

# STOKE-ON-TRENT RETAIL AND LEISURE STUDY

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## Final Report – Volume 3: Centre Health Checks and Proposed Centre Boundaries

Prepared for:

Stoke-on-Trent City Council

July 2025

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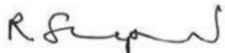
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Signed: 

For and on behalf of Lambert Smith Hampton

Issued: July 2025

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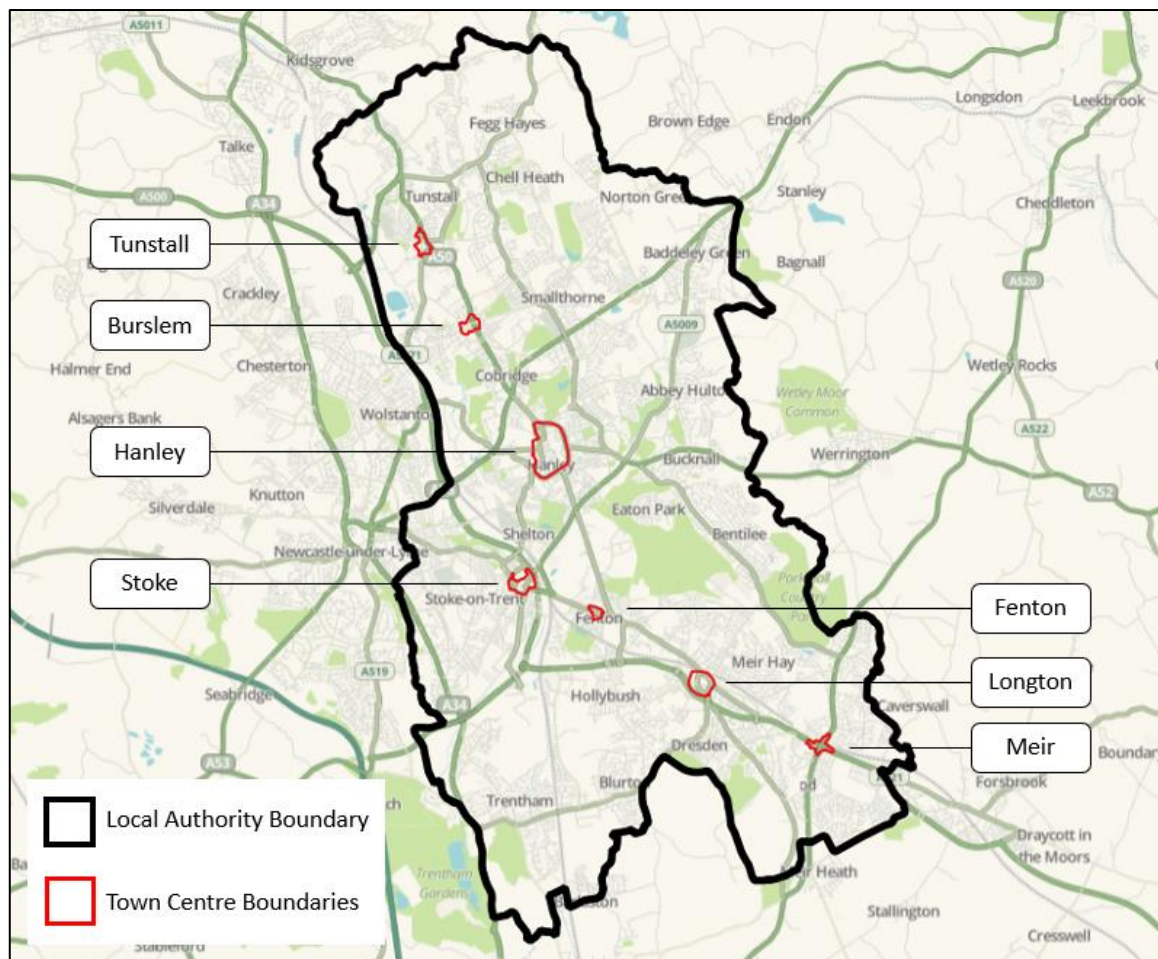
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## 1. Introduction

1. This appendix provides the findings of the qualitative and quantitative health check assessments of the town centres located within Stoke-on-Trent: Hanley; Burslem; Fenton; Longton; Meir; Stoke; and Tunstall.

**Figure 1: Stoke-on-Trent Centre Map**



2. The health checks provide an overview of the relative health of the main centres by examining the centres' current vitality and viability based on the key performance indicators (KPIs) set out in the Town Centres and Retail Planning Practice Guidance (PPG). The PPG states the following 12 KPIs may be relevant in assessing the health of the town centres and planning for the future:

- Diversity of uses
- Proportion of vacant street level property
- Commercial property indicators
- Retailer representation and intentions to change representation
- Pedestrian flows
- Accessibility
- Perception of safety and occurrence of crime
- State of town centre environmental quality
- Balance between independent and multiple stores

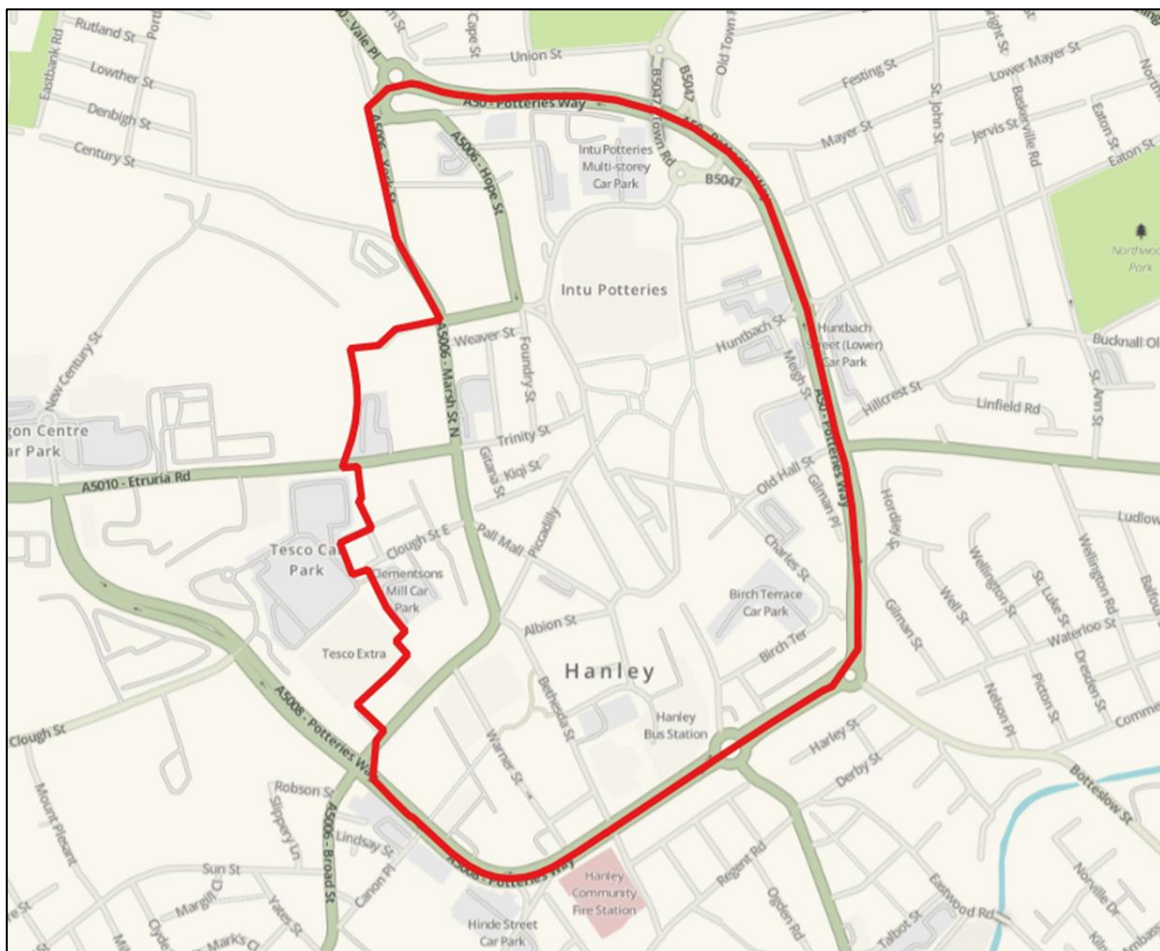
- Barriers to new businesses opening and existing businesses expanding
  - Extent to which there is an evening and night-time economy offer.
3. The **diversity of uses** is informed by survey data provided by Experian Goad and surveys conducted by LSH, and relates to the current number of outlets and quantum of floorspace for each commercial category. These are Convenience and Comparison Retail, Leisure Services (including food and drink outlets, games of chance venues (e.g. casinos, bingo halls, gambling arcades, and betting shops), sports and leisure facilities, night clubs, cinemas, theatres, concert halls and hotel/guesthouse accommodation), Retail Services (including health and beauty services (beauty salons, tattoo parlours etc.), post offices, dry cleaners & laundrettes, travel agents, photo processing outlets & studios, and other personal services) and Financial & Business Services. Vacancies are also discussed separately.
  4. **Pedestrian flows** are considered with reference to footfall data from MSCI Property Intel who harvest data from over 10 million mobile devices. All data is fully anonymised and GDPR compliant. Data is collected daily and MSCI Property Intel can identify footfall levels at different times of the day. The heat map included in the report also indicates concentrations of footfall, green indicating lower levels and orange/ red higher concentrations.
  5. **Retailer representation** is informed by the site visit. Future retailer requirements are obtained from the Requirement List, which identifies operators' known target locations to secure future representation.
  6. **Commercial property indicators** are informed using a variety of sources, including PROMIS, Co-Star, and speaking to agents to gather on-the-ground information on current market trends for rents and yields.
  7. For **crime and safety**, a postcode within each town centre is chosen as a central point with a ¼ mile radius created to gather crime data within that area for a range of crimes. The crime data, obtained from UK Crime Stats, can be compared across recent years to show any trends. A heatmap can also be generated to highlight where the occurrence of crimes in an area are concentrated.
  8. The KPIs help to identify the critical Strengths and Weaknesses of each centre; the Opportunities for future sustainable development and any current and potential Threats to their overall vitality and vitality, summarised in the main report.
  9. The findings of the health check assessments are set out below.

