

STOKE-ON-TRENT RETAIL AND LEISURE STUDY

Final Report – Volume 1

Prepared for:

Stoke-on-Trent City Council

July 2025


lsh.co.uk

This document has been prepared and checked in accordance with the Lambert Smith Hampton Quality Assurance procedures and authorised for release. If not signed off by a Director in the Planning, Regeneration + Infrastructure (PR+I) division at LSH then this document should be treated as a draft, and as being Private and Confidential. It should not be for wider distribution without the sign-off and permission of Lambert Smith Hampton.

This report meets the PDF/UA (Universal Accessibility) standard, which is equivalent to the WCAG 'AA' digital standard.

Prepared by:

Richard Shepherd

Signed: 

For and on behalf of Lambert Smith Hampton

Issued: July 2025

Contents

- 1. INTRODUCTION4
- 2. POLICY ANALYSIS.....6
- 3. RETAIL & LEISURE MARKET TRENDS OVERVIEW 13
- 4. MARKET RESEARCH: IN-STREET SURVEY29
- 5. MARKET RESEARCH: CATCHMENT, SURVEY AND MARKET
SHARES.....48
- 6. TOWN CENTRE HEALTH CHECKS.....61
- 7. RETAIL CAPACITY ASSESSMENT.....77
- 8. COMMERCIAL LEISURE TRENDS AND OPPORTUNITIES93
- 9. POLICY RECOMMENDATIONS 118

1. INTRODUCTION

1. Lambert Smith Hampton (hereafter referred to as 'LSH') was instructed by Stoke-on-Trent City Council ('the Council') in May 2024 to prepare a Retail and Leisure Study ('the Study') to address future such requirements across the authority area. The Study supersedes the previous Newcastle-under-Lyme Borough Council and Stoke-on-Trent City Council Retail and Leisure Study, which was published in July 2019 ('the 2019 RLS').
2. The Council is currently in the process of preparing a new Stoke-on-Trent Local Plan. This Retail and Leisure Study provides an updated and robust evidence base to support the formulation of strategies and policies specific to retail and other main town centre uses in the emerging Local Plan.
3. Subsequent to the preparation of the 2019 RLS, the UK has experienced major economic and social events (e.g. Covid-19, high rates of inflation, and a related 'cost-of-living' crisis) that have impacted on how we shop, work, and use our town centres. As such, it is an opportune time to review the current performance of Stoke-on-Trent's principal centres and to assess the future retail and leisure needs of local residents.
4. As such, this Study takes account of current and predicted market trends, and the recent impact of the pandemic on town centres and high streets as places to shop, live, work, study, and visit for a wide range of uses and activities. It has been carried out in accordance with current policy and guidance pertaining to retail and town centre uses at the national and local level, including the National Planning Policy Framework ('NPPF') and National Planning Practice Guidance ('PPG').
5. Notwithstanding the economic uncertainties highlighted above, the outputs of this Study will assist in the guiding both plan-making and decision-taking across Stoke-on-Trent and its principal centres over the timeframe of the new Local Plan. Whilst the Study will assess outputs up to 2040, any findings beyond 2035 should be treated with caution on the basis that forecasts become less reliable after a 10-year period.
6. The study is presented in a series of inter-related volumes:
 - **Volume 2** comprises the quantitative analysis and related appendices that inform the economic capacity tables for retail needs over the period to 2040;
 - **Volume 3** sets out comprehensive town centre health check assessments for Hanley city centre, and the town centres of Burslem, Fenton, Longton, Meir, Stoke, and Tunstall, and provides the proposed town centre and primary shopping area boundaries in respect of those town centres;
 - **Volume 4** presents the market research undertaken by NEMS Market Research ('NEMS') in support of this Study – comprising a household telephone interview survey and an 'in street' visitor survey in Hanley city centre (the locations for the household survey are also identified within this volume); and

- **Volume 5** provides the appraisal work that the Council itself has undertaken in respect of the offer, role and function of its local and neighbourhood centres.
7. Volume 1 draws on the evidence and research in Volumes 2 to 4. It provides policy recommendations to help the Council prepare positive strategies, plans and policies for the growth, management and adaptation of Stoke-on-Trent's principal centres over the short, medium, and long term to help ensure their future vitality and viability.
8. For ease of reference, Volume 1 of this Study is comprised of the following inter-related sections:
- **Section 2** reviews the national, regional and local planning policy context;
 - **Section 3** highlights key trends that are driving dynamic changes in the retail and leisure sectors at the national and regional level, and considers how these trends impact Stoke-on-Trent;
 - **Section 4** summarises responses to the in-street survey undertaken to understand visitors' perceptions and use of Hanley city centre;
 - **Section 5** summarises the survey-derived market share analysis of shopping patterns for convenience and comparison goods purchases across the defined Study Area and provides a summary profile of the City's principal centres and out-of-centre provision;
 - **Section 6** provides a summary assessment of the relative vitality and viability of the principal centres of Hanley, Burslem, Fenton, Longton, Meir, Stoke, and Tunstall;
 - **Section 7** details the key assumptions and findings of the retail capacity assessment for new convenience and comparison goods retailing up to 2040 based on LSH's in-house CREATE economic model and drawing on the results of the economic tabulations provided in Volume 2;
 - **Section 8** sets out the findings of the commercial leisure needs, drawing on land use evidence and market research, including the results of the household survey; and
 - **Section 9** draws on the previous sections and provides recommendations to help inform the Council's preparation of policies and strategies aimed at maintaining and enhancing the vitality and viability of Stoke-on-Trent's principal centres over the lifetime of the plan.

2. POLICY ANALYSIS

9. To help inform the preparation of this Study, this section provides a summary of the key national, regional and local planning policies pertaining to retail, leisure and other main town centre uses. The review also considers the implications of recent changes to the Use Classes Order and Permitted Development Rights (PDR), particularly in relation to PDRs that allow the conversion of buildings and units in commercial use to residential use.

National Planning Practice Framework (NPPF)

10. The NPPF was updated in December 2024 and sets out the Government's planning policies for England. Planning law requires that applications for planning permission be determined in accordance with the development plan, unless material considerations indicate otherwise. The NPPF must therefore be considered in plan-making and is a material consideration in making planning decisions.
11. The NPPF identifies that the purpose of the planning system is to contribute to the achievement of sustainable development, which is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs. Paragraph 11 sets out the Government's view of what the presumption in favour of sustainable development means in practice. For plan-making, all plans should promote a sustainable pattern of development that: meets the needs of the local area; aligns growth and infrastructure; improves the environment; and, mitigates against and adapts to the effects of climate change.
12. Section 3 ('Plan-making') of the NPPF provides guidance to local authorities on preparing local plans. Paragraph 20 states that policies should set out an overall strategy for the location, scale and quality of development, and make sufficient provision for new sustainable development. Paragraph 22 indicates that strategic policies should look ahead over a minimum 15-year period from adoption, except in relation to town centre development. Paragraph 31 identifies that, in preparing development plans, policies should be underpinned by relevant and up-to-date evidence. Paragraph 33 states that local plans and spatial strategies should be reviewed at least once every five years and updated as necessary.
13. Chapter 7 ('Ensuring the vitality of town centres') provides guidance on plan-making and decision-taking for retail and other town centre uses. Paragraph 90 identifies that planning policies and decisions should support the role that town centres play at the heart of local communities, and sets out criteria that local authorities should consider when preparing planning policies. These include: (a) defining a network and hierarchy of centres; (b) defining the extent of town centres and primary shopping areas (PSAs); (c) retaining and enhancing existing markets; and (d) allocating a range of suitable sites in town centres to meet the sales and type of development likely to be needed, '*looking at least ten years ahead*'.

14. Paragraphs 91 to 95 inclusive set out the requirement to apply the sequential and impact tests to planning applications for new retail and leisure developments that are neither in an existing centre, nor in accordance with an up-to-date development plan. The sequential test also applies to all proposals for main town centre use development.
15. Other sections of the NPPF are also of some relevance to the preparation of this Study, and to the Council's plan-making and decision-taking in respect of retail, leisure and town centres.
16. For example, paragraphs 96 and 97 of Section 8 ('Promoting healthy and safe communities') set out the need to achieve healthy, inclusive and safe places; including the need to plan positively for the provision and use of shared spaces, community facilities (such as local shops), and other local services to enhance the sustainability of communities and residential environments.

The Town Centres and Retail Planning Practice Guidance

17. The Town Centres and Retail PPG provides specific guidance on plan-making and decision-taking for retail, leisure, and main town centre uses, including guidance on Permitted Development Rights ('PDR'), Article 4 Directions, and amendments to the Use Classes Order ('UCO') that came into effect on 1 September 2020 (discussed later in this section). The PPG supports the policies and provisions of the NPPF, placing significant weight on the development of positive plan-led visions and strategies for town centres.
18. In terms of planning for town centres, the PPG states that a wide range of complementary uses can, if suitably located, help to support the vitality and viability of town centres. These include residential, employment, office, commercial, leisure/entertainment, healthcare, and educational development. Evening and night-time activities also have the potential to increase economic activity within town centres and provide additional employment opportunities.
19. Paragraph 004 of the PPG sets out the importance of evidence-based strategies and visions for town centres to help establish their role and function over the plan period, the need for new retail, leisure and town centre uses, and other interventions.
20. However, given the uncertainty in forecasting long-term retail trends and consumer behaviour, the same paragraph states that forecasts '*...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.*'
21. In those cases where development cannot be accommodated in town centres, paragraph 005 of the PPG requires planning authorities to plan positively to identify the most appropriate alternative strategy for meeting the identified need, having regard to the sequential and impact tests.

22. Paragraph 006 of the PPG also sets out several key performance indicators that *'...may be relevant in assessing the health of town centres, and planning for their future...'*.

Use Classes Order and Permitted Development Rights

23. The Government has issued a series of reforms to the planning system since 2020 that are relevant to this Study. The reforms principally relate to Permitted Development Rights ('PDR') and the Use Classes Order ('UCO').
24. The new UCO came into effect from 1 September 2020 and is relevant to the Council's plan-making and decision-taking on new retail, leisure and town centre uses. The new UCO amended and revoked a number of use classes under the 1987 Order and has replaced them with much broader use classes.
25. In summary, the main reforms introduced by the new UCO comprise the following.
- A new Class E (commercial, business and service uses), which subsumes the former Use Classes A1 (shops), A2 (financial and professional services), and A3 (restaurants and cafés). It also incorporates: the former Class B1 (commercial, business and service uses), comprising office, research and development, and light industry; Class D1 (non-residential institutions) in part, comprising medical or health services, clinics, crèches, day nurseries, and day centres; and Class D2 (assembly and leisure) in part, comprising gyms or areas for indoor recreation.
 - A new Class F1 (learning and non-residential institutions), which includes some of the former uses under Class D1 (non-residential institutions), including museums, public libraries, art galleries, schools, and places of worship.
 - A new Class F2 (local community uses), which comprises (former Class A1) shops defined as being not more than 280 sq.m mostly selling essential goods, including food, and at least 1 kilometre from another similar shop. This Use Class also includes some former Class D2 (assembly and leisure) uses such as meeting places/halls, indoor/outdoor swimming baths, skating rinks, and outdoor sport and recreation.
 - An extension to Sui Generis uses (which fall outside specified use classes) to include the former Use Classes A4 (pubs and drinking establishments) and A5 (hot food takeaways). It also incorporates some uses previously classified under Class D2 (assembly and leisure), including cinemas, concert halls, live music venues, bingo, and dance halls.
26. Changes of use within a defined Use Class are not considered to be development and as such do not require planning permission. As a result, the ability to restrict the use of an existing premises to retail or another specific town centre use has been substantially reduced.
27. The Government also issued new PDR rights on 1 August 2021 that permit the change of Class E to Class C3 (residential), subject to prior approval applications.

This PDR replaces the two existing commercial to residential PDRs under Class O (office to residential) and Class M (conversion of shops, financial services, betting offices and pay day loan or mixed uses to residential), with a new Class MA. In launching the PDR, the Government stated that the regulations will give ‘...*greater freedom for buildings and land in our town centres to change use without planning permission and create new homes from the regeneration of vacant and redundant buildings.*’

28. Although the above PDR does not apply to Listed Buildings, it can be applied in a Conservation Area (subject to an impact assessment if it involves converting the ground floor).

Article 4 Directions

29. Article 4 Directions are a tool used by local authorities to remove national permitted development rights, if warranted and supported by robust evidence.
30. The Government supports the use of Article 4 Directions in a ‘highly targeted way’ to protect core high street areas whilst not restricting the ability for much needed housing to be delivered.

Development Plan Context

31. The development plan forms the starting point for the determination of planning applications. The development plan for the City comprises the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy, adopted October 2009. The Council was in the process of preparing a new Joint Local Plan together with Newcastle-under-Lyme Borough Council. However, preparation of this Plan ceased in January 2021.
32. Key adopted Core Spatial Strategy policies and provisions that are most relevant to this Study are summarised below.
33. The Strategic Vision for the area is as follows:
‘The Borough of Newcastle-under-Lyme and the City of Stoke-on-Trent will be a prosperous, vibrant, environmentally responsible and successful area of choice for businesses, visitors and residents in the period up to 2026.’
34. A further series of Strategic Aims are identified to assist in realising the above Vision.
35. Strategic Aim 7 (‘SA7’) indicates that the City Centre of Stoke-on-Trent’s role as a sub-regional city centre will be enhanced and that it will operate within a network of accessible and complementary, vital, vibrant and distinctive town centres.
36. Strategic Aim 18 (‘SA18’) identifies that mixed-use and residential development will be promoted where it can support city, town, and local centres.

37. Section 5 of the Core Spatial Strategy identifies a hierarchy of defined centres for Newcastle-under-Lyme and Stoke-on-Trent. In respect of Stoke-on-Trent, this hierarchy is as follows:
 - Strategic Centre: City Centre of Stoke-on-Trent;
 - Significant Urban Centres: Longton, Tunstall, Stoke, Burslem, Fenton, and Meir; and
 - Local Urban Centres: 58 Local Urban Centres are identified across Stoke-on-Trent.
38. Designated Local Urban Centres and Villages are all located within Newcastle-under-Lyme.
39. Section 5 sets out a City Centre of Stoke-on-Trent Area Spatial Strategy. The Vision for the centre is:

‘To create a thriving, diverse and nationally recognised highly performing City Centre. By 2026 the City Centre will have an expanded primary shopping area, a new business district, a distinct cultural quarter and provide for a range of City Centre living opportunities not currently available. These developments and others in the private, public and voluntary sector will be set within a network of accessible, attractive, safe and largely traffic free open spaces well served by all forms of public transport. Linkages to and from the City Centre to outlying areas will be capitalised upon through the creation of specific boulevards and welcoming gateways. Mixed use employment, commercial enterprise and residential accommodation not readily able to locate within a completed Potteries Way will be accommodated to the west of the Potteries Way. Destined to grow the City Centre will serve the needs and aspirations of all its user groups.’
40. The related Core Spatial Strategy Policy ASP1 (‘City Centre of Stoke-on-Trent Area Spatial Policy’) identifies a range of objectives for the city centre which include:
 - The repopulation of the city centre and the revitalisation of a housing market that is currently weak.
 - The delivery of mixed-use proposals providing a significant quantum of additional comparison goods retail and office floorspace.
 - The maintenance of the city centre as a sub-regional attraction able to support a broad spectrum of uses, attractions and facilities, encompassing commercial development, shopping, leisure and cultural attractions, community facilities, and housing.
 - The primary shopping area will be expanded between Lichfield Street/Stafford Street/Bryan Street and the Potteries Way to the north, east and south. An additional ‘magnet of attraction’ will be created by the retail-led redevelopment of the East and West Precincts to complement the retail focus at the Potteries Shopping Centre.
 - The Cultural Quarter will be enhanced and its appeal expanded to incorporate more creative activities and complementary functions.

- A new, large scale, high density business district will be provided in the south western sector of the centre to help diversify the local economy and support the shopping area.
- High density city centre living will be encouraged.
- The Etruria Road corridor and western links of the Potteries Way will be the focus for complementary city centre uses which cannot reasonably be accommodated within the traditional core and which would not prejudice the sustained regeneration of that core.
- Land to the north and south of the corridor will be brought forward for a mix of residential and employment uses.

41. Core Strategy Policies ASP2 ('Stoke-on-Trent Inner Urban Core Area Spatial Policy') and ASP3 ('Stoke-on-Trent Outer Urban Area Spatial Policy') identify land use and regeneration priorities across other parts of the City. Key themes include the renewal of town centres, the diversification of commercial uses, the delivery of residential development, and improved access to modernised local facilities (including health facilities, shopping, education, sport and recreation, leisure, transport and employment).

Other Material Considerations

42. In addition, the previous Newcastle-under-Lyme Borough Council and Stoke-on-Trent City Council Retail and Leisure Study (published in July 2019) is of some relevance in establishing the existing position in respect of retail and town centre policy.

Retail and Town Centre Evidence Base

43. The previous 2019 RLS provided a series of findings in respect of the vitality and viability of centres, future retail and leisure needs, and proposed planning policy objectives.

44. The findings include:

- the identification of a need for between 1,700 sq.m and 3,000 sq.m of additional convenience goods floorspace in Stoke-on-Trent between 2019 and 2033;
- the identification of a need for between 25,100 sq.m and 42,900 sq.m of additional comparison goods floorspace in Stoke-on-Trent between 2019 and 2033;
- a potential need for additional cinema and ten pin bowling facilities across the joint authority area in the period to 2033;
- an issue with high vacancy rates across a number of principal centres, including Hanley;
- a proposed five tier centres hierarchy with: Tier 1 'Strategic Centres' comprising Hanley; Tier 2 'Larger Town Centres' comprising Burslem, Longton, Tunstall, and Stoke; Tier 3 'Smaller Town Centres' comprising Fenton and Meir; Tier 4 'Local Centres'; and Tier 5 'Neighbourhood Centres';

- a proposed 'tiered' local impact threshold where retail and leisure proposals providing greater than 300 sq.m gross floorspace in proximity to Smaller Town Centres, Local Centres or Neighbourhood Centres would be subject to formal impact assessment (higher thresholds apply to higher order centres).

Policy Summary

45. This policy review has summarised the context for the Council's review of retail, leisure and town centre planning policy as part of the forthcoming Local Plan review.
46. In summary, national and local plan policy and guidance seeks to maintain and enhance the vitality and viability of centres over time by, amongst other measures, directing new investment and development to town centres first and promoting a diverse mix of sustainable uses that meet the needs of all those who live, work, shop, and visit centres for a wide range of activities.
47. Current Core Spatial Strategy policies generally reflect these requirements but require review to reflect recent changes to the Use Classes Order and PDRs, as well as to reflect the significant changes seen both nationally and within the Stoke-on-Trent area in respect of the retail and leisure sectors and consumer shopping patterns. There have also been major economic upheavals affecting consumer spend and business costs. This report therefore provides an update to both the quantitative and qualitative retail and town centre evidence base to inform the Council's Local Plan review. It then advises on an appropriate Local Plan policy response to support vital and viable centres.

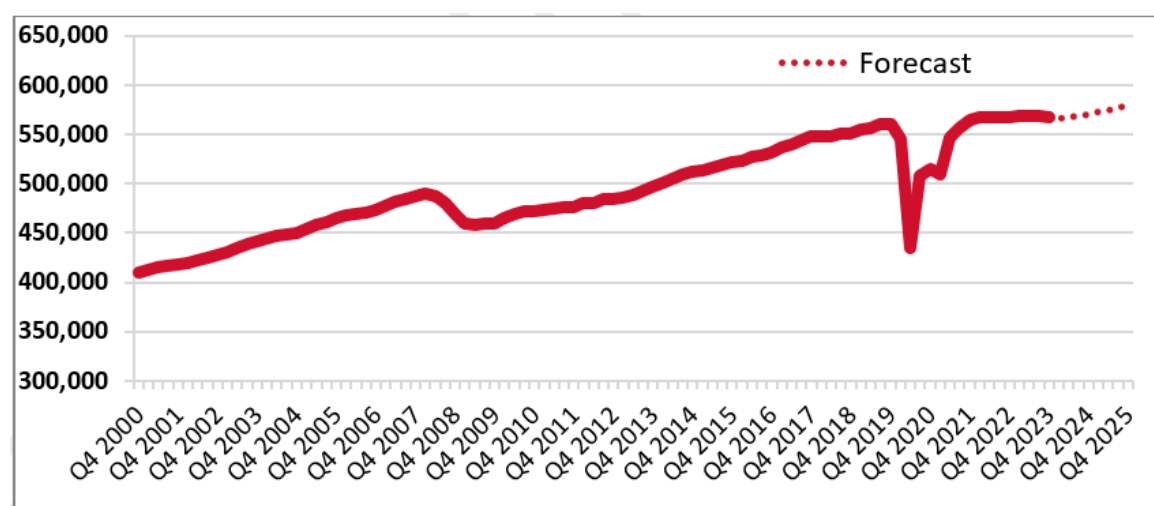
3. RETAIL & LEISURE MARKET TRENDS OVERVIEW

48. Key economic, consumer and property market trends have driven considerable change in the retail and leisure sectors over the last decade. We will consider how town centres can respond to these dynamic trends to remain competitive and enhance their overall vitality and viability in the future.
49. It should be noted that economic forecasts and dynamic trends discussed in this section could change over the short to medium term as the priorities of the Labour Government become further apparent.

UK Economy and Outlook

50. The UK economy has experienced significant and unprecedented ‘shockwaves’ over the last decade; including the United Kingdom leaving the European Union, the Covid-19 pandemic, and the subsequent cost-of-living crisis. Today it awaits the impacts of a Labour government, following the party gaining power for the first time since 2010.
51. The impact of the pandemic saw the UK economy experience its biggest annual decline in Gross Domestic Product (GDP) in 2020 for over 300 years (-10.4%).
52. Although the economy grew by 8.7% in 2021, it fell back to 4.3% in 2022 due to the cost-of-living and energy crisis. In 2023 there was very limited growth of 0.1%, with a technical recession across the final six months of the year. UK GDP is estimated to have grown by 0.7% in Quarter 1 (January to March) of 2024.

Figure 1: UK Real GDP (£M, chained volume measure)



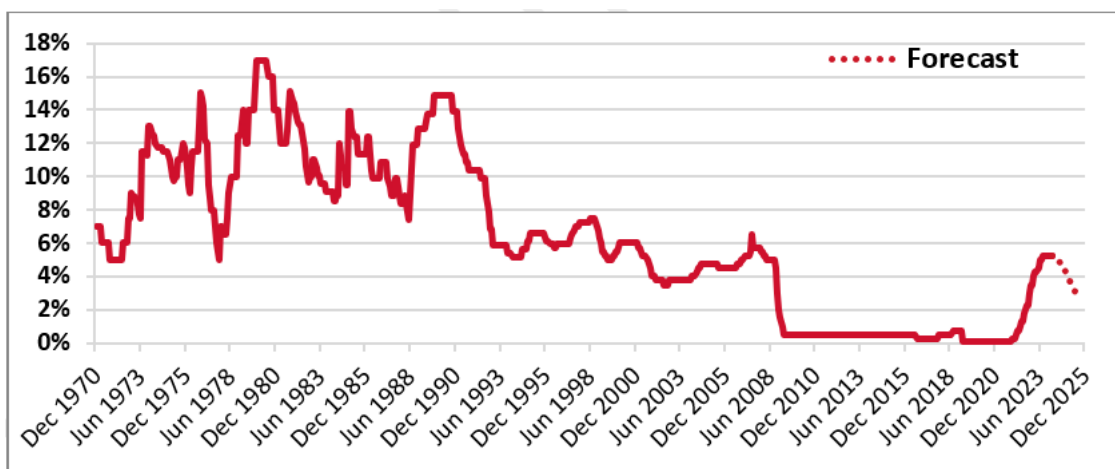
53. High inflation was one of the main factors behind the cost-of-living crisis in the UK. Consumer Price Inflation (CPI) peaked at a 40-year high of 11.1% in October 2022. As of October 2024, it stands at 2.3%, which is above the Bank of England target rate of 2.0%.

Figure 2: UK CPI Inflation (%): 1970 – 2025 (including forecast)



54. The Bank of England's response to rising inflation has been to increase interest rates from 0.5% in February 2022 to 5.25% in August 2023. These increases have impacted on mortgage costs for millions of homeowners, with a related effect on disposable incomes. However, interest rates are at 4.75% at November 2024 and it is expected that they will decrease further in the near future.

Figure 3: Bank of England Interest Rate



55. As a result of these trends, UK households are currently experiencing the biggest fall in real disposable income and living standards in decades. This has had a direct impact on household spending on retail goods and leisure services, and on the sales performance of retailers and leisure operators.

Retail and Leisure Expenditure Growth

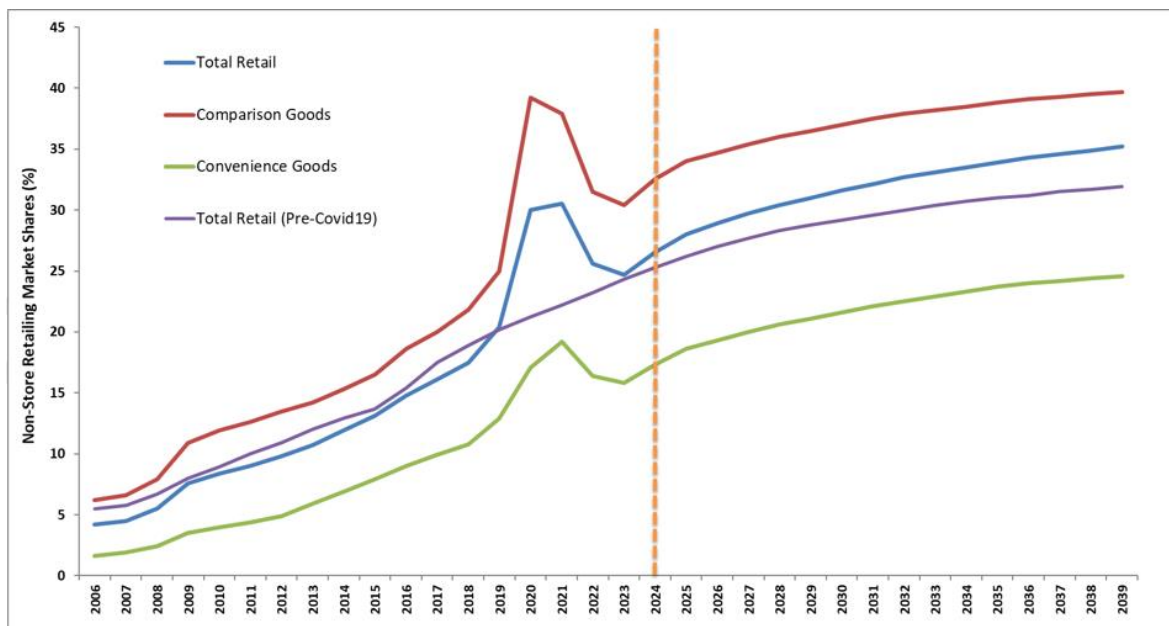
56. Although consumer spending has been a key driver of economic growth for decades, there had been increasing signs pre-pandemic that growth was starting to 'soften'. The pandemic and recent economic downturn has accelerated these trends and had a further dramatic impact on consumer spending and retail sales.
57. The latest retail and leisure spend per head (or per capita) forecasts published by Experian (Retail Planner Briefing Note 21, February 2024) identify the following.

- **Convenience goods:** Following significant +8.6% annual growth in expenditure on 'essential' food and convenience goods during the pandemic (2020), spend fell by -1.7% in 2021 and by -5.8% in 2022. Experian predicts that annual growth in convenience spend will fall again in 2023 (-3.0%), 2024 (-0.5%) and 2025 (-0.2%). No change in expenditure is expected between 2026 and 2030, with 0.1% annual growth expected between 2031 and 2040. This represents an improvement on the historic long-term trend (1998 to 2022) of -1.7% per annum.
- **Comparison goods:** There has been less fluctuation in comparison goods expenditure in recent years relative to that which has been evident in respect of convenience goods. Following growth in 2019 (+2.9%), there was significant negative growth in 2020 (-7.9%) due to the impact of the pandemic. Growth returned in 2021 (+8.1%), but negative growth in 2022 (-3.3%) is forecast to continue in 2023 (-3.3%) and 2024 (-1.2%). Growth is expected to return in 2025 (+2.7%) and is then expected to average 3.1% between 2026 and 2030, falling back to +2.8% between 2031 and 2040. This figure is comparable to the historic long term comparison goods growth trend evident between 1998 and 2022.
- **Leisure expenditure:** Following a dramatic -35.4% fall in leisure spend per capita in 2020, expenditure bounced back with growth of +28.6% and +21.3% recorded in 2021 and 2022 respectively. Experian forecasts this will fall back slightly in 2023 (-1.3%) and 2024 (-0.3%) due to the impact of the cost-of-living crisis on household expenditure. Average annual growth is then forecast to increase to +0.6% in 2025 and then settle at approximately +1.1% per annum over the period 2026 to 2030 and +0.8% over the longer term (2031 to 2040). This growth is also an improvement on the historic long-term trend (1998 to 2022) of -1.5% per annum.

Non-Store (Internet) Retail Sales

58. The growth in non-store retail sales, and principally internet shopping, has undoubtedly had the most significant sustained impact on consumer spend and behaviour over the last decade, with direct consequences for the performance of our high streets and traditional shops.
59. The market share of non-store retail sales, as a percentage of total sales, increased from 4.5% in 2007 to 30.0% in 2020 and 30.5% in 2021 (Experian Retail Planner Briefing Note 21, Appendix 3). Although non-store sales fell back to 25.6% in 2022 and 24.7% in 2023, Experian forecasts they it will increase to 31.6% by 2030 and to 35.2% by 2039.
60. As Figure 4 below identifies, the growth in the market share of non-store sales for convenience and comparison retail broadly mirrors the national trend. It also shows the impact of the pandemic on Experian's (pre-pandemic) forecasts.

Figure 4: Non-Store Retail Sales - estimated and projected market shares, 2006 to 2039



Source: Experian Retail Planner Briefing Note 21 (February 2024) Appendix 3 and Experian Briefing Note 17 (February 2020)

61. For convenience goods, the market share of non-store sales increased from 1.6% in 2006 to 19.2% in 2021, before declining to 16.4% in 2022. Experian forecasts the market share will increase to 21.6% by 2030 and to 24.6% by 2039. This trend is illustrated by the fact that the main foodstore retailers have principally focused on the growth of online sales and smaller convenience stores (e.g., Sainsbury's Local and Little Waitrose) over the last decade, rather than through major superstore development which characterised the previous 30 years. Notwithstanding this, the discount food retailers Aldi and Lidl have maintained an aggressive store development programme to increase their market shares and compete with the major grocery operators (namely Asda, Morrisons, Sainsbury's, and Tesco).
62. For comparison goods, the market share of non-store sales has increased from 6.2% in 2006 to 31.5% in 2022, down from 39.2% in 2020 and 37.9% in 2021. Experian forecasts the market share will increase to 37.0% by 2030 and to 39.7% by 2039.
63. The internet is also impacting on how and where people choose to spend their leisure time. Consumers are increasingly turning to digital platforms for entertainment, including video games, streaming services, and social media. This trend was further accelerated by the pandemic, as people were forced to spend more time at home. Streaming services such as Netflix, Amazon Prime Video, and Disney+ have benefited from a surge in subscribers in recent years, and this trend is expected to continue. Furthermore, social media is also a significant contributor to the growth of the digital retail and leisure markets. Platforms like Facebook, Instagram, and TikTok have become a major source of entertainment for many

people, particularly younger generations. These platforms have also evolved as important channels for advertising, marketing and e-commerce, as companies seek to reach new consumers. The use of delivery services for food and drink is also on the rise.

64. In summary, whatever the actual growth in online sales and digital platforms, our high streets, town centres, retailers and leisure operators will need to work even harder to retain their existing customer base and attract new customers. The challenge will be to provide attractive places and create experiences that will appeal to existing and new consumers across all ages and socio-economic groupings.

Out-of-Centre Retailing

65. The development and take-up of food and non-food out-of-centre space has also slowed over recent years, in line with the trends impacting on high streets and town centres. The main grocery retailers have pulled back from new larger format superstore openings in edge and out-of-centre locations to focus on maintaining and increasing market shares through online sales and opening smaller convenience outlets. The exception to this is the discounters, Aldi and Lidl, who continue to seek new sites in mainly edge and out-of-centre locations.
66. Vacancy levels in out-of-centre retail warehouses and parks have also increased over the last decade following the closure of major operators (such as, for example, Poundworld and Office Outlet), and a reduction in the store portfolios of other major out-of-centre retailers (such as, for example, B&Q and Homebase). There are likely to be further increases in closures, particularly in the poorly performing 'first generation' and secondary shopping locations, as leases come up for renewal and more retailers go into administration. As a result, a number of out-of-centre food store and retail warehouse sites are being repurposed and/or redeveloped for alternative uses, including logistics and residential uses.
67. Notwithstanding this, most out-of-centre shopping locations retain their significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, ease of access and ability, their lower occupancy costs, extensive free parking as well as their ability to serve as last-mile delivery hubs. This remains an attractive proposition for those retailers that are still seeking space in the current market. For example, as part of its revised business model Marks & Spencer has closed a number of its traditional high street stores and 'replaced' these with 'Simply Food/Food Hall' branded stores in out-of-centre locations.

Street and Covered Markets

68. Street markets and specialist markets can play a significant role in the success of town centres.
69. According to Mission4markets, there are 1,173 markets in the UK, which includes traditional and specialist markets. A total of 32,400 businesses trade on these markets and in 2017-18, had a collective turnover of over £3.1bn - an increase of £200m year on year since 2012.

70. Mission4markets also found that:
- 82% of markets are run by local authorities, 10% by private companies and the remainder are made up of trader cooperatives, social enterprises, and community interest companies;
 - 81% of businesses in the sector are not registered for VAT and 77% are sole traders; and
 - 48% are led by women (UK Government, 2017) compared with 21% of SMEs in the UK.
71. The Greater London's Authority's 'Understanding London's Markets' report is one of the most comprehensive reviews into the potential of modern markets. It provides useful insight into the current and future role of markets, and the type of trends and concepts that may be transferrable to other parts of the UK.
72. In London markets are considered:
- '...part of the fabric of London life. They are at the heart of our communities and local places, and offer Londoners a diverse range of economic, social, and environmental benefits, collectively known as 'social value'.'*
73. The report noted that:
- The number of markets in London had risen to 280 in 2017 from 163 in 2010;
 - Around 13,250 people worked in London markets, accounting for 2.8% of all jobs in London's retail sector;
 - Markets contributed £247.6m to London's economy in terms of gross value added, i.e. 1.3% of London's retail sector;
 - There is increasing public investment in markets;
 - Markets are significant assets to town centre vitality and support local businesses. They can generate footfall increases of around 25% for town centres and increase retail sales, with significant numbers (55% to 71%) of market visitors' spending money in other shops - calculated to be worth £752m a year to London's shop-based retailers;
 - Markets are affordable and flexible workspaces. Markets are a great and unique opportunity to trade, test business ideas, or showcase new products. On a per square foot basis markets provide more jobs than supermarkets;
 - Markets are a great place to gain experience and offer a wide range of job opportunities. In 2017, London markets saw 2,500 new employees coming into the markets sector. In the same year 12% of markets have taken on apprenticeships. Markets also create opportunities for people to access, or return, to work;
 - Markets help build the distinctive identity of a neighbourhood. From feeding the first settlers in an area, to becoming major centres of commerce in themselves, markets inject local distinctiveness into an area and help build a sense of belonging within communities;
 - Markets are places of social cohesion. Regular encounters in markets can help break down stereotypes and bridge differences, enabling long-term cohesion within a diverse area; and

- Markets help shoppers, including those on low incomes, to access fresh and healthy food.

74. Indoor and street markets have also provided the basis for new businesses to become established for a considerable period. The first M&S shop famously opened in Newcastle's Grainger Market in 1895, having started out as a market stall at Kirkgate Market in Leeds in 1884. However, there has recently been a new emphasis on empowering younger people to start out in businesses as market traders.
75. One initiative, Teenage Markets, was created to give young people a free platform to showcase their creative talents. There is now a fast-growing network of traders and performers taking part in Teenage Market events across the UK. At the time of reporting, over 400 Teenage Market events have been held across more than 50 towns and cities. Venues including market halls, street markets, and town squares. The Teenage Market has previously operated in Hanley.
76. The Teenage Market website summarises the benefits to young people and the wider community, noting *'When combined, the creative fusion of specialist retail and live performance creates a thriving and bustling marketplace which succeeds in attracting a new generation of shoppers and visitors to our nation's local markets.'*
77. Markets can therefore play an important part in supporting the local economy and community and assist small businesses, including those led by women, young people, and minority groups.

