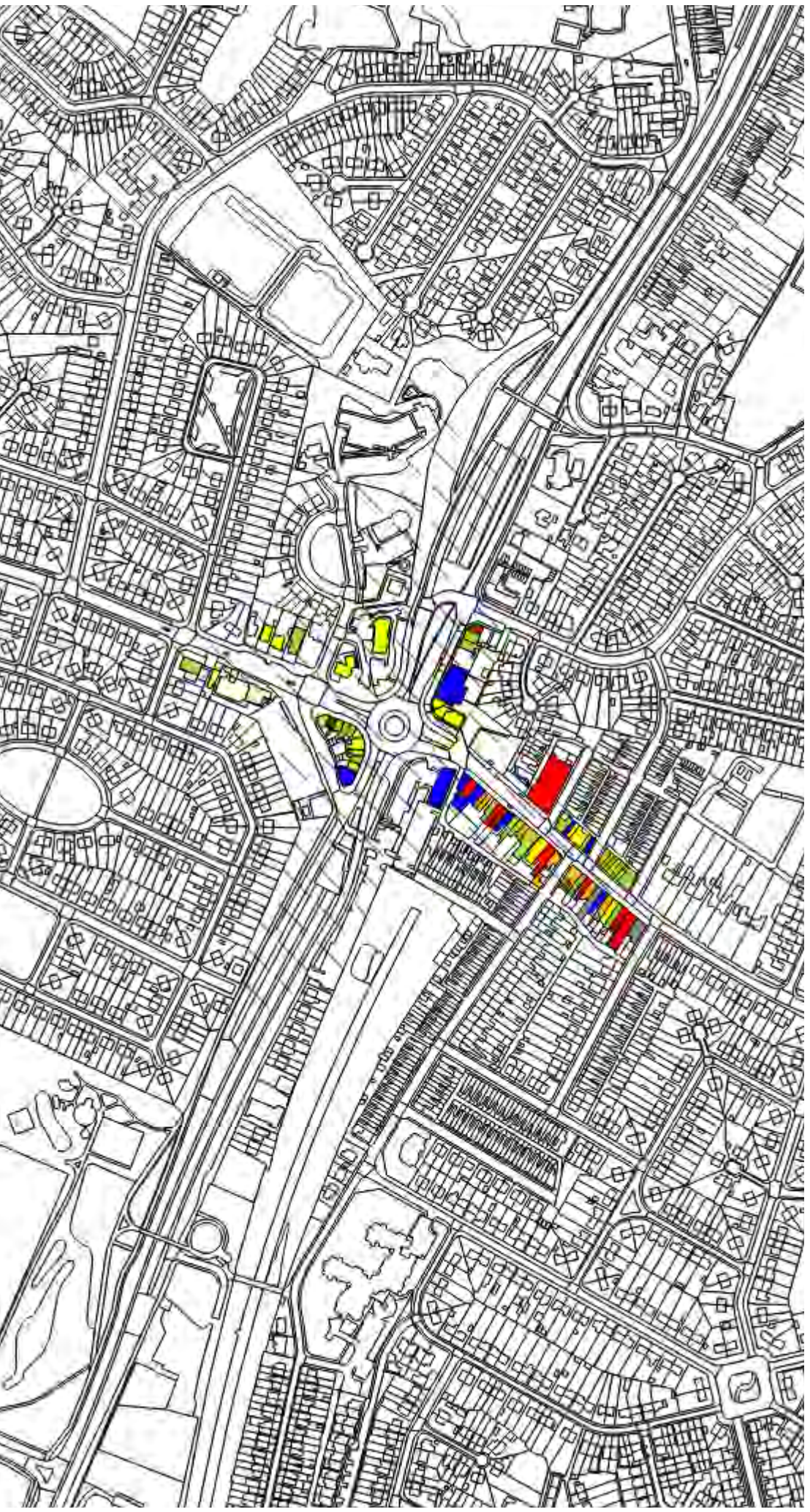
Environmental quality is also compromised due to the major arterial routes that run through Meir. A high level of traffic was noted through the centre at the time of our visit. The area along Weston Road has a lower overall environmental quality, with traffic dominating the public realm. Considerable congestion was noted at the time of our visit, with some of the units being poorly maintained.

The centre is clean, with no issues with litter and graffiti at the time of our visit. The parade frontage is dominated by a tarmacked surface, which reduces its environmental quality. Improvements to the environment could be made through the installation of seasonal planters, or planting around the Uttoxeter Road roundabout. Overall, the environmental quality of the centre is considered to be moderate.

Conclusion

Meir clearly performs an important role for the immediate community, providing retail and service uses in addition to a range of community facilities. It has a diverse provision of convenience operators, dominated by the Co-operative Foodstore on Weston Road and a range of service operators which are considered suitable to serve the town centre.

Overall, it is determined that despite the need for some investment, particularly in respect of the environment, Meir is a vital and viable centre.



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Stoke-on-Trent City Council and
Newcastle-under-Lyme Borough
Council

Project

Stoke-on-Trent and Newcas-
tle-under-Lyme Retail Study

Date

December 2018

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

Meir

Stoke-on-Trent

Stoke Town Centre

Description

Located at the centre of Stoke-on-Trent, Stoke performs a key role for the wider city as the location of many civic offices. It provides a range of convenience and comparison shopping for the surrounding community, with the centre's provision including Stoke Market. The centre contains many buildings of historic merit, particularly in and around the Conservation Area to the north-west of the centre. Stoke train station, the primary access to the national railway network for the entire conurbation is located adjacent the centre. The environmental quality of the centre is considered poor due to the state of some shop fronts and the concentration of vacant units.

Status

Significant Urban Centre (as defined by the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009)



Figure 1: The centre is surrounded by residential development, seen here from Hill Street.



Figure 2: The environment of the centre is mixed, and is largely dominated by cars.



Figure 3: Sainsbury's on London Road is one of the key destinations in Stoke.



Figure 4: Church Street runs through the centre of Stoke.

Table 1 Town Centre Floorspace Composition

GOAD Category	Stoke Floorspace at 2013 (sq.m)	Stoke Floorspace at 2013 (%)	Stoke Floorspace at 2018 (sq.m)	Stoke Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	12,310	26.8	11,520	29.3	15.2
Comparison	8,120	17.7	7,660	19.5	35.5
Retail Services	1,720	3.7	2,170	5.5	6.8
Leisure Services	10,800	23.5	5,910	15.0	24.7
Financial and Business Services	3,660	8.0	1,780	4.5	7.9
Miscellaneous	0	0.0	0	0.0	0.1
Vacant	9,340	20.3	10,310	26.2	9.3
TOTAL	45,950	100	39,350	100	100

Source: Composition of Stoke Town Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Table 2 Town Centre Unit Composition

GOAD Category	Stoke Number of Units at 2013	Stoke Units at 2013 (%)	Stoke Number of Units 2018	Stoke Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	15	8.0	12	6.7	8.7
Comparison	39	20.9	35	19.6	31.6
Retail Services	15	8.0	20	11.2	14.2
Leisure Services	38	20.3	37	20.7	23.6
Financial and Business Services	22	11.8	12	6.7	10.5
Miscellaneous	0	0.0	0	0.0	0.2
Vacant	58	31.0	63	35.2	11.2
TOTAL	187	100	179	100	100

Source: Composition of Stoke Town Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Overall Composition

- There are 179 operators in Stoke which account for a total of 39,350 sq.m of floorspace.
- The vacancy rate is considerably higher than the national average, with 63 vacant units recorded (equating to 35.2% of all units) and 10,310 sq.m of floorspace (equating to 26.2% of commercial floorspace).
- There are a number of national multiple operators with a presence in Stoke, including Argos, Poundstretcher, Sainsbury's, Lidl and Iceland.
- There are 92 convenience and comparison operators which account for 55,560 sq.m of floorspace and 69 service operators which account for 9,860 sq.m of floorspace.
- When compared to current national averages, convenience operators account for a greater proportion of floorspace due to the presence of a Sainsbury's foodstore.
- As the civic centre of Stoke-on-Trent, a number of council offices are located in Stoke.