## 2. Hanley City Centre Health Check

### Overview

10. Hanley serves as the commercial heart of Stoke-on-Trent, combining leisure, retail and cultural attractions. It is situated centrally within Stoke, equidistant from the two nearest town centres of Burslem (to the north) and Stoke (to the south). Both centres are just over 2km from Hanley. The town centre stretches almost 1km from north to south and 0.7km from east to west.
11. Having opened in 1988, The Potteries Centre (formerly Intu Potteries) is one of the largest shopping destinations in Staffordshire. Spanning across several floors, major retailers include Primark, H&M and JD, whilst the former Debenhams store to the south west of the centre remains vacant. Recent developments include The Hive, which opened in 2015 and houses Cineworld alongside a cluster of units suitable for food & beverage retailers.
12. Beyond the shopping centre, a mix of national multiples and independents can be found along several pedestrianised streets across the centre including Tontine Street, Parliament Row, Piccadilly.
13. Cultural and historic attractions/venues for the centre include Regent Theatre, Victoria Hall and The Potteries Museum & Art Gallery.
14. Following the demolition of the old East-West Precinct in 2019, various plans have been touted for the site. The site was bought by the Council in 2018 and sits to the south east of the centre, at Old Hall Street. A new masterplan that is viable and comparable to the Levelling Up outputs is to be worked up and put forward.

**Figure 2: Hanley Centre Boundary (Adopted)**

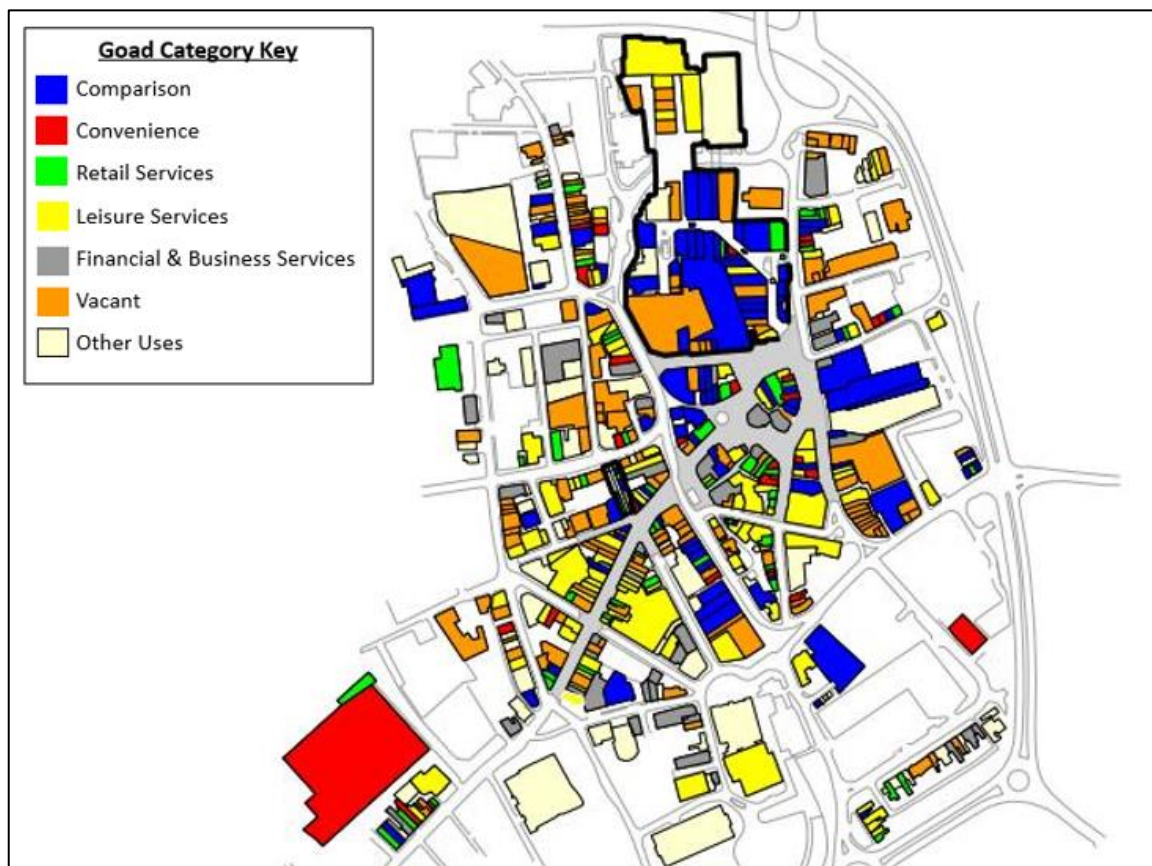


Source: Boundary provided by Stoke-on-Trent City Council and mapped by LSH

### Diversity of Uses

15. In order to assess the diversity of uses for the centre, Goad data from October 2023 was taken and updated based on LSH site visits across July and August 2024 to provide an updated view of the retail and leisure mix. The figure below indicates the area covered by Goad as well as giving a visual representation of the diversity of uses.
16. It should be noted that the Goad area does not perfectly align with the town centre boundary, with the main discrepancy being the inclusion of the Tesco Extra store within the Goad plan.

**Figure 3: Hanley Diversity of Uses Map**



Source: Experian Goad and LSH Site Visits (July & August 2024)

17. The table below shows that Hanley has a total of 506 outlets and an overall quantum of 153,100 sqm in floorspace.

**Figure 4: Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Hanley	UK Average		Hanley	UK Average
Comparison Retail	123	24.3%	26.4%	49,330	32.2%	29.4%
Convenience Retail	32	6.3%	9.3%	19,840	13.0%	15.6%
Retail Services	60	11.9%	15.9%	6,140	4.0%	7.3%
Leisure Services	97	19.2%	25.8%	26,480	17.3%	26.7%
Financial & Business Services	40	7.9%	8.3%	9,080	5.9%	6.3%
Vacant	154	30.4%	14.1%	42,230	27.6%	14.2%
<b>Total</b>	<b>506</b>	<b>100.0%</b>	<b>100.0%</b>	<b>153,100</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

18. Despite the closure of Debenhams in 2021, comparison retail still represents 32.2% of floorspace across the centre. This is slightly above the UK average of 29.4%. Almost one in four units in the centre fall within the comparison retail offer, with big names including Primark, TK Maxx and H&M. However, it is expected that larger centres have a propensity to support a greater proportion of comparison goods floorspace, and Hanley's current performance should be viewed in this context. By way of comparison, the previous Newcastle-under-Lyme and Stoke-on-Trent Retail and Leisure Study 2019 identified (based on an August 2018 survey of the centre)

that Hanley had a total of 71,360 sqm of comparison goods floorspace across 157 units. The reduction in comparison retail representation is of significant concern, and has been largely driven by the loss of Debenhams and M&S. The departure of these retailers highlights two key threats to centres such as Hanley – one being comparison retailers (such as Debenhams) who have struggled financially and either gone out of business or restructured their operations in favour of online retailing, and the other being comparison retailers (such as M&S) who are turning their focus to out-of-centre locations, such as retail parks, as opposed to town and city centre locations.

19. Convenience retail is slightly under-represented within Hanley when comparing to the UK averages. The Tesco Extra store makes up more than half of the convenience retail floorspace within the area, while the town centre offer includes Greggs and Iceland. Hanley Market, located in the basement of The Potteries Centre, also makes up a significant proportion of the convenience floorspace (33% of total convenience retail floorspace).
20. There is a lower provision of retail services both in terms of outlets and floorspace in Hanley when compared to the UK average. With 60 units covering just over 6,000 sqm of floorspace, the offer is dominated by health & beauty operators (47 outlets). Other services include opticians (such as Specsavers and Vision Express), Post Office and travel agents (TUI and Hays Travel).
21. Similarly to retail services, leisure services are notably under-represented within Hanley. A total of 97 outlets equates to 19.2% of all outlets (compared to UK average of 25.8%) and 26,460 sqm of floorspace represents 17.3% of the total (compared to UK average of 26.7%). Beyond the food & beverage provision (which is covered below), Hanley has a range of bingo & amusement operators, several betting offices (including Betfred and Paddy Power), and a nine-screen Cineworld which is located at the very northern edge of the centre, within The Potteries Centre.
22. Financial & business services provision within Hanley is broadly in line with UK averages, both in terms of proportion of outlets and floorspace. National high street banks still present in Hanley include Barclays, Halifax, HSBC, Lloyds, Nationwide, NatWest and Santander.