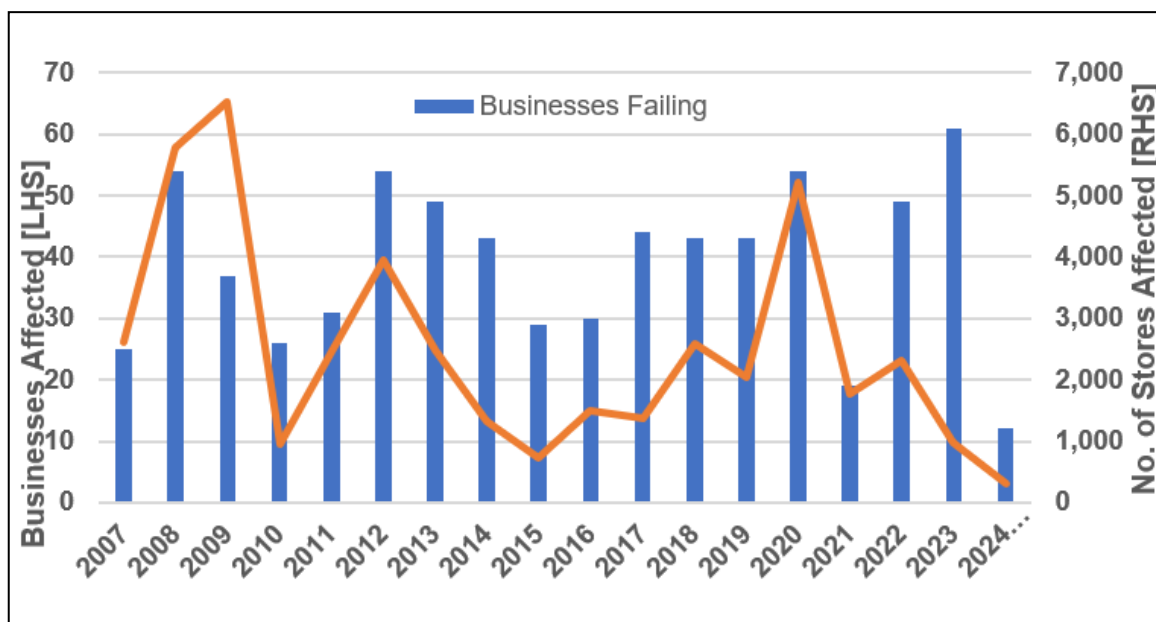
Business Failures and Vacancies

78. As described, the retail and leisure sectors have experienced significant impacts from the rise of online shopping, the pandemic and economic 'disruptions' since 2008. As a result, many high-profile retailers have either closed, or have significantly reduced their store portfolios over this period.
79. Centre for Retail Research (CRR) figures show that over 2,300 stores were forced into administration in 2022, with almost 35,000 jobs affected. In comparison, in 2023, 971 stores closed affecting over 20,600 jobs. At the height of the pandemic in 2020, over 5,200 stores closed and 109,000 jobs were affected.
80. The pandemic has accelerated the structural changes that were already impacting on the sector, resulting in the failure of a number of high-profile retailers that were struggling pre-pandemic due to falling sales, increasing costs/debt and poor management.
81. High profile examples are highlighted below.
 - **The Arcadia Group** (comprising the high street clothing retailers Burton, Dorothy Perkins, Evans, Miss Selfridge, Topman, Topshop, Wallis and the out-of-town chain Outfit) entered into administration in November 2020, and by February 2021 all of the brands had been sold by administrators to online retailers (mainly ASOS and Boohoo). All the bricks-and-mortar stores closed at the time, resulting in the loss of thousands of jobs.

- **Debenhams** also suffered a similar fate following financial difficulties that started pre-pandemic, in 2018. In January 2021, Boohoo acquired the Debenhams brand and website for £55m, and closed the remaining 118 stores, resulting in the loss of an estimated 12,000 jobs, after 243 years in business. Boohoo relaunched the website as Debenhams.com in April that year.
- **John Lewis**, after recording its first ever loss in 2020, closed 12 department stores (including anchor stores in Sheffield, York, Birmingham, Watford, Croydon and Newbury) and four 'At Home' stores in 2020/21 (in Ashford, Basingstoke, Chester, and Tunbridge Wells), with the loss of around 1,000 jobs.

82. Boots, Marks & Spencer, and Next, are other high street retailers that have also announced store rationalisation and store closure programmes in recent times.
83. National retailers with extensive high street store portfolios are also struggling to maintain market shares in the increasingly competitive environment. The higher costs of trading from high streets, compared with online and out-of-centre retailing, means it is not a 'level playing field'. These underlying costs (including rents, business rates, service charges, utility bills, staff costs, etc) are outpacing sales growth for many retailers, eroding profitability, and resulting in more store closures.

Figure 5: Major Retail Failures (2007 – 2024 (January))



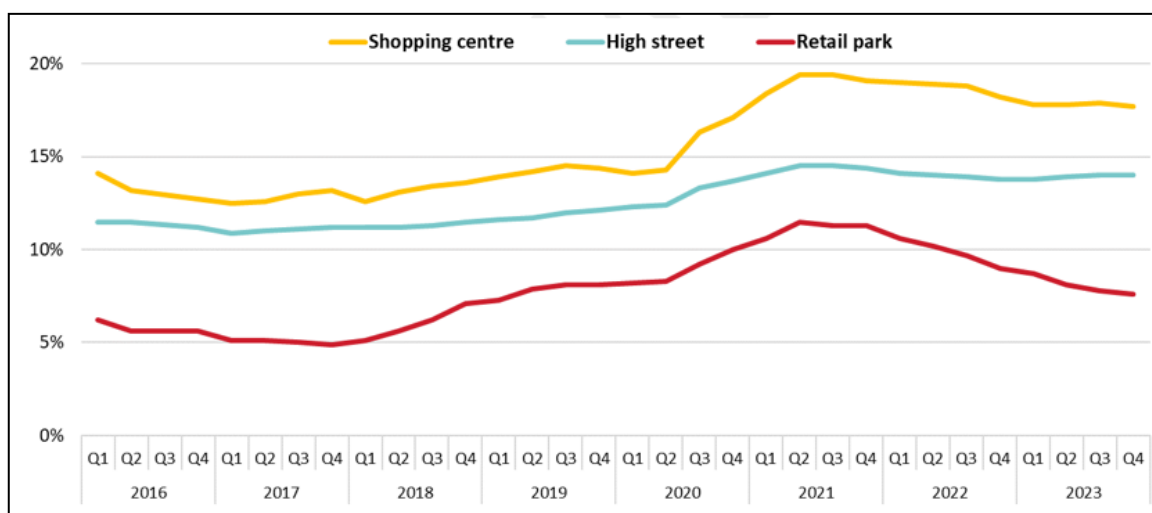
Source: Centre for Retail Research (2023)

84. The resultant increase in vacancy rates from business failures over the last 5-10 years further illustrates the challenges that the retail and leisure sectors are facing. According to the Local Data Company (LDC), the UK average vacancy rate for all retail and leisure increased from 12.1% in 2019 (H2) to a peak of 14.5% in 2021 (H1). Vacancies fell back to 13.8% in 2022 (H2) but have since risen marginally to

14.0% in 2023 (H2). This reflected vacancy rates of 15.3% for retail and 10.9% for leisure in 2023 (H2), down from the 2021 peaks of 15.8% and 11.3% respectively.

85. However, retailers normally associated with out-of-centre developments are also facing challenges and the closure/rationalisation of their operations also creates vacant space, providing those few businesses wanting space with greater choice and making it more difficult to let the usually older high street properties.
86. The result is that whilst vacancy rates went up for all locations immediately after the pandemic peaking in mid-2021, rates have fallen fastest in retail parks. Rates in high streets have remained fairly static.

Figure 6: Retail Vacancy Rates (2016 – 2023)



Source: Local Data Company

87. The strong performance of retail parks reflects the fact that they remain relatively desirable destinations for shoppers and operators due to their convenience, ease of access, free and extensive parking, larger format stores, and their competitive rental values compared to shopping centres and high streets. Retail parks are therefore still an attractive proposition for those retailers seeking space in the current market. For example, as part of its revised business model, Marks & Spencer has closed a number of its traditional high street stores and 'replaced' these with 'Simply Food/Food Hall' branded stores in out-of-centre locations. As a result, retailers who previously anchored the vitality and viability of town centres, are now competing directly in some locations with high streets for shoppers, spend, and sales.
88. Vacancy rates also vary by region, although for most, vacancy rates in 2023 are lower than in 2021 but remain higher than in 2019.
89. A noticeable exception is Greater London. This has the lowest vacancy rates but they have not reduced much since 2021.

Figure 7: Retail Vacancy Rates by Region (2016 – 2023)



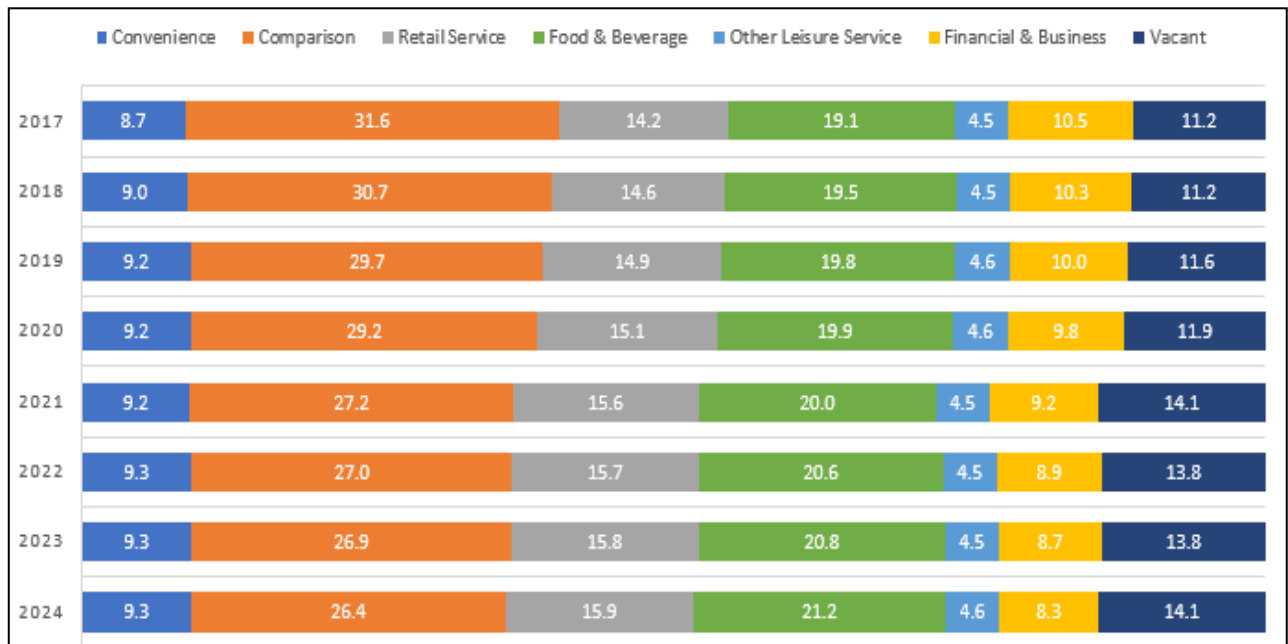
Source: Local Data Company

90. Research confirms that many centres and shopping locations across the UK simply have too much retail floorspace stock, and/or they have the 'wrong type' of retail floorspace that does not meet the needs of modern national retailers for larger format shop units.
91. Some analysts have reported that there may be as much as 30% too much physical space in the retail sector. LSH's recent joint research with Revo and other partners ('Places & Spaces Reinvented', LSH/Revo, 2024) also highlighted that six in 10 town centre stakeholders believe that between 20%-39% of retail space in town centres should be repurposed or redeveloped. The LSH/Revo research also confirms that the oversupply of retail floorspace has overtaken business rates as the main challenge for the recovery and renaissance of our town centres.

Impact on Town Centres and High Streets

92. The overall effect of these changes is that the mix of uses in town centres has changed significantly over the last decade, with comparison retail seeing a significant decline (from accounting for 31.6% of commercial units in 2017 down to 26.4% in 2024), whilst convenience retail provision has increased slightly (8.7% of units in 2017 to 9.3% in 2024). Retail services and food & beverage uses have increased whilst financial & business uses have declined.

Figure 8: Changes in Town Centre Composition (UK % Units)



Source: Experian Goad

Retailer Productivity and Sales Growth

93. As described above it is not a 'level playing field' for 'bricks-and-mortar' retailers versus online retailing, or between high street and out-of-centre retailing. This is against a backdrop of weak demand for retail property, high vacancy levels, and a significant fall in new retail-led development in centres across the UK. In response to the budgetary challenges from rising costs and tight margins, retailers are having to drive up efficiencies and productivity from existing floorspace to remain viable. Some of the options include the redevelopment/repurposing of existing floorspace; adoption of new technologies and innovations; more effective marketing strategies; and adopting an 'omni-channel' strategy that uses internet/digital platforms to help increase the sales performance of physical shops.
94. In this context, it is standard practice for retail planning assessments to make a reasonable and robust allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace for it to remain vital and viable. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. The latest Experian Retail Planner Briefing Note (Note 21, February 2024, Figures 3a/3b and 4a/4b) is the main source of information, and it sets out forecasts of annual floorspace productivity growth rates based on two different scenarios:
 - the 'constant floorspace scenario' - based on limited potential for new retail development, resulting in greater efficiency of existing floorspace; and
 - the 'changing floorspace scenario' - which takes account of the impact of new retail development on average retailer sales performance.
95. The table below shows the differences between the two scenarios.

Table 1: Floorspace Productivity Growth Rates (year-on-year %)

	2022	2023	2024	2025	2026-2030	2031-2040
CONSTANT FLOORSPACE						
Convenience Goods	-5.9%	-2.5%	-0.6%	-0.2%	0.2%	0.3%
Comparison Goods	4.7%	-1.2%	-2.7%	1.5%	2.8%	2.8%
CHANGING FLOORSPACE						
Convenience Goods	-5.9%	-2.5%	-0.1%	0.0%	0.2%	0.1%
Comparison Goods	4.7%	-1.2%	-2.6%	1.5%	2.6%	2.6%

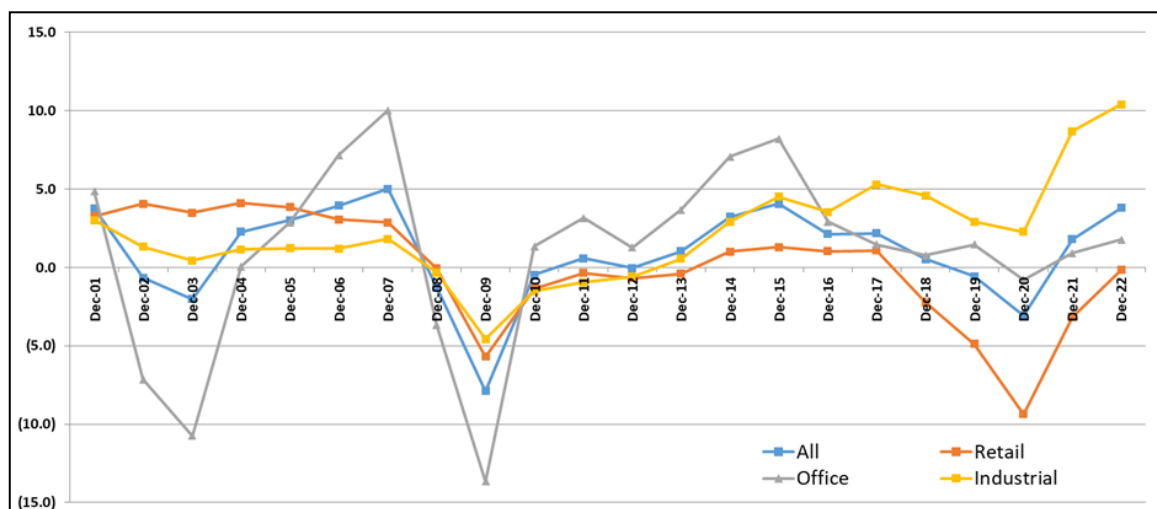
Source: Experian Retail Planner Briefing Note 21 (February 2024); Figures 3a/3b and 4a/4b

96. As Experian explains, sales density growth rates have been volatile in recent years given sharp swings in retail spending due to temporary closures in businesses and social distancing restrictions during the pandemic, and, more recently, the impact of high inflation on costs. Experian forecasts weak growth in 2023/24 given the poor near-term outlook for retail sales volumes, particularly in the comparison component, before recovering as spending strengthens.
97. For our retail planning assessments, LSH usually utilises the higher 'constant floorspace productivity' growth rates. We consider that these growth rates can better reflect local trends. In the case of Stoke-on-Trent, we believe that it is unlikely that the overall local level of comparison goods retail floorspace will substantially increase and therefore prefer to use the 'constant floorspace productivity' rates.
98. These rates also take better account of the need for existing retailers to increase their year-on-year sales potential and profit margins to remain viable.

Market Demand and Rental Growth

99. Demand for retail space in centres across the UK has fallen dramatically since 2007 and is currently at an all-time low. The over-supply of retail floorspace, increasing vacancies and limited market demand has also impacted on property values and rents, which is placing further pressures on the viability of shops and shopping centres.
100. LSH research shows that the retail sector has registered a year-on-year fall in average rents of -4.9% in December 2019, -9.4% in 2020, -3.2% in 2021, and -0.2% in 2022 (LSH Research (2023) using MSCI data, figures are from December in the respective years).
101. The below Figure 9 illustrates that retail has performed poorly since the 2007/08 economic recession benchmarked against other property sectors. This long-term trend was further exacerbated by the impact of the pandemic and, most recently, by the cost-of-living crisis.

Figure 9: Property: Average Rental Growth (2001-2023) (%)



Source: MSCI UK Quarterly Property Index (April 2023)

102. The fall in market demand and increasing vacancies has also helped to strengthen the negotiating position of the larger retail brands with landlords over new leases and lease renewals. For example, some of the key trends over recent years include:

- an increase in 'turnover rents' rather than traditional contracted rents linked to market value;
- shorter leases and regular tenant break options;
- capped increases to service charge;
- pandemic clauses with rent cessation provisions in case of forced closure; and
- larger incentive packages (including, for example, capital contributions, enhanced handover specifications and extended rent-free periods).

Leisure Trends

103. The most recent leisure expenditure projections by Experian as set out in Retail Planner Briefing Note 21 (February 2024) identify that, following a considerable -35.4% reduction in leisure expenditure per capita in 2020 due to the pandemic, there was an upsurge in 2021 of +28.6% that continued until 2022 (+21.3%). There then followed a reduction of -1.3% in leisure expenditure in 2023 due the cost-of-living crisis and rising inflation. Experian predicts a continued reduction in 2024 (-0.3%) followed by a forecast a return to growth of +0.6% in 2025 and +1.1% until 2030; thereafter, +0.8% growth per annum is forecast to 2040. This growth in leisure spend is higher than the long term trend (-1.5% per annum) over the period 1998-2022.

Table 2: Leisure Spend and Projections (year-on-year growth %)

	2019	2020	2021	2022	2023	2024	2025	2026-30	2031-40
Leisure Spend Growth (%)	0.1%	-35.4%	28.6%	21.3%	-1.3%	-0.3%	0.6%	1.1%	0.8%

Source: Retail Planner Briefing Note 21 (February 2024)

104. Spending on leisure is linked to consumer confidence and the wider economy. In recent times, higher mortgage rates, the rate of inflation, and the broader cost-of-living crisis has impacted the sector. This is illustrated with a review of the following selective commercial leisure categories.
- The **Cinema** sector is going through change as consumers become more price conscious and as a result are more selective in their frequency. The cinema sector remains under pressure and operators such as Cineworld and Empire filed for administration in 2023.
 - The **Food & Beverage (F&B)** sector has faced challenges from Brexit, the pandemic, and rising inflation; consequently, the sector has been under strain for a while. Online food delivery companies are also competing for consumer expenditure as people increasingly treat themselves at home despite potential economic cutbacks. Operators within the leisure sector have also seen sharp increases in overheads, with the heightened costs of energy, staffing, and goods impacting on margins and viability. However, future growth in eating out is predicted as consumer wages and confidence grow.
 - **Coffee shops** remain extremely popular with consumers and the 'coffee shop break' is often seen as integral to the shopping experience. However, the price of coffee has pushed up prices, so whilst demand volume is stable, price increases account for the revenue growth in the sector.
 - **Competitive socialising** is increasingly important in repurposing former retail floorspace. The range of competitive socialising activities includes escape rooms, axe throwing, crazy golf, and immersive group virtual reality (VR) experiences. This is being driven by younger demographic seeking new and diverse forms of entertainment and a desire for real social connection together with the availability of previously retail-dominated space.
 - According to recently published analysis from the Night Time Industries Association (June 2024), the **UK night-time economy** was worth £33.3bn in 2022, down from £37.2bn in 2019. From its declining music scene to the loss of significant numbers of clubs and pubs, the UK's night time economy is under strain. The Government's Interdepartmental Business Register (IDBR) indicates that the number of pubs and bars declined by 10% in the decade to 2022, while the number of licensed clubs fell by 28%, amounting to a total loss of around 7,000 establishments over ten years. In the same period, however, the number of licensed restaurants in the UK has increased by 30%. The decline in the night-time economy is attributed to squeezed consumer finances detailed previously as well as changing consumer preferences including the decline in drinking particularly among younger demographics.
 - The **Health & Fitness** sector remains broadly stable. According to the State of the UK Fitness Industry Report 2023, the UK had slightly fewer gyms (0.9 per cent) in 2023 than in 2022 but member numbers were up by 3.9%. The increases in member numbers were greater in the private sector than in the public sector, with budget chains, PureGym and The Gym Group, being the two leading operators in terms of new gym openings. The increasing emphasis on wellbeing, good health, and preventative healthcare remain a positive sign of the sector's longer term resilience.

Summary

105. Our towns, traditional high streets, and shopping centres have been challenged for more than a decade by falling retail market demand, rising occupancy costs, and increasing competition from online and out-of-centre shopping. Trends accelerated and compounded by the Covid-19 pandemic are resulting in an increase in vacant shop units, often in primary shopping areas, as retailers and occupiers either choose to downsize and/or close stores in some locations (or they are forced out of business altogether due to failing business models and unmanageable debts). As online spending has increased, the demand for physical retail demand has been impacted and where there is vacant space there is often a need for revaluation in respect of local needs and how a centre repositions itself to remain the hub of the community.
106. Today, many of our traditional towns and shopping centres simply have too much retail space and Stoke-on-Trent's centres have clearly not been immune to the changes. As we go on to explore in greater detail in the remainder of the report, Hanley's comparison goods function has been significantly impacted by the loss of department store and fashion operators, and centres' vacancy rates have generally increased in recent years.
107. The critical challenge over the short, medium and long term will be how to retain existing businesses, fill/replace the voids, and attract new investment. The danger is that an increase in long-term vacancies in centres will lead to a 'spiral of decline', which will further engender feelings of neglect and lack of investment confidence in town centres, and 'push' more people to shop online.
108. As town centres evolve, residential provision in centres is already being encouraged and considerable residential development is being realised in and around Stoke-on-Trent's defined centres in the form of developments such as Smithfield (in Hanley) and Goods Yard (in Stoke).
109. Residential development is also encouraged by previous national planning changes (such as office to residential conversions through prior approval, and permitted development for two flats above a shop). In those cases where retail vacancies are long-term and concentrated in secondary shopping streets/pitches, it will be necessary to plan for alternative uses and/or consider options for redevelopment. As a result of the increasing drive towards more flexible planning through changes to the Use Classes Order and Permitted Development Rights, there will inevitably be more mixed-uses within centres. Once again, residential uses will often be a key use in driving large-scale mixed-use redevelopment. Such development should generally be supported by development plan policy.
110. Providing a mix of other town centre uses is also key to the success of centres and it will be important to ensure that the Hive leisure development in Hanley meets its full potential to help drive footfall within the centre both during the day and into the evening.
111. In smaller centres, the effect of national trends is more variable. This is partly because post-Covid working from home habits can have a positive impact on

centres which are focused around meeting day-to-day retail and service needs. The inclusion of a major foodstore is often an important determinant of the draw of a centre. Supporting smaller centres through increased residential development will also provide a dual benefit in meeting housing needs and increasing local footfall on the high street.

4. MARKET RESEARCH: IN-STREET SURVEY

112. Two principal types of market research have been undertaken to inform the Study; a household shopper survey across a defined Study Area and an in-street survey in Hanley city centre.
113. The in-street survey was undertaken by NEMS in July 2024 to understand how the city centre is used and identify those aspects of the centre that may benefit from improvement and change. Our survey is nearly identical to that undertaken by NEMS in Hanley in July 2018 to inform the 2019 RLS. In addition, some questions are comparable to those included in the NEMS in-street survey that was undertaken in Hanley in July 2013 as part of the 2014 Stoke-on-Trent City Council Retail and Leisure Study. We refer to previous survey results to consider changes over time where it is appropriate to do so.
114. A total of 116 surveys were undertaken at different times and on different days to ensure interactions with a variety of users. The surveys were completed at the following five locations:
 - Market Square
 - Albion Square;
 - Potteries Museum and Art Gallery;
 - Crown Bank/top of Piccadilly; and
 - outside the former Marks & Spencer unit on Upper Market Square.
115. The full tabulated survey results are provided in Volume 4. An overview of the key findings of the survey are provided below, focusing on customer satisfaction ratings, customer behaviour, and suggestions for improvement.

Purpose of Visit

116. Respondents were asked to identify the principal purpose of their visit to Hanley city centre. Whilst Hanley has a varied offer, the principal driver of trips, as identified in the below Table 3, is to undertake non-food shopping, which was cited by 52.6% of respondents as the principal driver of their visit. Interestingly, whilst a number of important national multiple comparison goods retailers have closed their stores in Hanley in recent years, the proportion of visitors identifying non-food shopping as the principal reason for their visit has increased since the previous survey was undertaken in 2018, when just 20.8% of respondents provided this response. However, it should be noted that a significant number of respondents to the 2018 survey (17.8%) identified that they visited Hanley to undertake both food and non-food shopping in tandem. Only 3.4% of respondents to the 2024 survey identified that the principal reason for their visit was to undertake both food and non-food shopping as part of the same trip.
117. The next most popular reasons to visit Hanley in 2024 were to have a stroll (identified by 18.1% of respondents), followed by visiting service providers (12.1%), and undertaking food shopping (11.2%).

118. Reference to both the previous 2018 and 2013 in-street surveys suggest the principal reasons to visit Hanley – i.e. to undertake shopping and to access services – have remained fundamental to its appeal. This is unsurprising. However, the importance of food shopping appears to have decreased over the past six years since the undertaking of the 2018 survey. This is perhaps reflective of a diminished city centre food shopping offer, which is most notably exemplified by the loss of the Marks & Spencer Foodhall due to the closure of its wider operation which traded from premises at Upper Market Square.

Table 3: Purpose of Visit to Hanley City Centre

Date of Survey	1st	2nd	3rd	4th
2024	Shopping for non-food items (52.6%)	To have a stroll (18.1%)	To use services (e.g. bank, post office and so on) (12.1%)	Shopping for food items only (11.2%)
2018	Shopping for non-food items (20.8%)	Shopping for both food and non-food items (17.8%)	Shopping for food items only (16.8%)	To have a stroll <i>and</i> To use services (e.g. bank, post office and so on) (both 11.9%)
2013	Clothes/shoe shopping (40.7%)	Financial services (15.7%)	To browse (10.2%)	Other non-food shopping (5.6%)

Source: Question 2 of NEMS July 2024 Stoke-on-Trent In-Street Survey; Question 2 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 11 of NEMS July 2013 Stoke-on-Trent In-Street Survey

Shopping Intentions

119. The survey also considered the frequency of respondents undertaking food and non-food shopping within Hanley city centre. The results in respect of food shopping are reflective of a limited grocery retail offer in Hanley.
120. As set out below at Table 4, just 22.4% of 2024 survey respondents undertake food shopping in Hanley once a week or more frequently, which compares to 44.5% of respondents in 2018. In practice, the proportion of respondents making weekly food purchases in Hanley has almost halved over the past six years.

Table 4: Frequency of Respondent's Visit for Food Shopping

Date of Survey	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Don't do this activity	Don't know
2024	6.0%	16.4%	12.9%	6.0%	12.9%	12.9%	32.8%
2018	6.9%	37.6%	3.0%	6.9%	8.9%	32.7%	4.0%
2013	Not available	Not available	Not available	Not available	Not available	Not available	Not available

Source: Question 5 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and Question 5 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

121. The in-street survey also identifies that there has been a general reduction in the frequency of respondents undertaking non-food shopping in Hanley city centre. Table 5 identifies that 19.9% of 2024 survey respondents undertake non-food shopping in Hanley once a week or more frequently, which compares to 29.7% of respondents in 2018. In addition, the proportion of respondents that don't undertake any non-food shopping in Hanley city centre has increased from 7.9% in 2018 to 13.8% in 2024.
122. Accordingly, whilst non-food shopping remains a critical component of the city centre's offer, it appears that visitors are undertaking this type of shopping less frequently. This is perhaps reflective of the diminished comparison goods offer within the centre and the further shift to online retailing which has occurred over the past six years.

Table 5: Frequency of Respondent's Visit for Non-Food Shopping

Date of Survey	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Don't do this activity	Don't know
2024	5.2%	14.7%	11.2%	9.5%	31.0%	13.8%	14.7%
2018	3.0%	26.7%	8.9%	5.9%	39.6%	7.9%	7.9%
2013	0.0%	33.3%	4.8%	19.0%	33.3%	0.0%	12.4%

Source: Question 6 of NEMS July 2024 Stoke-on-Trent In-Street Survey; Question 6 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 21 of NEMS July 2013 Stoke-on-Trent In-Street Survey

123. Visitors to Hanley also reported visiting the centre to undertake leisure activities on a less frequent basis. As the below Table 6 identifies, 27.8% of respondents to the 2018 survey reported visiting leisure attractions once a week or more. However, the corresponding figure dropped to just 6.6% in the 2024 survey.
124. As we go on to explore in greater detail in the Hanley health check assessment, the leisure offer within the city centre was greatly impacted by Covid and

associated 'lockdown' restrictions which resulted in a loss of activity and representation within the Hive scheme.

Table 6: Frequency of Respondent's Visit for Leisure Purposes

Date of Survey	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Don't do this activity	Don't know
2024	2.6%	6.0%	3.4%	4.3%	13.8%	17.2%	52.6%
2018	3.0%	24.8%	5.0%	5.9%	17.8%	33.7%	9.9%
2013	Not available	Not available	Not available	Not available	Not available	Not available	Not available

Source: Question 6 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 6 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Type of Leisure Facility Visited

125. By far the most popular leisure activity undertaken in Hanley city centre is the patronage of restaurants and cafés. Table 7 identifies that, of respondents who stated that they would undertake a leisure activity on the day of their visit, 51.3% of those interviewed expressed an intention to visit a restaurant or café. The next most popular response was to visit a pub, bar, nightclub or live music venue (identified by 20.5% of respondents), followed then by visiting the cinema (10.3%), and then to experience family entertainment (5.1%).
126. Whilst there has been a reduction of nearly 30 percentage points in terms of the proportion of leisure visitors going to a restaurant or café over the course of their visit, some of this reduction is offset by the increased proportion of respondents visiting a pub, bar, nightclub, or live music venue. Only 7.3% of leisure users identified that they were to visit such an attraction at the time of the 2018 survey, with this figure increasing to 20.5% in 2024.

Table 7: Leisure Facilities Respondent Intends to Visit

Date of Survey	1st	2nd	3rd	4th
2024	Restaurants/cafes (51.3%)	Pub/bar/nightclub/live music venue (20.5%)	Cinema (10.3%)	Family entertainment (5.1%)
2018	Restaurants/cafes (80.5%)	Takeaway food and Walk about (both 12.2%)	-	Museum (9.8%)
2013	Not available	Not available	Not available	Not available

Source: Question 9 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and Question 9 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Amount Spent on Different Activities

127. There is a significant variation in the results of the 2024 and 2018 in-street surveys in terms of respondents' average spend on food and non-food shopping, and on leisure activities, whilst visiting Hanley city centre. In considering the results of the survey, it should be noted that the 2024 and 2018 survey methodology is different in that the current survey provided additional options to respondents in respect of the recording of responses within expenditure 'ranges'. It should also be noted that the responses do not take into consideration inflation, which has been particularly significant in respect of food and grocery goods over the past six years.
128. Notwithstanding this caveat, it is evident from Table 8 that the average level of food and grocery expenditure during respondents' visits to the centre increased from £7.70 in 2013 to £14.63 in 2018, and then significantly to £49.88 in 2024. The increase reflects the fact that 12.0% of respondents indicated that they intended to spend more than £100 on food purchases over the course of their visit in 2024, which compares to just 1.3% of respondents spending more than £100 in 2018. This level of expenditure within the centre may be somewhat atypical and the results should be viewed in this context.
129. The survey has also identified that the amount respondents typically spend on eating and drinking out increased over the six years to 2024. The 2018 in-street survey found that the average expenditure on eating and drinking amounted to £6.00 and the results of the 2024 survey suggest that this has more than doubled to £12.96. Conversely, the expenditure directed to non-food goods purchases decreased from £33.40 in 2013, to £18.97 in 2018, and to £13.39 in 2024. The amount of expenditure directed to non-food retailing is perhaps reflective of Hanley's diminished comparison goods offer and the reduced number of national multiple operators.

Table 8: Goods Respondent Intends to Purchase

Date of Survey	Food and grocery	Non-food goods	Eating/drinking out
2024	£49.88	£13.39	£12.96
2018	£14.63	£18.97	£6.00
2013	£7.70	£33.40	Not available

Source: Question 9 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and Question 9 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

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

Travel and Car Parking

130. As anticipated, the most popular mode of travel to Hanley city centre remains the car. However, whilst the car accounted for almost half of all journeys in 2013 and 2018, it now accounts for less than a third in 2024 (31.9%). Furthermore, whilst the bus/coach remains the second most popular means of travelling to the centre, this too accounts for a lesser proportion of journeys than previously recorded. The proportion of visitors travelling by bus/coach declined by 7.4 percentage points, accounting for 37.6% of visitors in 2018 and 30.2% of visitors in 2024.
131. As identified below at Table 9, the reduction in motorised travel is attributable to a significantly higher proportion of visitors travelling into the centre on foot. The proportion of visitors walking to the centre increased from 9.9% in 2018 to 25.9% in 2024. This may be attributable (at least in part) to the centre's catchment area becoming more localised as its comparison goods offer has declined. This means that the centre becomes more 'walkable' to a greater proportion of respondents. Additional residential development in and around the centre also supports trips on foot.

Table 9: Most Popular Mode of Travel

Date of Survey	1st	2nd	3rd	4th
2024	Private car (31.9%)	Bus/coach (30.2%)	On foot (25.9%)	Taxi (7.8%)
2018	Private car (48.5%)	Bus/coach (37.6%)	On foot (9.9%)	Taxi (3.0%)
2013	Private car (47.2%)	Bus/coach (37.0%)	On foot (12.0%)	Taxi (1.9%)

Source: Question 12 of NEMS July 2024 Stoke-on-Trent In-Street Survey; Question 12 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 5 of NEMS July 2013 Stoke-on-Trent In-Street Survey

132. Changes in respect of how Hanley city centre is used also appear to have resulted in changes in the use of car parking. Table 10 identifies that 18.9% of 2024 survey respondents use in-street car parking spaces. The most popular car park is currently at the Tesco Extra store at Clough Street. This car park was used by 16.2% of 2024 survey respondents who parked their car on the day of visit; this is almost identical to the result of the 2018 survey, which found that 16.3% of respondents who parked their car used the Tesco Extra car park.

Table 10: Most Popular Place to Park

Date of Survey	1st	2nd	3rd	4th
2024	In-Street (18.9%)	Tesco Extra, Clough Street (16.2%)	Potteries Centre (13.5%)	Festival Heights Retail Park <i>and</i> Broad Street <i>and</i> Lichfield Street (all 5.4%)

Date of Survey	1st	2nd	3rd	4th
2018	Intu Potteries (49.0%)	Tesco Extra, Clough Street (16.3%)	Don't know (8.2%)	Dropped off (6.1%)
2013	Intu Potteries (35.3%)	Tesco Extra, Clough Street (17.6%)	On-street (13.7%)	Dropped off (11.8%)

Source: Question 13 of NEMS July 2024 Stoke-on-Trent In-Street Survey; Question 13 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Question 4 of NEMS July 2013 Stoke-on-Trent In-Street Survey

133. The most significant change relates to the reduced popularity of the Potteries Centre car park. In 2018, 49.0% of respondents who parked a car used this car park. However, in 2024 just 13.5% of respondents who parked their car on the day of the survey used the Potteries Centre.
134. The popularity of the Potteries Centre car park increased between 2013 and 2018 which may have been attributable (in part) to the Hive leisure scheme. However, both the Hive and the Potteries Centre have been subject to challenging trading conditions in recent years which perhaps explains the reduced popularity of the car park amongst motorists.

Reasons for Choosing to Visit the Centre

135. Table 11 identifies the most popular reasons that influenced the respondent to visit the centre on the day of the survey. As is often the case, the most popular reason for choosing to visit the particular centre is that it is close to home, which was cited by 33.3% of respondents. This represents a reduction from the figure recorded in 2018 (when 51.5% of respondents provided this answer) and in 2013 (48.1%).
136. The second most popular response provided is to visit to a particular shop (cited by 19.0% of respondents). Three responses then follow in third place. These comprise: visiting arts and heritage attractions; the centre being close to work; and, the variety of shopping available. Each of these responses was identified by 6.9% of respondents.
137. The attraction of markets in Hanley is apparently diminished, with only 3.4% of respondents providing this answer which compares to 12.9% of respondents in 2018.