- The number of vacant units to the north of the centre reduces the overall environmental quality of Stoke.

Convenience & Comparison

There are 47 convenience and comparison operators in Stoke which account for 19,180 sq.m of floorspace. Stoke Market, which is located in the centre on South Wolfe Street, operators on Wednesdays, Fridays and Saturdays between 9am and 5pm.

The 12 convenience operators in Stoke account for 11,520 sq.m of floorspace, which equates to 29.3% of total commercial floorspace. Operators are diverse and include three convenience stores, a Sainsbury's superstore, Lidl, Heron Foods, Iceland, a baker and a butcher. Due to the presence of Sainsbury's superstore and Stoke Market, convenience retailers represent a greater proportion of space than the UK average floorspace figure of 15.2%.

There are 35 comparison operators in Stoke. These account for 7,660 sq.m of floorspace which equates to 19.5% of total commercial floorspace in the centre. The operators are diverse and include seven charity shops, three clothes stores, two discount stores, two chemists, a florist, a furniture store and a jewellers. National operators with a presence in Stoke include Argos. Although comparison operators represent a smaller proportion of floorspace in Stoke when compared to the UK average floorspace (19.5% compared to 35.5%), the range of comparison operators offer a diverse range of services suitable to serve the needs of Stoke Town Centre.

Services

Service operators account for 9,860 sq.m of floorpace, which equates to 25.0% of the total commercial floorspace in Stoke. Operators are diverse, and include 37 leisure service operators, 20 retail service operators and 12 financial and business service operators. The 37 leisure service operators account for 5,910 sq.m of floorspace and equate to 15.0% of total commercial floorspace in Stoke, a figure much lower than the UK floorspace average of 24.7%. This represents a significant decline in the amount of leisure service floorspace to that recorded at the time of the previous survey (23.5% to 15.0%). Operators include 12 hot-food takeaways, 10 restaurants, seven public houses, three cafés and three betting offices (including national operators Coral and Betfred).

There are 12 financial and business service operators in Stoke. These account for 1,780 sq.m of floorspace and equate to 4.5% of total commercial floorspace in Stoke. This figure represents a decline from the 8.0% recorded during the previous survey, and a lower figure than the 7.9% UK average floorspace. Operators

include five estate agents, two accountants, two solicitors and Lloyds Bank.

There has been an increase in the amount of retail floorspace since the previous survey (to 2,170 sq.m from 1,720 sq.m). This figure equates to 5.5% of total commercial floorspace. The 20 retail service operators include four hairdressers, three opticians, two car mechanics and two tattooists.

The variety of service uses are considered appropriate to serve the immediate community despite accounting for a lesser amount of floorspace than the national average. Opportunities should therefore be explored to improve the diversity of the retail and leisure service offering. This would also help to improve the vitality of Stoke.

Vacancies

There is 10,310 sq.m of floorspace throughout Stoke, which equates to 26.2% of total commercial floorspace and is much greater than the UK vacant floorspace average of 9.3%. In total there are 63 vacant units in Stoke. These vacant units are primarily located in the west and north of the centre, along Liverpool Road and Hartshill Road.

The proportion of vacant floorspace has increased since the previous survey from 20.3% to 26.2% now, indicating that the centre is facing challenges in regards to viability and vitality.

Miscellaneous

As the civic centre of Stoke-on-Trent, a number of council offices are located in Stoke including Stoke Town Hall. Stoke Minster is located adjacent to the town hall across Glebe Street.

In addition to these features there are three dental surgeries, Stoke Library, community centre and numerous stores, offices and warehouses located within the centre. Stoke therefore has a diverse non-retail offer that may increase the instances of linked trips through the centre.

Pedestrian Flows

With the exception of Liverpool Road, pedestrian flows throughout the centre were considered to be strong at the time of our visit. Activity was noted throughout the centre but was concentrated along Church Street and London Road. Pedestrian crossing are provided on these key routes into the town centre.

Considerable pedestrian activity was noted around the Sainsbury's superstore on London Road and there was a reasonable flow of pedestrians accessing walking between the store and the centre suggesting that the presence of the superstore drives some users through Stoke.

Accessibility

Stoke is located 3 kilometres to the south of Hanley, and a number of bus stops are located throughout the centre that provide a method of direct access to Hanley bus station. Stoke Town Centre is located approximately 400 metres, or 5 minutes' walk, to the south of Stoke-on-Trent railway station. This ensure the centre benefits from access to the broader regional and national transport networks.

The A500 runs to the immediate east of Stoke and provide access to the wider road network, providing access to the M6 which runs to the west of Stoke-on-Trent. There is also a large amount of surface level car parking in the centre, including a large Council owned car park at Kingsway and a car park associated with the Sainsbury's superstore on London Road. Stoke therefore benefits from a high level of accessibility.

Perception of Safety

The centre appears to offer a high level of user safety, with high levels of footfall and activity noted throughout our visit to the centre. This provides an active street scene, which accommodates a range of uses, including restaurants and bars. The town centre is well related to adjacent residential areas, which again adds to a sense of activity and surveillance. Pedestrian safety is strengthened by the restriction of access to Church Street and Campbell Place to buses, cycles and taxis only.

The vacant units, and consequent lack of footfall in the north of the centre reduces the perception of safety in this area through a lack of passive surveillance. To improve this consideration should be given as to how operators can be enticed and then retained in vacant units throughout Stoke.

Environmental Quality

As a centre for the ceramics industry over many centuries, Stoke contains a number of historic buildings and its importance is reflected by the Conservation Area designation in the north of the centre around Liverpool Road. However this status is compromised by the concentration and volume of vacant units in this location that cause the area to appear neglected.

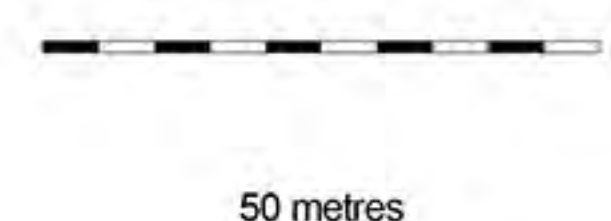
Conclusion

Stoke has a good convenience offer, dominated by the Sainsbury's superstore, however the range of comparison goods is weaker than that found in other centres. The centre also suffers from having a vacancy rate higher than the current national average. This detracts significantly from the environmental quality of the centre and reduces the vitality of the centre as a whole.

At the time of the previous survey Stoke was considered 'vulnerable' due to the high vacancy rate and there are currently no reasons to suggest that those concerns should change.

Although it is clear that Stoke does perform a key role for local residents and visitors to the area, the lack of demand for commercial units is a considerable issue to overcome.

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



Experian Goad Plan Created: 10/12/2018
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Tunstall Town Centre

Description

Located approximately 4.5 kilometres to the north of Hanley, Tunstall is located in the north-west of Stoke-on-Trent. Tunstall's main shopping area is focused on High Street, however more recent development around Alexandra Retail Park (which opened in 2014) has diversified the retail offer and has shifted the 'centre of gravity' of the centre.