**Figure 5: Food & Beverage Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Hanley	UK Average		Hanley	UK Average
Bars & Wine Bars	16	3.2%	2.3%	2,630	1.7%	2.4%
Cafes	14	2.8%	5.1%	1,700	1.1%	2.9%
Fast Food & Take-Away	19	3.8%	6.1%	1,980	1.3%	3.1%
Public Houses	9	1.8%	2.6%	3,010	2.0%	3.4%
Restaurants	14	2.8%	5.1%	3,360	2.2%	4.3%
<b>Total</b>	<b>72</b>	<b>14.2%</b>	<b>21.2%</b>	<b>12,680</b>	<b>8.3%</b>	<b>16.1%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

23. Whilst a higher proportion of bars & wine bars can be found in Hanley when compared to the UK average (3.2% vs 2.3%), all other food & beverage operator types fall below the UK average. As a result, food & beverage operators as a whole

make up 14.2% of all units in the centre and 8.3% of total floorspace. Both of these proportions of the centre are significantly lower than the UK average.

24. The 16 bars & wine bars includes a cluster of independent operators found along Piccadilly including Bloom, Bottle Craft, and Gin Rummy Bar & Kitchen.
25. Notable food & beverage national multiples within the centre include Starbucks, McDonald's and Nando's. Restaurants such Coast to Coast and Frankie & Benny's that had once accompanied Nando's by the Cineworld have now closed, with the units currently vacant.
26. It should be noted that Goad records 73 fewer units in Hanley at 2024 compared to 2018 (at which point there were 579 units within the centre). The number of units dedicated to all five commercial use categories has declined over the intervening period. The most significant reduction has been in respect of comparison retail representation, but there has also been a significant contraction in respect of financial & business services (64 units were dedicated to this use in 2018 compared to 40 units in 2024).
27. Convenience retail has been the most stable use with the current level of provision at 2024 (32 units comprising 19,840 sqm of floorspace) being broadly comparable to the position in 2018 (33 units comprising 19,820 sqm of floorspace).

### Vacancies

28. There are a total of 154 vacant outlets in Hanley which represents 30.4% of the overall outlets in the centre - more than double the UK average of 14.1%. Vacant floorspace accounts for 27.6% of total floorspace within the centre. This is an increase from the position identified at 2018 when 29.0% of units and 18.9% of floorspace was recorded as being vacant. The significant increase in vacant floorspace relates to the loss of a number of larger anchor tenants in recent years.
29. As can be seen from the Hanley Diversity of Uses plan above, vacancies are spread throughout the centre, ranging in size. Some of the larger vacant units include the previous Go Outdoors store to the north west of the centre (6,140 sqm), the former Debenhams unit in The Potteries Centre (3,420 sqm), and what was formerly BHS on Parliament Row (2,090 sqm).
30. Efforts are being made to address the vacancy issue, particularly in The Potteries Centre, where vacancy posters can be found with QR codes directing people to online information about the units that are available within the centre.

Figure 6: Vacancies Signage, The Potteries Centre



Source: LSH Site Visit

### Multiple and Independent Representation

31. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Despite the loss of Debenhams and Next in recent years, Hanley still has a range of national multiples including Primark, Waterstones, JD, Boots, Wetherspoon, TK Maxx, and B&M, as well as the Tesco Extra that borders the south west of the centre. However, the loss of large format national multiples has clearly impacted on the centre and reduced its mid-market fashion offer.
32. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Hanley has a range of independent outlets, with a particular concentration of independent food & beverage operators located along Piccadilly including The Slamwich Club, Desire Cocktail Bar, La Bella Napoli, Bloom Cocktails + Kitchen and Little Dumpling King. Elsewhere, along March Street South, Terraces provides designer menswear whilst Rubber Soul Records embrace the nostalgia and recent resurgence in the popularity of vinyl records. Given structural changes in the retail sector, it is of critical importance that the independent sector is nurtured further in order to reoccupy vacant units, drive footfall, and foster local distinctiveness.

**Figure 7: Terraces, March Street South**



Source: LSH Site Visit

### Market

33. Hanley's indoor market is located at basement level of the Potteries Centre. The market is open from Monday through to Saturday between 9am and 5pm. A variety of goods are on offer, including art & craft supplies, mobile phones & accessories, clothing, shoes, jewellery, small electrical appliances, baby items, pet items, groceries and books. A free soft play area, toilets, and changing facilities are also available at the market.
34. An outdoor market is also set up at Fountain Square from Monday through to Saturday, 9am to 5pm. This offers a more limited range of goods, but includes fresh fruit and vegetables, hot food and cosmetics.

### Retailer Requirements

35. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. Based upon discussions with letting agents within Hanley and a review of our retailer requirements database we conclude there is limited occupier demand which in turn accounts for the higher-than-average vacancy rates.

36. The latest published market demand report sourced from The Requirement List is set out below.

**Figure 8: Retailer Requirements List, Hanley**

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Feb-24	Shoezone	Comparison Retail	185	370
Nov-23	Evapo	Convenience Retail	30	90
Sep-23	Crepe Delicious	Leisure Services	30	110
Sep-23	Wok&Go	Leisure Services	65	140
Oct-22	Pizza Hut Delivery	Leisure Services	60	195
<b>Total</b>			<b>370</b>	<b>905</b>

Source: The Requirement List

37. As of September 2024, a review of published operator requirements identified five recorded requirements from retail and leisure operators since October 2022, seeking a combined maximum floorspace of up to 905 sqm.
38. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.
39. It is also possible that these operators are not looking for opportunities in Hanley specifically, rather they are looking for opportunities in areas similar to and including Hanley.
40. Independent/smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.
41. Whilst there will be operators seeking space in Hanley in the near future who are not accounted for above, the current retailer requirements list is limited and is indicative of weak commercial market demand.

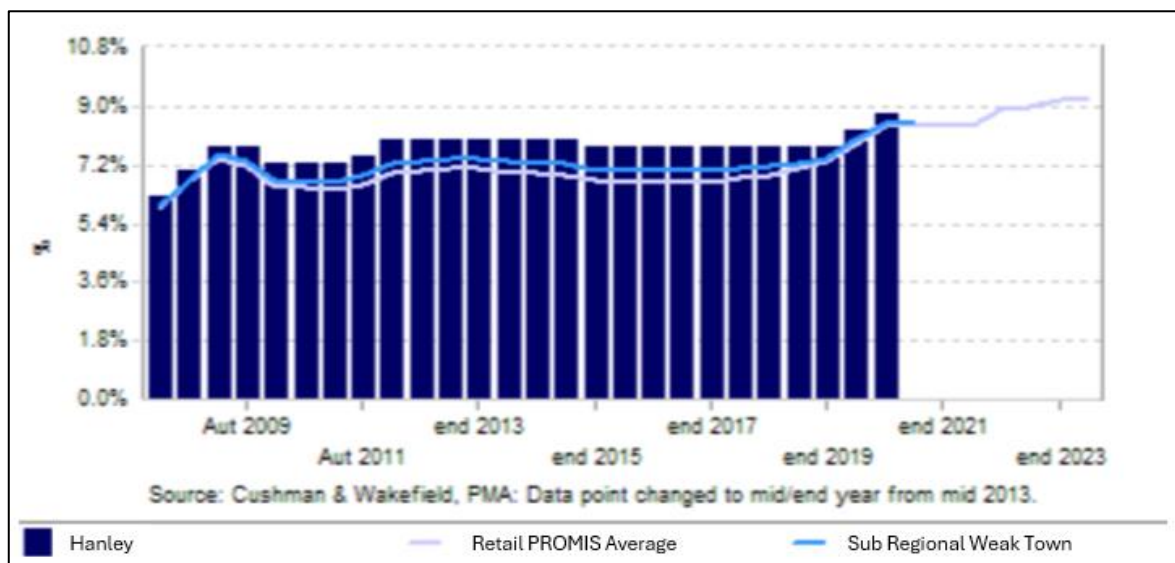
### Commercial Property Indicators

42. Hanley is recognised by retailers as the dominant retail centre within the Stoke-on-Trent conurbation. The centre's retail provision consists of the Potteries Shopping Centre and a series of compact interconnecting squares and streets including Market Square, Tontine Square, Fountain Square, Upper Market Street and Parliament Row.
43. The Potteries Shopping Centre is recognised as the prime retail location and is anchored by Primark and has a strong mix of mass market, comparison retailers including H&M, Flannels, New Look, River Island, JD Sports, Deichman, The Entertainer, Superdrug, Ernest Jones, WH Smith and Beaverbrook's.
44. We understand there has been limited recent letting activity within the centre although we have been advised that the remaining five restaurant units within The Hive are to be combined and are under offer to a large leisure occupier.
45. In line with wider national retail trends, The Potteries has been significantly impacted by the closure of some major retail stores, in particular the former Debenhams which closed in mid-2021. We understand there has been limited occupier interest and

given the demise of the department store sector, the space will in all probability need to be subdivided and potentially repurposed for wider Class E uses.