Table 11: Reasons for the Visit

Date of Survey	1st	2nd	3rd	4th
2024	Close to home (33.6%)	Visit a particular shop (19.0%)	Arts and heritage attractions <i>and</i> Close to work <i>and</i> Variety of	-

Date of Survey	1st	2nd	3rd	4th
			shopping (all 6.9%)	
2018	Close to home (51.5%)	Market and Variety of shopping (both 12.9%)	-	Visit a particular shop (9.9%)
2013	Close to home (48.1%)	Choice of High Street retailers (9.3%)	Choice of shops selling non-food goods (8.3%)	Close to friends/family (6.5%)

Source: Question 15 of NEMS July 2024 Stoke-on-Trent In-Street Survey; Question 15 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Table 4.10 of 2019 RLS

Duration of Visit

138. The survey suggests that the duration of respondents' visits has increased slightly over the past six years. As set out at Table 12 below, the 2018 survey suggested that the average duration of trips to the centre was 88 minutes. However, the current survey suggests that visitors spend, on average, around 109 minutes in the centre. The results are broadly similar across all three age groups, albeit those who are more advanced in age (55 plus) spend the least time in the centre across a single visit (with the average visit lasting 100 minutes for respondents in this category).

Table 12: Average Length of Time Spent in the Centre

Date of Survey	Age 18 to 34	Age 35 to 54	Age 55 plus	Total
2024	106 minutes	112 minutes	100 minutes	109 minutes
2018	110 minutes	91 minutes	72 minutes	88 minutes
2013	Not available	Not available	Not available	Not available

Source: Question 15 of NEMS July 2024 Stoke-on-Trent In-Street Survey; Question 15 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey; and, Table 4.10 of 2019 RLS

Visitor Satisfaction Ratings

139. Respondents were asked a series of questions in respect of how the attributes of each centre compare to other centres that the respondent visits. Responses have been recorded on a sliding scale ranging from 'very good' to 'very poor' (with 'quite good', 'neither good nor poor', and 'quite poor' in between). In order to present the results in a concise manner, we have attributed a mean average score to each criteria, based on the responses received. In each case, a respondent providing a 'very good' response results in a score of five, going down to a score of one for a

‘very poor’ response. This is the same scoring system NEMS previously used in reporting the July 2018 in-street survey results.

Accessibility

140. In general, respondents are less favourable in their assessment of the accessibility of Hanley city centre compared to six years ago. In most cases, respondents rated various accessibility criteria as being ‘neither good nor poor’ which corresponds to a score of 3.
141. The highest score in respect of accessibility was awarded to the centre’s accessibility by car (with a score of 3.5) followed then by the availability of car parking (3.4), and then by parking charges and traffic congestion (both of which scored 3.0). Each factor is the subject of a deterioration in its score relative to the position reported by the 2018 survey.

Table 13: Respondents’ Satisfaction with Accessibility Factors

Date of Survey	Accessibility by car	Availability of parking	Parking charges	Traffic congestion	Accessibility by public transport
2024	3.5	3.4	3.0	3.0	3.4
2018	4.7	4.7	3.7	3.8	4.1
2013	Not available	Not available	Not available	Not available	Not available

Source: Question 19 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Shopping Facilities

142. In respect of shopping facilities, visitors’ responses once again suggest that they are less satisfied in respect of the quality of Hanley’s offer. In respect of all six factors set out at Table 14 there has been a material decline in respondents’ satisfaction. Three criteria – namely the range of non-food shops, the quality of non-food shops, and the quality of food shops – were the subject of a reduction in score of 1.1 in respect of their satisfaction rating. As outlined in greater detail in the Hanley health check assessment, the ratings are consistent with a loss of retail function across the city centre, with the non-food (comparison goods) sector being particularly impacted.
143. Only 8.6% of 2024 survey respondents considered the range of non-food shops in Hanley to be very good, and only 9.5% reported the quality of non-food shops to be very good. This compares to respective figures of 53.5% and 54.5% at the time of the 2018 survey.
144. A similar position is evident in respect of food shopping. Just 7.8% of 2024 survey respondents identified that the range of food shops in Hanley is very good, and just 3.4% considered the quality of food shops to be very good. The comparable figures in 2018 were 35.6% and 44.6%.

Table 14: Respondents' Satisfaction with Shopping Facilities

Date of Survey	Range of non-food shops	Quality of non-food shops	Range of food shops	Quality of food shops	Range of warehousing/ retail parks	Market
2024	3.2	3.3	3.2	3.2	3.2	3.2
2018	4.3	4.4	3.9	4.3	4.0	4.0
2013	Not available	Not available	Not available	Not available	Not available	Not available

Source: Question 19 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Leisure Facilities

145. An even greater decline in respondents' satisfaction ratings was recorded when visitors were questioned about Hanley's leisure facilities.
146. In 2018, the satisfaction score for daytime leisure facilities, evening leisure facilities, theatres and cinemas was well above 4 for each. This indicates that a very high proportion of respondents rated such facilities as being 'very good'.
147. The satisfaction rating for each type of leisure provision is significantly reduced in 2014. The most significant reductions relate to evening entertainment (which reduced from a 4.8 rating in 2018 to 3.4 in 2024) and theatres (4.8 to 3.4).
148. In considering the satisfaction ratings set out at Table 15, it is relevant to note that cinema and theatre provision has remained consistent in Hanley city centre over the past six years, with key attractors including Cineworld (within the Hive development), Regent Theatre, and Victoria Hall. Accordingly, the reduction in rating may reflect respondents' perceptions of programming at these facilities. In the case of cinema provision, perceptions may also have been impacted by the challenging trading conditions at the Hive, which have resulted in food & beverage operators closing within the scheme. There is a lesser level of activity around the Cineworld cinema as a result and visiting the cinema is therefore potentially a less pleasurable activity.

Table 15a: Respondents' Satisfaction with Leisure Facilities

Date of Survey	Daytime entertainment and leisure facilities	Evening entertainment and leisure facilities	Theatres	Cinemas	Events
2024	3.1	3.1	3.4	3.4	3.0
2018	4.3	4.6	4.8	4.7	3.6
2013	Not available	Not available	Not available	Not available	Not available

Source: Question 19 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Table 15b: Respondents' Satisfaction with Leisure Facilities

Date of Survey	Liveliness, street life and character	Quality and number of places to eat and drink
2024	2.9	3.2
2018	3.7	4.1
2013	Not available	Not available

Source: Question 19 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Environment

149. Respondents' ratings also suggest a lesser level of satisfaction with Hanley's built environment in 2024 compared to 2018. In viewing satisfaction ratings, it should be noted that significant public realm works had recently been completed in Hanley in 2018 and that these improvements would have assisted in providing a favourable impression to visitors.
150. In this context, there has been a notable reduction in respect of the satisfaction ratings in respect of the general shopping environment, the attractiveness of the built environment, planting and landscape, and visitors' perception of safety. For each of these factors, the 2024 satisfaction rating is close to 3 which equates to the factor being 'neither good nor poor'. However, in 2018, a majority of respondents rated these two factors as either being 'quite good' or 'very good'.
151. It is considered that Hanley's high vacancy rate together with a number of hoarded development sites likely impacts on visitors' perceptions of the centre. Furthermore, the closure of key stores within the centre is impacting on visitor numbers and on footfall on particular streets. This lesser level of activity brings with it issues in respect of activity, surveillance, and the perception of safety.

Table 16: Respondents' Satisfaction with the Environment of the Centre

Date of Survey	General shopping environment	Attractiveness of built environment	Planting/ Landscape	Layout of centre	Public toilets	Personal safety
2024	3.1	2.9	2.9	3.3	2.8	3.0
2018	4.1	3.5	3.6	3.5	3.2	3.8
2013	Not available	Not available	Not available	Not available	Not available	Not available

Source: Question 19 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 19 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Suggested Improvements to the Centre

152. Respondents were asked for their views in terms of how each of the centres could be improved. In general, there was a greater range of responses to this question in 2024 compared to 2018.
153. Accordingly, whilst the desire to make the centre safer has moved from the third most popular response in 2018 to the most popular in 2024, the proportion of respondents providing this response is almost identical (21.8% of respondents in 2018 compared to 22.4% in 2024).
154. The second most popular suggestion to improve the centre identified by respondents in 2024 is to increase the range of local/speciality retailers (cited by 19.8% of respondents), followed then by a need to increase the range of national multiple retailers (19.0%, and then by the need to improve the appearance of the centre (18.1%).
155. It is notable that just 3.0% of respondents to the 2018 survey identified a need to improve the national multiple offer within the centre. Once again, respondents' concern in respect of the national multiple offer reflects the loss of some key retailers from Hanley city centre in recent years, including Debenhams, Marks & Spencer, Topshop and Topman.

Table 17: Most Popular Suggestions to Improve the Centre

Date of Survey	1st	2nd	3rd	4th
2024	Make the centre safer (more CCTV, policing, better lighting, etc) (22.4%)	Increase the range of local/speciality retailers (19.8%)	Increase the range of national/multiple chain stores (19.0%)	Improve the appearance of the centre (18.1%)
2018	Increase the range of local/speciality retailers (25.7%)	Nothing in particular (22.8%)	Make the centre safer (21.8%)	Improve the appearance of the centre (16.8%)
2013	Not available	Not available	Not available	Not available

Source: Question 20 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 20 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

156. Respondents were also asked to consider specific types of shops and services that the respective centres would benefit from. As Table 18 identifies, almost four out of every ten respondents (37.9%) in Hanley failed to identify any specific shops or service, with the most popular responses being the need for more high street names (cited by 22.4% of respondents), followed then by clothing stores (9.9%), and then department stores (16.4%).
157. Once again, there is a marked difference with the results of the 2018 survey, where respondents' principal concern was to encourage additional independent

and specialist shops. Just 2.0% of respondents in 2018 requested more high street names, and only 5.9% requested more clothing stores.

Table 18: Shops and Services to Improve the Centre

Date of Survey	1st	2nd	3rd	4th
2024	None mentioned or didn't know (37.9%)	High street names (22.4%)	Clothing stores (17.2%)	Department stores (16.4%)
2018	None mentioned or didn't know (49.5%)	Independent/specialist shops (18.8%)	Department stores (9.9%)	Public amenities (7.9%)
2013	Not available	Not available	Not available	Not available

Source: Question 21 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 21 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

158. The vast majority of respondents to both the 2018 and 2024 surveys failed to identify any additional leisure facilities required within the centre that they were visiting. As set out below at Table 19, 62.9% of respondents failed to identify any requirements in respect of additional leisure provision in Hanley.
159. The most popular suggestions were the need for entertainment and activities for young people (cited by 9.5% of respondents) followed then by further cinema provision and outdoor events (both of which were identified by 8.6% of respondents).

Table 19: Leisure Facilities to Improve the Centre

Date of Survey	1st	2nd	3rd	4th
2024	None mentioned or didn't know (62.9%)	Entertainment/activities for young people (9.5%)	Cinema <i>and</i> Outdoor events (both 8.6%)	-
2018	None mentioned or didn't know (68.0%)	Outdoor events (10.0%)	Entertainment/activities for young people <i>and</i> Parks and gardens (both 9.0%)	-
2013	Not available	Not available	Not available	Not available

Source: Question 22 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 22 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Markets

160. In total, 27.6% of respondents to the 2024 in-street survey expressed a firm intention to visit one of Hanley's markets over the course of their visit. This compares to 42.6% of respondents intending to visit a market in 2024.
161. The survey indicates that 25.6% of respondents in Hanley intended to go to the indoor market in the Potteries Centre (previously 37.6% in 2018), 12.1% intended to go to the Fountain Square outdoor market (previously 12.9% in 2018), and 12.1% intended to go to the Market Square outdoor market (previously 11.9% in 2018). Whilst the markets remain an important part of Hanley's offer, the attraction of the indoor market in the Potteries Centre appears to have diminished since 2018.
162. Furthermore, as the below Table 20 identifies, those respondents who do visit the markets are doing so on a less frequent basis. In Hanley, 25.0% of those using the Potteries Centre indoor market do so once a week or more; this compares to 73.7% visiting once a week or more in 2018. A substantial proportion of users of the outdoor markets at Market Square and Fountain Square visit less than once a month.

Table 20: Frequency of Respondent's Visit to Market

Market/ Date	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Don't know
2024 – Hanley Indoor Market	3.1%	21.9%	6.3%	15.6%	50.0%	3.1%
2024 – Hanley Market Square	0.0%	7.1%	0.0%	0.0%	50.0%	42.9%
2024 – Hanley Fountain Sq	0.0%	0.0%	0.0%	0.0%	64.3%	35.7%
2018 – Hanley Indoor Market	10.5%	63.2%	5.3%	2.6%	15.8%	2.6%
2018 – Hanley Market Square	8.3%	58.3%	0.0%	16.7%	8.3%	8.3%
2018 – Hanley Fountain Sq	7.7%	53.8%	15.4%	7.7%	7.7%	7.7%

Source: Question 24 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 24 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

163. In terms of the factors that respondents like about the markets, the most popular attributes at the indoor market at the Potteries Centre are the freshness of the food and the variety of goods (both of which were cited by 31.3% of respondents).
164. As identified below at Table 21, the joint third most popular attributes are the market's friendly atmosphere and the fact that everything is on one level (both of which were identified by 21.9% of respondents). Respondents struggled to identify positive attributes in relation to the Market Square and Fountain Square markets.

Table 21: Aspects of Markets Respondents Particularly Like

Market/Date	1st	2nd	3rd	4th
2024 – Hanley Indoor Market	Freshness of food <i>and</i> The variety (both 31.3%)	-	Friendly atmosphere <i>and</i> All on one level (both 21.9%)	-
2024 – Hanley Market Sq	Don't know (50.0%)	Nothing (35.7%)	Everything (14.3%)	-
2024 – Hanley Fountain Sq	Don't know (57.1%)	Nothing (28.6%)	Everything (14.3%)	-
2018 – Hanley Indoor Market	Freshness of food (23.7%)	All on one level (18.4%)	Friendly atmosphere <i>and</i> The café (both 13.2%)	-
2018 – Hanley Market Sq	Freshness of food <i>and</i> Friendly atmosphere <i>and</i> Value for money (all 33.3%)	-	-	All on one level <i>and</i> Quality of food (both 16.7%)
2018 – Hanley Fountain Sq	Value for money (46.2%)	Freshness of food (30.8%)	All on one level <i>and</i> Friendly atmosphere (both 23.1%)	-

Source: Question 25 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 25 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

165. Table 22 identifies the factors that respondents most dislike about the markets. Whilst the majority of respondents did not highlight any particular concerns, the two principal issues identified in respect of the Potteries Centre indoor market

relate to there not being enough stalls (identified by 25.0% of respondents) and there being too many empty stalls/too many stalls closing down (15.6%).

Table 22: Aspects of Markets Respondents Particularly Dislike

Market/Date	1st	2nd	3rd	4th
2024 – Hanley Indoor Market	Nothing (46.88%)	Not enough stalls (25.0%)	Empty stalls/stalls closing down (15.6%)	Don't know (9.4%)
2024 – Hanley Market Sq	Don't know (42.9%)	Nothing (28.6%)	Poor quality environment <i>and</i> Poor value for money <i>and</i> Not enough stalls <i>and</i> Litter (all 7.1%)	-
2024 – Hanley Fountain Sq	Don't know (50.0%)	Nothing (28.6%)	Poor quality environment <i>and</i> Poor value for money <i>and</i> Not enough stalls (all 7.1%)	-
2018 – Hanley Indoor Market	Empty stalls/stalls closing down (50.0%)	Not enough stalls (36.8%)	Nothing (34.2%)	Too many stalls selling the same goods (13.2%)
2018 – Hanley Market Sq	Nothing (50.0%)	Not enough stalls (33.3%)	Empty stalls/stalls closing down (25.0%)	Not big enough and Too many stalls selling the same goods (both 8.3%)
2018 – Hanley Fountain Sq	Nothing (53.8%)	Empty stalls/stalls closing down and Not enough stalls (both 23.1%)	-	Not big enough (15.4%)

Source: Question 26 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 26 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Safety and Security

166. Table 23 summarises respondents' views in respect of their perceived safety both during the day and into the evening. Whilst the majority of respondents' feel safe walking around Hanley city centre during the daytime, only 18.1% of respondents feel safe walking around at night.
167. A higher proportion of respondents in 2024 identified that they feel generally safe in the centre compared to 2018. However, when respondents were asked directly about whether they felt safer in the centre than they did five years ago, only 25.9% identified that they felt safer in the centre. A greater proportion – 36.2% of respondents – indicated that they felt less safe than five years ago.

Table 23: Perceptions of Safety

	2024	2024	2024	2018	2018	2018
Question	Yes	No	Don't know	Yes	No	Don't know
2024 – Do you generally feel safe walking around?	83.6%	12.1%	4.3%	68.3%	28.7%	3.0%
2024 – Do you generally feel safe walking around at night?	18.1%	58.6%	23.3%	17.8%	26.7%	55.4%
2024 – Do you feel safer than you did five years ago?	25.9%	36.2%	37.9%	18.8%	35.6%	45.5%

Source: Questions 31, 32 and 33 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Questions 31, 32 and 33 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

168. Table 24 summarises the views of respondents in terms of factors that may help engender a greater feeling of safety and security. In this regard, the most influential factor in improving safety was considered to be an increase in policing or patrolling, which was recognised by 76.7% of respondents as being beneficial in improving security in Hanley city centre. The second most influential identified factor is the increased use of CCTV cameras, which was cited by 69.8% of respondents followed then by improved street lighting (62.1%). These two factors were identified by a significantly higher proportion of respondents as being in need of improvement when compared to the position in 2018.

Table 24: Perceptions of Safety

	2024	2024	2024	2018	2018	2018
Factor	Yes	No	Don't know	Yes	No	Don't know
Increased policing/patrolling	76.7%	9.5%	13.8%	76.2%	15.8%	7.9%
Increased CCTV use	69.8%	13.8%	16.4%	42.6%	34.7%	22.8%
Improved street lighting	62.1%	13.8%	24.1%	33.7%	41.6%	24.8%
Fewer pubs/clubs etc	14.7%	56.9%	28.4%	19.8%	56.4%	23.8%
More people living in the centre	28.4%	37.1%	34.5%	8.9%	56.4%	34.7%
More secure car parks	22.4%	30.2%	47.4%	33.7%	42.6%	23.8%
Removal of shrubs/street furniture	6.9%	53.4%	39.7%	2.0%	81.2%	16.8%

Source: Question 34 of NEMS July 2024 Stoke-on-Trent In-Street Survey; and, Question 34 of NEMS July 2018 Hanley and Newcastle-under-Lyme In-Street Survey

Summary

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

- the principal reason to visit the city centre remains to go shopping for non-food goods, which given the loss in comparison goods retail representation in Hanley city centre, underlines the need for the centre to both diversify but to also retain a critical mass of retailers to attract visitors and underpin footfall;
- most respondents undertake some food shopping within the city centre, but there is a lesser propensity to do this on a regular basis relative to the position in 2018 (only 22.4% of respondents in 2024 indicated that they undertake food shopping within the centre once a week or more frequently);
- similarly, whilst most respondents undertake non-food shopping to some degree within the city centre, visitors are less inclined to do this on a frequent basis compared to 2018 (only 19.9% of respondents indicated that they undertake non-food shopping within the centre once a week or more frequently);
- trips to visit leisure provision within the city centre appear to have reduced significantly with just 8.6% of respondents indicating that they visit once a week or more to indulge in leisure pastimes compared to 27.8% in 2018;
- more than half of respondents indicated that their favoured leisure activity in Hanley was eating out at cafes and restaurants;
- the survey results suggest that the average level of food and grocery expenditure in Hanley city centre per visit has increased significantly since the time of the previous survey (albeit some of this increase is attributable to

inflation) but the average level of non-food expenditure per visit has decreased;

- in terms of respondents' mode of travel, travelling by car remains the most popular means by which to access the centre but this has become less popular over the past six years whilst walking has become more popular;
- respondents are typically spending a little longer in Hanley and there appears to be some link between the average length of visit and the age of respondents (older respondents on average spend less time in the centre);
- in terms of visitors' satisfaction with the city centre, the centre scored less well in respect of all factors (relative to the results of the 2018 survey) including those related to the accessibility of the centre, the strength of shopping facilities, the strength of leisure facilities, and the quality of the built environment;
- in terms of potential improvements to Hanley city centre, respondents identified a need to make the centre safer, to increase the range of both local and national multiple retailers, and to improve the appearance of the centre;
- in addition, a particular need has been identified to attract further high street names, clothing stores and department stores to Hanley;
- the survey identified that respondents have a lesser propensity to visit Hanley's markets during their visit;
- the most commonly identified issues associated with the Potteries Centre indoor market are that there are not enough stalls and that stalls are empty or closing down; and
- there is an increased general perception (relative to the position established by the 2018 survey) that Hanley city centre is not particularly safe and secure after dark.

5. MARKET RESEARCH: CATCHMENT, HOUSEHOLD SURVEY AND MARKET SHARES

170. This section first explains the Study Area ('catchment') which has been defined to represent the area from which retail and leisure facilities in Stoke-on-Trent principally draw trade. It then sets out the headline results of the household survey in respect of where households usually shop for different types of convenience (principally food) and comparison (non-food) goods.

Study Area Definition

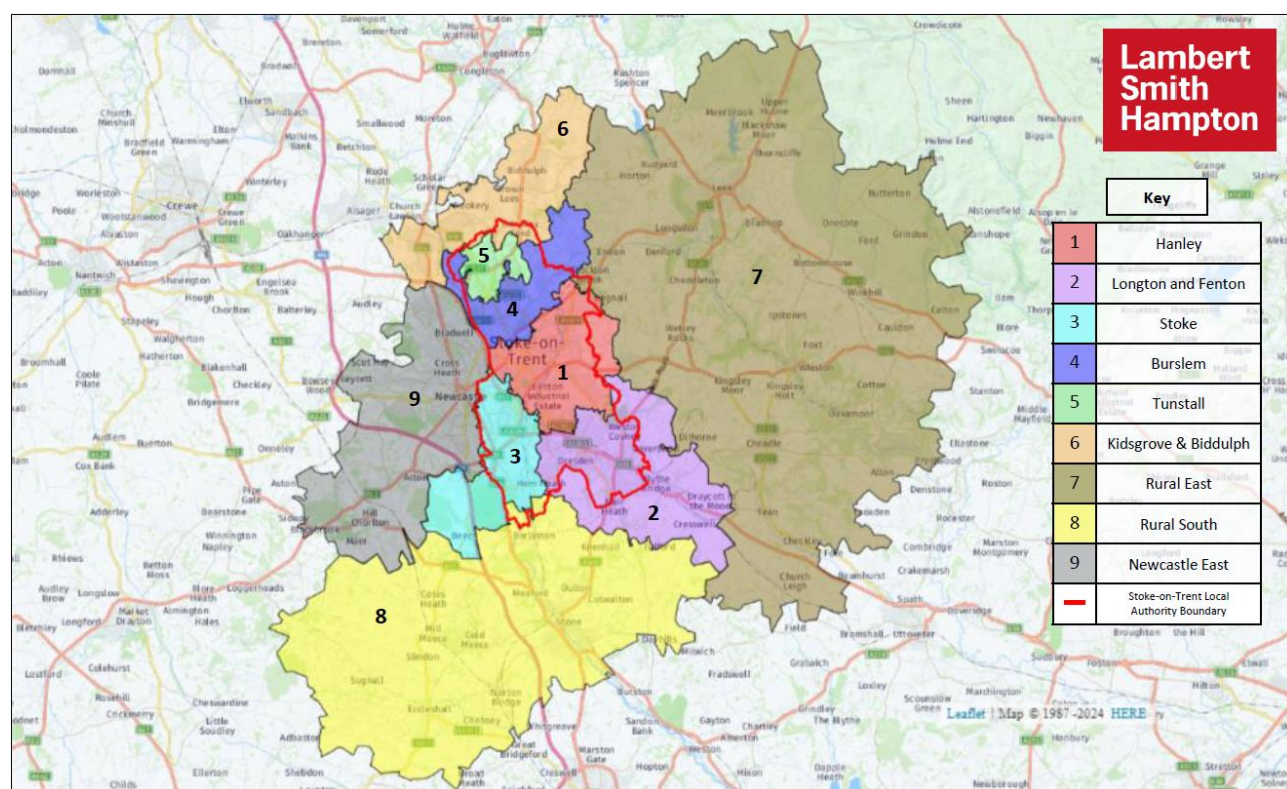
171. The definition of an appropriate Study Area is an important starting point for retail and town centre assessments. It provides the framework for the household telephone interview survey and the retail capacity analysis.
172. The Study Area and zones are derived from postcode sector areas. Their composition is informed by the approach taken by the 2019 RLS, albeit this Study sought to understand shopping and leisure use patterns across both Stoke-on-Trent and Newcastle-under-Lyme (and beyond). As a consequence of the current Study relating solely to the Stoke-on-Trent authority area, we have defined a more consolidated and focused Study Area.
173. Our approach has involved:
- removing the most westerly and distant zones associated with the 2019 RLS (Zones 2, 11 and 13 of the previous Study); and
 - consolidating two small northerly zones to form a single new zone (Zones 7 and 8 of the previous Study have been combined to form Zone 6 of the revised Study Area).
174. These changes reduce the previous 13 zones down to nine zones. The nine zones are considered to be reflective of the area which looks to facilities in Stoke-on-Trent to meet a significant proportion of their retail and leisure needs. The Study Area therefore covers the City of Stoke-on-Trent in its entirety but also incorporates parts of neighbouring local authority areas.
175. Our market research sub-consultant, NEMS, has undertaken a total of 1,151 household surveys. This is comprised of a minimum of 100 surveys in all zones with additional surveys in the more populous Zones 1, 2, 6, 7 and 9.
176. The below Table 25 confirms the composition of each zone with reference to postcode sector areas. Figure 10 then illustrates the full extent of the Study Area and the associated zones.
177. The methodology and full 'weighted' survey results are provided at Volume 4. Responses are weighted to reflect the population profile in each zone. As such, the results are understood to provide a broad, representative indication of the market shares of retail and leisure destinations across the Study Area.
178. The household survey results are used to populate LSH's in-house CREATE economic model which forecasts convenience and comparison goods floorspace

requirements to 2040.

Table 25: Study Zones and Postcode Sectors

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

Figure 10: Study Area and Zones



179. The CREATE model is presented at Volume 2. The market share data which underpins the model is summarised below following our initial review of the profile of key retail destinations.

Stoke-on-Trent's Principal Centres and Competition Profile

180. Volume 3 of this Study provides detailed health checks for the seven principal

centres in Stoke-on-Trent. Health check summaries in the form of SWOT reports are provided in Section 6 of this report. In order to provide a context for our market share analysis, we briefly confirm the key attributes of the seven centres below.

- **Hanley city centre** was identified as the Tier 1 'Strategic Centre' by the 2019 RLS. It is the focus for national multiple retail provision in the authority area, which is primarily congregated in the Potteries Centre (formerly known as Intu Potteries). Notwithstanding this, the strength of the Potteries Centre offer has been impacted in recent years through the loss of key retailers including Burton's, Debenhams, Dorothy Perkins, Miss Selfridge, Next, Topman, and Topshop. Key retailers which remain in the centre include Flannels, H&M, JD Sports, New Look, and Primark. Convenience goods retail provision within the centre is considered poor for a centre of its size.

The centre accommodates an indoor market at the Potteries centre, and outdoor markets at Fountain Square and Market Square.

As a consequence of the wider restructuring across the retail sector, Hanley's vacancy rate has increased and redevelopment schemes (most notably the Etruscan Square opportunity) have stalled. There is a lesser level of activity across the centre and a perceived issue in respect of anti-social behaviour.

More positively, Hanley's overall offer is bolstered by the presence of key leisure anchors, including Regent Theatre, Victoria Hall (a concert venue), and the Cineworld cinema within the Hive leisure development. The centre also accommodates the Potteries Museum & Art Gallery.

- **Longton town centre** is one of Stoke-on-Trent's larger centres and is located approximately 4.7 kilometres to the south west of Hanley city centre. It was identified as a Tier 2 'Larger Town Centre' by the 2019 RLS. The A50 wraps around the southern border of the centre which supports its connectivity by car, whilst the bus station to the north west of the centre and the train station just beyond the centre boundary provide key transport hubs.

Longton Exchange Shopping Centre is located at the heart of the town centre. It accommodates a good range of convenience and comparison goods retailers such as Boots, Heron Foods, Iceland, Poundland, and Specsavers. Longton's overall offer is also bolstered by Phoenix Retail Park (which includes retailers such as Argos, Boots, Home Bargains and Next), and Tesco Extra which lie to the north west of the defined boundary of the centre. The centre itself accommodates Longton Market which is located along The Strand and is open every Wednesday, Friday and Saturday.

Whilst the centre has a good, rounded retail offer its leisure service sector and associated evening economy are limited with representation being well below national average level.

- **Stoke town centre** is situated approximately 2 kilometres to the south of Hanley city centre. It is identified as a Tier 2 'Larger Town Centre' by the 2019 RLS. However, its offer is based around day-to-day retail and service uses. This is reflected in a relatively high proportion of commercial floorspace being

in convenience goods retail use and a relatively low proportion being in comparison goods use. The strong convenience goods offer is underpinned by the presence of both Lidl and Sainsbury's within the centre boundary.

A high proportion of units within the centre are vacant and a good number are occupied by leisure service uses. This includes a number of fast food and take-away outlets (12 operators) and cafes (10 operators).

- **Tunstall town centre** was identified as a Tier 2 'Larger Town Centre' by the 2019 RLS and is located around 4 kilometres from Hanley city centre in the north of the authority area. High Street is the focal point of Tunstall with Tunstall Market one of its main features, whilst larger format retail units to the east of the centre and just beyond the defined eastern boundary (Alexandra Park) now make up a significant part of the area's draw. Large format convenience retail provision can also be found just beyond the southern edge of the centre, with Asda and Aldi both accessible from the A5271.

The larger format retail units support a range of household multiples and the traditional smaller-scale retail premises along and adjacent to High Street generally support independent retailers and service providers. There is a relatively high proliferation of vacant units in the centre part of the centre. This, allied with limited investment in the building stock, impacts on the environmental quality of the centre, which could be improved. The centre also has a limited food & beverage offer that is dominated by fast-food and takeaway outlets.

- **Burslem town centre** is located approximately 2.5 kilometres to the north of Hanley city centre and was identified as a Tier 3 'Smaller Town Centre' by the 2019 RLS. It is often considered to be the most attractive centre in the authority area, which is reflected in its designation as a conservation area and the number of listed buildings it accommodates. Despite the attractiveness of the centre, it is also the subject of a high vacancy rate.

Burslem's retail offer is relatively moderate and is focused around day-to-day convenience and comparison goods retail, supplemented by a selection of niche specialist retailers. Few national multiples have representation within the centre and there is no market.

However, Burslem is relatively well provided for in respect of its food & beverage offer, and it is therefore considered to have a reasonable evening economy for a centre of its size.

- **Fenton town centre** is located approximately 2.8 kilometres to the south of Hanley city centre. It is a moderately-sized centre, which is focused around the intersection of City Road and Christchurch Street. It was identified as a Tier 3 Smaller Town Centre by the 2019 RLS.

The centre accommodates a range of niche comparison goods retailers and day-to-day service providers. Whilst there are few national multiple retailers, a focus of activity is the Co-op Food convenience store on Christchurch Street. The centre also has a limited leisure service economy, which is principally

focused around traditional pubs (there are no restaurants located within Fenton town centre).

- **Meir town centre** is the most easterly town centre in Stoke-on-Trent and is located approximately 7 kilometres from Hanley city centre. The centre is located at the intersection of the A50 Uttoxeter Road and Weston Road/Sandon Road. Although the A50 dual carriageway passes through a tunnel in this location, the character and function of the centre is impacted by its proximity to significant highways and the volume of local traffic.

Meir town centre is of modest scale and is focused around meeting day-to-day needs. As such, the centre has above average representation in respect of convenience goods retail provision and below average representation in respect of comparison goods retail provision. The centre accommodates 14 fast food and take-away uses which represents 18.7% of commercial units (significantly above the national average level of provision).

181. In addition to the above, Festival Retail Park provides large floorspace units, which support an extensive range of national multiples. These include Argos, B&Q, Boots, JD Sports, New Look, Next, Poundland, River Island, and so on. The retail park is located to the west of Hanley city centre. Given the restructuring of the retail sector, some retailers are choosing to locate at Festival Retail Park instead of operating stores at both the Retail Park and Hanley city centre. Due to the scale of the Retail Park and the abundance of free car parking, it is a very popular destination serving the same catchment area as the city centre.
182. The catchment is also served by:
 - Newcastle-under-Lyme town centre;
 - Wolstanton Retail Park (which accommodates a large Marks & Spencer store);
 - Trentham Shopping Village (which accommodates a range of small-scale specialist and independent retailers in over 80 timber lodges); and
 - Affinity Staffordshire (a discounted outlet centre which accommodates M&S Outlet, Next Outlet, and Nike Clearance amongst others).

Market Share Analysis

183. The survey-derived market share analysis is detailed in Volume 2 (see Appendix 3 for convenience goods and Appendix 4 for comparison goods). To note, the market share analysis at this stage of the assessment includes expenditure on 'Special Forms of Trading' (SFT), which comprises sales via the internet, mail order, stalls and markets, door to door and telephone sales.

Convenience Goods Market Shares

184. Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines, and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.).

185. The overall market share analysis (%) for all centres and stores are detailed in Table 1 of Appendix 3.
186. These market shares have been derived from the assessment of the 'primary' responses as to where people normally shop for their more infrequent main food purchases, and for their more frequent day-to-day 'top up' convenience and grocery purchases (these are set out in Tables 2 and 4 of Appendix 3).
187. Furthermore, in order to prevent food shopping patterns being 'skewed' by larger superstores and foodstores in the Study Area, the survey also asked respondents where else they normally shop (if anywhere) for their 'main' and 'top up' purchases in addition to the first store identified (i.e. the 'secondary' responses). The market shares for these 'secondary' shopping purchases are set out in Table 3 ('other' main food shopping) and Table 5 ('other' top up food purchases') of Appendix 3.
188. The 'primary' and 'secondary' responses for the different types of food shopping have then been merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. In this case we have applied a reasonable and robust weighting of 60% for main 'bulk' shopping; 15% for secondary main 'bulk' shopping; 15% for primary 'top-up' shopping; and 10% for secondary 'top-up' shopping. The summary of market shares for town centre and out-of-centre locations is detailed in Table 26 below.