Tunstall's traditional shopping environment, particularly along High Street is struggling with a high and increasing number of vacancies. These present a cause for concern and are indicative of the centre facing challenges.

Status

Significant Urban Centre (as defined by the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009)



Figure 1: Recent investment (Aldi on Brownhills Road) is evident in parts of Tunstall



Figure 2: However the centre is mixed, with a number of buildings appearing dated



Figure 3: Roundwell Street forms part of the northern boundary of Tunstall town centre



Figure 4: Alexandra Retail Park opened in 2014 and has altered the orientation of the centre

Table 1 Town Centre Floorspace Composition

GOAD Category	Tunstall Floorspace at 2013 (sq.m)	Tunstall Floorspace at 2013 (%)	Tunstall Floorspace at 2018 (sq.m)	Tunstall Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	11,270	23.3	12,570	23.3	15.2
Comparison	16,460	34.1	18,640	34.6	35.5
Retail Services	2,440	5.1	3,620	6.7	6.8
Leisure Services	7,610	15.8	6,050	11.2	24.7
Financial and Business Services	3,170	6.6	1,890	3.5	7.9
Miscellaneous	0	0.0	0	0.0	0.1
Vacant	7,340	15.2	11,130	20.6	9.3
TOTAL	48,290	100	53,900	100	100

Source: Composition of Tunstall Town Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Table 2 Town Centre Unit Composition

GOAD Category	Tunstall Number of Units at 2013	Tunstall Units at 2013 (%)	Tunstall Number of Units 2018	Tunstall Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	14	6.8	17	7.9	8.7
Comparison	56	27.2	58	27.0	31.6
Retail Services	27	13.1	35	16.3	14.2
Leisure Services	41	19.9	33	15.3	23.6
Financial and Business Services	20	9.7	12	5.6	10.5
Miscellaneous	0	0.0	0	0.0	0.2
Vacant	48	23.3	60	27.9	11.2
TOTAL	206	100	215	100	100

Source: Composition of Tunstall Town Centre derived from Nexus Planning Survey of August 2018; Stoke Retail and Leisure Study 2014; UK Average from Experian GOAD Report March 2018

Overall Composition

- There are 215 units in Tunstall which account for a total of 53,900 sq.m of floorspace.
- At the time of our survey there were 60 vacant units recorded, equating to a vacancy rate of 27.9% and accounting for 11,130 sq.m of vacant floorspace. These figures are larger than the national average and represent an increase on those recorded in the previous survey.
- Operators in Tunstall are diverse, including many independent and regional operators but also national multiples such as Next, Matalan, Argos and Asda.
- There are 75 convenience and comparison operators which account for a total of 31,210 sq.m of floorspace and equate to 57.9% of commercial floorspace in the centre.
- There are 80 service operators in the centre which account for 11,560 sq.m of floorspace and equate to 21.4% of commercial floorspace.
- The high vacancy rate is having a negative impact on the overall viability and vitality of Tunstall as a centre.

Convenience & Comparison

There are 75 convenience and comparison operators in Tunstall. These account for 31,210 sq.m of floorspace, an increase from the 27,730 sq.m recorded at the time of the previous survey. The offer is diverse and includes many national and independent operators in addition to Tunstall Market, which operates on Wednesdays, Fridays and Saturdays from 9am to 5pm.

There are 17 convenience operators in Tunstall which account for 12,570 sq.m of floorspace and equate to 23.3% of commercial floorspace. This is a larger figure than the UK average floorspace of 15.2%. Operators include an Asda superstore, Aldi and Iceland in addition to four bakeries, four convenience stores, a tobacconist, a confectioners and a health foods store. Comparison operators account for 18,640 sq.m of floorspace which equates to 34.6% of commercial floorspace and is broadly similar to the UK average floorspace. The 58 operators include nine clothes stores, seven charity shops, seven furniture stores, four chemists, three pet stores, three jewellers, three discount stores and two florists. National operators with a presence in Tunstall include Next, Matalan, Boots, Argos and Home Bargains.

The development of Alexandra Park on the eastern edge of Tunstall at Scotia Road has helped to diversify and strengthen the range of comparison retailers in the centre.

Services

The 80 service operators account for 11,560 sq.m of floorspace in Tunstall, equating to 21.4% of commercial floorspace in the centre. These figures represent a decline in the number of operators (to 80 from 88) and amount of floorspace (to 11,560 sq.m to 13,220 sq.m) in service use since the previous survey. There are 35 retail service operators, 33 leisure service operators and 12 financial and business service operators.

Retail service operators account for 3,620 sq.m of floorspace (an increase from 2,440 sq.m recorded at the previous survey). This figure equates to 6.7% of total commercial floorspace in the centre, a figure which is equal to the UK average floorspace figure. Operators include 11 hairdressers, five opticians, four beauty salons, three travel agents, three car mechanics, two tattooists and a Post Office. There are 33 leisure service operators in Tunstall which account for 6,050 sq.m of floorspace and equates to 11.2% of commercial floorspace. The number of leisure service operators and amount of floorspace is much lower than the UK average noted in 2018 (24.7% compared to 11.2% with respect to floorspace, 15.3% compared to 23.6% with respect to units). Operators include 11 hot-food takeaways, eight public houses, six cafés, three amusement arcades, two betting offices (William Hill and Coral), two restaurants and DW Fitness.

There are 12 financial and business service operators which account for 1,890 sq.m of floorspace and equates to 3.5% of commercial floorspace in Tunstall. The number of units has decreased from 20 to 12 since the previous survey. Although the decrease is troubling, the centre still contains a bank (Lloyds Bank), six estate agents, an employment agency and a solicitor.

Whilst there has been some change in Tunstall's service offer subsequent to the previous study reporting, we believe that the centre accommodates a diverse range of operators and uses; and that the range of uses remains strong.

Vacancies

Our survey recorded 60 vacant units in Tunstall, equating to 27.9% of all units and 20.6% of floorspace. These are concentrated around the north of Tunstall Town Centre along High Street and Scotia Road. Since the previous survey the proportion of vacant units and floorspace have both increased, from 15.2% of floorspace to 20.6% and from 23.3% of units to 27.9%. The amount of vacant units and floorspace is also far greater than the UK average at 2018.

Accordingly, Tunstall's vacancy rate, both in respect of the number of vacant units and the quantum of floorspace, is well above national average level and is a cause for concern.

Miscellaneous

Tunstall contains a number of community facilities and services. These include Tunstall Local Centre, Tunstall Primary Care Centre, Tunstall Library and Tunstall Community Centre. There are two dental surgeries and a chiropodist located within the Town Centre boundaries. In addition to these community facilities, there are a number of offices, stores and government offices. The range and diversity of community facilities ensures that Tunstall fulfils a key role, and has the potential to support linked trips.

Pedestrian Flows

Throughout the central area of Tunstall, along High Street, around Jasper Square, Alexandra Retail Park and the Asda superstore, reasonable levels of footfall were noted at the time of our visit. Away from these centres, particularly towards the north of the centre lower levels of footfall were witnessed. Perhaps unsurprisingly it is in these areas where vacancy rates were noted as being generally higher.

Although the centre is divided by major arterial routes pedestrian flows were not severely restricted by traffic as the centre contains a number of well-placed pedestrian crossings and a pedestrian subway runs under the A50 Scotia Road.