46. There are a number of vacancies outside of the shopping centre in the traditional retail thoroughfares, most notably the former BHS store along Parliament Row. The unit has been acquired by Frasers Group, although they have decided not to occupy the unit and have recently placed it on the market.
47. Based on agent sources, PMA PROMIS estimate that top achievable prime rents in Hanley were around £800 psqm (£75 psqf) Zone A as of mid-2024, which implies a decline in prime rents since the end of 2017 of -53.1%. This compares unfavourably with PMA PROMIS' average rate of decline of -35.6%.
48. Given the limited availability of transactional evidence, we are unable to report on the current level of prime retail unit shop yields in Hanley, however, the below graph from PMA PROMIS does show yields in Hanley up to the end of 2020, benchmarked against Sub Regional Weak Towns and the overall Retail PROMIS Average. As can be seen, prime yields grew from 6.3% in 2008 to 8.8% in 2020.

**Figure 9: Prime Unit Shop Yields**

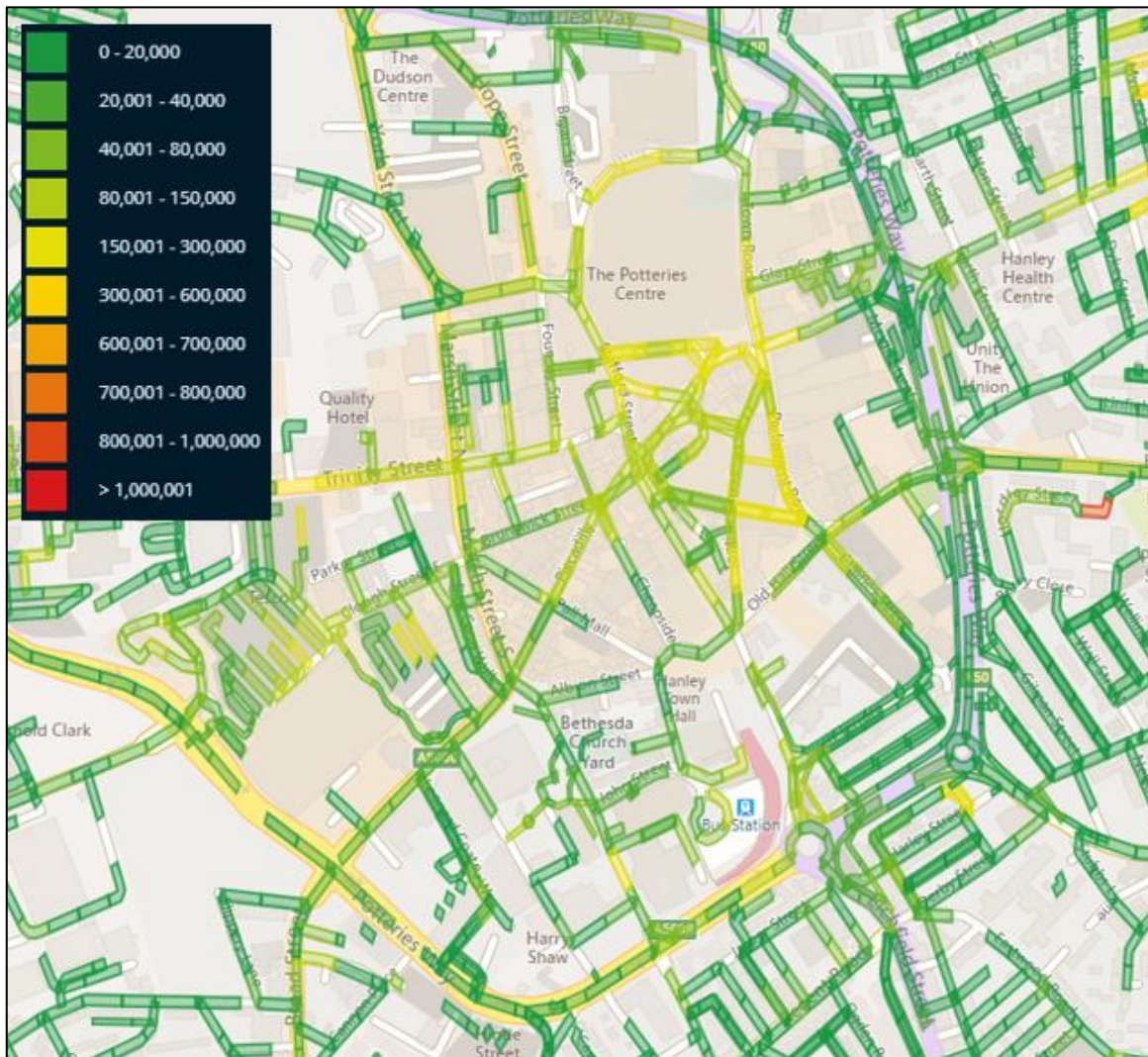


Source: PMA PROMIS

### Pedestrian Flows

49. The figure below illustrates pedestrian flows for Hanley in the form of a heatmap showing total pedestrian movements during August 2024. It shows a particular concentration at Market Square (by the main entrance to The Potteries Centre) as well as along Parliament Row, Percy Street and Town Road.

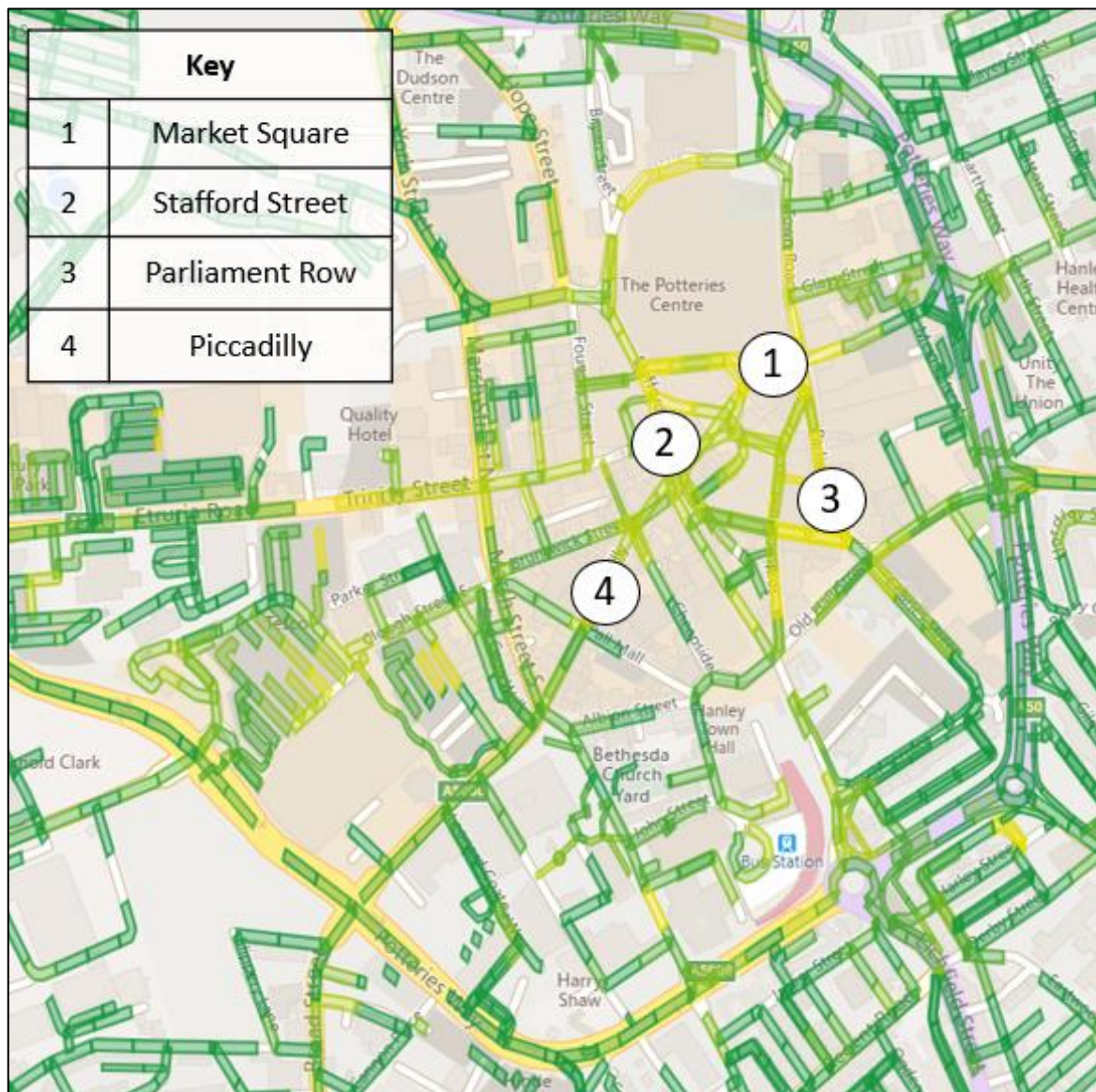
Figure 10: Hanley Footfall Heat Map, August 2024



Source: MSCI

50. Four locations within the centre have been sampled to assess footfall trends over recent years: Westgate, Exchange Street, Bridge Street and Rivergate Centre. These locations can be seen mapped in the figure below.