Table 26: Convenience Goods Town Centres and Out-of-Centre Market Shares (All Figures are Percentages)

Zone/Location	1	2	3	4	5	6	7	8	9	Total
Zone 1: Hanley										
Hanley City Centre	6.0	0.0	0.0	1.7	1.4	0.0	0.0	0.0	0.2	1.1
Fenton Town Centre	0.7	0.2	0.5	0.0	0.0	0.0	0.7	0.0	0.0	0.3
Other Centres	11.7	0.2	1.0	1.5	0.0	0.0	2.0	0.0	1.5	2.5
Out of Centre	36.3	9.0	5.5	21.0	16.6	1.5	2.0	0.1	3.3	10.4
Zone 2: Longton										
Longton Town Centre	4.4	25.3	3.0	1.0	0.0	0.0	1.4	4.1	0.1	5.1
Meir Town Centre	0.2	1.1	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.3
Other Centres	0.3	7.2	0.4	0.6	1.0	0.7	0.0	0.1	0.3	1.3
Out of Centre	4.6	33.7	0.6	0.9	0.0	0.1	13.2	2.1	1.1	7.7
Outside Stoke-on-Trent Authority Area	0.0	2.7	0.2	0.0	0.0	0.0	0.3	0.5	0.0	0.5
Zone 3: Stoke										
Stoke Town Centre	1.6	2.9	11.3	0.8	1.0	0.0	0.5	0.3	0.1	1.8
Other Centres	0.0	0.0	11.0	0.0	0.0	0.0	0.0	0.0	0.3	1.0
Out of Centre	2.2	5.1	33.8	0.0	1.1	0.7	0.6	1.3	9.2	5.8
Zone 4: Burslem										
Burslem Town Centre	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.1
Other Centres	0.1	0.0	0.0	8.7	4.1	0.0	0.0	0.0	0.0	0.9
Out of Centre	1.7	0.0	1.3	18.0	10.4	0.5	0.0	0.0	1.6	2.5
Outside Stoke-on-Trent Authority Area	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.1	0.1
Zone 5: Tunstall										
Tunstall Town Centre	0.0	0.0	0.0	0.5	0.8	0.1	0.0	0.0	0.0	0.1
Other Centres	0.0	0.0	0.0	1.5	3.4	1.0	0.0	0.0	0.0	0.4
Out of Centre	0.9	0.0	2.4	13.9	35.6	1.1	0.0	0.0	0.1	3.1
Zone 6: Kidsgrove										
All Zone 6	0.9	0.4	1.6	1.0	8.2	72.2	1.0	0.0	0.1	10.7
Zone 7: Rural East										
All Zone 7	4.9	1.8	0.6	7.1	0.0	0.5	62.4	0.4	0.0	10.1
Zone 8: Rural South										
All Zone 8	0.6	0.6	0.8	0.0	0.0	0.0	0.1	69.6	0.0	5.5
Zone 9: Newcastle East										

Zone/Location	1	2	3	4	5	6	7	8	9	Total
All Zone 9	5.5	1.9	12.3	10.3	5.7	6.3	1.1	1.1	69.8	15.6
Sub-Total S-o-T	70.8	84.5	70.8	71.1	77.4	5.7	20.6	8.1	17.7	44.2
Sub-Total Study Area	82.6	91.8	86.2	90.3	91.4	84.7	85.5	9.5	87.7	86.5
Outside Study Area										
Other Destinations	2.8	1.6	1.1	0.8	0.3	7.7	9.9	8.4	0.5	3.9
SFT	14.5	6.6	12.6	8.9	8.4	7.6	4.5	12.0	11.8	9.6
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

189. The main headlines from the convenience goods market share assessment are summarised below.

- All convenience goods provision located within Stoke-on-Trent collectively secures a market share of 44.2% of expenditure that originates within the Study Area.
- Of the five zones which are either wholly or predominantly located within the Stoke-on-Trent authority area (these being Zones 1 to 5), the market share of convenience goods expenditure claimed by retailers within Stoke-on-Trent ranges from 70.8% in Zones 1 and 3, to 84.5% in Zone 2. The lower Stoke-on-Trent market shares within Zones 1 and 3 reflect the proximity of these areas to the Newcastle-under-Lyme authority area. Grocery retailers in Newcastle-under-Lyme are able to meet some Zone 1 and 3 needs in a sustainable manner, and the identified market shares are not considered to be of concern on this basis. Indeed, they are consistent with shoppers generally benefitting from a good level of convenience goods provision and therefore undertaking such shopping close to home.
- It is evident that out-of-centre retailers in Stoke-on-Trent make a significantly greater contribution to meeting convenience goods shopping needs across the Study Area than provision within defined centres. Taken across the Study Area as a whole, out-of-centre retailers within Stoke-on-Trent authority area claim a market share of 29.5% of Study Area convenience goods expenditure, whereas operators within defined Stoke-on-Trent centres claim just 14.6%.
- The zones within which Stoke-on-Trent's in-centre retailers make the greatest contribution to meeting convenience goods shopping needs are Zone 2 (where in-centre retailers secure a market share of 36.7% of Study Area convenience goods expenditure), Zone 3 (27.2%), and Zone 1 (25.1%).
- The defined centres within Stoke-on-Trent that make the most significant contribution in respect of Study Area convenience goods market share are Longton town centre (which claims a 5.1% market share of Study Area convenience goods expenditure), Stoke (1.8%), and Hanley (1.1%). Longton benefits from the presence of the Tesco Extra superstore at Baths Road together with Farmfoods, Heron Foods, and Iceland. Stoke accommodates a Sainsbury's superstore at London Road.

- Stoke-on-Trent's most popular convenience goods shopping destinations across the Study Area are: Tesco at Meir Park in Zone 2 (with a Study Area market share of 4.0%); Tesco Extra at Baths Road in Longton in Zone 2 (4.0%); Tesco Extra at Clough Street in Hanley in Zone 1 (2.5%); Asda at Scotia Road in Tunstall in Zone 5 (2.4%); Aldi at Whittle Road in Meir in Zone 2 (2.4%); Morrisons at Festival Park in Zone 1 (2.3%); Tesco at Newcastle Road in Trent Vale in Zone 3 (2.2%); and Aldi at Norton Retail Park in Zone 1 (1.9%). It is therefore clear that discount foodstores in the authority area sometimes trade as strongly as larger stores operated by 'main four' grocery retailers (i.e. Asda, Morrisons, Sainsbury's, and Tesco). With the exception of the Tesco Extra at Longton, all the above stores are situated in out-of-centre locations, highlighting the fact that main food shopping generally makes a limited contribution in underpinning the vitality and viability of Stoke-on-Trent's defined centres.

190. Table 1 of Appendix 3 identifies key convenience goods shopping facilities outside the authority area which make a meaningful contribution in meeting grocery shopping needs in the Study Area. This includes facilities in: Newcastle-under-Lyme (which collectively secure a market share of 6.8% of all Study Area convenience goods expenditure); Leek (4.9%); Kidsgrove (4.7%); Cheadle (4.6%); and, Wolstanton Retail Park (3.8%). In each case, the above destinations have significant market share penetration within the zone in which they are located, but attract a relatively modest level of expenditure from other zones. A limited amount of convenience goods expenditure (equating to 3.9% of that generated within the Study Area) is spent outside of the Study Area at more distance locations (including Uttoxeter, Congleton, and Stafford). This expenditure 'leakage' is considered to be limited and also corroborates our view that the identified market shares are consistent with sustainable travel patterns.
191. A household survey of this nature uses a sample to provide a 'snapshot' of shopping patterns. By its nature, the survey will not reach all residents and focuses on main and top-up food shopping. As such, the survey may not identify all shopping destinations visited by Study Area residents and is less likely to identify the usage of smaller stores and speciality retailers. Whilst the survey did pick up that some residents shop at smaller independent grocers on a regular basis, it has (almost inevitably) underrepresented the usage of speciality retailers within the Study Area. This is not unexpected and is not, of itself, problematic in respect of an authority-wide Study of this nature. In this regard, we note the contribution made by Pak Foods in meeting specialist grocery needs in and around Shelton and Longton albeit these stores were not specifically identified by household survey respondents in respect of regular convenience goods shopping trips. It is important to highlight that, in practice, stores such as this make an important contribution in ensuring that different needs arising across a community are met.
192. The household survey results indicate that special forms of trading secure a varied convenience goods market share across the Study Area, ranging from 4.5% in Zone 7 to 14.5% in Zone 1. The average convenience goods SFT market share

across the Study Area as a whole is 9.6%. This is less than the general national market share identified by Experian Retail Planner Briefing Note 21, which is 17.3% at 2024.

Comparison Goods Market Shares

193. Comparison goods are generally classified as items purchased less frequently and include clothing, footwear, household and recreational goods. For the following main categories of non-food expenditure, each respondent was asked where they did most of their household's shopping (and 'where else' they visited in undertaking such shopping in the case of clothing and footwear purchases).

Table 27: Main Categories of Comparison Goods Expenditure

Household Survey Question	Goods Category	Appendix 7 Table Reference
Questions 8 and 10	Clothing and footwear (fashion) items	Table 2
Question 11	Recording media (e.g., records, CDs, DVDs, etc.)	Table 3
Question 12	Domestic electrical, audio-visual, photographic and computer items	Table 4
Question 13	Books, Stationery and Drawing Materials	Table 5
Question 14	Pet-related products, hobby items, sportswear, camping, cycling and musical instruments	Table 6
Question 15	Furniture, carpets, other floor coverings and household textiles	Table 7
Question 16	DIY goods, decorating supplies & garden products	Table 8
Question 17	Personal care and medical products & goods	Table 9
Question 18	All other goods – including jewellery, watches, glassware, tableware etc.	Table 10

194. Table 1 of Appendix 4 sets out the total combined market shares for all comparison goods expenditure allocated to the main centres and stores. The market share analysis takes account of the distribution and weight of expenditure by households across the different comparison goods categories. This ensures that that the resultant shares are not 'skewed' by any particular comparison goods expenditure category. This is a standard approach for retail assessments. As for the analysis of convenience goods, the market shares at this stage of the analysis include expenditure on SFT.
195. The summary of market shares for town and out-of-centre locations for comparison goods locations in the authority area is set out in Table 28 below.

Table 28: Comparison Goods Town Centres and Out-of-Centre Market Shares (All Figures are Percentages)

Zone/Location	1	2	3	4	5	6	7	8	9	Total
Zone 1: Hanley										
Hanley City Centre	10.4	6.6	5.7	8.0	5.5	3.9	3.0	2.1	5.9	5.8
Fenton Town Centre	0.5	0.3	0.2	0.3	0.8	0.1	0.3	0.1	0.1	0.3
Other Centres	0.4	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1
Out of Centre	18.4	12.3	15.0	18.0	18.4	10.4	8.3	4.3	9.6	12.2
Zone 2: Longton										
Longton Town Centre	3.7	15.8	7.8	1.3	1.0	0.1	1.1	1.4	0.4	3.9
Meir Town Centre	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Centres	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Out of Centre	2.4	16.3	3.9	2.3	0.9	0.9	8.2	5.6	1.1	5.0
Outside Stoke-on-Trent Authority Area	0.0	0.1	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.1
Zone 3: Stoke										
Stoke Town Centre	3.6	1.4	4.2	0.8	0.3	0.2	0.5	0.2	1.8	1.5
Other Centres	1.7	1.2	1.8	0.5	0.6	0.1	0.6	0.6	0.6	0.9
Out of Centre	0.5	0.5	5.8	0.7	0.8	0.8	1.0	1.5	2.4	1.5
Zone 4: Burslem										
Burslem Town Centre	0.2	0.0	0.0	1.8	2.7	0.3	0.0	0.0	0.0	0.3
Other Centres	0.0	0.0	0.0	0.7	0.1	0.0	0.0	0.0	0.0	0.1
Out of Centre	0.0	0.2	0.0	0.7	0.4	0.1	0.0	0.0	0.0	0.1
Outside Stoke-on-Trent Authority Area	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5: Tunstall										
Tunstall Town Centre	0.7	0.2	0.8	6.1	11.2	4.1	0.5	0.0	0.2	1.8
Other Centres	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Out of Centre	0.5	0.2	0.0	4.0	8.1	3.7	0.4	1.0	0.1	1.4
Zone 6: Kidsgrove										
All Zone 6	2.8	1.6	2.6	2.7	4.4	22.7	3.5	1.3	2.2	5.3
Zone 7: Rural East										
All Zone 7	1.7	0.3	0.1	2.9	0.8	0.8	24.1	1.3	0.4	4.2
Zone 8: Rural South										
All Zone 8	0.1	0.5	0.4	0.3	0.0	0.0	0.0	21.5	0.9	2.0
Zone 9: Newcastle East										

Zone/Location	1	2	3	4	5	6	7	8	9	Total
All Zone 9	3.4	3.6	6.6	9.3	8.5	9.1	3.1	1.8	21.9	8.0
Sub-Total S-o-T	43.7	56.2	46.1	46.4	52.4	24.6	24.4	16.8	22.3	35.3
Sub-Total Study Area	51.7	62.4	55.8	61.7	66.1	57.3	55.5	42.8	47.7	54.8
Outside Study Area										
Other Destinations	5.1	3.9	5.0	4.3	5.4	13.2	7.6	25.6	9.6	8.7
SFT	43.1	33.8	39.2	34.0	28.4	29.5	36.9	31.6	42.6	36.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

196. The main headlines from the comparison goods market share assessment are summarised below.

- All comparison goods provision located within Stoke-on-Trent collectively secures a market share of 35.3% of expenditure that originates within the Study Area. This is a lesser market share than secured in respect of convenience goods shopping expenditure, which is principally attributable to the significant higher market share of comparison goods expenditure committed through SFT.
- Of the five zones which are either wholly or predominantly located within the Stoke-on-Trent authority area (these being Zones 1 to 5), the market share of comparison goods expenditure claimed by retailers within Stoke-on-Trent ranges from 43.7% in Zone 1 to 56.2% in Zone 2. The lower Stoke-on-Trent market share within Zone 1 is reflective of the high market share of SFT in this zone.
- Hanley city centre's penetration rate across most zones is limited, with a greater than 10% comparison goods market share only secured within one zone (this being Zone 1). Across the Study Area as a whole, Hanley city centre secures a market share of just 5.8% of Study Area comparison goods expenditure. By way of contrast, out-of-centre comparison goods retail provision within Zone 1 (which includes Festival Retail Park) secures a Study Area market share of 12.2%. It should also be noted that Longton town centre's comparison goods Study Area market share is respectable at 3.9%, and that Tunstall town centre and Stoke town centre respectively secure market shares of 1.8% and 1.5%. Collectively, the comparison goods market share secured by these three centres is larger than that secured by Hanley city centre.
- As with convenience goods retail, out-of-centre operators across Stoke-on-Trent make a significantly greater contribution to meeting convenience goods shopping needs across the Study Area than provision within defined centres. Taken across the Study Area as a whole, out-of-centre retailers within Stoke-on-Trent authority area claim a market share of 20.2% of Study Area comparison goods expenditure, whereas operators within defined Stoke-on-Trent centres claim just 15.1%.
- Shoppers across the five core zones which broadly equate to the Stoke-on-Trent authority area (Zone 1 to 5 inclusive) exhibit similar behaviours in terms

of the usage of in-centre and out-of-centre destinations. Between 20.5% (Zone 4) and 26.7% (Zone 2) of zonal comparison goods expenditure in these five zones is directed to retailers located within Stoke-on-Trent's defined centres. This compares to between 43.7% (Zone 1) and 56.2% (Zone 2) of zonal comparison goods expenditure across the same zones being directed to out-of-centre locations across the authority area.

- After Hanley city centre, the defined centres within Stoke-on-Trent that make the most significant contribution in respect of Study Area comparison goods market share are Longton town centre (which claims a 3.9% market share of Study Area convenience goods expenditure), Tunstall (1.8%), and Stoke (1.5%). Longton benefits from the presence of the Longton Exchange shopping centre and significant large format provision in a 'retail park' format Tesco Extra superstore at Baths Road to the west.

197. Reference to Table 1 of Appendix 4 identifies the comparison goods shopping facilities outside the authority area that make a contribution in meeting such shopping needs across the Study Area. Within the wider Study Area, this includes: Wolstanton Retail Park (4.3%); Affinity Staffordshire (2.3%); Cheadle (2.0%); Stone (1.9%); and, Leek (1.5%). Outside of the Study Area, the most popular comparison goods shopping destination is Stafford which secures a market share of 2.0% of Study Area comparison goods expenditure.
198. Within the central Zones 1 to 5, only a relatively limited proportion of comparison goods expenditure is claimed by destinations outside the Stoke-on-Trent authority area, and very little expenditure is lost from the Study Area. The outflow of comparison goods expenditure to 'bricks and mortar' destinations outside of the Study Area ranges from 3.9% (Zone 2) to 5.4% (Zone 5) within these central five zones.
199. Notwithstanding this, the key competing provision for Stoke-on-Trent's retailers is online retailing. SFT accounts for a total of 36.5% of comparison goods expenditure that originates within the Study Area. SFT expenditure is greatest in Zone 1 where it secures a 43.1% market share of comparison goods expenditure. The proportion of Study Area comparison goods expenditure committed via SFT is higher than the overall national market share identified by Experian Retail Planner Briefing Note 21, which is 32.5% at 2024.
200. The greater use of SFT across the Stoke-on-Trent Study Area (relative to the national average position) may be reflective of the weakened national multiple offer within Hanley, and also may be a consequence of the distance to higher order destinations such as Manchester city centre. In the absence of strong local facilities, the attraction of online retail will further increase.

6. TOWN CENTRE HEALTH CHECKS

201. Planning policy at all levels seeks to maintain and enhance the vitality and viability of town centres and therefore understanding the current health of a centre is an important element of any evidence-based Retail and Leisure Study.
202. Health check assessments for Hanley city centre, and the town centres of Burslem, Fenton, Longton, Meir, Stoke, and Tunstall are provided in Volume 3 of this Study. The assessments provide a quantitative and qualitative overview of the current vitality and viability of the centres informed by analysis of the key performance indicators (KPIs) set out in the PPG. Details of the KPIs, other information used to inform our assessments, and our data sources used are set out within the health check assessments at Volume 3.
203. The key findings in terms of our overall conclusions and the strengths, weaknesses, opportunities and threats for each of the centres is summarised below.

Hanley City Centre

204. The Strengths, Weaknesses, Opportunities and Threats (SWOT) for Hanley city centre are as follows.

Strengths

- The Potteries Centre is able to support a national multiple comparison goods offer, which has historically played a big part in the centre's overall attraction (albeit as identified in the preceding section, this offer has declined in recent years).
- Regent Theatre, Victoria Hall and Cineworld as cultural and entertainment venues and attractions.
- Good presence of high street banks.
- Large proportion of the centre is pedestrianised/pedestrian friendly.
- Hub for national multiples/big brands for the region.
- Strong cluster of independent food & beverage operators along Piccadilly.
- Indoor market.
- Bus station provides a major transport hub.
- Strong car parking provision.
- Healthy evening footfall levels along Piccadilly.

Weaknesses

- Limited leisure services provision (and loss of representation within The Hive development).
- High vacancy rate (units and floorspace).
- The loss of Debenhams, Next and other fashion retailers as major anchor brands.
- Footfall hasn't recovered to pre-pandemic levels.
- Increasing levels of crime.
- Pockets of particularly low environmental quality.

- Lack of vibrancy, greenery and green space across the centre.
- A lack of interest in representation within Hanley from retailers.

Opportunities

- New uses brought in to address vacancies (education, residential, healthcare etc.).
- Address the large-scale vacancies, taking inspiration from the innovative repurposing of commercial premises elsewhere (examples include vacant floorspace at Merseyway Shopping Centre in Stockport being transformed into the Stockroom library, venue and community space, and the vacant former Toys R Us unit in Gloucester being tuned into a padel venue).
- The proposed development at the former East-West Precinct site has the potential to improve the vitality and viability of the centre through increased leisure provision and a boost to the centre's residential population through the delivery of new homes.
- Increased greenery and vibrancy across the centre (e.g. through planters, hanging baskets and pocket parks).
- Increased provision of street food operators within the market to reinvigorate its appeal (worked well in places like Chester and Warrington).
- Improvements to cycle accessibility (routes and parking).

Threats

- The potential loss of further high street brands leading to further vacancies.
- High/increasing business operating costs.
- The growth in online shopping and its impact on brick-and-mortar retail outlets.
- The vacancy level and associated lack of activity negatively impacting on operators' perceptions and willingness to invest.

205. We conclude that, whilst Hanley remains an important retail and leisure destination, its offer has significantly deteriorated in recent years and the centre faces significant challenges in respect of its vitality and viability.
206. Whilst the volume of vacant units and floorspace detracts from the centre's current offer, it also provides the opportunity for the introduction of a greater mix of uses to bring prosperity and vibrancy back to the centre, which could include residential, healthcare, and education.

Burslem Town Centre

207. The Strengths, Weaknesses, Opportunities and Threats (SWOT) of Burslem town centre are provided below.

Strengths

- Good food & beverage offer (particularly pubs).
- Healthy evening economy – good provision of establishments with late opening times and strong evening footfall.
- Stable footfall in recent years – minimally impacted by the pandemic.
- Several Listed Buildings and Buildings of Special Local Interest, adding to the town's character and attraction.

- Good road network connections.

Weaknesses

- Lack of market.
- Limited comparison and convenience retail offer.
- High vacancy rate – both units and floorspace.
- No bank following the closure of Lloyds.
- Accessibility challenges for pedestrians and cyclists due to road network.

Opportunities

- Redevelopment of the old market building.
- Introduction of a broader range of uses to tackle the level of vacancies, e.g. residential and healthcare.
- Improvements to accessibility for sustainable and active modes of transport (cycling and walking).

Threats

- Pubs contributing to levels of criminal activity risk impacting perceptions of safety.
- High/increasing business operating costs.
- The need to retain a critical mass of commercial operators in order to underpin Burslem's role and function to ensure it is an attractive proposition for local residents.

208. Whilst Burslem is able to serve many of the straightforward day-to-day retail and service needs of its immediate catchment, the very high vacancy rate is problematic and impacts on the health of centre. Notwithstanding this, Burslem is an attractive centre with significant potential, subject to securing additional viable uses to repurpose buildings, drive footfall and create activity.
209. The proposed redevelopment of the old market building along with the harnessing of its existing food & beverage offer could help to spark the regeneration and restructuring of the centre.

Fenton Town Centre

210. The Strengths, Weaknesses, Opportunities and Threats (SWOT) of Fenton town centre are provided below.

Strengths

- Convenience offer which is focused around the Co-op convenience store and supported by mini markets and a butchers.
- Relatively strong provision of retail services.
- High environmental quality to the south where improvements have been made in the Town Hall/Albert Square area.

Weaknesses

- Limited overall offer as a consequence of the centre's small scale and day-to-day retail and service function.
- Unable to fully capitalise on passing vehicle traffic due to a lack of on-street parking/accessible and convenient parking.
- City Road is a busy arterial highway and the volume of traffic impacts on the centre's attractiveness.
- Low provision of food & beverage outlets, particularly cafes, fast food & takeaways and restaurants (this may be related to the preceding issue).
- Rising levels of crime.

Opportunities

- Improvements to shop frontages.
- Potential to modernise retail and leisure offer.
- Potential to intensify the use of the Town Hall and Albert Square.
- Some sites within and in proximity to the centre may offer potential for residential conversion/redevelopment which could improve activity levels.

Threats

- High/increasing business operating costs.
- Rising crime levels to negatively impact perceptions of safety in the centre.

211. We believe that Fenton adequately serves the day-to-day needs of its immediate catchment through its convenience and retail services offer. Its potential to cater for a wider catchment is perhaps limited by parking options and its generally limited scale. The centre also lacks a significant foodstore anchor to drive footfall. Improvements to shop frontages across Fenton would provide a welcome boost to the appearance of the centre.

Longton Town Centre

212. The Strengths, Weaknesses, Opportunities and Threats (SWOT) for Longton town centre are provided below.

Strengths

- Strong transport connections – bus and train stations.
- Good road access/ connectivity.
- Good provision of national multiples and large format units.
- Indoor market.
- Footfall has been stable along The Strand and has bounced back well post-pandemic within Longton Exchange Shopping Centre.
- Ample convenient parking provision across the centre.
- Longton Exchange Shopping Centre provides a safe, pedestrianised shopping experience.

Weaknesses

- Limited leisure services offer, largely due to a lack of food & beverage provision.
- Low levels of evening footfall.
- High vacancy rates.
- Rising levels of crime.
- Low environmental quality in parts – largely due to clusters of unkept, long-term vacant units.
- General lack of greenery, vibrancy and green spaces.

Opportunities

- New uses brought in to address vacancies (education, residential, healthcare etc.).
- Increased greenery and vibrancy across the centre (e.g. through planters, hanging baskets and pocket parks) – build on the start made within Longton Exchange Shopping Centre.
- Increased provision of street food operators within the market to reinvigorate its appeal (worked well in places like Chester and Warrington).
- Improvements to cycle accessibility (routes and parking).

Threats

- Rising crime levels to negatively impact perceptions of safety in the centre.
- Further high street retail closures.
- High/increasing business operating costs.

213. Our assessment concludes that Longton town centre plays a significant role within the area, both in its ability to serve the day-to-day needs of its immediate catchment, but also to draw visitors in from further afield due to its strong transport links, good retail provision, and numerous national brands.
214. The number of vacant units, quantum of vacant floorspace and low environmental quality in parts are, however, a cause for concern. Alternative uses such as residential, healthcare, and education should be explored in an attempt to address the vacancy rate, whilst initial efforts to improve the environmental quality in Longton Exchange Shopping Centre could be extended throughout the centre to make the town a more welcoming and enjoyable place to visit and spend time.

Meir Town Centre

215. The Strengths, Weaknesses, Opportunities and Threats (SWOT) for Meir town centre are as follows.

Strengths

- Good road network/ connectivity.
- Proportion of vacant floorspace below UK national average.
- Accessible and convenient parking options.
- Growth in footfall along Weston Road in recent years.
- Meir Primary Care Centre boosting visitor numbers (staff and patients).

Weaknesses

- Centre dominated by roads and traffic – challenging from pedestrian and cyclist perspective.
- Significant over-representation of fast-food & takeaways.
- Limited food & beverage offer (when excluding fast-food & takeaways).
- Limited greenery, vibrancy, and green spaces.

Opportunities

- Traffic calming measures.
- Further efforts to increase greenery and vibrancy across the centre.

Threats

- Rising crime levels to negatively impact perceptions of safety in the centre.

216. Meir town centre meets the day-to-day needs of its immediate catchment, whilst benefitting from the passing vehicle trade which is supported by convenient parking options. This vehicle traffic does however detract from the centre's environmental quality, meaning further efforts to improve the overall experience for all visitors (particularly those on foot and bike) through traffic calming measures, increased greenery and improved vibrancy would be beneficial. The reduction in the vacancy rate over the past six years is a positive sign and reflective of a centre on a general upwards trajectory.
217. The passing trade and the presence of Meir Primary Care Centre keep visitor numbers strong, with footfall up in recent years, and a resulting vacancy rate in respect of floorspace which is below national average level.

Stoke Town Centre

218. The Strengths, Weaknesses, Opportunities and Threats (SWOT) for Stoke town centre are provided below.

Strengths

- Strong convenience goods offer (principally in the form of the Sainsbury's superstore at London Road).
- Train station nearby with direct connections to major cities.
- Indoor market.
- Stoke local centre and library.
- Student accommodation provision in and around the centre helping to boost local population and subsequently footfall and spend in the centre.
- The Spode factory site and Goods Yard redevelopment opportunities have significant potential in supporting an additional resident population (who may well have elevated levels of disposable income) in proximity to Stoke town centre.

Weaknesses

- The location of the market and the quality of its market offer.

- Limited comparison retail offer.
- High vacancy rate which has risen in recent years.
- Limited provision of high street banks.
- A lack of national multiples.
- Footfall has not returned to pre-pandemic levels.
- Low environmental quality in parts.
- Limited greenery, green space and vibrancy across the centre.

Opportunities

- New investment (in the form of the Capital & Centric Goods Yard development) will bring additional activity and additional residents who are likely to have disposable income and a propensity to spend on leisure services).
- Improvements made to the market, such as increased provision of street food operators to reinvigorate its appeal (worked well in places like Chester and Warrington).
- Better signage to direct people to the market.
- New uses brought in to address vacancies (education, residential, healthcare etc.).
- Investment into shop frontages to improve appearance.
- Increased greenery and vibrancy across the centre (e.g. through planters, hanging baskets and pocket parks).
- Making better use of the open space by the library building.

Threats

- High/increasing business operating costs.

219. We therefore conclude that Stoke town centre continues to face challenges and threats to its vitality and viability, largely characterised by its high vacancy rate and subsequent environmental quality concerns.
220. Whilst the Sainsbury's and Lidl stores provide a significant draw to the area, the centre in its current form is not able to capitalise on this nearby interest due to its limited offer and appeal. The comparison retail provision remains low, whilst there is potentially scope for the market to evolve and strengthen its offer in a way that generates interest and attraction. The Capital & Centric development has the potential to change perceptions, improve investor confidence, and bring new operators to the centre.

Tunstall Town Centre

221. The Strengths, Weaknesses, Opportunities and Threats (SWOT) for Tunstall town centre are provided below.

Strengths

- Strong convenience goods retail offer in the area.
- Good presence of national multiples in and around the centre (particularly at Alexandra Retail Park).

- A good number of larger format comparison goods retailers (relative to the overall scale of Tunstall).
- Indoor market, which is popular and a key driver of footfall.
- Ample convenient and accessible parking across the centre.
- Retail park spaces provide modern, clean and convenient shopping experiences.
- Improvements made to the Town Hall building (with the market and library positively impacted).

Weaknesses

- Limited high street bank offer.
- Environmental quality issues along High Street and nearby – poor quality shop frontages and signage.
- High vacancy rate (units).
- Food & beverage offer is dominated by takeaways & fast-food operators.
- Limited evening economy as a result of low provision of bars, pubs and restaurants – resulting low evening footfall.
- Footfall has not recovered to pre-pandemic levels.
- Lack of vibrancy, greenery and green space across the centre.

Opportunities

- Investment in/improvements made to shop frontages.
- New uses brought in to address vacancies (education, residential, healthcare etc.).
- Increased greenery and vibrancy across the centre (e.g. through planters, hanging baskets and pocket parks).

Threats

- Large format units with accompanying parking drawing people away from the High Street as opposed to complementing the High Street/Market/Tower Square area offer, resulting in a widening gap in health between the east and west of the centre.
- High/increasing business operating costs.

222. Tunstall continues to face challenges to its vitality and viability, which is reflected in its high vacancy rate.
223. Whilst large format, national multiple comparison and convenience retailers provide a draw to the east and south of the centre, and welcome investment has been put into the Town Hall, low environmental quality along High Street has a clear detrimental impact on the attractiveness and viability of the western part of the centre.
224. A package of measures should be considered to boost footfall levels within the centre (particularly to the west), and ultimately strengthen Tunstall's overall vitality and viability – investment made into shop frontages and signage, new uses brought into the centre (such as residential, healthcare and education) and efforts made to increase the provision of green space and vibrancy.

Local and Neighbourhood Centres

225. The Council has undertaken its own health check assessments of Stoke-on-Trent's local and neighbourhood centres to understand the role and function of these smaller centres. They are presented as a matrix on an Excel spreadsheet and are provided within Volume 5.
226. The matrix identifies 17 centres as local centres and 40 centres as neighbourhood centres. LSH's role is to review and endorse the matrix in respect of whether centres are appropriately designated or whether there is scope to revise the hierarchy in respect of these smaller centres.
227. The Council's matrix follows the principles established by the previous 2019 RLS in 'scoring' centres according to the range of shops and services they support.
228. The scoring system is based on an assessment of the type and scale of facilities supported, the proportion of national operators, the vacancy rate, and whether the centre accommodates a Post Office and/or ATM.
229. Most particularly, the scoring system is applied as follows:
 - i. Facilities Points – Based on a review of convenience stores, Post Offices and pharmacies. Each facility receives a score of four.
 - ii. ATM Score – One of more ATMs results in the award of three points, no ATMs receives a score of zero.
 - iii. Percentage of National Operators, scored as follows:
 - 25% or more of units scores four points;
 - Less than 25% but more than 0% scores two points; and
 - 0% scores zero points.
 - iv. Percentage of vacancies, scored as follows:
 - 0% to 10% of units scores six points;
 - 11% to 24% of units scores four points;
 - 25% to 49% of units scores two points; and
 - 50% of units or more scores zero points.
230. The 17 local centres reviewed vary considerably in size. A total of 32 units are recorded at 'Milton – Leek Road/Millrise Road', 31 at 'Smallthorne – Ford Green Road', and 29 at 'Fenton – Victoria Road'.
231. At the other end of the scale, the number of commercial units is in single figures at six local centres. These centres are: 'Bucknall – Werrington Road' (nine units); 'Blurton – Finstock Avenue' (eight units); 'Trentham Lakes – Stanley Meadows' (seven units); 'Heron Cross – Heron Street/Grove Road' (six units); 'Norton Park – Leek New Road' (three units); and, 'Hanford – Mayne Street' (two units). These centres are also generally limited in respect of the scale of units that they accommodate (with notable exceptions being 'Trentham Lakes – Stanley Meadows' which supports an Aldi foodstore, and 'Norton Park – Leek New Road' which supports an Aldi foodstore and a McDonald's).

232. Current national planning policy requires local planning authorities to define a network and hierarchy of town centres. However, the Annex 2: Glossary of the NPPF fails to define and differentiate between different types of centre.
233. The most recent definitions provided by the Government were contained within Planning Policy Statement 4: Planning for Sustainable Economic Growth ('PPS4'), which was originally published in December 2009, but was then subsequently superseded by the publication of the NPPF in March 2012.
234. Whilst PPS4 needs to be considered on this basis (i.e. it is not up to date practice guidance), in the absence of any other definitions, it is of some relevance to the consideration of a retail centres hierarchy.
235. Annex B of PPS4 identified that:
- 'City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions.*
- Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. In London the 'international' and 'metropolitan' centres identified in the Mayor's Spatial Development Strategy typically perform the role of city centres.*
- Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.*
- District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.*
- Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.*
- Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.'*
236. Based on the above, it is accepted that none of Stoke-on-Trent's local and neighbourhood centres accommodate substantial supermarket or superstore

provision together with any significant local public facilities. As a consequence, we do not think there is any potential to upgrade centres from 'local' to 'district'.

237. In this context, the review that follows focuses on three matters:
- whether smaller local centres appropriately fulfil a 'local centre' function;
 - whether larger neighbourhood centres more accurately fulfil a 'local centre' function; and
 - whether smaller local neighbourhood centres should benefit from any formal designation.
238. In total, we have reviewed 16 of the smaller centres considered by the Council's centres matrix.
239. Our review acts as a 'spot check' of the Council's assessment to ensure that the scale and nature of the provision is consistent with our own understanding of the centre. The 'spot check' has been a desk-based exercise reliant on maps, street photography, and (where appropriate) additional online research to verify the key attributes of the centre.
240. We can confirm that this exercise has not identified any anomalies or issues in respect of the Council's work, and its assessments of these centres is accepted as being an appropriate and proportionate means by which to determine their place in the centres hierarchy.

Local Centres

241. We have reviewed the role, function and appropriate designation of the smallest six local centres in the context of the PPS4 definitions.
242. **'Bucknall – Werrington Road'** has nine units, which include the Traveller's Rest public house, hot food takeaways, hairdressers, and a small independent convenience store. The Coral bookmaker unit has been reoccupied as the GoGoz hot food takeaway. The centre is comprised of ground floor units within a traditional terraced row.
243. The Council's matrix provides a score of eight. This is comprised of four points relating to facilities (due to the convenience store) and four points relating to the vacancy rate.
244. The score is considered to be limited and the centre's offer is modest in practice. The range of provision is not considered to be consistent with a local centre designation. The 2019 RLS recommended that 'Bucknall – Werrington Road' be redesignated as a neighbourhood centre and we are of the same opinion based on our review of the centre's current role and function.
245. **'Blurton – Finstock Avenue'** supports eight units, which include two convenience stores (Co-op and Blurton Pound Plus), a Post Office, and a pharmacy. The centre takes the form of purpose-built retail and commercial units, which sit alongside Blurton Community Hub.
246. The Council's matrix scores the centre relatively strongly with a facilities score of 12 (reflecting the convenience store, Post Office, and pharmacy), a national

operator score of two (reflecting the presence of the Co-op), and a vacancy score of four (providing a total score of 18). The centre's offer is considered consistent with that of a local centre.

247. **'Trentham Lakes – Stanley Meadows'** supports seven units, including an Aldi foodstore, two hot food takeaways, a hairdresser, and a pub. The centre is purpose built and provides a modern centre focused around a substantial area of car parking. It is well-located to serve Trentham residential suburbs and employees at Trentham Technology Park and Trentham Trade Park.
248. The matrix supports a score of 10 for the centre. This is comprised of a facilities score of four (reflecting the discount foodstore), a national operator score of four (reflecting the presence of Aldi and the Hungry Horse pub), and a vacancy score of four. The Aldi store supports a significant amount of activity and the centre's offer is considered consistent with that of a local centre.
249. **'Heron Cross – Heron Street/Grove Road'** accommodates six units, including a Best One convenience store, a pharmacy, and a hairdresser. The units are formed by the ground floor of traditional terraced properties and are of a small scale. The centre is located at the junction of Blurton Road, Duke Street, Grove Road, and Heron Street.
250. The matrix provides a score of 19 for the centre, which is comprised of eight points in respect of its facilities offer (convenience store and pharmacy), three points in terms of accommodating an ATM, two points in respect of national operators (Best One), and six points in respect of its vacancy score. The centre's offer is consistent with that of a small local centre and no change in designation is proposed.
251. **'Norton Park – Leek New Road'** accommodates three units, these being an Aldi foodstore, McDonald's restaurant, and the Horn & Trumpet public house. Each of the uses is physically separate and is served by its own demarcated parking area. The character of the development is that of a small out-of-centre retail/leisure park.
252. The centre secures a score of 14 on the Council's matrix. This is comprised of four points in respect of its facilities offer (foodstore), four points in respect of national operators (Aldi and McDonald's), and six points due to their being no vacancies. However, it is important to recognise that this score is essentially derived from the destination supporting a foodstore and a McDonald's, and there being no vacant units.
253. We do not believe that there is anything integral to the development's character and offer that is consistent with a local centre operation. There are only three units and the character of each is consistent with typical out-of-centre provision.
254. The NPPF Annex 2: Glossary identifies that *'...existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.'*
255. Noting the character of 'Norton Park – Leek New Road' and the above guidance, we do not believe that the identification of the development as a local centre is

merited. We recommend that it is dropped as a defined local centre in the forthcoming Local Plan.

256. **‘Hanford – Mayne Street’** supports two units namely a Co-op convenience store and a florist. On this basis ‘Hanford – Mayne Street’ achieves a score of 17 on the Council’s matrix. This comprises four points in respect of its facilities offer (convenience store), three points in terms of accommodating an ATM, four points in respect of national operators (Co-op), and six points in respect of its vacancy score.
257. Notwithstanding the relatively strong score achieved by ‘Hanford – Mayne Street’, the level of provision within the current defined boundary is limited. However, we note that the previous 2019 RLS identified an opportunity to extend the boundary of the local centre to include additional properties on Mayne Street, Wilson Street, and New Inn Lane. There is the potential to include six additional main town centre uses through this expansion. In our view, it is only by expanding the boundary that the local centre designation is justified.