Accessibility

The A50, a major arterial route through Stoke-on-Trent, runs through Tunstall and provides access to Kidsgrove to the north and Hanley to the south.

Large amounts of free, surface level car parking are provided at the large retail units to the east of the centre. Additionally small amounts of car parking is provided at Farndale Street and Tower Square.

Public transport is also readily accessible from Tunstall, with several bus stops located throughout the town centre. Services 3 and 3A provide a means of direct access into Hanley, which can be reached in approximately 25 minutes from Tunstall. Services also run from Tunstall to Newcastle-under-Lyme and destinations outside the city area such as Congleton and Biddulph. Although there is no railway station located within Tunstall, the town centre benefits from a number of alternative public transport options and is therefore considered to benefit from a high standard of accessibility.

Perception of Safety

Tunstall is laid out along two parallel streets lined by linear units. This ensures a high standard of natural and passive surveillance which, despite the high vacancy levels noted above, is common throughout the centre. Levels of visitor safety in these areas is therefore considered to be good, but improvements could be made through more obvious CCTV in the centre and securing alternative uses for currently vacant units.

However the high vacancy rate does negatively impact the perception of safety in the centre. Consequently improvements to the overall safety could be improved by reducing the vacancy rate recorded in Tunstall.

Environmental Quality

The high vacancy rate recorded throughout Tunstall but concentrated particularly along High Street has negative consequences on the overall environmental quality of the centre. The vacant units generally appear to be poorly maintained and in need of investment, and the concentration of these in particular areas of the centre creates an impression that Tunstall is poorly maintained and in need of investment. This is despite a number of buildings located in the centre being of a high architectural quality.

Overall the environmental quality of the centre was considered to require improvement, with either intervention required to improve the appearances and façades of vacant units or consideration to improvements to the public realm. Although the

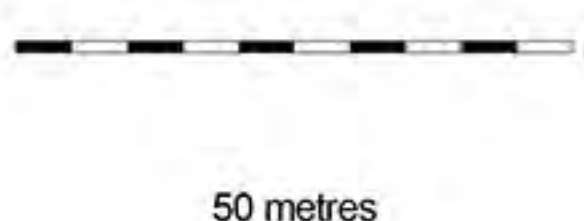
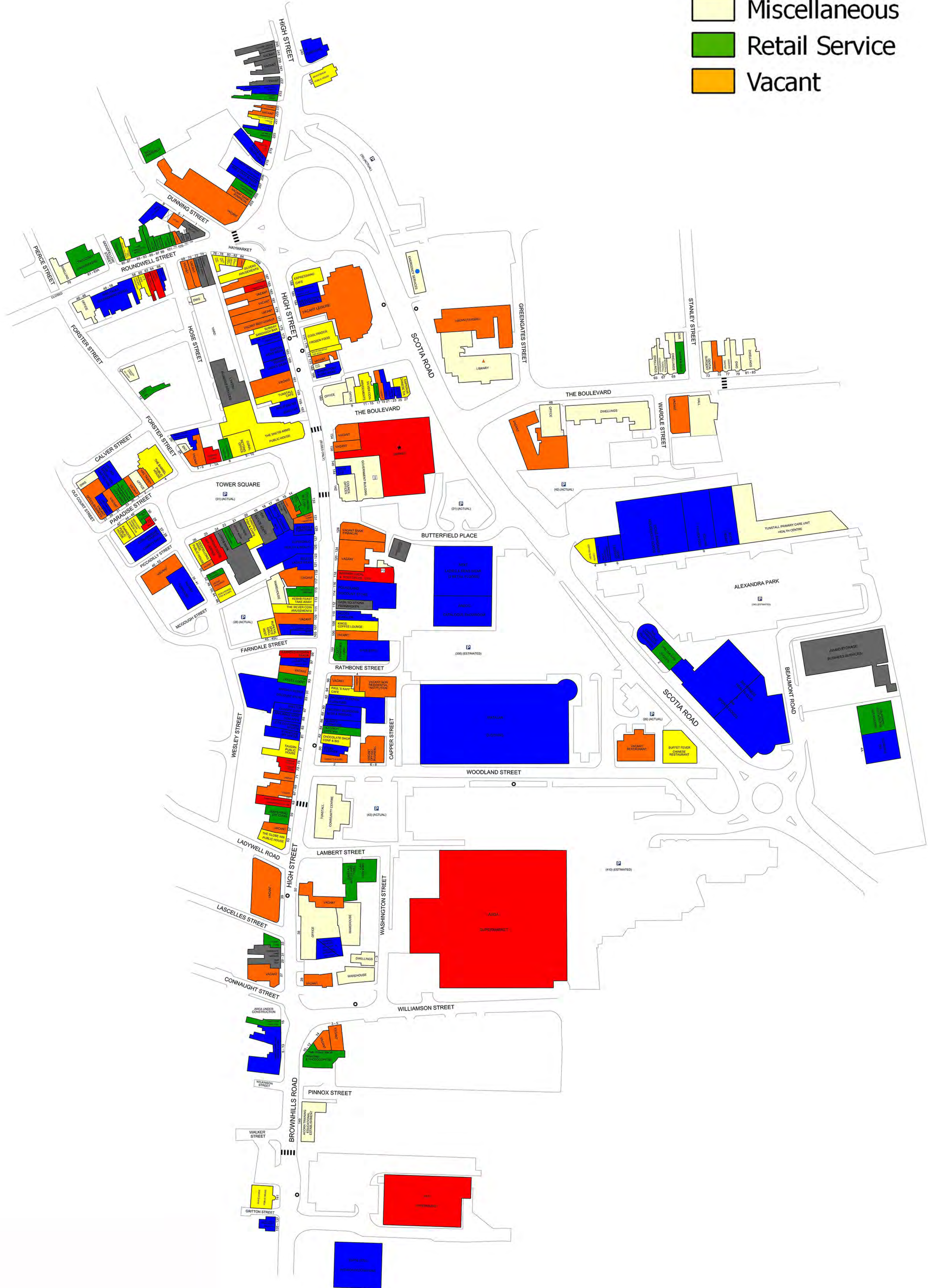
public realm was not considered to be poorly maintained, it is less visually appealing than that of Burslem.

Conclusion

The vitality and viability of Tunstall is compromised by the high vacancy rate recorded in the centre, with a resultant effect on the centre’s environmental quality and footfall. This impacts both the environmental quality of the centre and perception of safety, but also the attractiveness of the centre to potential tenants and visitors. Consequently efforts to improve the centre should be made. These could relate to re-purposing vacant units in the centre, possibly through residential development. Furthermore we believe that consideration should be given to expanding the boundary of the town centre to accommodate the retail park.

However it is clear that Tunstall does perform a vital role, with a high number of users noted in the centre at the time of our visit. Although unlike a traditional centre these were concentrated around Alexandra Retail Park, with the area around High Street recording considerably less footfall. Efforts should therefore be made to retaining this activity to all areas throughout Tunstall town centre.

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



Experian Goad Plan Created: 10/12/2018
Created By: Nexus Planning Ltd



Newcastle-under-Lyme Town Centre

Description

The second largest centre in the study area and the principal centre in the borough of Newcastle-under-Lyme, the centre is located 3.5 kilometres to the west of Hanley. The town centre is focused around a historic market core which is reflected in the high quality and attractive environment of the centre. The range of operators in the centre is considered to be sufficient to support the centre's role, and to serve the needs of a diverse variety of users. The comparison offer in the centre has reduced in size and diversity since the previous survey, and with respect to fashion retailers the centre now likely plays a secondary role to Hanley. Using the centre boundary as identified by Experian Goad, a total of 326 units were recorded comprising a total gross floorspace of 77,570 sq.m.