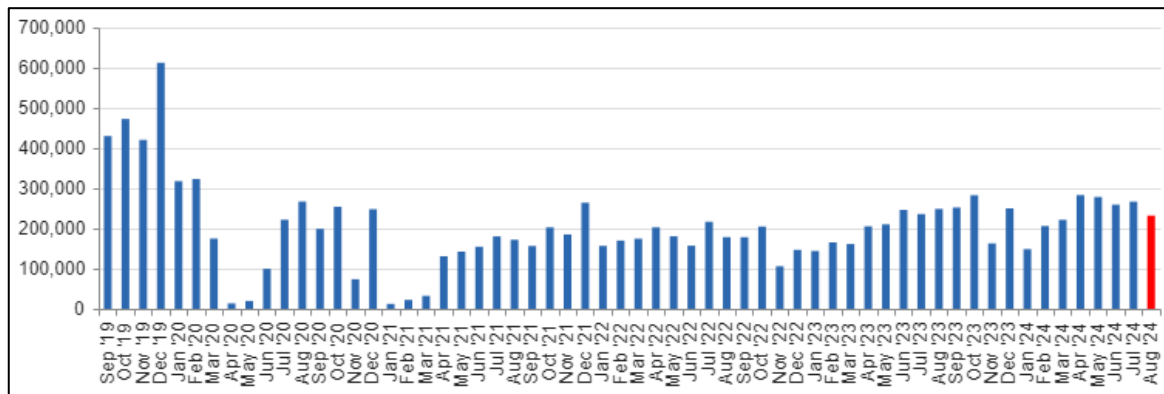
Figure 11: Hanley Footfall Sample Locations



Source: MSCI

51. The figure below shows how footfall levels have changed between September 2019 and August 2024 at Market Square. As can be seen, pedestrian activity dropped dramatically in line with the heights of the pandemic-related restrictions on travel and movement. Figures have grown and stabilised from mid-2021 onwards but have not returned to anything like the levels seen in late 2019.
52. The second half of 2023 and 2024 so far have shown some positive signs, with monthly figures regularly surpassing 200,000, but again, nothing like the 400,000+ seen in late 2019.

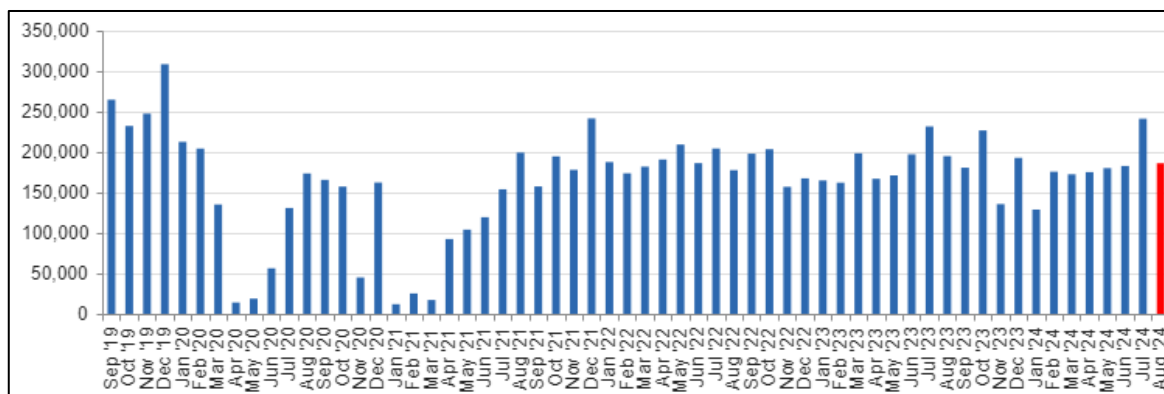
**Figure 12: Monthly Footfall Graph, September 2019 - August 2024, Market Square**



Source: MSCI

- 53. The figure below shows how footfall levels have changed between September 2019 and August 2024 along Stafford Street, by the Trinity Street junction.
- 54. As can be seen, pedestrian activity has generally bounced back strongly post-pandemic. Whilst activity hasn't quite equalled figures seen in late 2019, monthly numbers are stable and are regularly above 150,000 monthly movements, with 200,000 monthly movements occasionally being surpassed.

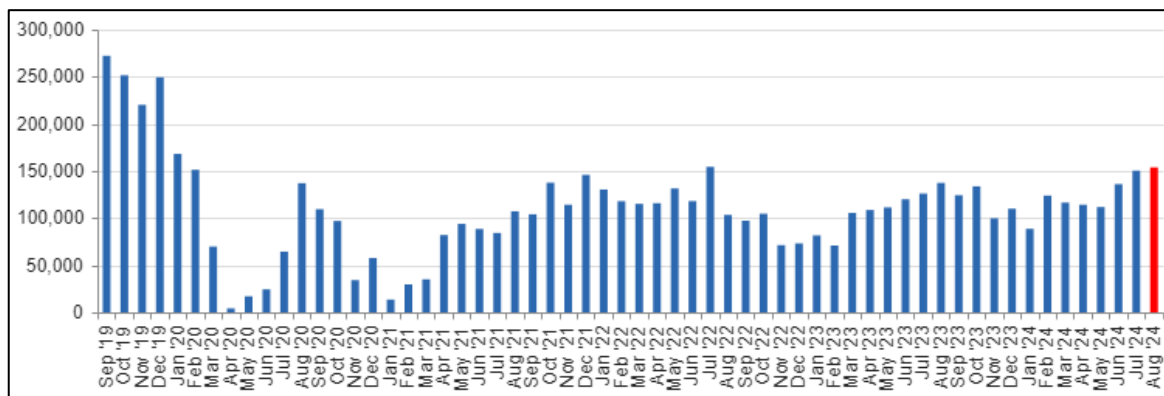
**Figure 13: Monthly Footfall Graph, September 2019 - August 2024, Stafford Street**



Source: MSCI

- 55. The figure below shows how footfall levels have changed between September 2019 and August 2024 along Parliament Row.
- 56. As can be seen, pedestrian activity dropped dramatically in line with the heights of the pandemic-related restrictions on travel and movement. Figures have grown and stabilised from mid-2021 onwards but have not returned to anything like the levels seen in late 2019.
- 57. The most recent two months recorded (July and August 2024) show some positive signs, with the 150,000 monthly movements mark surpassed in both months, which barring July 2022, has not happened since the beginning of the pandemic.

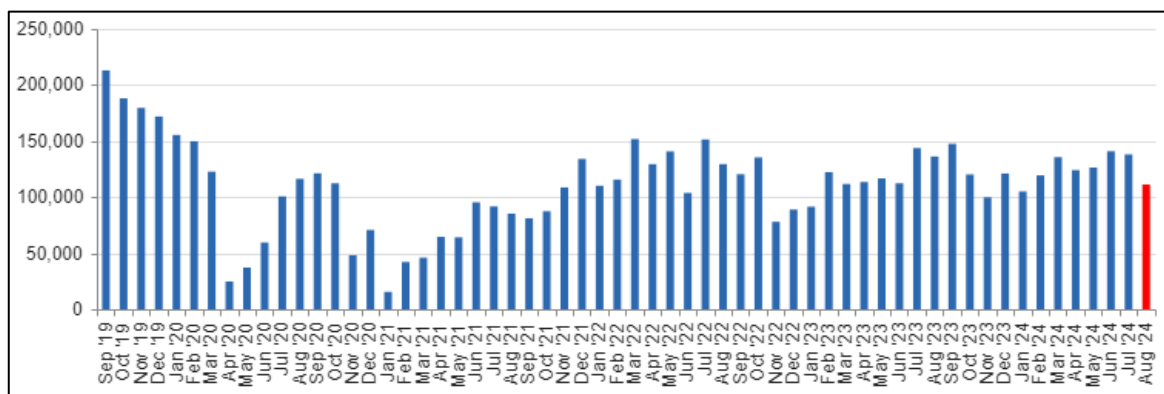
**Figure 14: Monthly Footfall Graph, September 2019 - August 2024, Parliament Row**



Source: MSCI

- 58. The figure below shows how footfall levels have changed between September 2019 and August 2024 along Piccadilly (where Brunswick Street and Cheapside meet Piccadilly).
- 59. As can be seen, post-pandemic pedestrian activity in this area has been more resilient than at some other locations in Hanley. Whilst activity doesn't match the levels seen in late 2019, monthly numbers are stable and are now consistently above 100,000 monthly movements, with numbers occasionally reaching closer to 150,000 monthly movements.