Neighbourhood Centres

258. Of Stoke-on-Trent’s 40 neighbourhood centres, five support more than nine commercial units. The role and function of these larger neighbourhood centres are considered below.
259. **‘Normacot – Uttoxeter Road’** is by some distance the largest neighbourhood centre in Stoke-on-Trent, accommodating 24 units. However, the centre does not support a convenience store, Post Office, pharmacy or ATM. Instead, its offer is focused around ten hot food takeaways, two hairdressers, two barbers, two mobile phone shops, a pet groomer, and an insurance office. Due to the lack of a core day-to-day retail and service offer, the centre only scores four marks on the Council’s matrix (these all derive from its low vacancy rate).
260. Due to the lack of convenience store, we do not believe that the centre fulfils the requirements for a local centre designation and recommend that it remains a neighbourhood centre in the Council’s hierarchy.
261. **‘Shelton – College Road’** accommodates a total of 13 commercial premises. The centre is anchored by three convenience stores (Premier, Your Local, and University Stores), a Post Office, and also accommodates an ATM. Other operators include two bakers, hairdresser, barber, café, dessert shop, hot food takeaway, clothing shop, and letting agent.
262. The Council’s matrix indicates that the centre scores 19 marks. This is comprised of eight marks in respect of facilities (convenience store and Post Office), three marks derived from having an ATM, two marks associated with national operators, and six marks derived from a low vacancy rate.
263. Whilst the centre scores well, the most significant convenience store is the Premier which trades under its ‘Premier Express’ fascia. This is the smallest format of Premier stores. There is limited car parking in the area and the centre is embedded within a dense residential area. As a consequence of its location and

the character of the surrounding area, it is considered that 'Shelton – College Road' has a highly localised catchment in practice. Accordingly, whilst the centre is extensive, we recommend that it remains designated as a neighbourhood centre due to its localised role and the limited scale of the convenience store offer.

264. **'Chell Heath – Chell Heath Road'** supports 10 commercial units, which include a Premier convenience store, three hot food takeaways, a barber, café and charity shop. The Council's land use survey also identified three vacant units at the centre.
265. The Council's matrix identifies a score of eight for the centre, which is comprised of four marks in respect of facilities (convenience store), two marks in respect of national multiple operator representation, and two marks in respect of the vacancy rate.
266. The performance and overall function of the centre is limited, and we recommend that it remains a neighbourhood centre in respect of the centres hierarchy.
267. **'Dresden – Carlisle Street'** also accommodates ten units, including Dresden Off Licence which acts as a small scale off licence/convenience store. The centre is relatively diverse and incorporates three hot food takeaways, two hairdressers, a tattooist, and a convenience store/off licence. Between some of the various commercial uses are a number of residential dwellings.
268. The matrix provides a score of 10 for the centre, based on its current composition. This reflects the centre scoring four points in respect of its facilities offer (off licence/convenience store) and six points due to its low vacancy rate. In considering the centre's offer, it should be noted that there is a Premier convenience store to the north of the existing centre boundary at the junction of Peel Street and Carlisle Road. This store would form a logical extension to the current boundary and would mean that the centre would score an additional two marks in respect of national multiple operator representation.
269. The re-drawing of the boundary would also better reflect how the centre operates in practice. The Premier is a good sized convenience store, which is able to support day-to-day local convenience goods shopping needs.
270. It is considered that 'Dresden – Carlisle Street' could be redesignated as a local centre based on the more expansive offer provided by including the Premier convenience store.
271. **'Hollybush – Blurton Road'** supports nine units, including Blurton News which is a small scale newsagent/convenience store. The centre also supports four hairdressers, a party shop, a bridal shop, and a hot food takeaway. The centre occupies the ground floor of traditional residential properties and the units are therefore of a small scale as a consequence.
272. The centre secures a score of 14 on the Council's matrix, which reflects a score of eight in respect of its facilities offer (newsagent/convenience store and Post Office) and six in respect of vacancies. Whilst the centre scores relatively strongly for a neighbourhood centre, Blurton News is not a fully fledged convenience store which

is capable of supporting a range of top-up shopping trips. As such, we recommend that the centre continues to be designated as a neighbourhood centre.

273. At the other end of the scale, four neighbourhood centres are identified as supporting just one or two commercial units. The role and function of these centres is considered below.
274. **‘Eaton Park – Southall Way’** supports two units, albeit these are a Morrison’s Daily and Eaton Park Pharmacy. These uses are accommodated in a purpose-built retail terrace which is served by car parking.
275. Notwithstanding its small scale, the Council’s matrix supports a score of 25 for the centre which is comprised of a facilities score of 12 (convenience store, Post Office, and pharmacy), an ATM score of three, a national operators score of four, and a vacancies score of six. The centre clearly makes an important contribution to meeting day-to-day local retail needs and should retain its neighbourhood designation.
276. **‘Bentilee – Beverley Drive’** also supports two units, these being a Best One convenience store (occupying a double unit) and The Oat Cake Shop.
277. The matrix supports a score of 17 for the centre, which is comprised of a facilities score of four (convenience store), an ATM score of three, a national operators score of four, and a vacancies score of six.
278. The centre is well maintained and well located to cater for the northern part of the Bentilee suburb. Whilst the convenience store and adjacent retail unit are considered to fulfil a neighbourhood centre function, we recommend that consideration is given to including The Beverley public house (which lies immediately to the north west of the centre) within its boundary.
279. **‘Weston Coyney – Westonfields Drive’** is comprised of two units, these being a Booze Buster off licence and a hairdresser. There are also some DPD click and collect lockers situated adjacent to the Booze Buster unit.
280. The Council’s matrix awards a score of six to the centre; this is solely due to there being no vacant units within the centre.
281. Whilst the centre is very limited in terms of its function, the Booze Buster sells newspapers and hot and cold food and there is some potential to link trips between the two uses. It is recommended that the centre remains designated as a neighbourhood centre. The 2019 RLS recommended that the centre boundary is revised to reflect only commercial properties and we believe that this remains a logical revision.
282. **‘Newford – Community Drive’** is a single unit, which is occupied by One Stop. The centre scores a mark of 10, which relates to four marks being awarded in recognition of the convenience store facility and six marks reflecting the fact that the shop is occupied. In actuality, we believe that a further four marks should be awarded due to One Stop being a national multiple retailer.

-
283. However, in practice, 'Newford – Community Drive' is a single convenience store. We do not believe that single stores generally perform the role of a defined centre and therefore recommend that it is de-designated as a neighbourhood centre.
284. In addition to the above, it is noted that the 2019 RLS recommended that **'West End – London Road'** be undesignated as a neighbourhood centre.
285. The Council's matrix identifies that the centre supports five units, comprising a hot food takeaway, hairdresser, tattoo studio, and two vacant units. The Council's matrix awards four marks to the centre. No marks are awarded in respect of the core day-to-day retail and service offer as the centre does not accommodate a convenience store, post office or pharmacy. Two commercial units have been converted into residential properties.
286. Notwithstanding this, it is considered that 'West End – London Road' provides an attractive row of commercial properties and that any vacant units are capable of being reoccupied. The premises are of a limited scale but are well positioned in respect of the local residential catchment area and offer some potential to support linked trips between different businesses.
287. Furthermore, we note that further commercial properties are located directly to the south at 363 London Road (occupied by Everest Pharmacy) and at numbers 369 to 385 London Road. On this basis, we recommend that 'West End – London Road' continues to be designated as a neighbourhood centre and that consideration should be given to whether its boundary is extended to incorporate nearby commercial premises along London Road.

7. RETAIL CAPACITY ASSESSMENT

288. This section sets out the results of the economic retail capacity ('need') assessment for additional retail floorspace across the Stoke-on-Trent authority area as a whole and its centres. The timeframe of the capacity forecast accords with that of the emerging Local Plan and covers the period from 2024 'base year' to 2040. The detailed economic capacity tabulations are set out in Volume 2. These forecasts update and supersede the findings of the previous 2019 RLS.

The CREAT^e Model

289. The CREAT^e economic model has been specifically designed, developed and tested by the LSH team over more than 25 years to assess the capacity for and impact of new retail (convenience and comparison goods) floorspace development. The evidence-based model has helped to inform and guide plan-making and decision-taking at the local, sub-regional, and regional level. In brief, the CREAT^e (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested. The model is underpinned by the findings of the household survey, which provides a robust understanding of shopping patterns, market shares and the trading/turnover performance of existing centres, retail parks, and standalone stores.
290. At the outset it has necessarily been assumed for the purpose of the capacity assessment that the local retail market is in 'equilibrium' at the base year. In other words, all existing centres/stores are broadly assumed to be trading in line with expected average ('benchmark') turnover levels. This is considered the appropriate approach as it reflects the impact of the economic downturn and the significant growth in online sales on the trading levels and performance of retailers and stores across the UK. It also reflects the outputs of the health checks covering the main centres and shopping locations. The stock of vacant floorspace suggest that there is no pressing immediate quantitative requirement for either convenience or comparison goods floorspace.
291. The main challenge and focus over the short/medium term in response to market trends and the impact of rising cost inflation will be to retain existing occupiers and to redevelop/repurpose vacant retail floorspace to attract new businesses and uses.
292. It should also be noted that, whilst the 2019 RLS incorporated a 'benchmark' assessment in assessing convenience goods capacity, it found that the turnover of existing level of convenience goods provision (as identified with reference to the household survey and Study Area expenditure) was broadly commensurate with the expected turnover of this floorspace (as identified with reference to store net sales areas and the company average sales density of retailers). As such, the 2019 RLS did not identify any significant undersupply of convenience goods floorspace in the short term.

293. In simple terms, any residual expenditure available to support new retail floorspace over the forecast period will be generated by the difference between the forecast growth in 'current' (survey-derived) turnover levels and the growth in the turnover of existing and committed retail floorspace after applying robust year-on-year 'productivity' ('turnover efficiency') growth rates.
294. It is important to underline that medium to long term forecasts should be treated with caution, as they will be influenced by the dynamic changes in economic, demographic and market trends. As described previously (see Section 2), paragraph 90 of the NPPF states that local planning authorities should meet the need for retail and town centre uses looking at least ten years ahead.
295. Paragraph 004 of the Town Centres and Retail PPG also states that, given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments '*...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.*'
296. Therefore, whilst this Study assesses retail capacity up to 2040, it is strongly recommended that greater weight should be placed by the local planning authority on forecasts across the next five to ten years.
297. The capacity forecasts set out in this section provide the Council with a broad indication of the (quantitative) need for new retail (convenience and comparison goods) floorspace in the authority area and across Stoke's principal centres. In turn, this will inform whether there is a need to identify and allocate additional sites to meet any forecast need, in accordance with national planning policy requirements.

Key Assumptions and Forecasts

298. The capacity assessment requires an understanding of future changes in per capita expenditure and population growth will affect the amount of expenditure available across the Study Area. Any future Study Area population growth is then distributed to retail venues in accordance with the market shares identified by the household survey.
299. We set out below our key assumptions in respect of: the current and forecast Study Area population; per capita expenditure growth; and SFT.

Base Year Population and Future Projections

300. Appendices 2 of Volume 2 sets out the latest base year (2024) population estimates for the nine Study Area zones sourced from Experian's Location Analyst Geographic Information System. For the four zones that sit substantially outside the Stoke-on-Trent authority area (Zones 6 to 9), we utilise Experian Location Analyst forecasts in respect of how the population of these outlying zones may change over the reporting period to 2040 (other reporting years are 2030 and 2035).

301. Zones 1 to 5 are located substantially within the Stoke-on-Trent authority area and it is therefore appropriate to model future population growth across these zones based on the level of growth that the Council is planning to support in practice. Whilst some parts of Zones 1 to 5 sit outside of the Council's administrative area, these are predominantly rural in nature and are unlikely to support any material additional level of population growth in practice. No additional allowance for growth occurring outside of Stoke-in-Trent is accounted for within Zones 1 to 5.
302. Our approach in modelling growth across Zones 1 to 5 has two principal stages, as follows:
 - i. Estimate the likely population growth across Stoke-on-Trent in the period to 2040; and then
 - ii. Consider the spatial distribution of this growth across Zones 1 to 5.
303. We are informed that the Council's growth strategy is consistent with that set out in the Housing and Employment Needs Assessment Update (prepared by Turley and published in November 2021). Paragraph 6 of the Executive Summary of this document identifies that the Stoke-on-Trent population could increase by circa 5% in the period 2020 to 2040. We use this figure as a proxy for the likely level of growth between 2024 and 2040. Whilst this timeframe is slightly truncated relative to the 20-year period covered by the Housing and Employment Needs Assessment Update, we apply the 5% growth multiplier to the entirety of the area covered by Zones 1 and 5 (i.e. an area extending beyond Stoke-on-Trent).
304. Experian Location Analyst data identifies that the population of Stoke-on-Trent at 2024 is 261,308 persons. Applying the 5% growth figure to this population allows for an increase of 13,065 persons across Stoke-on-Trent between 2024 and 2040.
305. The Council has provided us with a schedule that indicates the broad distribution of growth that it is planning for in practice. Given that the preparation of the Local Plan is ongoing and housing sites have not been scrutinised, this schedule provides a general guide on the distribution of future growth with reference to a zone's size and the Council's perception of its potential for further expansion. The Council's consideration of the growth potential of Study Area zones and the related distribution of population growth is set out below at Table 29.
306. In practice, Zone 6 falls substantially outside the Stoke-on-Trent authority area and Experian's forecast population growth to 2040 across this zone outstrips the growth which is being planned for in Stoke-on-Trent across this period. As a result, we utilise Experian's population forecasts within this zone.

Table 29: Stoke-on-Trent Council's Estimated Distribution of Future Housing Growth

	Potential Number of Homes	Potential Windfall	Potential Total Number of Homes	Percentage of Housing Delivery	Assumed S-o-T Population Increase Between 2024 and 2040	Annual S-o-T Housing Growth Allowance
Zone 1: Hanley	8,372	517	8,889	44%	5,749	338
Zone 2: Longton and Fenton	1,566	517	2,083	10%	1,307	77
Zone 3: Stoke	3,230	517	3,747	18%	2,352	138
Zone 4: Burslem	2,690	517	3,207	16%	2,090	123
Zone 5: Tunstall	452	517	969	5%	653	38
Zone 6: Kidsgrove, Biddulph and Alsager	1,000	517	1,517	7%	915	54
Zone 7: Rural East	0	0	0	0%	0	0
Zone 8: Rural South	0	0	0	0%	0	0
Zone 9: Newcastle East	0	0	0	0%	0	0
Total	17,310	3,102	20,412	100%	13,065	769

307. For clarity, the below Table 30 confirms the population growth modelled across each zone and the means by which this has been estimated.

Table 30: Study Area Zonal Population Growth Forecasts

	Base Year Population at 2024 Identified by Experience	Forecast Population at 2040	% Growth Across 16 Years	Average Annual Population Growth	Total Population Growth	Method for Estimating Growth
Zone 1: Hanley	84,113	89,862	6.8%	359	5,749	S-o-T Estimate
Zone 2: Longton and Fenton	77,752	79,059	1.7%	82	1,307	S-o-T Estimate
Zone 3: Stoke	45,256	47,608	5.2%	147	2,352	S-o-T Estimate

	Base Year Population at 2024 Identified by Experian	Forecast Population at 2040	% Growth Across 16 Years	Average Annual Population Growth	Total Population Growth	Method for Estimating Growth
Zone 4: Burslem	42,084	44,174	5.0%	131	2,090	S-o-T Estimate
Zone 5: Tunstall	25,573	26,226	2.6%	41	653	S-o-T Estimate
Zone 6: Kidsgrove, Biddulph and Alsager	67,783	70,559	4.1%	174	2,776	Experian
Zone 7: Rural East	65,709	67,974	1.9%	79	1,265	Experian
Zone 8: Rural South	34,989	37,721	7.8%	171	2,732	Experian
Zone 9: Newcastle East	84,250	89,793	6.6%	346	5,543	Experian
Total	527,509	551,976	4.6%	1,529	24,467	

308. Through application of the above methodology, we estimate that the Study Area population (Zones 1-9) is forecast to increase by +4.6% (+24,467 persons) between 2024 and 2040.

Expenditure per Capita & Special Forms of Trading (SFT)

309. Appendix 2 of Volume 2 set out the growth forecasts for convenience goods and comparison goods retail expenditure for the wider Study Area and zones. Total expenditure is derived by multiplying the population and average expenditure per capita together. All monetary and turnover values are expressed in a 2022 price base.
310. In identifying expenditure per capita, an allowance has been made for the market share of non-store retail sales (i.e. Special Forms of Trading) at the base year, informed by the results of the household telephone interview survey. These SFT market shares have been 'adjusted' to take account of goods sourced from traditional ('physical') retail space based on Experian's latest Retail Planner Briefing Note 21 (February 2024) (RPBN21). The adjusted baseline SFT market shares in 2024 are 2.9% for convenience goods and 27.4% for comparison goods and are forecast to increase to 4.1% and 33.4% respectively by 2040 based on the growth rates forecast by the RPBN21.

Average Expenditure Growth Forecasts

311. The growth in average expenditure per capita levels to 2040 has been informed by the forecasts set out in Experian's RPBN21 (as described in detail in Section 3).

Experian's forecasts show a reduction in per capita convenience goods expenditure in 2024 (-0.5%) and 2025 (-0.2%), thereafter effectively 'flatlining' with limited annual variation. For comparison goods, Experian forecasts a -1.2% reduction in per capita expenditure at 2024 followed by a sustained period of growth. Experian predicts that per capita growth in comparison goods expenditure will settle at around +2.8% per annum on average up to 2040. Our forecasts take account of Experian's forecast changes in future per capita convenience and comparison goods expenditure.

Total Available Expenditure

- 312. For convenience goods retailing, there is a forecast +4.1% (+£49.4m) growth in total available expenditure between 2024 and 2040 across the overall Study Area (see Table 3, Appendix 2).
- 313. The forecast growth for comparison goods retailing is higher than for convenience goods. The forecasts show a +50.3% (+£749.3m) growth in total comparison goods expenditure by 2040 across the Study Area (see Table 5, Appendix 2).

Market Share Analysis (excluding SFT)

- 314. The capacity assessment is informed by the survey-derived market shares for all stores and centres across the Study Area. A key step in the economic capacity assessment involves allocating the baseline convenience and comparison expenditure to the identified centres, stores and floorspace based on the household survey market shares. This helps to establish the current trading performance of the main centres and stores within Stoke-on-Trent area based on the expenditure that originates within the Study Area.
- 315. For the purpose of the retail capacity assessment, and in line with LSH's standard approach, the market shares reported in Section 5 have been recalibrated for both convenience goods (Table 1, Appendix 5) and comparison goods (Table 1, Appendix 6) to exclude SFT.
- 316. The 'baseline' 2024 turnovers are projected forward to 2030 (Table 3 of Appendices 5 and 6), 2035 (Table 4), and 2040 (Table 5). Our assessment assumes no changes in market share. The 'constant market share' approach is standard practice for strategic retail capacity assessments, particularly when there is no substantial retail development in the pipeline (whether within the Study Area or just outside) that is likely to materially impact on Study Area market share. Notwithstanding this, it should be noted that, in practice, new retail investment and development (both within and outside the Stoke-on-Trent authority area) can impact on shopping patterns, market shares, and the turnover of retail floorspace over time. The delivery of retail floorspace within and in proximity to the Study Area should therefore be monitored going forward.
- 317. It should be noted that no allowance is made at this stage for any potential 'inflow' of expenditure to centres and stores from outside the defined Study Area.

'Inflow' of Expenditure from Beyond the Study Area

318. The level of expenditure 'inflow' that is drawn from outside the defined Study Area is based on professional judgement related to:
 - the scale, quality and mix of retail provision across the authority area, based on the results of the health check assessments;
 - the location of centres and stores in the authority area, including out-of-centre shopping locations;
 - competition from centres, stores and shopping facilities outside the Study Area, as informed by the results of the survey-derived market share analysis; and
 - the likely level of tourism activity within a given area and whether there is a substantive quantum of expenditure generated from outside the region.
319. The Study Area is reasonably substantial and extends into the neighbouring authority areas of Cheshire East, Newcastle-under-Lyme, Stafford, and Staffordshire Moorlands. As such, it is generally assumed that the level of inflow that might be secured will be limited.
320. For Hanley, the in-street survey identified the postcode sector associated with respondents' home address. This means that we are able to determine the proportion of respondents that live within the defined Study Area and the proportion that reside outside. Out of a total of 110 respondents who provided the postcode sector of their address, 96 live inside the Study Area and 14 live outside. On this basis, 13% of respondents travelled from beyond the Study Area to visit Hanley city centre.
321. We assume that 13% of both the convenience and comparison goods turnover of Hanley is derived from inflow.
322. Elsewhere, convenience goods are generally shopped close to home and visits to Stoke-on-Trent's foodstores from outside the Study Area will be limited. As such, we have assumed that other convenience goods destinations will only secure 5% of their turnover as inflow from beyond the Study Area.
323. In respect of comparison goods expenditure, we apply a 5% inflow allowance to most centres. However, we believe that Longton town centre will be able to secure a greater level of inflow – amounting to 10% of its turnover – due to its proximity to the A50 which affords straightforward access to Stafford and Staffordshire Moorlands.
324. In summary, our position in respect of inflow allowances is as follows:
 - assumed convenience goods inflow to Hanley city centre equating to 13% of its turnover;
 - assumed convenience goods inflow to all other Stoke-on-Trent destinations equating to 5% of their turnover;
 - assumed comparison goods inflow to Hanley city centre equating to 13% of its turnover;

- assumed comparison goods inflow to Longton town centre equating to 10% of its turnover;
- assumed convenience goods inflow to all other Stoke-on-Trent centres equating to 5% of their turnover; and
- assumed comparison goods inflow to all out-of-centre Stoke-on-Trent destinations equating to 15% of their turnover.

Total Forecast Turnover

325. Based on the (survey-derived) market analysis and 'inflow' assumptions, Table 2 of Appendix 7 sets out the overall convenience turnover estimates for the main centres and stores in the authority area and Table 2 of Appendix 8 details the comparison turnover estimates.
326. The table below summarises the 2024 ('base year') total turnover estimates. It shows that Hanley is estimated to achieve a total turnover of £180.5m in 2024, of which approximately 90% is accounted for by comparison goods sales. Interestingly, Longton town centre's identified turnover of £170.0m at 2024 is approaching that of Hanley (albeit it should be noted that Longton's turnover includes expenditure attracted to large format retail provision immediately to the west of the traditional town centre, including the Tesco Extra superstore).
327. Hanley's trading position is also placed into context through reference to the previous the 2019 RLS. Table 25 of Appendix 7 of the 2019 RLS identified that the city centre had a comparison goods turnover of £313.0m at 2019 after account was taken of inflow. This figure was expressed in a 2017 prices. Converted into a 2022 price base, the 2019 RLS comparison goods turnover for Hanley city centre at 2019 is £350.2m.
328. Different studies utilise different methodologies and comparison between their findings need to be qualified in this context. However, it is clear that Hanley has lost key retailers over the past five years and that this has had a very significant impact on its trading performance.

Table 31: Trading Performance of Key Stoke-on-Trent Retail Destinations at 2024

Destination	Convenience Goods (£m)	Comparison Goods (£m)	Total (£m)
Hanley City Centre	17.5	163.0	180.5
Burslem Town Centre	0.9	7.2	8.2
Fenton Town Centre	3.8	6.8	10.6
Meir Town Centre	3.7	0.9	4.6
Longton Town Centre	69.6	100.4	170.0
Stoke Town Centre	25.7	39.9	65.6
Tunstall Town Centre	1.2	41.1	42.3
Local Centres	45.9	10.9	56.8
Other Smaller Centres	38.5	27.9	66.5
Out-of-Centre	411.0	527.7	938.7
Total	617.9	925.9	1,543.7

329. It is also evident from the above that out-of-centre destinations are more dominant than in-centre destinations in meeting both convenience and comparison retail needs. Out-of-centre destinations account for 67% of convenience goods and 57% of comparison goods expenditure attracted to bricks and mortar destinations. Given that a very significant proportion of expenditure is also accounted for by online retailing, this further underlines the difficulties faced by Stoke-on-Trent's defined centres.

Floorspace Productivity

330. A key input to the retail capacity assessment is the application of a year-on-year floorspace 'productivity' growth rate to all existing and new retail floorspace. As described in Section 3, existing retailers will need to achieve higher annual 'productivity' growth rates to cover their increasing costs (including, for example, rising rents, business rates and wages), in order to remain profitable and viable over the short, medium, and long term. This is particularly the case as the competition from online retailing increases; a trend that has been significantly accelerated by the impact of the pandemic.
331. For all existing and new retail floorspace we have tested annual average 'productivity' growth rates informed by Experian's latest Retail Planning Briefing Note (RPBN21). These are described in more detail in Section 3. For convenience goods a 'productivity' growth rate of -0.6% for 2024, -0.2% for 2025, +0.2% for 2026-30 and +0.3% for 2030 onwards. For comparison goods, the annual productivity growth rates are -2.7% for 2024, +1.5% for 2025, +2.8% from 2026 onwards.

Retail Commitments

332. The next step in the retail capacity assessment takes account of all the major retail (convenience/comparison) floorspace commitments and planned development at the time of preparing this study. The assessment of pipeline floorspace and the predicted turnover of this new floorspace. All planned and pipeline floorspace commitments have been provided by the Council.
333. It should be noted that Class E allows for changes in the use of commercial floorspace without the requirement for planning permission. As such, there will be significant changes in commercial uses secured over the forthcoming plan period. In this context, it is considered appropriate in factoring in commitments to account for only those that provide for more than 500 sq.m of gross retail floorspace.
334. Appendix 7 provides for a total of 1,341 sq.m net of committed convenience goods floorspace, comprising the following:
- Planning application reference 67346/FUL – Mixed-use residential-led development (with ground floor retail and leisure uses) at Goods Yard, Glebe Street, Stoke-on-Trent. Approved 30 March 2022. This permission provides for 2,911 sq.m retail and leisure floorspace. It is assumed that approximately one third of this (970 sq.m) would come forward for retail uses and that this will be split evenly between convenience and comparison goods. This provides for an estimated 485 sq.m gross of convenience goods floorspace, which we

estimate would support an estimated convenience goods sales area of 340 sq.m

- Planning application reference 68675/FUL – Discount foodstore (Lidl) at Land off Weston Coyney Road, Stoke-on-Trent. This permission provides for a foodstore with 1,901 sq.m of gross floorspace with a net sales area of 1,251 sq.m. Of this, 1,001 sq.m is dedicated to convenience goods sales and 250 sq.m is dedicated to comparison goods sales.

335. Appendix 9 also sets out the comparison floorspace commitments that total up to some 590 sq.m net. This floorspace is related to the same two commitments as above. In relation to comparison goods sales floorspace, our assumptions are as follows:

- Planning application reference 67346/FUL – Mixed-use residential-led development (with ground floor retail and leisure uses) at Goods Yard, Glebe Street, Stoke-on-Trent. Approved 30 March 2022. It is assumed that the planning permission will support approximately 485 sq.m gross of comparison goods floorspace, and that this translates to an estimated comparison goods sales area of 340 sq.m
- Planning application reference 68675/FUL – Discount foodstore (Lidl) at Land off Weston Coyney Road, Stoke-on-Trent. This permission provides for a foodstore with 1,901 sq.m of gross floorspace with a net sales area of 1,251 sq.m. It is estimated that 250 sq.m of this area would be dedicated to comparison goods sales.

Retail Capacity Forecasts

336. The below Table 32 sets out City-wide and more localised convenience and comparison goods capacity forecasts for Stoke's principal centres in the period to 2040. Whilst the forecasts are provided over a 16-year period, paragraph 90 of the NPPF is clear that local planning authorities should plan to meet the need for new retail and town centre uses by *'looking at least ten years ahead'*. The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments *'...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.'*
337. The detailed capacity tabulations for convenience and comparison goods are set out in Appendices 5 and 9. The capacity findings are summarised below at Table 32.

Table 32: Net Retail Floorspace Capacity Forecasts

	Convenience Goods Capacity (net sq.m)	Convenience Goods Capacity (net sq.m)	Convenience Goods Capacity (net sq.m)	Comparison Goods Capacity (net sq.m)	Comparison Goods Capacity (net sq.m)	Comparison Goods Capacity (net sq.m)
Destination	2030	2035	2040	2030	2035	2040
Hanley City Centre	11	21	34	-467	-657	-547
Burslem Town Centre	0	0	1	-25	-37	-35
Fenton Town Centre	0	0	0	-22	-32	-29
Meir Town Centre	-3	-5	-6	-4	-7	-7
Longton Town Centre	-40	-70	-89	-402	-598	-611
Stoke Town Centre	-341	-340	-335	-443	-479	-449
Tunstall Town Centre	0	-1	-1	-143	-210	-205
Local Centres	15	31	53	-37	-53	-48
Other Smaller Centres	-9	-14	-14	-86	-121	-104
Out-of-Centre	-1,166	-1,166	-1,107	-1,838	-2,620	-2,446
Stoke-on-Trent Total	-1,533	-1,543	-1,464	-3,468	-4,813	-4,480

Source: CREAT^e Retail Capacity Model (Appendices 7 and 8, Volume 2)

338. In respect of **both convenience and comparison goods**, there is no overall capacity identified in the period to 2040. This is because any expenditure growth which is available over this timeframe is accounted for by a combination of forecast increases in online retailing, committed additional retail floorspace and through improvements in the sales efficiency of existing floorspace.
339. A negative requirement effectively means that Stoke-on-Trent likely has too much retail floorspace and that some such floorspace will be vacated over the plan period.
340. In practice, some of the inputs associated with this capacity modelling exercise will change over time. Forecasts should be treated as indicative and should be updated on a regular basis. Given the findings of this capacity assessment, future

proposals for additional floorspace should be reviewed carefully as the first priority should be to provide for the reoccupation of existing in-centre floorspace wherever possible.

Qualitative Need

341. In order to consider qualitative need, it is of some relevance to review the trading performance of Stoke-on-Trent's principal foodstores. The below Table 33 identifies the survey-derived turnover of all foodstores which this Study estimates secure a convenience goods turnover of more than £10m at 2024 which is derived from insider the defined Study Area. The table compares the 2024 turnover with that identified at 2019 by the previous RLS. In order to allow a direct comparison, the table converts the 2019 RLS turnovers from a 2017 price base to a 2022 price base.
342. In viewing the below, it should be noted that the two studies utilise different methodologies (in particular, this applies to the wording of the household survey). As such, some changes in performance are undoubtedly attributable to the different approach taken by different consultants.
343. Notwithstanding this caveat, as a general finding it is evident that the estimated turnover of discount foodstores appears to have generally reduced. This may partly be a consequence of new discount foodstore provision being delivered in Stoke-on-Trent in recent years, but a greater number of stores are trading in line with company benchmark trading expectations (a typical discount foodstore will usually have a convenience goods turnover of around £10m to £15m). A number of discount foodstores in the below table are trading within this range, and a further number (as identified by Appendix 5 of Volume 2) have a convenience goods turnover of less than £10m.
344. The below table therefore suggests that there has been some levelling off in respect of the performance of discount foodstores in the Stoke-on-Trent area (assisted by an increased supply of such stores in recent years). This is reflected in Aldi no longer having any specific requirements for additional foodstores in Stoke-on-Trent. Whilst Lidl has a stated requirement for four additional Stoke-on-Trent stores (at Chesterton, Lightwood, Meir, and Trentham) it remains to be seen whether they would pursue all of these destinations in practice.

Table 33: Survey Derived Turnover of Stoke-on-Trent's Principal Foodstores

Zone	Store	2019 RLS Turnover (2017 Prices) (£m)	2019 RLS Turnover Adjusted (2022 Prices) (£m)	2024 Turnover (2022 Prices) (£m)	Difference (2022 Prices) (£m)
1	Lidl, Lichfield Street	N/A	N/A	10.9	N/A
	Aldi, Norton Retail Park	30.4	35.1	25.1	-10.0

Zone	Store	2019 RLS Turnove r (2017 Prices) (£m)	2019 RLS Turnove r Adjuste d (2022 Prices) (£m)	2024 Turnove r (2022 Prices) (£m)	Differenc e (2022 Prices) (£m)
	Aldi, Victoria Road, Fenton	24.4	28.2	11.0	-17.2
	Lidl, Dividy Road, Bentilee	7.9	9.1	13.2	+4.1
	Morrisons, Festival Park	44.0	50.9	30.6	-20.3
	Tesco Extra, Clough Street	22.9	26.5	33.3	+6.8
2	Tesco Extra, Longton	47.1	54.4	51.6	-2.8
	Aldi, Whittle Road, Meir	27.6	31.9	30.7	-1.2
	Lidl, Trentham Road, Longton	N/A	N/A	13.9	N/A
	Tesco, Lysander Road, Meir Park	59.1	68.3	51.6	-16.7
3	Sainsbury's, London Road	11.7	13.5	24.4	+10.9
	Aldi, Stanley Matthews Way	26.1	30.2	22.7	-7.5
	Tesco, Newcastle Road	39.3	45.4	29.8	-15.6
4	Aldi, Brownhills Road, Tunstall	26.1	30.2	17.4	-12.8
5	Asda, Scotia Road, Tunstall	5.9	6.8	31.9	+25.1

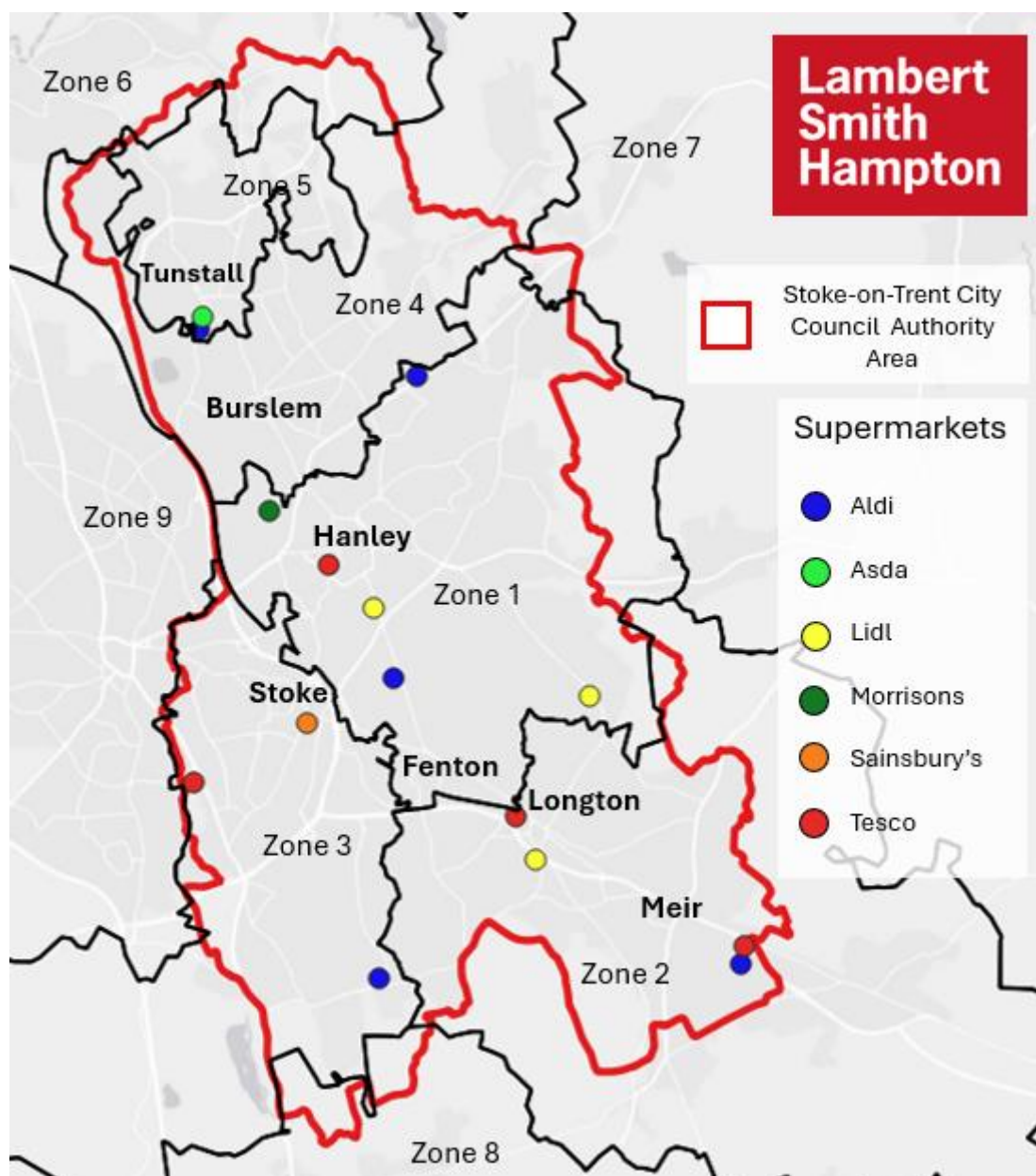
Source: CREAT^e Retail Capacity Model (Appendix 5, Volume 2) and Table 3 of Appendix 7 of 2019 RLS

345. It should also be noted that the performance of some of the bigger food superstores has also declined. We do not anticipate significant demand from the 'main four' grocery operators (Asda, Morrisons, Sainsbury's, and Tesco) for additional large format stores in the foreseeable future to serve existing urban areas. Instead, these retailers' interest is typically to serve new settlements and urban extensions through their convenience store formats and (on a limited number of occasions) through new supermarkets which are broadly similar in scale to Aldi and Lidl stores.
346. Turning to comparison goods, the local dominance of Hanley city centre has been greatly diminished in recent years. Hanley has been the subject of significant retail losses (including Debenhams, Marks & Spencer, and Arcadia Group operators) in recent years, and this Study has identified an associated reduction in respect of the city centre turnover. There is a real danger that any further reduction in its comparison goods function will undermine its attractiveness such that it no longer supports the critical mass of retailers needed to draw customers in from beyond an immediate catchment.
347. Whilst Festival Retail Park has effectively been a beneficiary of the decline of Hanley city centre, it is important that any further future out-of-centre opportunities are broadly complementary to the offer within the city centre. Wherever possible, a

‘town centre first’ approach should be applied in respect of new retail development and retailer representation in the area. In our view, the loss of trade from Hanley is such that there is clear need for the centre to improve on its current performance and not merely maintain it. The same applies to any other centre which is subject to a vacancy rate in excess of the national average figure.