Status

Strategic Centre (as defined by the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009)



Figure 1: Newcastle-under-Lyme town centre has a pleasant, historic environment



Figure 2: The centre is surrounded at all sides by a dual carriageway, which impedes movement



Figure 3: Walkability is good in the centre, which benefits from wide footways and pavements



Figure 4: Newcastle-under-Lyme is a historic market town, with many picturesque buildings

Table 1 Town Centre Floorspace Composition

GOAD Category	Floorspace at 2010 (sq.m)	Floorspace at 2010 (%)	Floorspace at 2018 (sq.m)	Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	9,281	13.3	10,050	13.0	15.3
Comparison	31,048	46.1	25,790	33.2	34.6
Retail Services	2,359	3.5	4,360	5.6	6.9
Leisure Services	6,986	10.4	22,200	28.6	25.2
Financial and Business Services	4,524	6.7	4,850	6.3	7.6
Miscellaneous	1,152	1.7	0	0.0	0.1
Vacant	12,312	18.3	10,320	13.3	9.9
TOTAL	66,312	100	77,570	100	100

Source: Composition of Town Centre derived from Nexus Planning Survey of August 2018; Newcastle-under-Lyme Retail and Leisure Study 2011; UK Average from Experian Goad Report June 2018

Table 2 Town Centre Unit Composition

GOAD Category	Newcastle-under-Lyme Number of Units at 2010	Newcastle-under-Lyme Units at 2010 (%)	Newcastle-under-Lyme Number of Units 2018	Newcastle-under-Lyme Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	26	10.0	28	8.6	9.1
Comparison	114	43.7	97	29.8	30.5
Retail Services	27	10.3	38	11.7	14.6
Leisure Services	31	11.9	80	24.5	24.1
Financial and Business Services	27	10.3	24	7.4	10.2
Miscellaneous	2	0.8	0	0.0	0.1
Vacant	34	13.0	59	18.1	11.3
TOTAL		100	326	100	100

Source: Composition of Town Centre derived from Nexus Planning Survey of August 2018; Newcastle-under-Lyme Retail and Leisure Study 2011; UK Average from Experian Goad Report June 2018

Table 3 Town Centre Facilities

Type of Provision		Total
Key Anchor Store	Morrisons, Sports Direct and Wilko	43
Other National Retailers	02, Aldi, Barnardo's, Blacks, Bodycare, Bon Marche, Boots, Cancer Research UK, Card Factory, Cex, Claire's, Clarks, Clintons, Dorothy Perkins, Dunelm Mill, EE, Game, Greggs, H Samuel, Heron, Home Bargains, Iceland, JD, Laura Ashley, Millets, New Look, Oxfam, PDSA, Peacocks, Poundland, Ryman, Save the Children, Sense, Superdrug, The Edinburgh Woollen Mill, The Salvation Army, The Works, Three, Vodafone, Warren James	
Community Facilities	Two health centres, two places of worship and a tourist information centre	5

Source: Composition of Newcastle-under-Lyme Town Centre derived from Nexus Planning Survey of August 2018;

Table 4 Major Retailers Present

Department Stores		Clothing	
Debenhams	0	Burton	0
House of Fraser	0	Dorothy Perkins	1
John Lewis	0	H&M	0
Marks & Spencer	0	Monsoon Accessorize	0
Mixed Goods Retailers		New Look	1
Argos	0	Next	0
Boots the Chemist	1	Primark	0
TKMaxx	0	River Island	0
W H Smith	0	Topman	0
Wilko	1	Topshop	0
Supermarkets		Other Retailers	
Sainsbury's	0	Carphone Warehouse	0
Tesco	0	Clarks	1
Waitrose	0	Clintons	1
		EE	1
		HMV	0
		02	1
		Superdrug	1
		Vodafone	1
		Waterstones	0

Source: Composition of Newcastle-under-Lyme Town Centre derived from Nexus Planning Survey of August 2018;

Overall Composition

- Within Newcastle-under-Lyme town centre (as defined by Experian Goad) there are 326 units comprising a total gross floorspace of 77,570 sq.m.
- Our survey recorded 59 vacant units within the centre, which accounts for a vacancy rate of 18.1% and equates to 13.3% of the total stock of retail floorspace. Both figures are higher than the national average.
- Newcastle-under-Lyme serves a diverse catchment area, with operators and services geared towards local residents and the resident student population.
- Although the centre is walkable for pedestrians, it is surrounded on all sides by a ring road which reduces its accessibility somewhat.

Convenience & Comparison

There are 125 convenience and comparison retailers located within Newcastle-under-Lyme, with these units accounting for a total of 35,840 sq.m of floorspace which equates to 46.2% of the total commercial floorspace in the centre.

Comparison operators account for 25,790 sq.m of floorspace, or 33.2% of the total stock of floorspace. The 97 operators (which account for 29.8% of all operators in the centre) include a decent range of retail operators, ranging from local independents to national multiples such as Dunelm, Laura Ashley and New Look. However the centre lacks a diversity with respect to fashion retailing, with the only major national

fashion multiples located in Newcastle-under-Lyme being Dorothy Perkins and New Look. The centre should therefore look to diversify its fashion retail offer, with the potential of exploring possibilities on the now vacant Ryecroft site to the north of the centre. Although the comparison offer in Newcastle-under-Lyme maintains an underlying strength, since the previous survey there have been a number of changes to the composition of comparison retailers including the loss of Burton on Ironmarket and the relocation of Argos from the Roebuck Shopping Centre to a kiosk within the Sainsbury's on Liverpool Road. As a consequence of these changes Newcastle-under-Lyme town centre appears to play a secondary role to Hanley with respect of its comparison goods offer. Attention should therefore be given to enticing comparison operators into the centre, potentially by locating in the currently under-utilised Roebuck Shopping Centre.

The convenience offer is diverse, and in respect of units and floorspace is broadly in line with current UK national averages. It is underpinned by a large Morrisons superstore located on Brook Lane, but includes bakers, butchers, convenience stores, tobacconists and delicatessens as well as national operators such as Iceland frozen food specialist and Aldi. The 28 convenience operators account for 10,050 sq.m of floorspace which equates to 13.0% of the total commercial floorspace in the centre.

Convenience and comparison operators are broadly in line with current UK national averages, although the loss of diversity and floorspace in respect of the comparison offer does present cause for concern.

Services

There are 142 service (leisure, retail and financial and business) operators in Newcastle-under-Lyme. These account for 43.6% of all units in the town centre and 31,410 sq.m of floorspace in the centre, which is 40.5% of the total stock of commercial floorspace.

Leisure service units are the most numerous, with 80 individual operators located in Newcastle-under-Lyme. These account for 22,200 sq.m of floorspace, equating to 40.5% of the total stock of commercial floorspace. The leisure service offer is diverse and helps to underpin the vitality and viability of Newcastle-under-Lyme through its varied offer. Operators include restaurants, public houses, cafés, bars and wine bars, betting offices, hot-food takeaways, gyms and a nightclub. The centre gears its offer to a diverse range of groups, reflecting the demographics of Newcastle-under-Lyme, with services for students, residents and visitors. Leisure service operators are found throughout the centre, and although the majority of operators are independent there are a number of national multiples with a presence in the centre, including Pizza Hut, Xercise4Less, Betfred and Costa.