**Figure 15: Monthly Footfall Graph, September 2019 - August 2024, Piccadilly**



Source: MSCI

### Accessibility

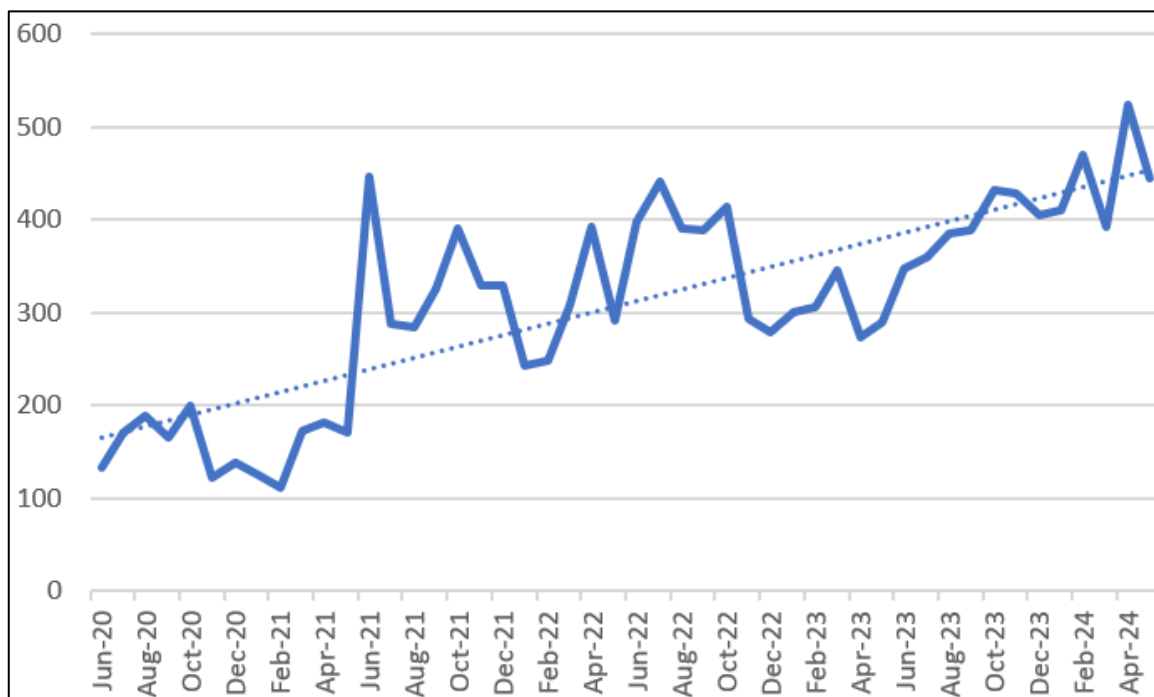
- 60. Stoke-on-Trent City Centre Bus Station provides a major transport hub, connecting Hanley with areas across the Stoke-on-Trent region (including Tunstall, Longton and Stoke) and beyond (including Newcastle-under-Lyme). The station is located at the southern edge of the centre and provides passengers with a sheltered waiting area and accompanying bike storage/ parking. Bus services can also be picked up more centrally within the centre, most notably along Stafford Street.

61. The bus station is also serviced by national coach routes that provide longer-distance travel to major cities across the country including Manchester, Birmingham and London.
62. Hanley is well connected by road, with the A50, A5006 and A5008 combining to wrap around the centre. Major routes provide connections in all directions – the A50 north west to Burslem and beyond as well as south east towards Fenton, Longton and Meir, the A5006 south west to Stoke and beyond and the A5010 west which leads to the A53 and provides linkage to Newcastle-under-Lyme.
63. Car parking is available across the centre, with the largest provision found at The Potteries Shopping Centre’s multi-storey car park. Over 900 spaces are available, including disabled bays, parent & child bays and electric vehicle charging provision. Other notable parking locations include the Cultural Quarter Multi Storey (492 spaces), Charles Street (94 spaces) and along Glass Street to the east of the centre.
64. Limited provision of cycle parking and lanes were found to be present across the centre, whilst the pedestrianisation of large parts of the centre makes it a safer and more enjoyable experience for those navigating the centre on foot. Ample benches and seating areas are available across the centre, further strengthening the centre’s pedestrian accessibility credentials.

### Crime and Safety

65. A central postcode within Hanley was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
66. As can be seen, recorded crime levels have been rising during this period. This may, in part, be attributable to the pandemic and associated ‘lockdown’ restrictions which had a particular effect on larger centres such as Hanley. However, there has still been a notable increase in recorded crime numbers when comparing 2022 to 2024, with April 2024 representing the peak month for this period (523 recorded crimes).

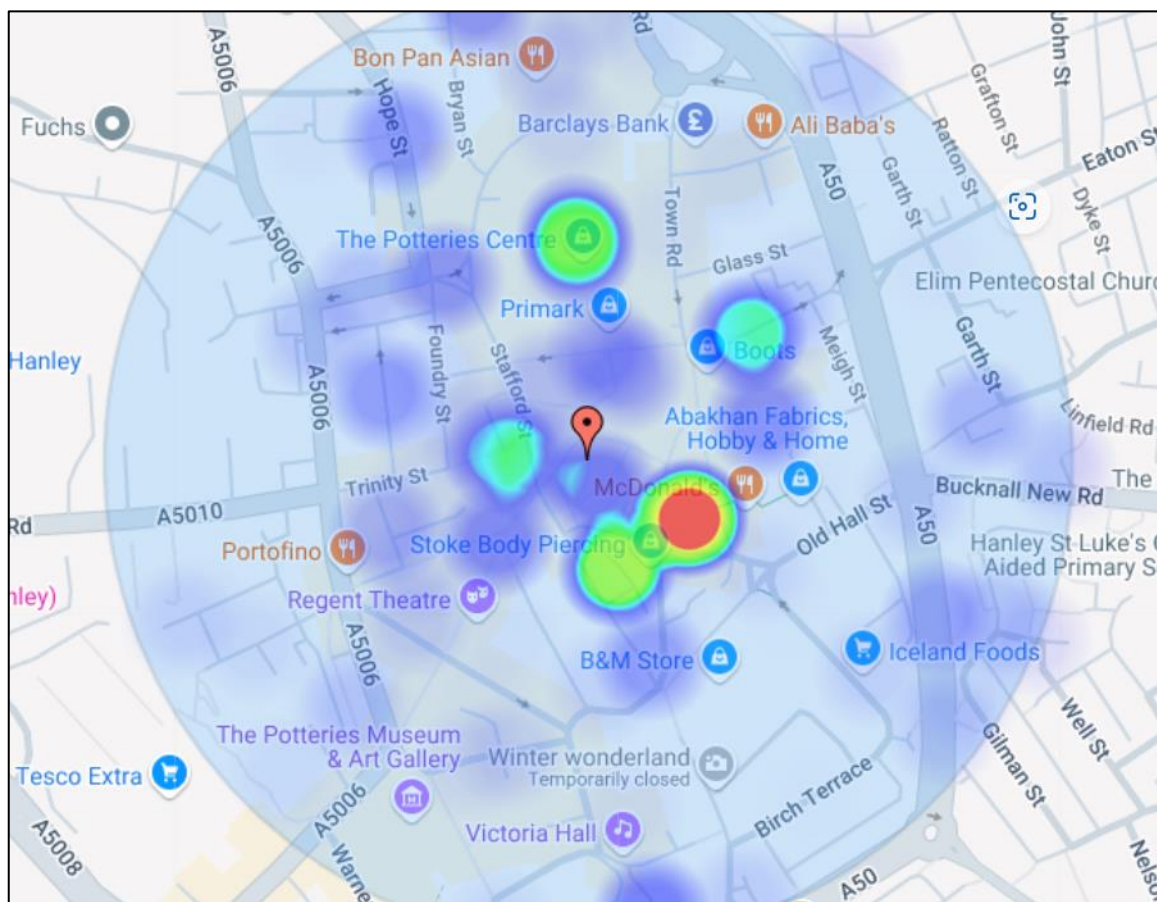
**Figure 16: Hanley Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

67. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is predominately concentrated to the core of the centre, particularly in the vicinity of The Reginald Mitchell (Wetherspoon) pub.
68. The top three types of crimes recorded within this area during this period are violence & sexual offences (2,273 recorded incidences), anti-social behaviour (1,553), and shoplifting (1,119).

Figure 17: Hanley Crime Heat Map, June 2020 - May 2024



Source: UKCrimeStats

### Environmental Quality

69. As the largest of the centres in the region, Hanley's environmental quality varies across several parts of the city. Investment in areas such as The Hive (The Potteries Centre), by The Potteries Museum & Art Gallery, and Stoke-on-Trent City Centre Bus Station have provided clean, modern and enjoyable spaces for people to use and spend time in. Pockets to the south east (Old Hall Street/Charles Street area, nearby to McDonald's and Iceland), north east (Town Road/Glass Street/Hillchurch Street) and west (Trinity Street/March Street) detract from this. These areas are generally characterised by a combination of vacant units, deteriorating buildings (many of which with low architectural appeal), and generally low-quality public realm contributing to spaces within the centre that are unlikely to have a positive impact on centre dwell times.