348. However, in practice, new retailer requirements will be limited. A key policy requirement should be to ensure that comparison goods retail representation is consolidated within a focused part of Hanley city centre in order to drive footfall, create activity, and boost visitor and investor confidence.
349. The distribution of the principal foodstores across the City (as identified by the above Table 33) is set out in Figure 11 below.
350. The below plan identifies that both discount and mainstream main food shopping provision is distributed across the City. It should also be noted that significant grocery stores are available in neighbouring authority areas and that, in particular, foodstores in Newcastle-under-Lyme and Kidsgrove make an important contribution in meeting needs that originate within Zones 1, 3, 4 and 5.
351. The plan indicates that the most obvious omissions in respect of main food shopping facilities are the central and eastern part of Zone 1 and the central part of Zone 3.
352. The settlements of Abbey Hulton, Baddeley Edge, and Bentilee are located in the eastern part of Zone 1. Whilst these settlements support small supermarkets (e.g. Co-op and Heron Food), there would be some merit in improving customer choice in this area such that more main food shopping needs are met locally. This would reduce the need to travel and provide for more sustainable settlements. It should be noted that if any such development is proposed in an out of centre location then proposals should accord with the sequential and impact planning policy tests.
353. Whilst the central part of Zone 3 is lacking in grocery retail provision, it is recognised that much of this area is industrial in character and accessibility to a residential population is lessened as a result. We do not believe there is a qualitative requirement for additional significant retail provision within the central part of Zone 3.

Figure 11: Distribution of Principal Foodstores Across Stoke-on-Trent Authority Area



Summary

354. To reiterate, the NPPF (paragraph 90d) is clear that local planning authorities should plan to meet the need for new retail and town centre uses by *'looking at least ten years ahead'*. The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments *'...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.'*
355. Therefore, whilst greater weight should be placed on forecasts over the next five to ten-year period, we have also assessed the potential capacity for new retail

floorspace over the lifetime of the Local Plan (to 2040) to help inform the Council's longer-term plan-making and strategies.

356. As shown, the forecasts indicate that there is no quantitative need for both convenience and comparison goods retail floorspace to 2040. In practice, the negative requirement identified suggests that there is too much retail floorspace across the authority area.
357. A robust policy approach should therefore be adopted in accordance with the requirements of NPPF paragraphs 90 and 95 to support the robust assessment and determination of future retail proposals that are not in a centre and not in accordance with an up-to-date development plan. NPPF policy particularly emphasises the importance of the sequential test and having robust locally set impact thresholds, in compliance with the NPPF and PPG, to ensure that edge and/or out-of-centre proposals do not result in any significant adverse impacts on existing centres.

8. COMMERCIAL LEISURE TRENDS AND OPPORTUNITIES

358. This section focuses on the potential need for new leisure uses and facilities in the Stoke-on-Trent authority area over the period to 2040.
359. This assessment necessarily focuses on the main leisure, entertainment and cultural uses identified by the NPPF (Annex 2). These uses are widely accepted as making a significant contribution to the overall vitality and viability of town centres and should be located in town centres first in accordance with national and local plan policy objectives.
360. This assessment focuses on the main leisure, entertainment and cultural uses identified as town centre uses in the NPPF (Annex 2), namely:
- '...leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); ... and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).'*
361. These uses are widely accepted as making a significant contribution to the overall vitality and viability of town centres and should be located in accordance with national planning policy 'town centre first' principles.
362. The Government's 2020 reform of the Use Classes Order classified the main food & beverage, commercial leisure and cultural uses as follows:

Table 34: Use Classes Order Update

Original Use Class	Revised Use Class	Use	Description
Class A3	Class E(b)	Restaurants and cafés	Defined as selling food and drink for consumption on the premises.
Class A4	Sui Generis	Drinking establishments	Includes public houses, wine bars or other drinking establishments (but not night clubs), and drinking establishments with expanded food provision.
Class A5	Sui Generis	Hot food takeaways	Defined as the sale of hot food for consumption off the premises.
Class D1	Class F.1	Non-residential institutions	Includes art galleries (other than for sale or hire) and museums.
Class D2	Sui Generis	Leisure/Recreation (indoor/outdoor)	Cinemas, music and concert halls, bingo and dance halls.
Class D2	Class E (d)	Leisure/Recreation	Gymnasiums or area for indoor recreations.

Original Use Class	Revised Use Class	Use	Description
		(indoor/outdoor)	
Class D2	Class F.2	Leisure/Recreation (indoor/outdoor)	Indoor or outdoor swimming baths, skating rinks and outdoor sports/recreations.
Sui Generis	Sui Generis	A use on its own	Theatres, nightclubs, casinos and so on.

Source: Town and Country Planning (Use Classes) Order 1987 (as amended) and Revised Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 (SI 2020 No.757)

Forecasting Need for Commercial Leisure Uses

363. It is important to understand at the outset that forecasting the need for new leisure uses is more problematic than for retailing, as the sector is highly complex and dynamic. For example, the demand for existing and new leisure uses and facilities is particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently, the methods developed to forecast the need for new leisure uses are necessarily more flexible, qualitative, and high level.
364. From a planning policy perspective therefore the key to meeting future, as yet unknown needs, will be the development of policies that can accommodate the dynamic needs of the sector and support growth in the real world. This includes recognising that many commercial leisure uses have a substantial floorspace requirement and, unlike retail outlets where store size can vary significantly, incremental development is unlikely if only small increases in market growth are identified. For instance, a new cinema or bowling alley will need a certain number of screens or alleys to be commercially viable.
365. It is also the case that the recent changes to the Use Classes Order mean that the change of use of premises from retail to (some) leisure uses can be achieved without planning permission. The principal aim of the Class E use is to provide greater flexibility and expedite the re-use of commercial premises. As a result, changing demand for restaurant and café uses is likely to be accommodated by the re-use of existing commercial floorspace. This trend was already apparent before 2020 with many developments seeking permission for flexible Class A1/A3 uses but now applies more generally given that planning permission is not required to change between retail and café/restaurant uses.
366. In this context LSH has developed robust and transparent approaches to assess leisure needs based on the following key inter-related workstreams:
- a review of the key trends driving expenditure growth and market demand in the leisure sector over the last decade;

- an audit of existing leisure provision to help identify any significant 'gaps' in provision;
- a review of current leisure participation rates and preferences across the Study Area based on the results of the household survey; and
- the application of a robust economic/quantitative need assessment for some leisure groups based on accepted approaches.

367. The assessment is informed by the review of leisure market trends provided at Section 3 of this Study.

Stoke-on-Trent Authority Area Evening Economy

368. The Council area offers a varied evening and night time economy depending on the size of the centre as described below.

- **Hanley city centre** is a focus for evening and night time visits across the Study Area, which is reflected through a varied range of establishments across the centre. A particular focus is along Piccadilly, which accommodates cocktail bars to restaurants of varying cuisines. Almost all venues remain open beyond 9pm, indicating that there is a respectable offer in respect of evening/late night leisure services in the centre. Hanley features a range of dining options from fast food outlets and casual dining chains to independent restaurants offering global cuisines. The city centre is home to cafes and dessert parlours which remain open till late to serve both theatregoers and nightlife enthusiasts. In addition to the food & beverage offer, arts and entertainment venues such as Regent Theatre, Victoria Hall, and Cineworld are also present within the centre. Victoria Hall and Regent Theatre have hosted a range of popular plays, shows and acts such as War Horse, Mamma Mia!, Morrissey, and Jimmy Carr. They provide a key cultural and entertainment draw to the centre, bringing visitors in from across the region. The Cineworld cinema has nine screens and forms part of The Hive development at the Potteries Centre. As identified elsewhere in this report, the Covid-19 pandemic had a significant negative impact on usage and lettings in The Hive and it is of critical importance that vacant units in the development are reoccupied in order to provide a particular focus for mid-market national multiple operators in the centre. Hanley hosts seasonal events including outdoor cinema screenings and cultural festivals often extending into the evening.
- **Longton town centre** has a limited number of leisure provision in the centre. It mainly consists of a handful of restaurants and pubs. Venues include: The Strand public house; George & Dragon public house; The Last Post public house; Ali's Kitchen (restaurant); Saghir Express (restaurant), and Namaste Dine (restaurant).
- **Tunstall town centre** has a modest evening economy compared to Hanley city centre. The centre's offer is shaped by its local community and heritage. Traditional pubs are a cornerstone. Venues include The Globe public house; Oddfellows Arms public house; Paradise Inn public house; Pep's Bar and Restaurant; and, The Sneyd Arms Hotel.

- **Stoke-on-Trent town centre** has a relatively moderate evening economy in comparison to Hanley. It features a range of family run restaurants, cafes, pubs, and casual dining chains. It has several establishments that remain open until around midnight. There is a good selection of pubs, ranging from Crafty Lion and Wheatsheaf (Wetherspoon) along Church Street, to The Glebe to the north east of the centre. Other venues include: bru (craft beer and cocktails bar); The King's Way public house; Planet Bollywood (restaurant); Sangam (restaurant); and Tandoori Knights (restaurant). There are cultural and entertainment venues such as The Spode Works which hosts art exhibitions and community gatherings in to the evening.
- **Burslem town centre** has a strong provision of evening-related food & beverage operators, particularly in relation to the size of the centre. The pub provision is particularly strong, with late closing times across several venues helping to support a good evening economy in the town. Venues include Priscilla's Bar, Johnny's Micro Pub, The Clayhanger public house, The Bulls Head public house, together with restaurants serving a variety of cuisines. The centre also has a good live music scene.
- **Fenton town centre** has a limited provision of evening establishments within the centre comprising of pubs and takeaways. The Ye Olde Manor Inne public house and The Musician (bar) are located within close proximity of one another and remain open until 11pm. Marmaris Kebabs & Pizza (fast food & takeaway) and the Co-op convenience store add to the limited list of operators that remain open later into the evening. Overall, there is a low provision of food & beverage outlets, particularly cafes and restaurants, to sustain a viable evening/night time economy.
- **Meir town centre** also has a very limited provision of establishments to support the evening economy. Key operators include Swiftys (bar), which is located along Sandon Road, and Taste of India on Weston Road. There are also range of takeaways in Meir that operate well into the evening.

Leisure Expenditure Overview

369. The leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the sector has been significantly impacted by the pandemic, leisure and entertainment activities remain an important lifestyle and entertainment choice for many consumers.
370. Average spend on leisure services is dominated by food & beverage expenditure ('F&B'), which includes cafés, restaurants and bars. Experian's expenditure data identifies that F&B accounts for approximately 58.8% of average spend per capita on leisure services in the Study Area (Zones 1-9).

Table 35: Experian Estimates of Expenditure per Capita on Leisure Services (2024)

Zone	Accommodation	Cultural services	Games of chance	Hairdressing salons & personal grooming	Recreational & sporting services	Restaurants, cafes, etc.	Total
Zone 1	£192	£314	£150	£64	£120	£1,301	£2,140
Zone 2	£226	£350	£173	£79	£144	£1,379	£2,351
Zone 3	£246	£362	£164	£86	£146	£1,518	£2,522
Zone 4	£197	£326	£154	£67	£126	£1,318	£2,187
Zone 5	£185	£306	£146	£61	£118	£1,222	£2,038
Zone 6	£276	£401	£204	£103	£197	£1,645	£2,826
Zone 7	£305	£428	£210	£102	£191	£1,585	£2,821
Zone 8	£345	£458	£223	£116	£207	£1,783	£3,132
Zone 9	£257	£375	£177	£89	£155	£1,549	£2,602
Study Area Average (£)	£248	£369	£178	£85	£156	£1,478	£2,513
(% of Total)	9.9%	14.7%	7.1%	3.4%	6.2%	58.8%	100.0%

371. From a planning perspective this clearly shows the potential importance of F&B in supporting town centres' leisure and evening economies given much of this expenditure will be available to defined centres across Stoke-on-Trent's centres hierarchy. Cultural spend will be important for the larger centres at the top of the hierarchy, whilst hairdressing and personal grooming services may generate less expenditure per capita but are more likely to be spent locally.
372. Expenditure generated by the residents of Stoke-on-Trent on accommodation services is not likely to be spent within its centres. However, there will be some inflow of spending on accommodation services from outside the Study Area and improved hotel provision in the area will assist in help to secure this expenditure.
373. Expenditure on recreational & sporting activities is likely to be less important for town centres, as is spend on games of chance – the former due to the likelihood of such provision being located outside of town centres and the latter due to the significance of online spend.

Leisure Expenditure Forecasts

374. The table below shows the most recent leisure spend projections by Experian as set out at Figure 1a and Figure 1b of Retail Planner Briefing Note 21 (February 2024).

Table 36: Actual & Forecast Growth in UK Leisure Spend (% per annum)

	2018	2019	2020	2021	2022	2023	2024	2025	2026-30	2031-40
Leisure Spend Growth (%)	-0.9%	0.1%	-35.4%	28.6%	21.3%	-1.3%	-0.3%	0.6%	1.1%	0.8%

375. The base year expenditure per capita levels for leisure have been projected forward to 2040 using Experian's forecast annual growth rates above, and then applied to the projected population for each Study Zone to identify the total available expenditure on leisure and recreation goods and services.

376. This results in total available leisure expenditure in 2024 of £1,326.8m in the Study Area (see table below).

Table 37: Study Area: Total Forecast Growth in Commercial Leisure Expenditure: 2024 – 2040 (£m)

Zone	2024	2030	2035	2040	Change: 2024-2040	Change: 2024-2040
	(£m)	(£m)	(£m)	(£m)	(£m)	(%)
Zone 1	180.0	196.2	208.4	221.3	41.3	22.9%
Zone 2	182.8	195.4	204.4	213.9	31.1	17.0%
Zone 3	114.1	123.6	130.7	138.2	24.0	21.0%
Zone 4	92.0	99.6	105.2	111.1	19.1	20.8%
Zone 5	52.1	55.9	58.6	61.5	9.4	18.0%
Zone 6	191.6	207.3	218.3	229.5	37.9	19.8%
Zone 7	185.4	198.3	207.6	217.4	32.0	17.3%
Zone 8	109.6	120.5	128.2	136.0	26.4	24.1%
Zone 9	219.2	239.3	253.8	268.8	49.6	22.6%
Study Area (Zones 1-9) (£)	1,326.8	1,436.2	1,515.4	1,597.7	270.8	20.4%

377. Applying the most recent year-on-year leisure spend growth rates sourced from Experian Retail Planner Briefing Note 21 to the population projections results in an increase in total available commercial leisure expenditure across the defined Study Area (Zones 1-9) of +20.4% (+£270.8m) by 2040.
378. The table below breaks down the growth in leisure expenditure by category. It shows that F&B expenditure between 2024 and 2040 across the Study Area is forecast to increase by +£159.6m (accounting for 59% of the total) followed then by cultural services (+£39.6m, accounting for 15% of the total).

Table 38: Study Area: Total Forecast Growth in Commercial Leisure Expenditure: 2024 – 2040 (£m)

	Study Area: Total Available Leisure Spend (£m)				Change: 2024-2040	Change: 2024-2040
	2024	2030	2035	2040	(£m)	(%)
Accommodation	£130.3	£141.1	£148.8	£156.9	£26.6	20.4%
Cultural services	£194.5	£210.5	£222.1	£234.1	£39.6	20.4%
Games of chance	£94.0	£101.7	£107.3	£113.1	£19.1	20.3%
Hairdressing salons & personal grooming	£45.0	£48.7	£51.4	£54.2	£9.2	20.4%
Recreational & sporting services	£82.4	£89.2	£94.1	£99.2	£16.8	20.3%
Restaurants, cafes, etc.	£780.6	£845.0	£891.7	£940.2	£159.6	20.4%
Total	£1,326.8	£1,436.2	£1,515.4	£1,597.7	£270.8	20.4%

379. Against this background of forecast leisure expenditure growth over the plan period, the following assessment identifies the potential quantitative and qualitative need for new commercial leisure uses in the centres across the Council area.
380. From a planning perspective this clearly shows the potential importance of spending on F&B for town centres, given much of that spend will be claimed by

defined centres at all levels of the retail hierarchy. Cultural spend will be important for the larger centres, at the top of the hierarchy, whilst hairdressing and personal grooming services may generate less expenditure per head this is more likely to be spent locally and is important in sustaining smaller centres.

Eating and Drinking Out

381. The F&B sector includes restaurants, cafés, bars and pubs (former Class A3, A4 and A5 uses). These uses are integral to a town centre's wider offer and economy. A good choice and quality of F&B uses can help to complement other town centre uses, by generating trips, stretching 'dwell times', and increasing 'linked' expenditure to other shops and businesses as part of the same trip, and strengthening both daytime and evening economies.
382. As identified previously, the F&B sector dominates average household expenditure and participation in leisure across the Study Area. Spend on F&B is also forecast to experience the greatest growth over the period to 2040. In theory, this expenditure growth should support the potential to enhance the scale, quality and choice of F&B uses across the Study Area. However, in reality, this growth will be impacted by current and future trends in the sector and market demand (linked to the strength of local provision).
383. Research indicates that national multiple chains had a significant beneficial impact in underpinning the expansion of the F&B sector up to 2017 when they accounted for almost half of all net new business openings. However, since 2017, a number of multiples in the casual dining sector have struggled against a backdrop of increased competition, rising costs, and a tightening of consumer spending due to wider Brexit and economic concerns. The reality is that too many F&B operators expanded too quickly into increasingly marginal locations, funded by private equity, and the market became saturated and unsustainable. The growth in the availability, convenience and speed of home deliveries driven by innovative technology and apps represents a further significant challenge to more traditional F&B operators. In the local context, many traditional food & beverage operators have adopted a hybrid model where they offer both in-house dining and platform-based home delivery.
384. These new challenges and pressures have resulted in a radical restructuring of businesses across the sector, resulting in the rationalisation of physical space. It is likely that there will be an increase in business failures and closures during 2024/25 as the impact of the pandemic, cost of living and energy costs on sales, profit margins and rising debts deepens. Commentators predict that this further 'shakeout' in the sector will leave the proactively-managed multiple and independent businesses that have strong brand loyalty and/or a clear differentiated offer as the main 'winners'.
385. F&B operators, like retailers, will also need to understand and cater for the needs of the changing demographic and consumer market to remain relevant and viable. For example, Millennials (under 35s) make-up almost one-quarter of the UK population and research shows that they spend a substantial 13% of their

disposable incomes on eating and drinking out. This demographic is now in their parenting years, meaning that restaurants, pubs and cafés will also need to evolve and adapt to cater for the changing needs of new 'Millennial families'. This could be driven for example, by increasing emphasis on convenience, affordability, entertainment, uniqueness and the use of technology and apps.

386. Restaurant operators will therefore, as a minimum, need to make sure that they are easy to reach online and on social media with up-to-date menus and strong images, and adapt the latest technologies to drive online booking.
387. The popularity of street food, market halls and 'meanwhile'/'pop-up' restaurants and bars is largely driven by Millennials and subsequently demographic cohorts. These more informal drinking and eating venues fulfil younger generations' desire to experiment and explore distinctive styles of drink, food and new cuisines in exciting new and more informal environments. Trialling a 'pop-up' site also represents an opportunity to test a new concept, gain a following, fine-tune details, and secure investment before making a long-term commitment.
388. The household survey identified where people living in the Study Area currently chose to eat and drink. The below Table 39 identifies that Stoke-on-Trent authority area market share of trips to bars, pubs and nightclubs and to café and restaurants equates to 34.5% for the former and 36.3% for the latter. Both of these market shares are considered to be relatively low and reflect the relative attractiveness of some smaller towns and villages just beyond the Stoke-on-Trent authority area. As would be expected, the most popular location for such trips within Stoke-on-Trent is Hanley city centre. In terms of competing centres, the dominant centre is Newcastle-under-Lyme town centre, followed by Stone town centre, Cheadle town centre, and then Leek town centre.

Table 39: Market Shares for Eating Out Locations (%)

	Cafes & Restaurants	Bars, Pubs, Nightclubs
STOKE ON TRENT CITY COUNCIL AREA		
Hanley City Centre	17.0%	15.7%
Longton Town Centre	1.6%	1.4%
Tunstall Town Centre	1.4%	2.1%
Stoke-upon-Trent Town Centre	3.4%	3.5%
Burslem Town Centre	0.4%	2.4%
Fenton Town Centre	1.1%	1.0%
Meir Town Centre	1.5%	1.9%
Local Centres	6.2%	4.7%
Festival Retail Park, Marina Way, Stoke-on-Trent	2.1%	0.1%
All Other Locations in the City Council Area	1.6%	1.6%
STOKE ON TRENT CITY COUNCIL AREA	36.3%	34.5%
OTHER CENTRES/LOCATIONS OUTSIDE STOKE ON TRENT CITY COUNCIL AREA		
	0.0%	0.0%
Cheadle Town Centre	7.1%	8.9%
Leek Town Centre	4.2%	2.8%
Newcastle-under-Lyme Town Centre	11.6%	13.3%
Stone Town Centre	9.2%	9.8%
All Other Centres/Locations	31.5%	30.7%
ALL OTHER LOCATIONS	63.7%	65.5%
TOTAL	100.0%	100.0%

389. Drawing on these market shares and retention levels, it is possible to carry out a high-level assessment of the potential need for new food & beverage uses over the plan period using a robust approach developed by LSH. This involves applying the F&B retention level of 36.3% to the available F&B spend of £780.6m in 2024 (see below Table 40). This results in a 'retained' F&B expenditure (or 'turnover') of £283.0m in 2024 which is forecast to increase to £340.9m by 2040.

Table 40: F&B Spend Across Study Area (£m): 2024 to 2040

Study Area (Zones 1-9)	2024	2030	2035	2040
Available Spend on F&B:	£780.6	£845.0	£891.7	£940.2
Participation Levels (%)	36.3%	36.3%	36.3%	36.3%
Market Share (£m)	£283.0	£306.4	£323.3	£340.9
Benchmark Turnover (£m)	£283.0	£306.4	£323.7	£341.9
Net Residual F&B Spend Capacity	£0.0	-£0.1	-£0.4	-£1.0

390. Using a similar approach as for the assessment of retail capacity, we have applied Experian's forecast year-on-year 'productivity' (sales 'efficiency') growth rates (as set out at Figure 1 of Experian Retail Planner Briefing Note 21 – Leisure) to the retained turnover of £283.0m in 2024 to allow for existing businesses to cover their reasonable costs over time to remain viable. This results in a negative residual expenditure to support additional F&B floorspace to 2040 (i.e. there is no quantitative requirement).
391. As detailed previously, this is a sector that has been hit hard prior to and (even more so) during the pandemic and the prevailing macro-economic position will also influence discretionary leisure spending. The sector was effectively shut down and carried high overheads. On this basis, it can be reasonably assumed that a proportion of any growth is likely to be absorbed by existing businesses to cover the debt incurred during the pandemic and thereafter the rising operational/occupancy costs and inflationary pressures.
392. It should be emphasised that the growth to sustain new cafés, restaurants and bars will be very much subject to market demand. Focusing new uses in the main town centres will help increase competition and consumer choice, and underpin both daytime and evening economies. Any market demand from operators is likely to be satisfied by the take-up of suitable vacant units in existing centres, the repurposing of floorspace and/or as part of mixed-use developments. In particular, in the context of the above capacity assessment, we do not envisage any requirement to identify sites for any significant F&B-led development.
393. This approach is consistent with the household is further confirmed by the responses to the household survey which do not suggest a requirement to radically overhaul Stoke-on-Trent's F&B offer. In response to the question relating to what improvements could be made to the Stoke-on-Trent authority area's leisure offer that would make respondents visit/partake in leisure activities more often (Question 49), the responses suggest a general level of contentment with the offer. Only 5.5% of respondents stated 'more/better restaurants'; 4.7% suggested 'more/better cafes/coffee shops'; 4.2% stated 'more/better pubs/bars'; 3.3% suggested 'more family-friendly pubs / restaurants'; 1.0% stated 'more nightclubs/better nightlife'; and, 0.5% 'more pavement cafes'.

Cinemas

394. The UK cinema sector has evolved dramatically since the 1990s when it was largely dominated by a handful of national multiples. Today the sector's offer ranges from larger multiplexes (any cinema with five screens or more, though some of the largest multiplex sites have as many as 12 or 16 screens) to smaller independent operators and 'pop up' venues.
395. Although year-on-year admissions and box-office takings are volatile – driven by the appeal of individual films and Hollywood 'blockbusters' – the long-term trend since the mid-1980s has been upward and has principally been driven by the development of new cinemas. The growth in the cinema sector over the last 10 to 20 years is even more impressive when one considers that this has occurred

against the increase in new and sophisticated in-home entertainment, driven by innovative technology, choice and flexibility (including online streaming platforms, for example, Sky, Netflix and Amazon Prime, Apple TV, and Disney+ platforms).

396. There has also been a growth in smaller (digital) cinemas serving smaller catchment areas. Digital cinemas are more flexible and less 'space-hungry' as they do not require large auditoriums. There are therefore opportunities to provide a modern cinema offer in existing (repurposed) buildings and shopping centres, or as part of a mixed-use offering.
397. The pandemic hit the cinema industry hard, particularly for the major chains. As previously mentioned, smaller nimble operators have found novel ways to show films by operating 'pop-up' cinemas and drive-in cinemas have had a resurgence in popularity. In addition, the UK's smaller independent chains – including Curzon, Picture House (which is owned by Cineworld), and Everyman – fared much better during the pandemic. They showed a more diverse selection of films, and with high-quality food offering, fully stocked bars and high-end seating, appeared more resilient during a particularly challenging period.
398. The future growth in the sector is dependent on the levels of available discretionary spending. Cinema trips will remain a significant and popular leisure activity for all age groups. Notwithstanding this, the competition from home entertainment and alternative at-home film channels will intensify and cinema operators will have to keep updating and adapting their offer to respond to consumer needs.
399. The provision within the Council area comprises of 20 screens. These are located at: Cineworld, The Potteries Centre, Hanley (nine screens); Odeon, Festival Park, Stoke-on-Trent (ten screens); and, Stoke Film Theatre (one screen).
400. Table 41 below shows the most popular cinema venues in the authority and wider Study Area based on the household survey market shares.

Table 41: Popular Cinema Venues Based on Survey-derived Market Shares (%)

	Study Area Zones 1-9	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %
STOKE ON TRENT CITY COUNCIL AREA										
Cineworld, The Potteries Centre, Hanley	30.8%	60.9%	35.8%	19.7%	48.5%	45.7%	19.9%	30.4%	4.1%	10.8%
Odeon, Festival Park, Stoke-on-Trent	10.8%	5.4%	18.0%	13.8%	7.1%	49.3%	14.5%	9.2%	7.5%	7.6%
Stoke Film Theatre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
STOKE ON TRENT CITY COUNCIL AREA	41.6%	66.3%	53.8%	33.5%	55.6%	95.0%	34.4%	39.6%	11.6%	18.4%
OTHER VENUES OUTSIDE STOKE ON TRENT CITY COUNCIL AREA										
CineBowl, Uttoxeter	5.2%	1.9%	2.9%	0.0%	0.0%	0.0%	0.0%	26.7%	0.9%	2.4%
Odeon, Stafford	3.7%	2.5%	0.7%	5.3%	4.8%	0.0%	0.0%	3.5%	19.7%	2.4%
Vue, The Square, Newcastle-under-Lyme	47.4%	22.8%	42.6%	58.7%	39.5%	5.0%	60.5%	30.2%	65.9%	76.8%
All Other Venues Elsewhere	2.2%	6.5%	0.0%	2.6%	0.0%	0.0%	5.2%	0.0%	1.9%	0.0%
ALL OTHER VENUES	58.4%	33.7%	46.2%	66.5%	44.4%	5.0%	65.6%	60.4%	88.4%	81.6%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

401. In summary, the key headlines are as follows.

- Venues in the Council area are collectively achieving a market share of 41.6% from the wider Study Area. This market share is dominated by the Cineworld, (30.8%) followed by the Odeon at 10.8%. The single screen Stoke Film Theatre did not register a market share based on responses to the household survey.
- The main competition is from the Vue Cinema in Newcastle-under-Lyme (47.4%) and to lesser extent CineBowl, Uttoxeter (5.2%), and Odeon, Stafford (3.7%).

402. The high-level assessment of the potential need for new commercial cinema provision in the Council area is based on standard approaches that draws on a regional 'screen density' average (i.e. the number of screens per 100,000 population). According to the latest available research (from Dodona Research, Office for National Statistics (ONS) and British Film Institute (BFI)), the current UK average is 6.9 screens per 100,000 people, which represents an increase from 6.1 screens in 2014. The equivalent average figure for the West Midlands region is lower, at 5.9 screens per 100,000 people.
403. The table below shows the potential quantitative need for additional cinema screens to 2040 based on Stoke-on-Trent's current market share and the population forecasts previously described.

Table 42: Potential Capacity for New Cinema Screens

	2024	2030	2035	2040
Potential Cinema Catchment Population (Zones 1-9)	219,475	223,541	226,658	229,655
Cinema Screen Density (screens per 100,000 persons) based on average for West Midlands Region	5.9	5.9	5.9	5.9
Cinema Screen Potential	13	13	13	14
Existing: Screen Numbers	20	20	20	20
Proposed: Screen Numbers	0	0	0	0
Net Screen Potential	-7	-7	-7	-6

404. The key steps in the assessment of cinema capacity involve applying the market share ('retention level') for cinema trips (41.6%) to the total population at the base year (some 527,509 persons). This produces the total Stoke-on-Trent 'cinema-going population' (219,475 persons). Applying the average screen density of 5.9 to this population, the forecasts show that there is no capacity for new cinema screens based on existing provision.
405. This is consistent with responses to the household survey which do not show a significant demand for new cinemas. In response to the question on what improvements could be made to the Stoke-on-Trent authority area's leisure offer that would make respondents visit/partake in leisure activities more often (Question 49), only 3.2% of respondents in the Study Area identified the need for 'a multi-screen cinema' and 0.3% for an 'art house cinema'.
406. In summary, there does not appear to be any significant overarching quantitative capacity or demand for new cinema provision in the Council area. Any market interest and demand from cinema operators seeking representation in the area should be directed to the town centres first, to further help diversity daytime and

evening economies. This also does not preclude any improvements to the existing offer (e.g. through regeneration or replacement).

Health and Fitness Facilities

407. The health and fitness sector as a whole was also significantly impacted by the pandemic, with lockdowns forcing the closure of facilities. It is undeniable that the pandemic reinforced the need for outdoor activity particularly to support mental health and wellbeing. Furthermore, alternative means of exercise increased during the series of lockdowns in 2020 and 2021, including at-home workouts, digital workouts, outdoor exercise and classes, and the purchase of home gym equipment. Whilst this was an accelerated reaction to the pandemic, the long-term impact on the sector and gym memberships remains unclear.
408. The growth of the budget gym operators has also 'squeezed' the memberships and viability of some of the established mid-market chains, such as LA Fitness and Fitness First. This has resulted in the increasing polarisation of the gym sector between the budget operators at the value end of the spectrum, and the more exclusive health and fitness centres at the higher, more expensive end. As a result, analysts predict that those mid-market gym operators that are neither very cheap, nor particularly exclusive will struggle to maintain market share in the competitive marketplace unless they revise their business models.
409. In terms of fitness/health activity participation rates H&F facilities in the Council area:
 - Facilities are achieving a relatively good market share within the widely defined Study Area of 50.7%. Of this total, named venues with significant market shares include: PureGym, Stoke-on-Trent, Ravensdale Retail Park (9.2%); JD Gyms Stoke, China Street, Fenton (5.4%); and, Fenton Manor Sports Complex, Fenton (5.4%).
 - 'Leakage' to other H&F facilities is primarily to venues in Newcastle-under-Lyme followed to a lesser extent by venues in Cheadle.

Table 43: Study Area: Health and Fitness Market Share

	Study Area Zones 1-9
STOKE ON TRENT CITY COUNCIL AREA	
Hanley City Centre	2.9%
Longton Town Centre	0.4%
Tunstall Town Centre	0.0%
Stoke-upon-Trent Town Centre	0.0%
Burslem Town Centre	0.6%
Fenton Town Centre	0.0%
Meir Town Centre	0.6%
Local Centres	1.8%
Named Venues in the City Council Area	0.0%
Apex Gym Stoke, Stoke-on-Trent,	3.1%
Base Body Fitness, Stoke-on-Trent,	1.4%
Caveman Training, Fenton	0.7%
Dimensions Leisure Centre, Stoke-on-Trent,	3.2%
Elite Fitness, Fenton	1.9%
Energie Fitness Tunstalle, Stoke-on-Trent,	0.0%
Everlast Gym, Stoke-on-Trent,	1.3%
Fenton Manor Sports Complex, Fenton	5.4%
JD Gyms Stoke, China Street, Fenton	5.4%
M Club Spa & Fitness, Festival Way, Hanley.	3.4%
M Club Spa & Fitness, Stoke-on-Trent,	2.8%
New Horizons Sport and Leisure Centre, Stoke-on-Trent,	0.6%
Ng2 fitness, Stoke-on-Trent,	0.0%
Nuffield Health Stoke Fitness & Wellbeing Gym, Stoke-on-Trent,	0.2%
PureGym Stoke On Trent East, Ravensdale Retail Park	9.2%
Samien Fitness, Stoke-on-Trent,	1.1%
Sir Stanley Matthews Sports Centre, Stoke-on-Trent	0.2%
Strength Asylum, Stoke-on-Trent	1.6%
True Grit Training, Hanley	0.0%
Universal Fitness Fenton, Fenton	1.4%
Wallace Sports And Education Centre, Stoke-on-Trent	1.2%
All Other Locations in the City Council Area	0.6%
STOKE ON TRENT CITY COUNCIL AREA	50.7%
OTHER CENTRES/LOCATIONS OUTSIDE STOKE ON TRENT CITY COUNCIL AREA	
Cheadle Town Centre	1.4%
Body Bank Gym, Cheadle	1.2%
South Moorlands Leisure Centre, Allen Street, Cheadle	3.8%
Leek Town Centre	1.9%
Brough Park Leisure Centre, Leek	1.7%
Cave Fitness, Leek	1.2%
Newcastle-under-Lyme Town Centre	2.6%
JD Gyms, Newcastle-under-Lyme	5.1%
Jubilee 2 Leisure Centre, Newcastle-under-Lyme	2.4%
PureGym, Newcastle-under-Lyme	5.7%
Stone Town Centre	0.5%
Stone Leisure Centre, Stone	2.8%
All Other Centres/Locations	19.0%
ALL OTHER LOCATIONS	49.3%
TOTAL	100.0%

410. The household survey also asked a specific question on what improvements could be made to the Stoke-on-Trent authority area's leisure offer that would make

respondents visit/partake in leisure activities more often (Question 49). The main responses for the wider Study Area included: 'an indoor swimming pool' (cited by 3.2% of respondents); 'leisure/sports centre' (1.9%); 'more local sports and recreation facilities' (football pitches, tennis courts, and so on) (1.9%); 'an outdoor swimming pool' (1.1%); 'more/better health clubs/gyms' (0.9%); and, 'outdoor gyms' (0.2%).

411. In terms of the need for new health club/gym facilities, the population growth projected for the Study Area equates to an additional 17,263 persons by 2035 and an additional 24,467 persons by 2040. Applying the survey derived area participation rate for health and fitness activities of 50.7% within the Study Area provides an indication of the potential for new gym/health and fitness club members. This approach identifies an additional 8,757 persons at 2035, increasing to an additional 12,412 persons by 2040.
412. Based on average membership levels for key premium gym operators (average 2,897 members per club) or a budget gym (average 3,452 members), the population projection increases will support an additional three gyms at 2035 and four gyms at 2040 under both premium and budget gym models.
413. As with other commercial leisure sectors, the take-up of any forecast need based on population growth will be dependent on market interest and the demand from gym operators for representation.
414. Translating demand for new gyms to actual floorspace will also depend on the type of gym. For example, smaller boutique and specialist independent gyms generally require smaller units of between 300 sq.m and 700 sq.m, and budget operators generally have requirements for unit sizes of up to circa 3,700 sq.m. Anytime Fitness is an example of a smaller independent gym, with a floorspace requirement generally ranging from 350 sq.m to 650 sq.m. Budget operators Pure Gym and The Gym have requirements for up to 1,850 sq.m, and NRG is acquiring units of up to 3,700 sq.m.
415. Enhancement of existing facilities and promotion of the provision of new gym and fitness facilities is recommended within town centres to help maintain and enhance their overall diversity and attraction, and/or focussed on transport hubs. Town centre locations also represent the most sustainable and accessible locations for the majority of the population. Meeting needs over the plan period will also have to take account of the changes in the local demographic profile and lifestyle trends. For example, facilities, clubs and classes will need to cater for a wide range of demographics.