There are 38 retail service operators in Newcastle-under-Lyme, accounting for approximately 4,360 sq.m of floorspace or 5.6% of the total commercial floorspace in the centre. This figure is only marginally less than the current national average floorspace at 6.9%. There are a diverse number of operators in the centre and these include hairdressers, beauty salons, dry cleaners, opticians, travel agents and a Post Office. National retail service operators with a presence in Newcastle-under-Lyme include Specsavers, Toni & Guy, Timpson and Thomas Cook. Financial and business service operators are less numerous than the UK national average, but have remained largely static since the previous survey. There are 24 financial and business service operators in the centre, accounting for 4,850 sq.m of floorspace which equates to 6.3% of the total stock of floorspace. There are 11 banks and building societies, eight estate agents and three employment agencies. The financial and business service offer, although somewhat lacking in diversity, is considered to be sufficient to serve the needs of Newcastle-under-Lyme town centre.

Service operators are broadly similar to current national averages, and the diversity of the offer in Newcastle-under-Lyme is considered suitable to serve the needs of the centre and as being helpful in securing the continued vitality and viability of the town centre.

Vacancies

Our survey recorded a total of 59 vacant units in Newcastle-under-Lyme, which account for a total of 10,320 sq.m of retail floorspace and equate to 13.3% of the total stock of commercial floorspace. This figure is higher than the current UK national average for vacant floorspace of 9.9%. Although a vacancy rate greater than the national average may present cause for concern, the current figure is lower than that recorded by the previous survey and is not felt to result in a significant loss of vitality in Newcastle-under-Lyme, which remains one of the better performing centres in the study area. The overall decrease in vacant floorspace since the previous survey is likely driven by the demolition of the former vacant Sainsbury's store at Ryecroft.

Vacant units are dispersed throughout the centre, which is beneficial as it results in no one area feeling dominated by empty units. The exception to this may be in the Roebuck Shopping Centre, which appears to suffer from a level of under-utilisation. Although situated in a central location to the rear of High Street, it contains a number of vacant units. It therefore appears to have lost its place on the retail circuit, and consideration should be given to attracting and retaining operators to the shopping centre. This situation has not been helped by the relocation of Argos to the Sainsbury's on Liverpool Road. However it is felt that the vacancy rate does not significantly impact on the viability of vitality of Newcastle-under-Lyme.

Miscellaneous

Newcastle-under-Lyme plays an important civic and governmental role for the wider borough, with the main offices of Newcastle-under-Lyme Borough Council being located within the centre. Additionally within the centre are a number of offices, a Tourist Information Centre on Ironmarket, two places of worship, including St Giles Church and two health centres. The town centre is therefore has a wide range of services that are likely to result in a number of linked trips into Newcastle-under-Lyme.

Pedestrian Flows

At the time of our visit moderate pedestrian flows were noted along the main pedestrianised routes through Newcastle-under-Lyme, namely Ironmarket, Castle Walk and High Street. These routes are considered to form the main retail circuit in the centre. Activity was strongest towards the south of the centre and around the bus station on Barrack Road. Lower levels of activity were noted in Roebuck Shopping Centre, again indicative of the under-utilisation of the centre and symptomatic of its greater concentration of vacant units. Reduced pedestrian flows were also noted along Merrial Street and in the northern part of the town centre. Although there are fewer retail operators in this area, it is considered that this disparity is reflective of the negative impact the large derelict site at Ryecroft has on pedestrian footfall in the north of Newcastle-under-Lyme.

As a result of the centre's location within a ring road, relatively poor pedestrian flows were noted between the centre and the areas in the immediate vicinity of it. This is likely a result of the ring road restricting movement between Newcastle-under-Lyme town centre and areas beyond, despite the provision of pedestrian crossings and subways at key access points. Although it was noted that a large number of visitors appeared to arrive by car, strong pedestrian flows were noted from the bus station at Barracks Road along Castle Walk and Hassell Street, indicating usage of the public transport network.

Pedestrian activity in Newcastle-under-Lyme is concentrated on the main retail circuit with little activity noted on the peripheral routes through the centre. Encouraging greater levels of footfall through Newcastle-under-Lyme would be helped by securing a development on the former Sainsbury's site at Ryecroft.

Accessibility

Newcastle-under-Lyme town centre is surrounded by a dual carriageway ring road formed by the A34, A52 and A527. This has the effect of isolating the town centre from the surrounding residential areas, creating a central retail 'island'. However there are a number of direct pedestrian links across the ring road, including pedestrian crossings and subways, which ensure that the town centre is accessible to pedestrians. The main retail core of Newcastle-under-Lyme is

located on the pedestrianised streets of Ironmarket, Castle Walk and High Street and ensures that pedestrians feel safe when in the centre.

The centre is also well served by public transport and has two bus stations, on Merrial Street and Barracks Road. These offer direct services to Hanley, Keele, Kidsgrove and locations throughout Newcastle-under-Lyme, but also regional destinations such as Nantwich, Crewe and Market Drayton. Direct services are also provided to Stoke-on-Trent train station (located approximately three kilometres to the east) which can be accessed on the Orange 1/1A bus service in approximately 20 minutes. Train services from Stoke-on-Trent provide direct access to a number of regional destinations, and national destinations including Birmingham, Manchester and London.

Being bound by the local highway network, Newcastle-under-Lyme is easily accessible to the local, regional and national road network. Car parks are located throughout the centre, with the largest being the Midway car park adjacent to the Roebuck Shopping Centre. This is a multi-storey car park providing 655 spaces. Car parks are also located at St Georges Centre, Windsor Street, School Street and Goose Street, with some on-road parking possible in the centre. Although the accessibility of the centre is somewhat compromised due to its location within the inner ring road, there are ample pedestrian crossings provided and the public transport network radiates out from the town centre. Therefore the town centre is considered to be easily accessible to residents throughout Newcastle-under-Lyme and beyond.

Perception of Safety

Newcastle-under-Lyme is an attractive and well-maintained centre, with no evidence of graffiti, vandalism or anti-social behaviour and little evidence of littering at the time of our visit. The pedestrianised areas of the centre and the area around the bus stations on Merrial Street and Barracks Road ensure a high level of natural and passive surveillance, and a lack of passing traffic throughout much of the centre provides for a largely safe and secure environment. However in less central areas, as footfall falls away, the perception of safety reduces. This is particularly the case to the north of the centre, although the retail units in this area provide an element of natural surveillance. According to the website www.crime-statistics.co.uk, 359 crimes were reported within a mile radius of Newcastle-under-Lyme town centre in August 2018. This compares with 416 crimes reported across the same area in August 2017 and 304 in August 2016.

Environmental Quality

Newcastle-under-Lyme is a historic market town and consequently the centre, particularly around the Guildhall and at the junction of High Street and Ironmarket, benefits from a number of attractive period buildings. Many of the buildings in the centre are unique in appearance which makes the centre a nice centre in which to spend time. This is further bolstered by the high quality public realm throughout the

centre. Trees line the majority of the pedestrianised areas, and there are seasonal planters sporadically placed throughout the centre. Queen's Gardens on Ironmarket also adds to the overall pleasant environment in the centre. Vacant units are located throughout the centre, and although these do not impact positively on environmental quality as they are not concentrated in a particular area, these are not felt to reduce significantly from the centre's overall quality. The feature impacting most negatively on environmental quality is considered to be the vacant former Sainsbury's site on Ryecroft road. Although this is somewhat removed from the retail core of Newcastle-under-Lyme it is felt that this site impacts negatively on its surrounding area, and therefore has a negative impact on the environmental quality of the centre as a whole. Ensuring a high quality redevelopment of this site is therefore of great importance to maintain the high environmental quality noted throughout Newcastle-under-Lyme.