**Figure 18: Vacant Units, Parliament Row/ Old Hall Street**



Source: LSH Site Visit

70. Efforts have been made to improve the public realm in key locations within the centre, including to the south around Percy Street and Parliament Row. Here, pedestrian friendly spaces can be found with seating, bins and street lighting. This further enhances Hanley's pedestrian friendly nature, with pedestrianised areas including Piccadilly, Market Square and The Potteries Shopping Centre. Street signage can also be found across the centre, with maps to support with the navigation of Hanley.
71. Whilst planters and trees can be found dotted around the centre, there is a general lack of real vibrancy, greenery and green space within the centre and nearby.
72. There are several designated Listed Buildings and Buildings of Special Local Interest within the centre, with a particular concentration found to the south of the centre, such as The Potteries Museum & Art Gallery, Hanley Town Hall, The Reginald Mitchell (Wetherspoon pub), and Regent Theatre. These buildings add to the charm, character and identity of Hanley through their architectural and historic significance which in turn boosts the area's environmental quality.

**Figure 19: The Potteries Museum & Art Gallery**



Source: LSH Site Visit

### Barriers to Business

73. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of their control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges facing businesses in Hanley include:
- **Economic Factors** – a decline in manufacturing employment opportunities and a shift to lower paid health and social care work is playing its part in a substantial number of workers in the area having to supplement low incomes through welfare (as outlined in the Stoke-on-Trent Economic Development Strategy). These economic conditions can affect consumer spending power and demand for retail goods and leisure services.
  - **High Street Decline** – the closure of several key stores in recent years (including Debenhams and M&S) has damaged the attractiveness of Hanley as a shopping destination. This is reflected in the declining footfall seen in recent years, and as such, poses challenges for new businesses aiming to establish a physical presence in the centre.
  - **Skills Shortage** – the area lags behind regional and national averages in skills, particularly digital skills (as set out in the Stoke-on-Trent Economic Development Strategy). A workforce lacking essential skills can impede business operations and growth, especially as the retail and leisure sectors increasingly incorporate digital technologies.

- Economic Inactivity – a notable portion of the local population is economically inactive, many due to long-term health conditions. This can limit the available talent pool for businesses seeking to hire staff.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

## Evening and Night Time Economy

74. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Hanley have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.
75. As outlined below, there are a range of establishments across the centre, although with a particular concentration along Piccadilly, ranging from cocktail bars to restaurants of varying cuisines. Almost all venues sampled remain open beyond 9pm, indicating that there is a healthy offer of evening/late night leisure services in the centre.

**Figure 20: Cineworld Cinema, The Potteries Centre**



Source: LSH Site Visit

76. 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 new The Hive development at The Potteries Centre.

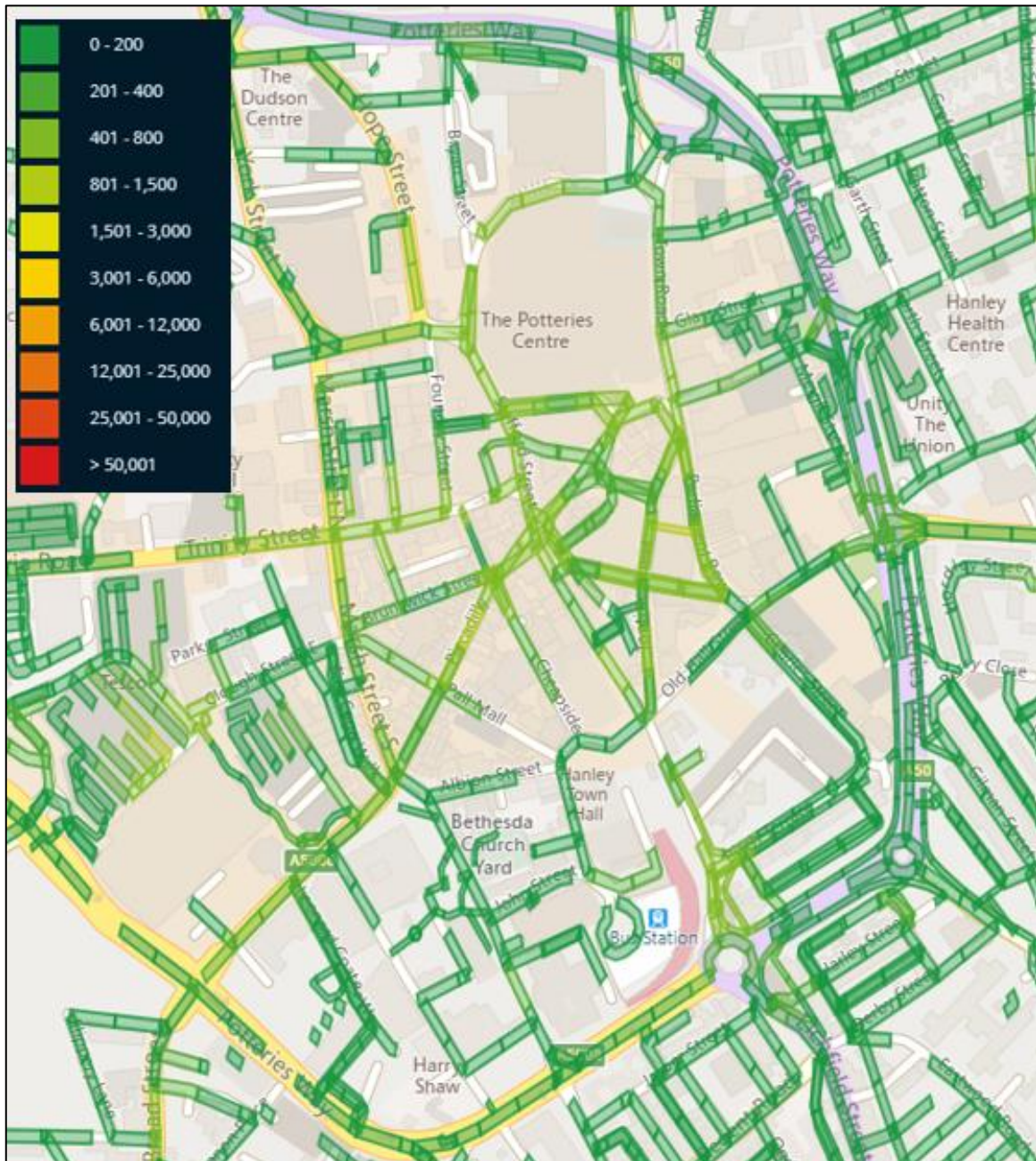
**Figure 21: Leisure Operator Sample**

Retailer Name	Type	Open	Close
Gin Rummy	Bar	12-4pm	9-10pm
Bloom	Bar	12-4pm	10pm-12am
Desire	Cocktail Bar	12-4pm	12am
Little Dumpling King	Asian Restaurant	12-5pm	8-9pm
Market Tavern	Pub	12pm	10pm
The Reginald Mitchell	Pub	8am	12-1am
Nando's	Restaurant	11:30am	10pm
La Bella Napoli	Italian Restaurant	11am	10-11pm
Karwan	Afghan Restaurant	12pm	11:30pm
Victoria Hall	Concert Hall	Afternoon	Evening
Regent Theatre	Theatre	Morning	Evening
Cineworld	Cinema	Morning	Evening

Source: LSH research

77. The figure below shows the footfall heatmap for Hanley during the evening (5pm – 11pm). As can be seen, pedestrian activity is generally low across the area, although with some pockets where footfall is marginally higher along Piccadilly and around The Reginal Mitchell (Wetherspoon) pub.

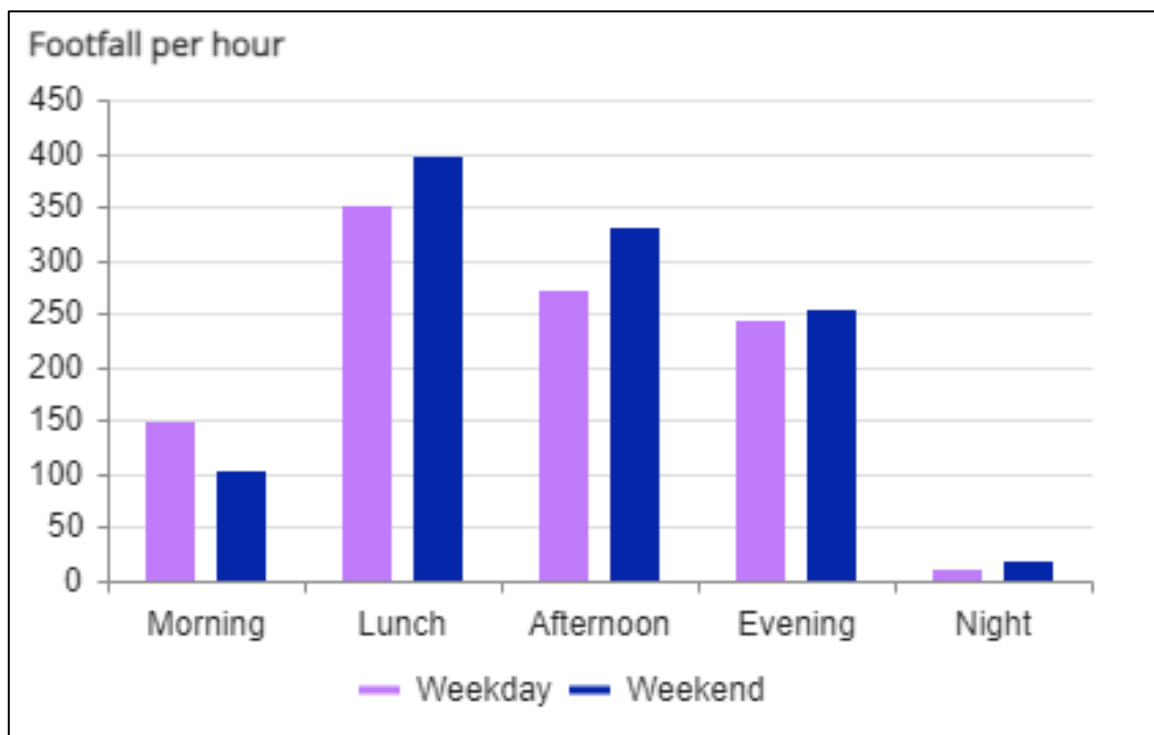
Figure 22: Hanley Evening (5pm – 11pm) Footfall Heat Map, August 2024