Gambling Venues

416. Gambling represents a significant component of the leisure industry. The main sectors comprise 'games of chance' (namely bingo clubs, casinos, betting shops, and amusement arcades). The latest research from the Gambling Commission Industry Statistics (published February 2024) indicates that the gambling industry in Great Britain generated a total gross gambling yield ('GGY') for the year end to

March 2023 of £15.1bn. This represented a +6.8% increase from the previous year. Remote (online) gambling accounted for £6.5bn of total GGY.

417. The following assesses the main trends in this sector, current provision and the potential need/demand for new uses and facilities.

- **Bingo Halls** – In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smart-phone technology through new ‘app’ development. This forms part of a wider trend and has fuelled the growth in ‘remote/online’ gambling (which includes gambling activities through the internet, telephone, radio, and so on). Bingo operators are also increasingly looking to diversify their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result, there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes. At the opposite end of the scale, research shows that 55 to 64 age group has generated the biggest growth in online gambling as more mature bingo players switch to online bingo sites, as they grow in confidence with the modern technology. These trends have resulted in the closure of many bingo halls in centres across the UK over the last decade, and the prospects for new openings are limited.
- **Casinos** – The latest figures published by the Gambling Commission show that non-remote casinos sector (i.e. not online) saw a £118.6 million increase of 17.2% in GGY to £810.4 million (casino games at £609 million and casino machines at £201.4 million) over the period April 2022 to March 2023. The casino sector is dominated by two companies: the Rank Group with 67 venues has a 44% market share and Genting UK has 44 venues and a 29% market share. There has been some consolidation of the sector in the past few years, such as Rank Group’s purchase of Gala Coral Casinos.
- **Betting Shops** – According to Gambling Commission data, there were some 5,995 betting shops in the UK as of March 2023 which represents a reduction in the figure of 6,219 recorded in March 2022. The decline in the sector is longstanding as 8,320 betting shops were recorded in March 2019 and 9,111 in March 2014. The decline in the number of betting shops has been due to regulatory changes introduced in 2015 which led to a fall in revenue and profit. William Hill accounted for 27% of all premises in 2019, Ladbrokes had a 22% share, Tote’s market share was 19% (following its purchase of Betfred), and Gala Coral Group’s share was 18%. As gambling activities continue their shift to online channels, so the demand for physical outlets will inevitably dampen in the future and more betting shops will inevitably close. The presence of betting shops in high streets is also a contentious issue due to the perceived social, economic and health/wellbeing impacts on individuals and households. The Government recognised that betting shops have specific impacts and in 2016 reclassified their use from Class A2 to sui generis. This classification was maintained in the revised Use Classes Order that came into effect on 1 September 2020. This classification of betting shops as a sui generis use

means any change of use to a betting shop requires an application to the local planning authority for planning permission.

418. As set out below at Table 44, analysis of the survey-derived market shares for visits to bingo halls, casinos and bookmakers identifies that venues in the Stoke-on-Trent Study Area attain a high market share equating to 74.6% of all such trips originating from the Study Area. The dominant venues include: Buzz Bingo, Fenton (17.1%); Buzz Bingo, Hanley (16.6%), Genting Casino, Hanley (9.9%); Mecca Bingo, Hanley (8.9%); and Admiral Casino, Hanley (7.6%).
419. The main competing location outside of the Stoke-on-Trent local authority area is the Admiral Casino at Newcastle-under-Lyme, which attains a market share of 5.9%, and provision within Newcastle-under-Lyme town centre more generally (which achieves a market share of 4.1%).

Table 44: Gambling Venues Market Shares (%)

	Study Area Zones 1-9
STOKE ON TRENT CITY COUNCIL AREA	
Hanley City Centre	2.9%
Longton Town Centre	0.6%
Tunstall Town Centre	0.6%
Stoke-upon-Trent Town Centre	0.3%
Burslem Town Centre	1.2%
Fenton Town Centre	0.6%
Meir Town Centre	2.1%
Local Centres	0.9%
Admiral Casino, Percy Street, Hanley	7.6%
Ball Green Working Mens Club, Stoke-on-Trent	0.6%
Buzz Bingo, Albion Square, Hanley	16.6%
Buzz Bingo, Victoria Road, Fenton	17.1%
Genting Casino, Hanley	9.9%
Grosvenor Casino, Hanley	2.0%
Mecca Bingo, Hanley, Stoke-on-Trent	8.9%
All Other Locations in the City Council Area	2.7%
STOKE ON TRENT CITY COUNCIL AREA	74.6%
OTHER CENTRES/LOCATIONS OUTSIDE STOKE ON TRENT CITY COUNCIL AREA	
Birmingham City Centre	2.0%
Cheadle Town Centre	4.3%
Leek Town Centre	2.7%
Newcastle-under-Lyme Town Centre	4.1%
Admiral Casino, Newcastle-under-Lyme	5.9%
Stone Town Centre	2.0%
All Other Centres/Locations	4.4%
ALL OTHER LOCATIONS	25.4%
TOTAL	100.0%

420. Based on current provision, market and consumer demand, we do not believe that there is a demonstrable need to enhance existing provision to help improve competitive position and the choice of venues in the authority area. This is further confirmed by the responses to the household survey which do not show a significant demand. In response to the question on what improvements could be made to the Stoke-on-Trent authority area's leisure offer that would make respondents visit/partake in leisure activities more often (Question 49), only 0.9% stated 'bingo venue' and 0.5% suggested a 'casino'.

Other Commercial Leisure

421. Other commercial leisure facilities can be grouped together under ‘family entertainment venues’ (FEVs), which include paid activities that appeal to adults and children (such as tenpin bowling, BMX biking, roller skating, ice skating, and similar uses).
- Tenpin bowling** – This is possibly the most popular and well established activity within the ‘family entertainment’ sector. After a period of decline in the 1970s, there are currently some 320 venues in the UK according to Mintel. A number of the successful bowling facilities opened over the last 15 to 20 years (e.g. Hollywood Bowl and Ten Entertainment) tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and (on occasion) nightclubs. The critical mass of leisure uses ‘under one roof’ help to underpin the viability of tenpin bowling centres, as they tend to struggle as standalone destinations. The sector is evolving from old-style bowling alleys, to modern, multi-generational entertainment centres where bowling is blended with other forms of activity alongside an enhanced dining offer. This is balanced by the growth of smaller independent specialist bowling facilities. Within the Council area provision of commercial ten pin bowling is found at Festival Park (Tenpin). In response to the question on what improvements could be made to the Stoke-on-Trent authority area’s leisure offer that would make respondents visit/partake in leisure activities more often (Question 49), only 0.7% of respondents suggested ‘ten pin bowling’.
 - Trampoline Parks** – Over recent years there has also been growth in other more specialist commercial leisure attractions, such as trampoline parks. Since the opening of the first indoor parks in the UK in 2014, trampolining has become one of the UK’s fastest growing sport and leisure trends. It is estimated that there were some 150 parks in the UK in 2017/18, with the potential capacity for between 250 to 300 parks before saturation is potentially reached. This mirrors the growth in the United States and Australia, where parks first emerged in the early to mid-2000s. The main operators in this sector include Oxygen Freejumping, Ryze, and Gravity Active Entertainment. The public sector is also investing in trampoline parks, including Eastbourne Borough Council, Waltham Forest Council, and Tameside Council. In response to the broad range of ‘jumpers’, trampoline parks are also offering a range of activities and experiences that cater to the needs of a broader demographic, including rock-climbing, ninja courses (e.g. Ninja Warrior, Stoke), laser tag and other social events. Within the Council area provision of trampolining is found at Fenton Manor Sports Complex and Stoke Trampoline & Gymnastics at the Trentham Academy. In response to the question on what improvements could be made to the Stoke-on-Trent authority area’s leisure offer that would make respondents visit / partake in leisure activities more often (Question 49), only 0.3% of respondents suggested a ‘trampoline park’.

Collectively, the notable responses to suggested improvements to FEVs were as follows.

Table 45: Family Entertainment Venues (FEVs): Suggested Improvements

FEV's Suggested Improvements	Study Area (Zones 1-9) Market Shares
More leisure facilities / activities for families	4.8%
More leisure facilities / activities for teenagers	4.4%
Ice rink	2.9%
Crazy golf	2.8%
More leisure facilities / activities for the elderly	1.4%
Augmented reality gaming centre	1.3%
Indoor soft play areas	0.7%
Ten-pin bowling	0.7%
Trampoline park	0.3%
More leisure facilities / activities for women	0.3%

422. Table 46 below summarises the findings of the survey-derived market shares for trips to FEVs. The results show that venues within the Council area are achieving a high market share of 61% from within the Study Area (Zones 1-9). Tenpin Stoke, Festival Park attains almost two thirds of this market share (41%) followed by Hanley town centre (9%). The key competing locations/venues include: Uttoxeter, Cinebowl (11.2%); Tenpin Crewe (3.7%); and, Newcastle-under-Lyme town centre (3.5%).

Table 46: Family Entertainment Venues – Market Shares (%)

	Study Area Zones 1-9
STOKE ON TRENT CITY COUNCIL AREA	
Hanley City Centre	9.0%
Longton Town Centre	0.0%
Tunstall Town Centre	0.0%
Stoke-upon-Trent Town Centre	0.0%
Burslem Town Centre	0.0%
Fenton Town Centre	0.8%
Meir Town Centre	0.0%
Local Centres	0.7%
Festival Park, Tenpin Stoke	40.8%
Festival Park, Waterworld	1.2%
Festival Park, Inflato	0.9%
Festival Park (Unnamed Venue)	2.1%
Hanley Park, Hanley	4.0%
All Other Locations in the City Council Area	1.6%
STOKE ON TRENT CITY COUNCIL AREA	61.0%
OTHER CENTRES/LOCATIONS OUTSIDE STOKE ON TRENT CITY COUNCIL AREA	
Cheadle Town Centre	0.5%
Leek Town Centre	1.0%
Newcastle-under-Lyme Town Centre	3.5%
Stone Town Centre	0.8%
Crewe, Tenpin Crewe	3.7%
Macclesfield, Superbowl	1.9%
Stafford, Tenpin Stafford	1.8%
Uttoxeter, Cinebowl	11.2%
All Other Centres/Locations	14.5%
ALL OTHER LOCATIONS	39.0%
TOTAL	100.0%

Theatre and Cultural Activities

423. Cultural activities include a broad range of activities that are focused on the arts and historic attractions. This assessment is concerned with the provision and potential need for theatres and museums. Within the Council area there are several cultural venues that are also important in supporting day and evening time centre economies including the Regent Theatre and Victoria Hall in Hanley.
424. The household survey shows that for trips to the theatre and/or music from across the Study Area, venues in the Council area attain a relatively high market share of 66.3% (dominated by Hanley city centre generally with a market share of 49.7%, and Regent Theatre, Hanley with a market share of 11.4%). Other theatre and music venues outside the Stoke-on-Trent local authority area attain a market share from the Study Area of 33.7%. Of this total, 12.9% is attributed to venues in Newcastle-under-Lyme town centre and 4.5% is attributable to the New Vic Theatre in Newcastle-under-Lyme. Some 2.7% of market share is claimed by Birmingham city centre, and Central London claims a market share of 1.6%.

Table 47: Theatre and Music Venues – Market Shares (%)

		Study Area Zones 1-9
STOKE ON TRENT CITY COUNCIL AREA		
Hanley City Centre	49.7%	
Longton Town Centre	0.0%	
Tunstall Town Centre	0.0%	
Stoke-upon-Trent Town Centre	2.4%	
Burslem Town Centre	0.1%	
Fenton Town Centre	0.0%	
Meir Town Centre	0.0%	
Local Centres	0.7%	
Regent Theatre, Hanley	11.4%	
Victoria Hall, Hanley	1.4%	
All Other Locations in the City Council Area	0.6%	
STOKE ON TRENT CITY COUNCIL AREA		66.3%
OTHER CENTRES/LOCATIONS OUTSIDE STOKE ON TRENT CITY COUNCIL AREA		
Leek Town Centre	0.1%	
Newcastle-under-Lyme Town Centre	12.9%	
Newcastle-under-Lyme: New Vic Theatre	4.5%	
Stone Town Centre	0.3%	
Birmingham City Centre	2.7%	
Central_London	1.6%	
Crewe Town Centre	1.1%	
Stafford Town Centre	1.2%	
All Other Centres/Locations	9.2%	
ALL OTHER LOCATIONS		33.7%
TOTAL		100.0%

425. In response to the question on what improvements could be made to the Stoke-on-Trent authority area's leisure offer that would make respondents visit / partake in leisure activities more often (Question 49), 4.0% suggested 'more live music venues'; 1.8% suggested 'more outdoor festivals/events/carnivals'; 0.9% suggested 'theatres'; and a further 0.4% suggested 'more/better shows at current theatres'.

426. For trips to cultural venues from across the Study Area, venues in the Council area attain a relatively strong market share of 60.3%. Of this, the large majority (55.8%) is attributable to Hanley city centre.
427. Other historic and cultural venues outside the authority area attain a market share from the Study Area of 39.7%. This is dominated by Central London with a market share of 7.5%, followed then by Newcastle-under-Lyme town centre (6.5%), Manchester city centre (6.1%). the Brampton Museum in Newcastle-under-Lyme; and, Birmingham city centre (4.4%).

Table 48: Historic and Cultural Venues – Market Shares (%)

Study Area Zones 1-9	
STOKE ON TRENT CITY COUNCIL AREA	
Hanley City Centre	55.8%
Longton Town Centre	1.1%
Tunstall Town Centre	0.0%
Stoke-upon-Trent Town Centre	2.0%
Burslem Town Centre	0.0%
Fenton Town Centre	0.0%
Meir Town Centre	0.0%
Local Centres	0.0%
Regent Theatre, Hanley	1.0%
Victoria Hall, Hanley	0.0%
All Other Locations in the City Council Area	0.3%
STOKE ON TRENT CITY COUNCIL AREA	60.3%
OTHER CENTRES/LOCATIONS OUTSIDE STOKE ON TRENT CITY COUNCIL AREA	
Newcastle-under-Lyme Town Centre	6.5%
Newcastle-under-Lyme: The Brampton Museum	4.5%
Birmingham City Centre	4.4%
Central_London	7.5%
Liverpool City Centre	2.4%
Manchester City Centre	6.1%
Stafford Town Centre	0.8%
All Other Centres/Locations	7.4%
ALL OTHER LOCATIONS	39.7%
TOTAL	100.0%

428. Overall, it is considered that the household survey indicates that Stoke-on-Trent's principal centres and venues achieve a good market share of trips and activities focused on theatre, music, cultural and historic attractions.

429. In response to the question on what improvements could be made to the Stoke-on-Trent authority area's leisure offer that would make respondents visit/partake in leisure activities more often (Question 49), 1.4% of respondents suggested 'more/better cultural facilities', 0.5% suggested 'more art galleries', and 0.1% suggested 'museums'.

Summary

430. Our assessment has confirmed that the commercial leisure industry faces considerable challenges and pressures. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending, but new activities and innovative offers will continue to evolve and attract people.
431. However, there will also be a continued increase in at-home activities due to the advances in computers, tablets, television, gaming, and audio technology. The challenge for town centres and leisure operators in the future will be how to attract customers away from their homes.
432. In summary, the leisure needs assessment based on the participation derived from the household survey and current provision has identified the following:
- Food & Beverage – There is not considered to be a quantitative need for additional cafés, restaurants and bars by 2040 based on projected population and expenditure growth.
 - Cinemas – Existing venues in the Stoke-on-Trent authority area secure a Study Area market share of 41.6%. Overall, there is no quantitative capacity for new cinema provision based on the level of existing provision across Stoke-on-Trent.
 - Gyms/Health and Fitness facilities – Existing venues in the Stoke-on-Trent authority area secure a market share of 50.7%. The projected growth in the population could potentially sustain an additional three gyms by 2035 and potentially four premium or budget gyms by 2040.
 - Family Entertainment Venues – In terms of addressing future needs and supporting the overall attraction and resilience of the daytime and evening economies, there could be potential to promote more family-based activities.
433. Responses from the household survey indicate that the main centres and venues in the Council area are achieving a good market share (above 60%) of trips and activities focused on theatre, music, cultural, and historic attractions.
434. In all cases, the potential for new commercial leisure venues, facilities and attractions will be subject to dynamic economic, market and consumer trends over time. Where demand from operators does arise for representation, this should be directed to town centres first, aligned with national and local plan policy objectives.

9. SUMMARY AND POLICY RECOMMENDATIONS

435. This concluding section provides high-level advice and recommendations to help the Council effectively plan and manage the vitality and viability of its centres. Paragraph 90 of the NPPF identifies that planning policies and decisions should ‘...support the role that town centres play at the heart of local communities...’ and also promote the long term vitality and viability of centres ‘...by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters...’.
436. Aligned with the NPPF and the Town Centres and Retail PPG, our advice takes account of the lifetime of the emerging plan period to 2040 but focuses most particularly on the next five to ten years.
437. We have robustly assessed the need for new retail (convenience and comparison goods) floorspace and commercial leisure uses over the Local Plan period. Our assessment has been informed by a comprehensive review and update of the dynamic economic and market trends that are impacting on the retail and leisure sectors. This accounts for the impact of the pandemic, recent high levels of inflation, and the cost of living crisis.
438. This assessment is informed by the 1,151 household shopper surveys undertaken by NEMS in July 2024. The Study also draws on new health check assessments for Stoke-on-Trent’s town centres, which are provided in Volume 3. The health checks are based on a series of key performance indicators (KPIs), informed by the PPG, which help identify the vitality and viability of centres, and the associated strengths, weaknesses, opportunities, and threats in each.
439. This Study also takes account of the series of reforms to the planning system that were enacted through the amended Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 that came into effect from 1 September 2020.
440. It is against this background, including the legacy of the pandemic, cost-of-living crisis and worsening macro-economic position, that we provide the Council with our recommendations to help inform plan-making and decision-making over the next 5 to 10 years, and over the period to 2040. Our advice covers:
- the need (‘capacity’) for new retail (convenience and comparison goods) floorspace and other main leisure and town centre uses;
 - the requirement to allocate a range of suitable sites to meet the scale and type of any forecast need identified, looking at least ten years ahead;
 - the current definition of the network and hierarchy of centres, and whether this reflects existing and future shopping and leisure trends, planned investment and regeneration strategies, and future growth;

- the need to update and change the definition of town centre boundaries and primary shopping areas in light of the key findings and evidence, and recent planning reform; and
- the setting of a local impact assessment threshold to inform the assessment and determination of applications for new retail and leisure developments proposed outside of defined town centres.

Reform of Use Classes Order and Permitted Development Rights

441. As previously identified, the Government has implemented a series of reforms to the planning system. These reforms principally relate to permitted development rights (PDR), the Use Classes Order (UCO), and more recently the Levelling-up and Regeneration Act 2023.
442. The changes mean that the planning system is less well equipped to restrict and control uses both within and outside of town centres. Notwithstanding this, there is still a need to define town centre boundaries and, in larger centres, a primary shopping area (which, in practice, will operate as the primary 'commercial' area to be the focus for Class E and Class F uses). The defined boundaries are of direct consequence in applying the sequential and impact tests to development outside of defined centres.
443. However, the changes have implications for the designation of primary and secondary shopping frontages, as the control of shopping and service uses is less enforceable in commercial areas given that change of uses within Class E do not constitute development and will therefore not require planning permission. It should be noted that the effectiveness of frontage policies was declining before the pandemic and the changes to the UCO.
444. Hence beyond 2024, town centres are likely to consolidate their retail and shopping role with more emphasis on place and non-transactional uses; this could include high activity-based land uses such as health and education being located in more central locations and stem previous trends of decentralisation.
445. As is evident in Hanley, the increase in 'city and town centre' living is likely to be a growth area over the next decade and could be a positive regenerative mandate. We also expect more emphasis on residential upper floor living accompanying ground floor commercial uses. This will be a growing area especially with the increased emphasis by the newly elected Government on accelerating housing and infrastructure delivery.
446. The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 2) Order 2020 came into force on 31 August 2020. The Order introduced Class AA and Class AB development rights that allow the construction of new residential apartments on top of detached or terrace buildings in commercial or mixed-use areas (but not in conservation areas). This could potentially lead to the loss of commercial floorspace to residential.

447. Furthermore, the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021 (Order), which came into force on 21 April 2021, created a new class of permitted development right (Class MA) into the Town and Country Planning (General Permitted Development) Order 2015 (GPDO). This authorised changes of use from Class E commercial uses to Class C3 residential. The changes within the Order allowed a change in the permitted use of a property or land from a use falling with Use Class E to Use Class C3 residential use where the property had:
- been in Class E use for two years (including time in former uses i.e. Class A1, A2, A3, B1, D1 or D2 now within that Use Class); and
 - been vacant for at least three continuous months.
448. The floorspace subject to the change of use was capped at 1,500 sq.m.
449. The permitted development right was subsequently amended by The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2024, which came into force on 5 March 2024. This removed the cap on floorspace and the need for premises to have been vacant for at least three months.
450. Exercise of the Class MA right is subject to prior approval by the local planning authority and therefore is subject to some planning control. Details must be submitted relating to flooding, transport, contamination, noise amenity, natural light, fire safety, and agent of change issues.
451. Research conducted by LSH and Revo (Places & Spaces Reinvented: What is the Future for Our Towns, High Streets and Shopping Centres?, 2024) suggests that there are varying opinions in respect of whether the changes have had a beneficial impact. On the one hand, they are viewed positively by some as helping to revitalise and repurpose high streets and boost housing delivery by making it easier to change the use of buildings and respond more flexibly to dynamic market trends. On the other hand, it is argued that the reforms seriously undermine the plan-led approach to town centre regeneration and place-making. Almost half of respondents from the private sector believe that reform has had or will have a positive impact (49%), with less enthusiasm apparent from public sector respondents (30%).
452. In response, some local planning authorities have turned to Article 4 Directions to remove permitted development rights. Where appropriately applied, Article 4 Direction can help prevent '*wholly unacceptable adverse impacts*' (paragraph 54 of the NPPF) on the vitality and viability of centres by protecting against the dilution of retail and commercial uses within core areas.

Article 4 Directions

453. The NPPF seeks to provide a note of caution in respect of local planning authorities' use of Article 4 Directions. Paragraph 54 of the NPPF identifies that,

where permitted development rights relate to changes from non-residential uses to residential uses, the use of Article 4 Directions should:

‘...be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability but would be very unlikely to extend to the whole of a town centre...’.

454. In this context, the Council should be mindful of the following in considering the potential future use of Article 4 Directions:
- it will be difficult to restrict the use of permitted development rights through the imposition of an Article 4 Direction;
 - restriction is likely to be more difficult for residential permitted development rights relative to non-residential, but in all cases ‘robust evidence’ will be needed to justify their use;
 - there is a ‘high bar’ to justify Article 4 Directions and their scope must be limited geographically to the smallest area possible; and
 - in terms of an appropriate area, the Council will need to clearly justify the restriction of permitted development rights with targeted evidence (e.g. loss of commercial space, preservation of important community facilities, or protection of a historic area/local amenity).
455. The health check assessments undertaken as part of this Study generally identify reduced market demand for retail and commercial uses. This is apparent through high (and in some cases increasing) vacancy rates. As a consequence, there is a significant stock of unused and underutilised floorspace in many of Stoke-on-Trent’s town centres.
456. Much of the vacant floorspace will need to be repurposed for other uses, including residential. In this context, the use of permitted development rights may well be beneficial in providing for diverse and animated town centres. As such, we do not believe that the evidence collated by this Study supports the use of Article 4 Directions.

Levelling-up and Regeneration Act 2023

457. The Levelling-up and Regeneration Bill received Royal Assent at the end of October 2023 and officially became the Levelling-up and Regeneration Act 2023 (LURA 2023). The Conservative Government proclaimed that LURA 2023 will *‘...speed up the planning system, hold developers to account, cut bureaucracy, and encourage more councils to put in place plans to enable the building of new homes.’*
458. In relation to town centres specifically, the Act enables local authorities powers to instigate auctions to rent vacant commercial properties in town centres and on high streets for leases from one to five years to attract new tenants.

459. The new Government has affirmed its commitment to High Street Rental Auctions and brought into force the Local Authorities (Rental Auctions) (England) and Town and Country Planning (General Permitted Development) (Amendment) Regulations 2024 on 2 December 2024.
460. The Regulations identify that local authorities must designate streets or areas where High Street Rental Auction powers can be exercised. Two principal conditions must be satisfied to use a High Street Rental Auction, namely:
- the vacancy condition, which relates to the need for High Street Rental Auction where it has been unoccupied continuously for 12 months or for at least 366 days non-continuously within a 24-month period; and
 - the local benefit condition, which states that the local authority must be satisfied that the occupation of the premises for a suitable high street use would be beneficial to the local economy, society, or environment.
461. The general consensus is that, whilst High Street Rental Auctions may be a useful tool in combatting long-term vacancies, it remains to be seen whether local authorities have the resources to execute the powers that they have been given on a regular basis. Furthermore, in areas where there is a substantial quantum of vacant stock and underlying issues in respect of the strength of the commercial market, Rental Auctions are unlikely to materially impact on the overall vacancy rate.
462. Accordingly, we recommend that the potential benefit of High Street Rental Auctions is considered as part of a mix of initiatives to support high streets and town centres. The Council should review the composition of town centres over time and identify properties which are difficult to let and have been vacant for an extended period. The landlords of such premises will need to be identified and steps taken to engage with them to understand their strategy in respect of the re-use of vacant premises. Where appropriate, the Council may wish to embark on the High Street Rental Auction where it is apparent that the landlord's actions may not be sufficient to provide for the timely re-use of premises.

Retail Needs

463. Paragraph 90 of the NPPF is clear that local planning authorities should plan to meet the need for new retail and town centre uses looking at least ten years ahead. However, the PPG suggests that, given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments '*...may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.*' Therefore, greater weight should be placed on forecasts over the next five to ten-year period.
464. The headline retail capacity forecasts provided in Table 28 and reproduced below in Table 49 identify no convenience goods quantitative capacity over the short, medium and longer term to 2040.

465. In practice, grocery retailers are continually reviewing their requirements and it is anticipated that there will be some activity in respect of the submission of planning application proposals for additional convenience goods floorspace in Stoke-on-Trent in the short to medium terms. This may be because certain operators believe that their offer is increasingly attractive to shoppers and, as such, they may be able to sustain their operation by diverting sufficient expenditure from existing stores. In some cases, small scale local retail facilities may also be appropriately delivered in association with larger retail developments.

Table 49: Net Retail Floorspace Capacity Forecasts

	Convenience Goods Capacity (net sq.m)	Convenience Goods Capacity (net sq.m)	Convenience Goods Capacity (net sq.m)	Comparison Goods Capacity (net sq.m)	Comparison Goods Capacity (net sq.m)	Comparison Goods Capacity (net sq.m)
Destination	2030	2035	2040	2030	2035	2040
Hanley City Centre	11	21	34	-467	-657	-547
Burslem Town Centre	0	0	1	-25	-37	-35
Fenton Town Centre	0	0	0	-22	-32	-29
Meir Town Centre	-3	-5	-6	-4	-7	-7
Longton Town Centre	-40	-70	-89	-402	-598	-611
Stoke Town Centre	-341	-340	-335	-443	-479	-449
Tunstall Town Centre	0	-1	-1	-143	-210	-205
Local Centres	15	31	53	-37	-53	-48
Other Smaller Centres	-9	-14	-14	-86	-121	-104
Out-of-Centre	-1,166	-1,166	-1,107	-1,838	-2,620	-2,446
Stoke-on-Trent Total	-1,533	-1,543	-1,464	-3,468	-4,813	-4,480

466. In this context, we recommend that the Council does not specifically allocate any sites for substantive retail development over the period to 2040. Provision may be made for local retail facilities within the Local Plan to support concentrations of additional residential development in order that residents are able to meet day-to-day needs in a sustainable manner.
467. Where additional residential growth is planned, we recommend that the Council engages at an early stage with the land promoter/developer to consider the potential need to provide day-to-day retail and service provision within the scheme. We anticipate that the focus of any such development will be convenience retail (likely to be provided in a 'c-store' format with a maximum net sales area of 280 sq.m to accord with Sunday Trading regulations) potentially supplemented with a very limited number of additional commercial units (which could be occupied by retailers or service providers). The principal focus should be on meeting needs which principally arise from new development, albeit developers would also likely consider whether the existing residential population could also access the provision in a sustainable manner.

468. However, it is expected that the objective of any such development would be to meet localised day-to-day needs and not provide development of such a scale that it could impact on the trading performance of nearby centres.
469. There may also be an opportunity to provide medical and/or community facilities within such developments. We anticipate that such development would form small-scale neighbourhood hubs/centres.
470. Where it is considered that there may be a need for new retail provision to provide for sustainable developments, assessments should take into consideration:
- the location of existing centres and standalone provision in the area;
 - the current vitality and viability of existing centres;
 - the additional population supported by residential development;
 - the additional expenditure generated by the new residential population;
 - the propensity for this expenditure to be spent locally in association with day-to-day needs; and
 - the quantum of expenditure that exists in the local area to support additional floorspace.
471. It is considered that the merits of additional local retail provision should be considered on a case-by-case basis with reference to the above considerations.

Leisure Needs

472. A high-level assessment has been provided of the potential need for new commercial leisure uses and facilities over the lifetime of the Local Plan. Even under normal circumstances, it is difficult to predict the need and demand for new leisure uses, as the sector is very diverse and highly influenced by market, lifestyle and consumer trends. Predictions as to likely future need, even over the short term (i.e. the next three to four years), have been further complicated by the impact of the pandemic, rising inflation, and the cost of living crisis. These factors have an ongoing impact on leisure expenditure trends and growth, consumer preferences, and business viability.
473. Notwithstanding these caveats, commercial leisure uses are a critical part of the overall offer and attraction of centres. They make a significant contribution to their overall diversity, vitality and viability of centres, and to their daytime, evening and night-time economies.
474. As part of their future adaptation and growth, it is therefore important that the Council maintains and promotes diverse and flexible leisure uses, venues and events catering for a wide demographic in Stoke-on-Trent's principal centres over the period to 2040.
475. From a planning policy perspective therefore the key to meeting future needs (some of which will evolve over the plan period) is the formulation of policies that can accommodate changing needs and provide appropriate flexibility in the real world. This includes recognising that for many larger format commercial leisure

uses the cost for entering a new market will be relatively high and, unlike retail outlets where store size can vary significantly, incremental development is unlikely if only small increases in market growth are identified.

476. It is also the case that the recent changes to the Use Classes Order mean that the principal commercial leisure sector (in terms of expenditure) is food & beverage which encompasses both Class E and sui generis uses. Given the small to moderate scale of most operator requirements, changing demand for café and restaurant uses can generally be met through the reoccupation and reuse of existing city and town centre floorspace.
477. The headline findings from the leisure needs assessment are as follows.
- **Eating and drinking** is a popular leisure activity with venues in Stoke-on-Trent attracting between 34.5% (bars, pubs and nightclubs) and 36.3% (cafes and restaurants) of Study Area market share. Based on expenditure growth and after allocating a proportion of this growth to existing businesses to help support their viability (against a backdrop of rising costs), our high-level forecasts indicate no net residual expenditure capacity up to 2040. However, it is important to reaffirm that this is a long-term forecast and that economic conditions could be stronger than currently anticipated over the medium to longer term. In addition, new concepts and improved local provision may also encourage residents to eat and drink out more frequently in Stoke-on-Trent's centres. In this context, it will be important to focus new uses in town centres to increase consumer choice, repurpose commercial floorspace, and provide a critical mass of activity. The food & beverage sector is of significant importance as it can help underpin both daytime and evening economies.
 - In relation to **cinemas**, the existing provision in Stoke-on-Trent equates to 20 screens and venues in the authority area secure a market share of 41.6% of such leisure trips. Our benchmarking capacity assessment identifies an expectation for Stoke-on-Trent to support approximately 13 screens at 2024, increasing to 14 screens by 2040. However, this is a lesser requirement relative to the 20 screens which currently operate in the area. As such, there is no identified quantitative capacity for cinema screens.
 - Regarding other commercial leisure uses, there is currently no identified need for **gambling venues** (e.g. bingo halls and casinos). Stoke-on-Trent secures a high market share of trips to bingo halls and casinos, with Buzz Bingo facilities at Hanley and Fenton, and Genting and Grosvenor casinos being key facilities. The presence of physical gambling activities such as betting shops in high streets is also a contentious issue due to the perceived social, economic and health/wellbeing impacts on individuals and households.
 - **Tenpin bowling** in the authority in the authority area is catered for by the large Tenpin Stoke facility (30 tenpin lanes), which is supplemented by Lymelight Lanes in Newcastle-under-Lyme (four tenpin lanes and four smaller duckpin lanes). Both of these existing facilities cater for needs which originate (in part) in Stoke-on-Trent and it is not considered that there is any pressing quantitative requirement for additional facilities. Should there be any future

operator interest for additional tenpin facilities, then it is recommended that this should be directed towards Hanley city centre in the first instance to help provide an additional reason to visit and to boost the centre's daytime and evening leisure economy.

- Stoke-on-Trent is generally well provided for in terms of **theatres and music venues**, with the Regent Theatre and Victoria Hall in Hanley able to attract high profile shows and artists. There are also a number of well-established smaller concert venues within Hanley, including the Sugarmill and the Underground. As a consequence of the strong provision, the household survey identifies that venues within the local authority area secure a market share of 66.3% of trips to theatres and music venues, which is considered to be a particularly strong performance and reflective of a good existing offer.
- **Historic and cultural attractions** also secure a relatively strong market share of 60.3%, with other popular venues being located in Newcastle-under-Lyme (collectively securing a 11.0% market share), London (7.5%), and Manchester (6.1%). The use of higher order centres in respect of historic and cultural attractions is inevitable and comprises a key reason to travel and experience different cities. As such, the household survey results do not suggest any underlying weakness in respect of Stoke-on-Trent's provision.

478. The forecast need for any new commercial leisure uses will be subject to wider economic, consumer and market trends, and will depend on the demand from leisure operators for representation. Where demand does exist, new uses and activities should be focussed within Stoke-on-Trent's principal centres in accordance with national and local planning policy objectives.

Accommodating Retail and Leisure Needs

479. Paragraph 90 of the NPPF states that planning policies should '*...allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead.*' Aligned with the NPPF, paragraph 004 of the Town Centres and Retail PPG identifies that town centre strategies should establish the potential for the development or redevelopment of under-utilised space to accommodate the scale of assessed need. The same paragraph also advocates using existing land more effectively, for example by grouping particular uses such as retail, restaurants, and leisure activities into hubs. In turn, this will help with the consolidation and restructuring of centres.
480. It is to be recognised that the capacity forecasts do not take account of current (or future) vacant retail floorspace in the main centres and shopping locations. Some of this vacant space (particularly in prime shopping streets) will be available and suitable for reoccupation, repurposing and/or redevelopment both now and in the future. We therefore advise that any market demand for new retail and commercial leisure floorspace should be directed in the first instance to vacant units or to sites that can be assembled through the redevelopment of underutilised and vacant land and premises within centres.

481. Notwithstanding the above, in practice our quantitative retail capacity assessment has demonstrated no requirement for additional convenience and comparison goods retail floorspace in the period to 2040.

Network and Hierarchy of Centres

482. Paragraph 90 of the NPPF indicates that local planning authorities should define a network and hierarchy of town centres. However, very little detail is provided in this regard and, notably, neither the NPPF nor the Town Centres and Retail PPG provide define different types of town centre with reference to the role they serve.

483. As we identified in Section 5 of this Study, the most recent definitions provided by the Government in respect of the role and function of different types of town centre were contained within PPS4, which was published in 2009.

484. The PPS4 definitions effectively established a four tier hierarchy as follows.

- **Tier 1: City Centre** – City centres may be very large and act as a regional centre, serving a wide catchment. regional centre and will serve a wide catchment embracing a wide range of activities and may be distinguished by areas which may perform different.
- **Tier 2: Town Centre** – Usually the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area.
- **Tier 3: District Centre** – District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
- **Tier 4: Local Centre** – Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.

485. PPS4 made it clear that small parades of shops of purely neighbourhood significance are not generally regarded as centres.