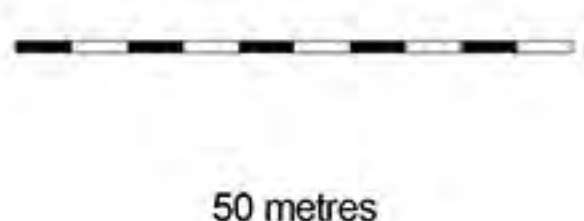
Newcastle-under-Lyme is therefore a pleasant centre in which to spend time, with an attractive and well-maintained public realm. The historic buildings in the centre provide further interest for visitors, and the managed areas along Castle Walk are of a high quality. The area to the north of Merrial Street, particularly around the former Sainsbury's, is of a poorer quality and the redevelopment of this site is thought likely to improve the quality of this area.

Conclusion

The composition of units and floorspace in Newcastle-under-Lyme is broadly similar to the average composition of UK shopping venues. This is reflective of the town centre's varied offer, although it is important to note that within the joint authority area Newcastle-under-Lyme is thought likely to play a secondary role to Hanley in respect of its comparison goods offer. The vacant site at Ryecroft, although cleared, has not seen a successful redevelopment to date, with momentum for any proposals appearing to have stalled. Implementation of a scheme at Ryecroft would be beneficial, both in utilising a derelict site but also in driving footfall to the north of the town centre and counterbalancing attractions (such as the market, cinema and foodstores on the edge of the centre) to the south.

The vacancy rate in respect of both floorspace and units is higher than national average. However it is one of the better performing centres in the joint authority area in this regard. Whilst a reduction in Newcastle-under-Lyme's vacancy rate would be beneficial, the variety of uses within the centre help to ensure it is vital and viable. Additionally the town centre has a decent range of retail operators, including both local independents and national multiples such as Dunelm, Laura Ashley and New Look.

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



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Kidsgrove Town Centre

Description

Located approximately 8 kilometres to the north of Newcastle-under-Lyme and 8 kilometres to the north-west of Hanley, Kidsgrove is the northernmost centre in the study area. It is a small centre formed of two parallel, linear parades along Market Street and Liverpool Road and has a modest range of convenience, comparison and service operators.

Although the centre benefits from a high standard of accessibility and environmental quality, at the time of our visit relatively light pedestrian flows were noted through the centre.

Status

Significant Urban Centre (as defined by the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009)



Figure 1: Surface car parking on King Street



Figure 2: Home Bargains on Market Street is a significant driver of visitors into the centre



Figure 3: Liverpool Road is dominated by vehicular movements



Figure 4: Tesco is located immediately to the west of the adopted town centre boundary

Table 1 Town Centre Floorspace Composition

GOAD Category	Kidsgrove Floorspace at 2011 (sq.m)	Kidsgrove Floorspace at 2011 (%)	Kidsgrove Floorspace at 2018 (sq.m)	Kidsgrove Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	680	8.8	686	6.8	15.2
Comparison	2,698	34.7	4,243	42.0	35.5
Retail Services	1,689	21.7	2,094	20.8	6.8
Leisure Services	808	10.4	2,247	22.3	24.7
Financial and Business Services	709	9.1	459	4.5	7.9
Miscellaneous	671	8.6	0	0.0	0.1
Vacant	511	6.6	363	3.6	9.3
TOTAL	7,766	100	10,091	100	100

Source: Current composition of Kidsgrove Town Centre derived from Nexus Planning Survey of August 2018; 2011 figures derived from Newcastle-under-Lyme Retail and Leisure Study 2011; UK Average from Experian GOAD Report March 2018

Table 2 Town Centre Unit Composition

GOAD Category	Kidsgrove Number of Units at 2011	Kidsgrove Units at 2011 (%)	Kidsgrove Number of Units 2018	Kidsgrove Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	7	9.7	9	11.5	8.7
Comparison	23	31.9	17	21.8	31.6
Retail Services	16	22.2	24	30.8	14.2
Leisure Services	12	16.7	19	24.4	23.6
Financial and Business Services	6	8.3	4	5.1	10.5
Miscellaneous	1	1.4	0	0.0	0.2
Vacant	7	9.7	5	6.4	11.2
TOTAL	72	100	78	100	100

Source: Current composition of Kidsgrove Town Centre derived from Nexus Planning Survey of August 2018; 2011 figures derived from Newcastle-under-Lyme Retail and Leisure Study 2011; UK Average from Experian GOAD Report March 2018

Overall Composition

- There are 78 units located within Kidsgrove which account for a total of 10,091 sq.m of floorspace.
- At the time of our survey five vacant units were recorded in the centre, accounting for a vacancy rate of 6.4% and equating to 363 sq.m of vacant floorspace. Both figures are considerably lower than the national average.
- National multiples with a presence in Kidsgrove are limited to Home Bargains, Barclays and Coral. The remaining operators are either regional or independent.
- There are 26 convenience and comparison operators in Kidsgrove. These account for 4,929 sq.m of floorspace which equates to 48.8% of commercial floorspace.
- There are 47 service operators in Kidsgrove. These account for 4,800 sq.m of floorspace which equates to 47.6% of commercial floorspace.

- Kidsgrove has a high level of accessibility and a good standard of environmental quality, however pedestrian flows at the time of our visit were considered to be light.

Convenience & Comparison

There are 26 convenience and comparison operators located in Kidsgrove; 17 comparison operators and nine convenience operators.

The nine convenience operators account for 686 sq.m of floorspace (equating to 6.8% of total commercial floorspace). The number of convenience operators has increased since the previous survey (7 to 9), however the floorspace figure is broadly similar (680 sq.m compared to 686 sq.m). Convenience operators include three bakeries, two butchers, a convenience store and a newsagent. There are two additional convenience operators, a Tesco superstore approximately 150 metres to the north-west of the centre and an Aldi foodstore approximately 350 metres to the south-west. Although not within the boundaries of the centre, they explain the limited convenience offer noted in Kidsgrove which is much less than the national average figure.

Comparison operators include three charity shops, two furniture shops, a pharmacy, a florist and Home Bargains. The 17 comparison operators account for 4,243 sq.m of floorspace. Since the previous survey the proportion of comparison commercial floorspace has increased from 34.7% to 42.0%. The amount of floorspace in comparison uses is greater than the national average figure of 35.5%. Overall Kidsgrove has a reasonable provision of comparison operators which are considered suitable to serve the needs of the local community.

Services

There are 47 retail, leisure and financial and business service operators in Kidsgrove which account for 4,800 sq.m of floorspace (or 47.6% of commercial floorspace in the centre). This represents an increase in the number of service operators since the 2011 survey when 34 operators were recorded, accounting for 3,206 sq.m of floorspace or 41.2% of commercial floorspace in Kidsgrove.

There are 19 leisure service operators in Kidsgrove which equate to 2,247 sq.m of floorspace (or 22.3% of commercial floorspace in Kidsgrove). Operators include 13 hot-food takeaways, two public houses, a restaurant, Coral betting office and an amusement arcade. Leisure service operators are therefore dominated by takeaways. Retail service operators include 11 hairdressers, two dry cleaners, two funeral directors (including Co-op Funeralcare) two optometrists and a Post Office. In total there are 24 retail

service operators which account for 2,094 sq.m of floorspace, or 20.8% of total commercial floorspace.

Financial and business services account for four units and equate to 459 sq.m of floorspace. Operators include three estate agents and Barclays bank. Overall the service offer in Kidsgrove is considered to be varied and suitable to serve the needs of the surrounding community.

Vacancies

At the time of our visit a total of five vacant units were recorded, with these located along Market Street and Liverpool Road. These units account for 363 sq.m of floorspace (equating to 3.6% of total commercial floorspace).

Since the previous survey of 2011 the number of vacant units has reduced from 7 to 5, a decrease replicated in less vacant floorspace being recorded in 2018. Kidsgrove also has a lower vacancy rate than the national average, indicating the vitality of the centre.

Miscellaneous

There are a number of community facilities located within Kidsgrove centre, including a dentist, Kidsgrove Library, Jobcentre plus, Beechwood Veterinary Practice, MIM Drama School and Kidsgrove Methodist Church. Kidsgrove is therefore well served by a variety of community facilities that support its status as a significant centre.

Pedestrian Flows

Pedestrian flows in Kidsgrove are concentrated around Home Bargains and Heathcote Street in the north of the centre. Kidsgrove is essentially two parallel, linear streets – Liverpool Road and Market Street – which are linked by Heathcote Street. Pedestrian footfall was therefore observed to be divided between these two distinct halves and was concentrated around Market Street in the north.

Equally, most customers at the Home Bargains store at Heathcote Street arrived by car and we observed few linked trips arising from the Home Bargains at the time of our visit.

Accessibility

Kidsgrove Town Centre benefits from a high standard of accessibility. It is located immediately adjacent to Kidsgrove Train Station which provides direct services to a range of local and national destinations, including Stoke-on-Trent station. This ensures that the Town Centre is easily accessible to locations throughout Newcastle-under-Lyme and Stoke-on-Trent.

Other forms of public transport, including buses, further strengthen the accessibility of the centre. Bus route 3 provides up

to three services per hour between Crewe and Hanley bus station, which can be accessed in approximately 40 minutes. There are a number of bus stops located throughout the centre, primarily along Liverpool Road. Large, surface-level car parks are located in the north of the town centre around Heathcote Street adjacent to Home Bargains. This further strengthens accessibility into Kidsgrove.

Perception of Safety

Due to the relatively light levels of pedestrian activity noted in Kidsgrove, there is little natural surveillance throughout most of the centre. This is especially the case in less central areas away from Market Street and the Home Bargains store as footfall falls away and the perception of safety is consequently likely to be lower. This is somewhat tempered by the number of vehicles that pass through the centre and the proximity of residential areas to the north and south, which provide an element of natural surveillance.

The area appears to be relatively free of graffiti, vandalism, litter or other sign of anti-social behaviour.

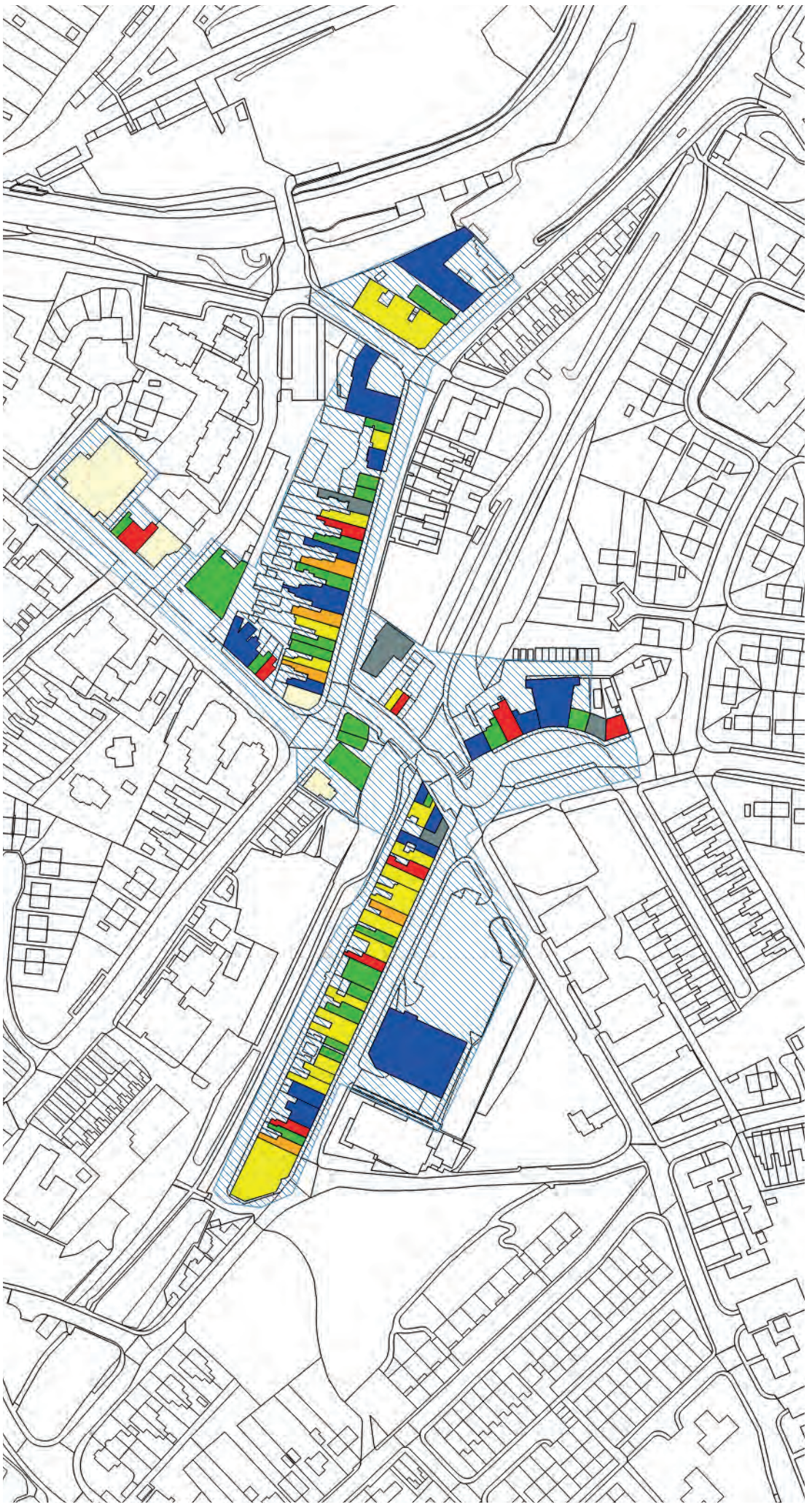
Environmental Quality

The overall environmental quality of the centre is considered to be reasonable if essentially functional with little in the way of interest, or distinctive character. All areas appear to be generally well-managed and maintained, albeit generally dominated by busy routes running through the Town Centre. The majority of traditional units lining the Liverpool Road and Market Street offer a positive frontage to the streets.

Whilst the public realm is of reasonably good quality there is scope for improvement, particularly to the northern end of the Town Centre around Heathcote Street.

Conclusion

Overall Kidsgrove provides a rather limited convenience, comparison and service offer that is likely to only serve the immediate needs of the communities it is located in. That being said the range of operators located within, or just beyond the centre are considered to be strong for a centre of its size and the vacancy rate is also indicative of the centre's vitality.



Clients








Stoke-on-Trent City Council and
Newcastle-under-Lyme Borough
Council

Project

Stoke-on-Trent and Newcas-
tle-under-Lyme Retail Study

Date

December 2018

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

Kidsgrove
Newcastle-under-Lyme