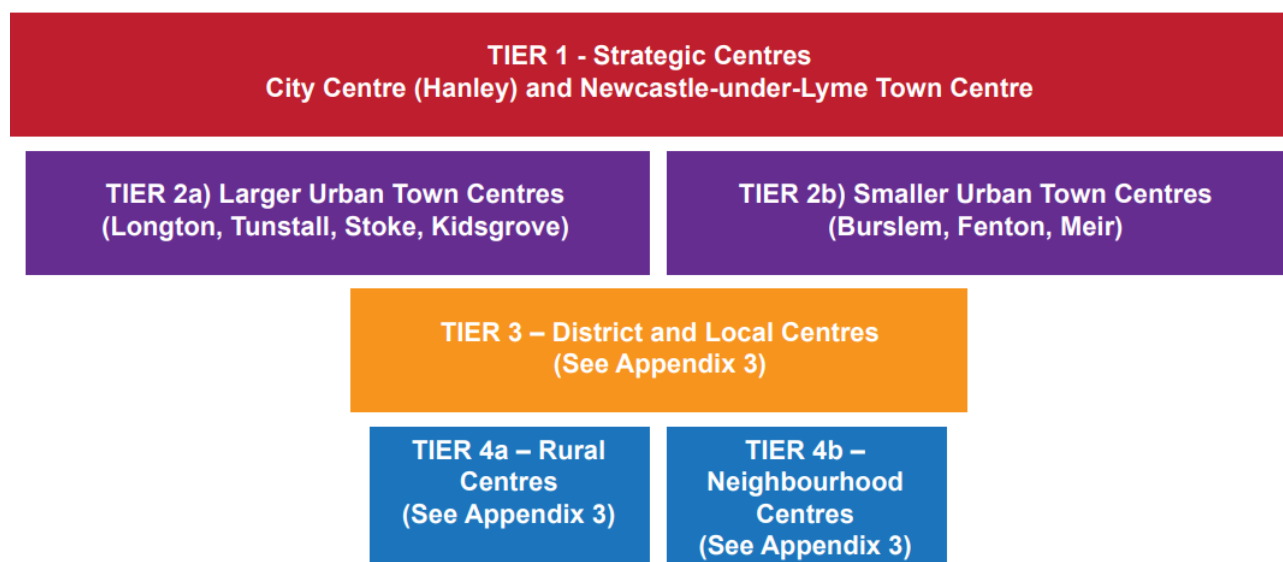
486. Section 5 of the Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy identifies a hierarchy of defined centres for Newcastle-under-Lyme and Stoke-on-Trent. In respect of Stoke-on-Trent, this hierarchy is as follows:

- Strategic Centre: City Centre of Stoke-on-Trent (i.e. Hanley);
- Significant Urban Centres: Longton, Tunstall, Stoke, Burslem, Fenton, and Meir; and
- Local Urban Centres: 58 Local Urban Centres are identified across Stoke-on-Trent.

487. Subsequent to this, the Council published a draft proposed centres hierarchy at page 34 of the Stoke-on-Trent and Newcastle-under-Lyme Joint Local Plan

Preferred Options (published in February 2018). This is extracted and provided below as Figure 12.

Figure 12: Draft Proposed Stoke-on-Trent and Newcastle-under-Lyme Centres Hierarchy



488. In respect of Stoke-on-Trent, the above translates to a four/five tier hierarchy as follows:

- **Tier 1 City Centre:** Hanley;
- **Tier 2a Larger Town Centres:** Longton; Tunstall; and Stoke;
- **Tier 2b Smaller Town Centres:** Burslem; Fenton; and Meir;
- **Tier 3 Local Centres:** Abbey Hulton – Leek Road; Basford – Etruria Road; Bentilee – Devonshire Square; Blurton – Finstock Avenue; Fenton - King Street; Fenton – Victoria Road; Goldenhill – High Street; Hanford – Mayne Street; Hartshill – Hartshill Road; Middleport – Newcastle Street; Milton – Leek Road/Millrise Road; Normacot – Uttoxeter Road; Norton Park – Leek New Road; Smallthorne – Ford Green Road; and, Trentham Lakes – Stanley Matthews Way (15 centres total); and
- **Tier 4 Neighbourhood Centres:** Abbey Hulton – Abbots Road; Baddeley Green – Baddeley Green Lane; Bank Top – High Lane; Bentilee – Beverley Drive; Bentilee – Ford Hayes Lane; Berry Hill – Twigg Street; Birches Head – Diana Road; Blurton – Blurton Road; Blurton – Nashe Drive; Blurton – Wimborne Avenue; Bradeley – Joyce Avenue; Bucknall – Werrington Road; Chell Heath – Chell Heath Road; Dresden – Carlisle Street; Dresden – Trentham Road; Eaton Park – Southall Way; Great Chell – Biddulph Road; Harpfield – Woodberry Close; Heron Cross – Heron Street/Grove Road; Hollybush – Blurton Road; Lightwood – Belgrave Road; Meir Hay – Amison Street; Meir Park – Lysander Road; Northwood – Keelings Road; Norton – Knypersley Road; Norton – Pinfold Avenue; Oakhill – London Road; Penkhull – Manor Court Road; Sandford Hill – Heathcote Street; Shelton – College Road; Shelton – Stoke Road; Sneyd Green – Milton Road; Trentham – The

Lea; Trentham – Werburgh Drive; West End – London Road; Weston Coyney – New Kingsway; and, Weston Coyney – Westonfields Drive (37 centres total).

489. We have the following comments on the hierarchy of Stoke's centres, which are informed by the PPS4 definitions, our health check assessments of principal centres, and our review of key smaller centres.
- Whilst Hanley has been the subject of significant market pressures in recent years, it remains a focal point for retail, leisure and civic amenities. There is a need for consolidation in respect of its retail offer and for additional operators and concepts to be drawn to the centre. Hanley needs to be a focus for future investment and merits its position at the top tier of the retail hierarchy.
 - The centres of Longton, Tunstall, and Stoke provide a range of retail, leisure and community facilities, and their offer is consistent with the definition of a town centre. Their offer is appreciably greater than that of Burslem, Fenton, and Meir; as such, if the Council wishes to differentiate between 'larger' and 'smaller' town centres, the designation of these three centres as second tier centres is justified.
 - The 2019 RLS identified that Burslem's role and function is consistent with that of a town centre but that Fenton and Meir perform a role commensurate with the district centre definition provided by Annex B of PPS4. We believe that this remains the case. However, it is noted that the City of Stoke-on-Trent is composed of six towns (Burslem, Fenton, Hanley, Longton, Stoke-on-Trent) and that the Council is committed to supporting the future prosperity and needs of each of these. As such, we recognise that the Council may perceive that it is beneficial for Fenton and Meir to be referred to as town centres; as such, they could be referred to as 'smaller town centres'.
 - We provide recommendations in respect of individual local centres at Section 6 of this report. At a strategic level, it is accepted that these centres generally conform with the expected role and function of a local centre and that they form the fourth tier of the hierarchy on this basis.
 - We also provide recommendations in respect of neighbourhood centres at Section 6 of this report. Some of these centres comprise one or two units which have no significant complementary relationship. In our view, these perform the role of out-of-centre retail/leisure facilities in practice. More generally, we recommend that the Council's reviews the purpose of designating neighbourhood centres in the context of Annex B of PPS4, which stated that parades of shops of neighbourhood significance should not be afforded formal status as a defined centre. Given this direction, we believe that the Council should review whether there is a requirement to formally designate neighbourhood centres with the defined centres hierarchy.

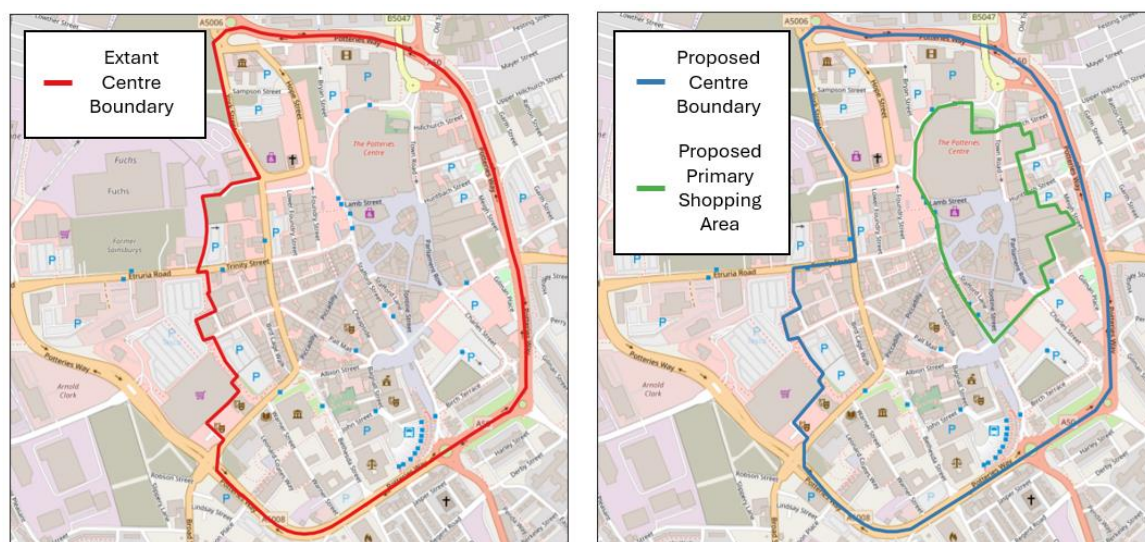
Town Centre Boundaries and Primary Shopping Area Definitions

490. The current boundaries of Stoke-on-Trent's principal centres are identified by the City of Stoke-on-Trent Local Development Framework Proposals Map. With

reference to these boundaries, our principal recommended revisions to the boundaries are set out below.

491. In **Hanley city centre**, the recommended centre boundary remains largely as adopted, with the northern, eastern and southern boundaries being defined by Potteries Way. The highway has a clear impact on land use and character and is considered to appropriately form the majority of centre city centre boundary.
492. On the western edge, we recommend redrawing the boundary along Trinity Street and Marsh Street North to exclude the units including the Best Western Hotel and Kwik Fit Plus. The city centre boundary therefore includes the area covering the primary shopping area, and the surrounding main town centre uses.
493. The recommended primary shopping area covers the area of the city where retail uses are concentrated. We recommend that it is tightly formed, such that:
 - its northern extent is formed by the northern boundary of the Potteries Centre;
 - its eastern boundary runs along the rear of units fronting Town Road and Parliament Row;
 - its southern boundary is formed by Percy Street; and
 - its western boundary is formed by Stafford Street and Quadrant Road.

Figure 13: Proposed Centre Boundary and Primary Shopping Area, Hanley

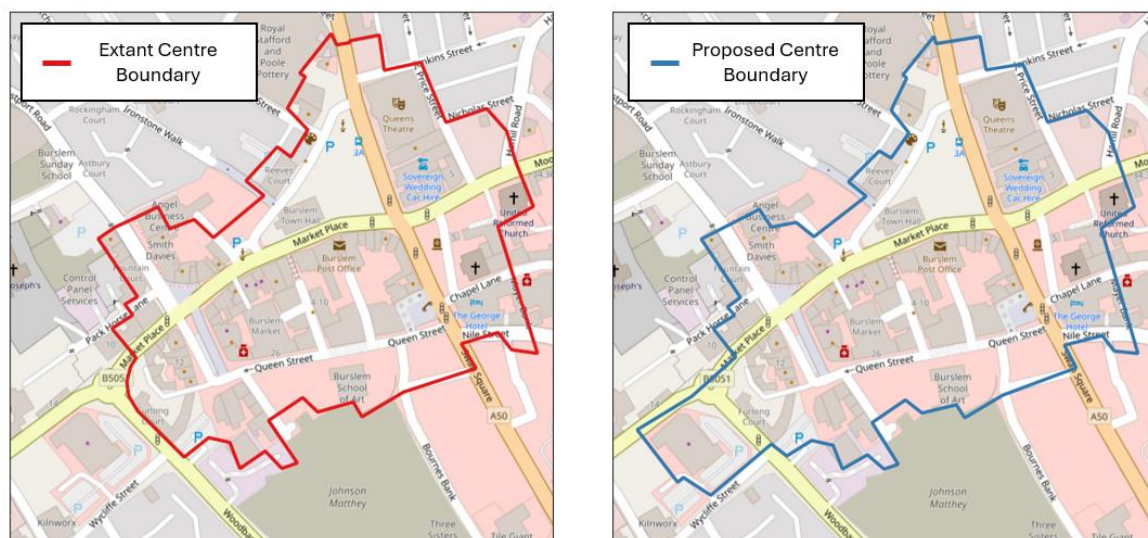


494. Based on our recommendation, the Tesco Extra at Clough Street remains outside of the defined town centre boundary. There are a number of reasons for this.
495. Firstly, the NPPF definition of a 'town centre' indicates that this will comprise *'...areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area.'* The Tesco store is relatively distant from the primary shopping area. Furthermore, the entrance to the Tesco Extra store is also set somewhat apart from other main town centre uses.
496. Secondly, the Tesco Extra store is orientated such that its principal relationship is with its car park rather than being positioned to encourage linked trips on foot with attractions within the defined centre. There is no clear view of the store from most

of Clough Street which somewhat acts to diminish the functional relationship between the Tesco Extra and the town centre.

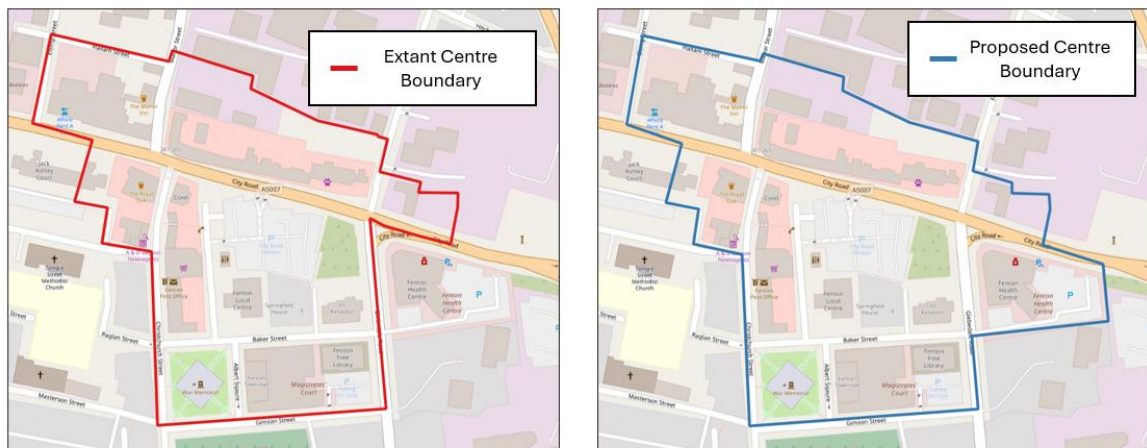
497. Thirdly, many visitors to the Tesco Extra will not visit town centre attractions nor pass through the centre itself. There is no sense of being within the town centre when stood outside the Tesco Extra store; indeed, a first-time visitor may have no clear understanding of how to orientate their way to the centre.
498. The proposed boundary of **Burslem town centre** largely remains as currently adopted, the exception to this being a limited extension to the boundary at the south-western corner to include the Home Bargains on Newcastle Street. It is considered that this store is integrated into the town centre offer and that it is well-located to support linked trips to other operators within the centre. Therefore, the new western edge of the boundary is formed by the Home Bargains and its associated car park.

Figure 14: Proposed Town Centre Boundary, Burslem



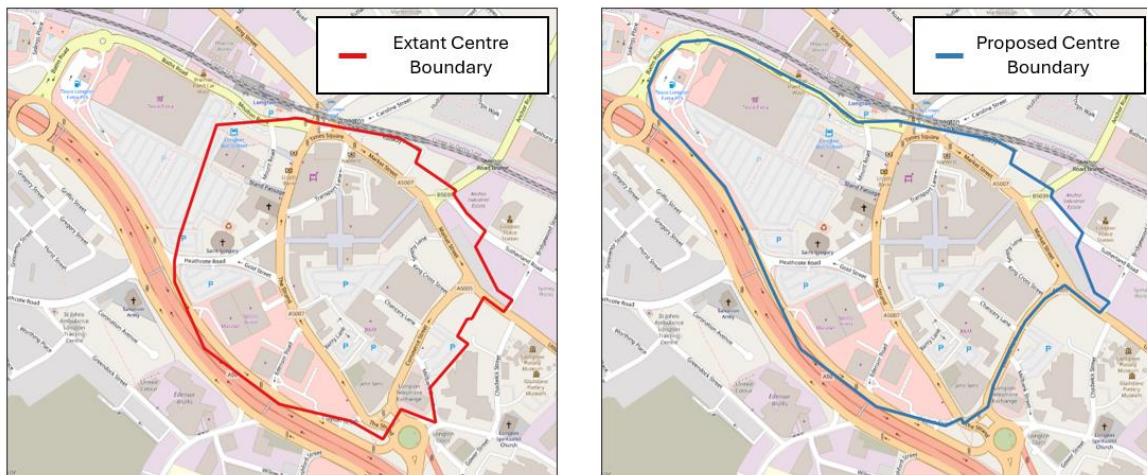
499. There is one proposed amendment to the currently adopted **Fenton town centre** boundary, this being the inclusion of the Fenton Health Centre and its associated car park. The Health Centre is directly contiguous with the existing eastern boundary of the centre. Whilst the Health Centre is not a 'main town centre use' as such, it is an important generator of activity in the area and is considered complementary to other uses in the centre.

Figure 15: Proposed Town Centre Boundary, Fenton



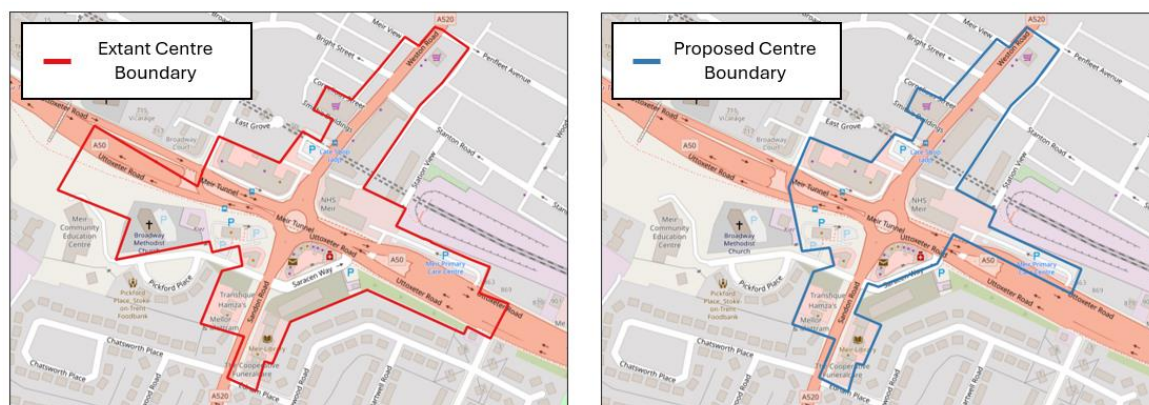
500. It is recommended that the boundary of **Longton town centre** is extended to the to include the Tesco Extra at Longton Exchange. The Tesco Extra and its car park are well located to support linked trips to other operators within the centre via the pedestrian link to The Strand. The proposed western edge of the boundary is therefore formed by Baths Road and the Tesco Extra car park. The eastern boundary of the town centre is proposed to be formed by Commercial Street between The Strand and Market Street/Uttoxeter Road, reflecting the limited level of activity beyond this highway.

Figure 16: Proposed Town Centre Boundary, Longton



501. We recommend that the town centre boundary for **Meir town centre** is reduced so that it is more focused more tightly along Weston Road and Sandon Road. The Methodist Church on Pickford Place is in a slightly peripheral location and the former Meir Health Centre on Saracen Way is now converted to residential uses. We recommend that the town centre boundary is revised to exclude both of these sites. Furthermore, we do not believe that the boundary should run east-west along Uttoxeter Road as this area relates to the highway itself and does not comprise of main town centre uses.

Figure 17: Proposed Town Centre Boundary, Meir

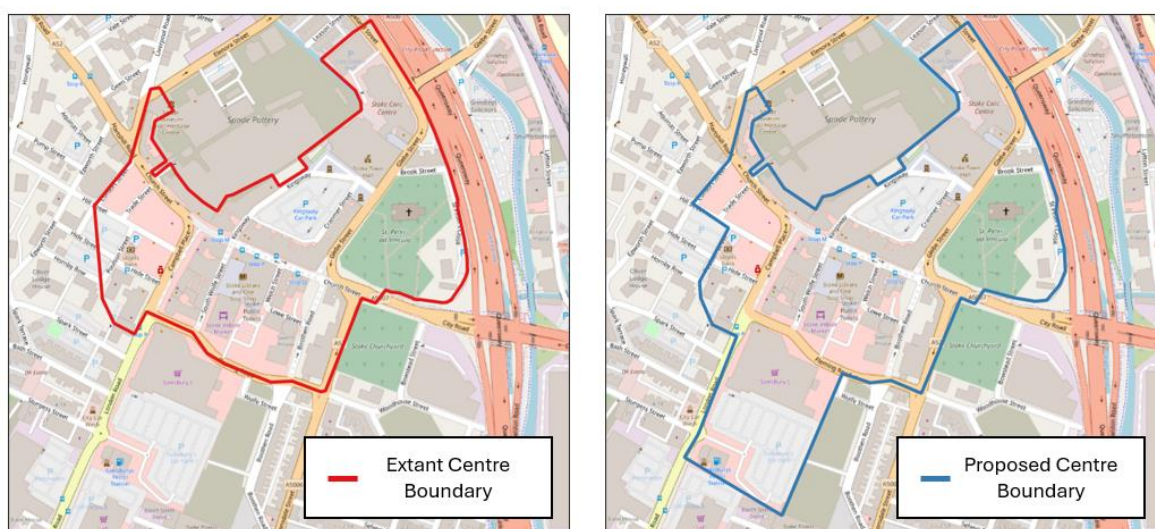


502. The recommended amendments to **Stoke town centre** boundary include an expansion to the south to include the Sainsbury's foodstore and associated car park, with the site's southern boundary forming the southern boundary of the town centre.
503. The Sainsbury's is located a short distance from the core of the centre and acts as a key anchor to drive activity across the centre. Whilst there is a Lidl store further down London Road to the south, this store is notably less well integrated with the centre and we recommend that the Lidl remains outside of its boundary.
504. We also recommend that the western boundary of the centre is revised such that it follows Poulson Street and Hill Street before linking again with the existing boundary at Epworth Street.
505. We again note the Spode factory site redevelopment opportunity, which is situated just beyond the northern extent of the town centre. Mace, Montague Evans, Urban Flow, and Augarde & Partners have produced a development plan for the future of the Spode site, which was approved by the Council's Cabinet in August 2024. The plan provides for the re-use of part of the Spode site as a creative technology hub supporting start-up firms, art studios, a theatre, and a museum. The Council plans to use £10m of Levelling Up funding on the first phase of the project, which would include demolition and infrastructure work and the refurbishment of a number of retained buildings.
506. The detail of the Spode project will be the subject of future planning applications. Whilst the site clearly has the potential to support main town centre uses, parts of the future redevelopment of the site are likely to fall outside of this definition. It therefore remains to be seen the extent to which the site's redevelopment is focused around main town centre uses and the degree to which the redeveloped site functions as part of the town centre.
507. It is recognised that the Spode Works redevelopment is of critical importance to the town of Stoke and has significant implications for the town centre itself (in terms of drawing people into the area and there being 'spin-off' benefits for the centre). However, we recommend that the site remains outside of the defined town centre

boundary. This potentially gives the Council additional control as planning authority in respect of the mix of uses delivered at the site in practice.

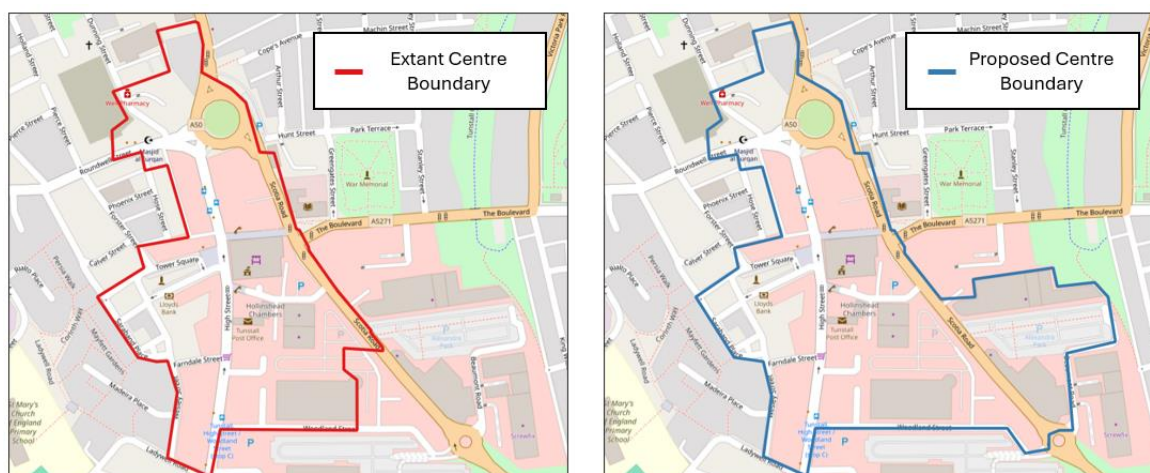
508. It is also recognised that the successful delivery of Capital & Centric's Goods Yard development (which is located adjacent to Stoke railway station on the north eastern side of A500 Queensway) is potentially of some consequence in respect of the centre's future role and function. The Goods Yard development is a residential-led mixed-use development that also provides workspace together with bars, cafes, and some retail.
509. Goods Yard is considered to be an important sign of investor confidence into the Stoke area. Furthermore, the additional residential population may help to sustain businesses and encourage different types of operator to locate within the centre.
510. Notwithstanding this, the development is geographically separate from the town centre (by virtue of A500 Queensway running between the two) and it is considered to be an edge-of-centre site. We do not recommend that any change is made to the town centre boundary in respect of Goods Yard.

Figure 18: Proposed Town Centre Boundary, Stoke



511. A substantial revision is proposed in respect of the adopted boundary for **Tunstall town centre**. Alexandra Retail Park, to the east of Scotia Road, connects well with existing adjacent main town centre uses, including Jasper Square Retail Park. We believe that the Retail Park is a key focus for activity in the area and should be included within the centre boundary.
512. On this basis, the proposed boundary runs to the rear of the retail units (including Home Bargains and the Tunstall Primary Care Centre) and then runs along Beaumont Road to re-join Scotia Road at the junction with Woodland Street.

Figure 19: Proposed Town Centre Boundary, Tunstall



Sequential Test

513. Paragraph 91 of the NPPF identifies that local planning authorities should apply a sequential approach to proposals for main town centre uses which are not in an existing centre nor in accordance with an up-to-date development plan. This means that town centre sites should be considered first, followed by edge-of-centre locations, followed by out-of-centre locations.
514. The NPPF sequential test is to be applied in the same broad manner nationally, albeit with reference made to local circumstances. The sequential test applies to all main town centre uses.
515. As identified above at Section 5 of this report, specialist retail provision has emerged within the local authority area to cater for the distinct needs of communities. One example of this is Pak Foods, which trades from stores in Shelton and Longton. Whilst the household survey has not specifically identified the contribution made by such retailers, it is likely that the Council will be subject to further planning applications for specialist retail and service provision going forward.
516. In this regard, we note that paragraph 012 of the Town Centres and Retail PPG states that:
'Use of the sequential test should recognise that certain main town centre uses have particular market and locational requirements which mean that they may only be accommodated in specific locations. Robust justification will need to be provided where this is the case, and land ownership does not provide such a justification.'
517. It is recognised that the sequential test should be applied with reference to 'real world' commercial decisions.
518. In this context, it is anticipated that the sequential test should be applied to proposals for specialist/niche retail and service provision with reference to:

- the catchment area served;
- the ability of the catchment area to access relevant town centres in proximity to the application proposal;
- the type of retailing proposed and whether this impacts on accessibility requirements (for example, grocery retailing is often purchased relatively close to home due to the weight of such goods and difficulties in transporting them over distance); and
- the location of current/competing provision.

519. As identified by the Town Centres and Retail PPG, the expectation will be that – where an applicant suggests that its proposal meets a distinct ‘location specific’ need – robust justification will be required where it is argued that the use could not be accommodated within a nearby centre or centres.
520. In considering the appropriate catchment area for a proposal, it may assist the applicant’s case to provide trading data relating to existing stores (whether within the local authority area or elsewhere) and the catchment area from which they draw trade.

Local Floorspace Impact Threshold

521. Paragraph 94 of the NPPF indicates that it is appropriate to identify thresholds for the scale of edge-of-centre and out-of-centre retail and leisure development that should be the subject of an impact assessment (where such development is not consistent with the provisions of the development plan). Any such threshold policy applies only to the impact test (all planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test).
522. The purpose of applying an impact threshold within the development plan which deviates from the national threshold of 2,500 sq.m is to allow the Council to retain appropriate control in respect of the potential for retail and leisure development that has the potential to impact on the future health of defined centres. By applying a lower threshold, applications for developments which could potentially have a harmful effect on the overall vitality and viability of a defined centre, will need to be supported by a proportionate impact assessment which sets out the potential trade diversion impact assumptions.
523. Paragraph 015 of the Town Centres and Retail PPG provides the following guidance in relation to floorspace thresholds. It states that:
- ‘The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:*

- *scale of proposals relative to town centres;*
- *the existing viability and vitality of town centres;*
- *cumulative effects of recent developments;*
- *whether local town centres are vulnerable;*
- *likely effects of development on any town centre strategy; and*
- *impact on any other planned investment.'*

524. As we have highlighted elsewhere in this report (and within the detailed health check assessments provided at Volume 3 of the Study), many of Stoke-on-Trent's principal centres have been negatively impacted by changes in retailer representation and the shift to online retail. As such, some centres (in particular, Hanley, Burslem, Stoke, and Tunstall) are considered to be particularly fragile and susceptible to additional competition. A key theme of this Study is that, where future retail and leisure operator requirements are apparent, they should be directed wherever possible to defined centres.
525. In this context, we are of the view that a lower threshold (i.e. less than 2,500 sq.m) should be applied in respect of the application impact test across Stoke-on-Trent.
526. It should be noted that there is no local impact threshold set by the adopted Newcastle-under-Lyme and Stoke-on-Trent Core Spatial Strategy. However, the Joint Local Plan Preferred Options Consultation document proposed the following thresholds:
- for Tier 1 centres – development proposals providing greater than 1,500 sq.m (gross);
 - for Tier 2a centres – development proposals providing greater than 1,000 sq.m (gross); and
 - for Tier 2b centres and below – development proposals providing greater than 300 sq.m (gross).
527. We agree that it is often not appropriate to adopt a 'blanket' threshold across the entirety of the authority area. We also note that the 2019 RLS advocated a tiered approach to the impact threshold to reflect the different scale and nature of centres across Stoke-on-Trent.
528. Paragraphs 10.109 and 10.110 of the 2019 RLS reported that:
- '...we are of the view that an impact assessment will be necessary to accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre where:*
- *the proposal provides a gross floorspace in excess of 500 sq.m gross; or*
 - *the proposal is located within 800 metres of the boundary of a district, local or neighbourhood centre (Tiers 3, 4 and 5) and is in excess of 200 sq.m gross.*
- In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could*

merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 90 of the NPPF.'

529. In reviewing the above recommendation, we note the following.
- Approximately 13.1% of the stock of commercial units in Hanley city centre are provide a floorspace of 500 sq.m or more. As such, this quantum of floorspace is considered to be representative of an important, larger store within the centre. Hanley's vacancy rate is particularly high and there are a significant number of units providing 500 sq.m or more gross floorspace that are in need of reoccupation.
 - Within the town centres of Burslem, Fenton, Longton, Meir, Stoke and Tunstall between 6.4% and 13.1% of commercial units provide greater than 500 sq.m of gross floorspace. Within the smaller centres of Fenton and Meir, there are only six and eight units respectively that provide greater than 300 sq.m gross floorspace.
 - Vacancy rates in the centres vary, but in all cases are above the national average.
530. As such, LSH also recommends a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of a particular centre.
531. In considering the setting of a local impact threshold, it is important to give consideration to the type of development (relating to convenience and comparison goods retail uses, and leisure uses) which would, in practice, provide space for key operators who could act to 'anchor' a centre. Should one of these anchor units or operators leave a centre, there will likely be the potential for a significant adverse impact to arise.
532. Where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre, or potentially remove a key tenant from that centre, there will likely be a requirement to consider the impacts arising from the proposal in detail.
533. In respect of lower order centres, the introduction of even a small convenience store nearby (of the type operated by Sainsbury's Local or Tesco Express) may have the potential to impact on the ongoing viability of key operators. Small convenience stores operated by national multiple grocers can generate a relatively substantial turnover. If this is diverted from existing retailers in defined centres, the impact on the overall vitality and viability through the loss of spend and footfall, could be of a significant adverse magnitude.
534. Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre the proposed development is proximate to. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice.

535. Given the prevailing conditions in Stoke-on-Trent, we also advocate a tiered approach to local impact thresholds, which aligns with our recommendations in respect of the centres hierarchy. Accordingly, we recommend that an impact assessment should accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace, the extension of existing floorspace, and the variation of restrictive conditions) where:

- *the proposal provides a gross floorspace in excess of 500 sq.m gross; or*
- *the proposal is located within 800 metres of the boundary of a Tier 3 centre (Fenton and Meir) and provides in excess of 300 sq.m gross; or*
- *the proposal is located within 800 metres of the boundary of a Tier 4 local centres and provides in excess of 200 sq.m gross.*

536. The specified 800 sq.m distance is considered to be broadly reflective of the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 500 sq.m to apply authority-wide (i.e. beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts arising from retail, leisure and office development.

Monitoring and Review

537. This Study provides two principal outputs: a capacity exercise which assesses future retail and leisure floorspace requirements; and, health check assessments which identify the current vitality and viability of defined town centres.

538. The retail and leisure needs assessment is derived from a number of different data inputs and assumptions relating to matters such as:

- future planned population growth across the Study Area and its zones;
- future forecast per capita expenditure growth;
- allowances for expenditure committed via special forms of trading;
- allowances for changes in the sales efficiency of existing floorspace; and
- the sales density likely to be secured by future operators such that a monetary surplus can be converted to a floorspace requirement.

539. The above inputs need to be applied through LSH's in-house CREATE economic model.

540. It is noted that the Town Centre and Retail PPG identifies that needs assessments should be regularly reviewed.

541. Given the technical nature of the capacity assessment exercise, it is anticipated that this will be undertaken through either a partial or full update of the assessment by a specialist consultant at an appropriate time (e.g. to coincide the preparation of development plan documents or due to significant changes in the retail and leisure sectors).

542. In order to provide a 'rolling' monitor of the overall level of need, it is recommended that the Council regularly updates its schedule of retail and leisure commitments and that the floorspace associated with larger commitments is summed together. This should be deducted from the floorspace capacity figures identified within this report to provide for an indication of how requirements are changing over time.
543. We recommend that the health check assessments provided by this Study are subject to regular review by the Council. This will ensure that the 'direction of travel' in respect of the health of centres is understood, and help determine the merits of decisions made in respect of in-centre investment and additional out-of-centre retail and leisure development. Given the high vacancy rate in Hanley and the need to address its issues, it may be appropriate to update key health indicators for this centre (most particularly, land use composition data and the vacancy rate) on an annual basis. Other principal town centres may be the subject of biennial reviews.
544. Paragraph 006 of the NPPF sets out a number of key performance indicators of relevance to the health of town centres. Indicators that are regularly reviewed by local planning authorities to help determine the performance of centres over time are as follows.
545. The **diversity of uses** within a centre can be monitored with reference to Experian Goad categories (convenience, comparison, retail service, leisure service, and financial and business service) or with regard to Use Class. Reviewing changes in representation over time can assist in understanding the changing role and function of the centre, and how it meets local residents' needs. Changes in representation may also be of consequence to the determination of planning applications for main town centre uses outside of defined town centres (which would potentially compete with the subject centre for custom).
546. The **proportion of vacant properties** is a clear and straightforward barometer of operator demand and can also be instructive in respect of the role of centres and their environmental quality. A large number of vacancies often impacts on visitors' perceptions of the centre and can lead to a 'spiral of decline' that is difficult to reverse. We recommend that both the range of land uses and the number of vacant properties are reviewed by the Council on a regular basis.
547. **Pedestrian flows** can be determined with reference to observations 'on the ground' or with reference to exact pedestrian count systems. Whilst this has most often been undertaken in recent years with reference to an automated laser-based pedestrian count system, smartphone GPS data (as used in this Study) is now generally the preferred choice in understanding pedestrian flows and the popularity of different parts of a centre throughout the day and into the evening. The Council may wish to consider the use of GPS data to review activity across a range of centres in a consistent manner and over a period of time.
548. It is considered that the above three indicators provide metrics that allow changes and the relative performance of the centre to be measured and tracked over time.

-
549. The monitoring of centres on this basis allows:
- the impact of development management decisions to be quantified and understood;
 - future development management decisions to be made with reference to an up to date evidence base;
 - structural changes in the composition of centres to be understood and redevelopment opportunities to be identified;
 - the prioritisation of public sector investments to ensure that centres remain vital and viable, and continue to act as the hub of local communities; and
 - the identification of urgent issues in respect of the function of centres.
550. The timeframe for the monitoring and update of health check information may be dependent on local authority budgets. However, it is considered that the collation of land use composition and vacancy data on an annual or bi-annual basis may be appropriate. Pedestrian count data can be collated on an ongoing basis through agreement with GPS data providers.
551. It is recommended that the collation and summary of land use, vacancy and pedestrian count data would be undertaken in the form of concise health check summary reports to be issued by the Council on a regular basis.