Source: MSCI

78. The figure below shows how footfall levels differ across different parts of the day along Piccadilly (by Regent Theatre). As can be seen, footfall in an evening (5pm – 11pm) only drops marginally as the day moves from afternoon to evening, suggesting that the area is able to retain footfall and visitors through a healthy provision of evening leisure provision.

Figure 23: Footfall by time-of-day, Piccadilly



Source: MSCI

79. It should be noted that the evening economy in Hanley was significantly impacted by the pandemic. This is not unusual and it is notable that cinema admissions throughout the UK have still not returned to pre-pandemic levels as a result of changing consumer behaviours and the ongoing impact of streaming services in this sector. In Hanley, The Hive development at The Potteries Centre appears to have struggled in recent years. The Hive is anchored by Cineworld and has previously also supported a good range of leading mid-market food and beverage operators. However, our land use survey identified that four of the seven leisure units immediately adjacent to Cineworld are vacant. It is important to gain further leisure representation in this part of the centre to support the cinema use and ensure that The Hive is vibrant and functions appropriately as a key evening economy anchor.

## Conclusion

80. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) of Hanley can be summarised 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
- 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 supporting small businesses and traders and boosting footfall in the centre
- 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
- Rising level 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)
- Potential large-scale development at the former East-West Precinct site as a catalyst for regeneration and opportunities as well as further investment to follow
- 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
- The attraction of out-of-centre locations, such as retail parks, to both shoppers and retailers (particularly comparison retailers)

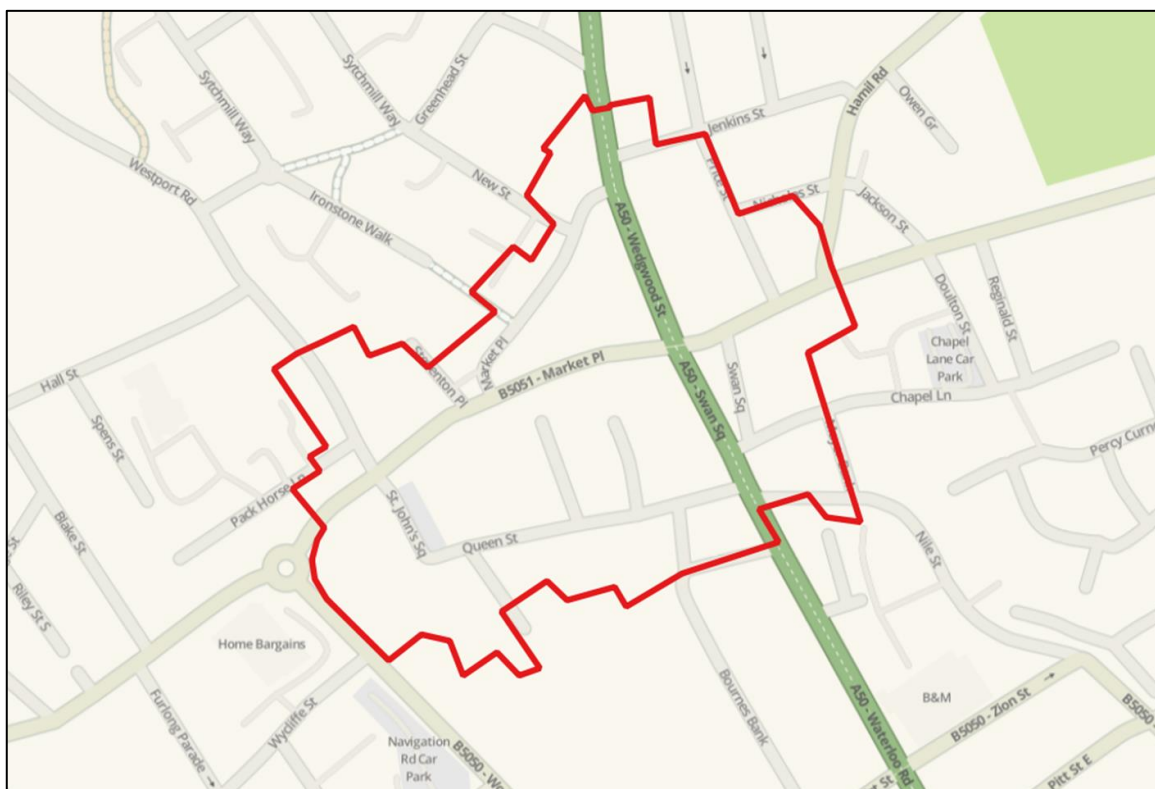
- 
81. We therefore conclude that whilst Hanley remains the retail and leisure hub for the region, with entertainment and cultural venues drawing visitors in, the centre faces significant challenges and threats to its vitality and viability.
  82. As evidenced by the household survey, Hanley has been subject to a significant loss of study area comparison goods market share. A principal beneficiary of this has been Festival Retail Park. It will therefore be important for Hanley to retain a critical mass of comparison goods retailers in order to remain competitive relative to alternative out-of-centre destinations.
  83. 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.

### 3. Burslem Town Centre Health Check

#### Overview

84. Sandwiched between Tunstall to the north (1.5km) and Hanley to the south (2.2km), Burslem town centre can be accessed via the A50 stretching north to south and the B5051 running from east to west.
85. Despite being one of the smaller centres in the area, Burslem offers a mix of historic architecture and heritage from its days of contributing to Stoke's infamous pottery industry, a selection of independent & national retailers as well as being the home of City College (Burslem School of Art) which can be found along Queen Street and Haywood Sixth Form Academy which occupies the former town hall building.
86. Major retailers Home Bargains and B&M fall just outside of the centre boundary, whilst the large former market building between Queen Street and Market Place lies empty following the closure of the market back in 2003, having originally opened in 1879.
87. Stoke-on-Trent City Council have advised of early interest in the redevelopment of Queens Theatre, which sits to the north of the centre, along Wedgewood Street. A feasibility study for the property was recently completed and recommends the buildings use as a multi-purpose space.

**Figure 24: Burslem Centre Boundary (Adopted)**



Source: Boundary provided by Stoke-on-Trent City Council and mapped by LSH

## Diversity of Uses

88. In order to assess the diversity of uses for the centre, Goad data from October 2023 was taken and updated based on LSH site visits across July and August 2024 to provide an updated view of the retail and leisure mix. The figure below indicates the area covered by Goad as well giving a visual representation of the diversity of uses.
89. It should be noted that the Goad area does not perfectly align with the town centre boundary, with Goad's coverage stretching beyond the town centre boundary to the east along Moorland Road and south along Waterloo Road as far as the B&M store.

**Figure 25: Burslem Diversity of Uses Map**



Source: Experian Goad and LSH Site Visits (July & August 2024)

90. The table below shows that Burslem has a total of 160 outlets and an overall quantum of 33,500 sqm of commercial floorspace.

**Figure 26: Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Burslem	UK Average		Burslem	UK Average
Comparison Retail	23	14.4%	26.4%	7,700	23.0%	29.4%
Convenience Retail	11	6.9%	9.3%	1,510	4.5%	15.6%
Retail Services	18	11.3%	15.9%	1,770	5.3%	7.3%
Leisure Services	39	24.4%	25.8%	5,640	16.8%	26.7%
Financial & Business Services	12	7.5%	8.3%	2,040	6.1%	6.3%
Vacant	57	35.6%	14.1%	14,840	44.3%	14.2%
<b>Total</b>	<b>160</b>	<b>100.0%</b>	<b>100.0%</b>	<b>33,500</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

91. Comparison retail accounts for 23 of the outlets within Burslem. This represents 14.4% of the total, considerably lower than the UK average of 26.4%. The

comparison retail offer includes B&M to the south east and Home Bargains to the west, which make up a large proportion of the total comparison retail floorspace.

92. Convenience retail represents 6.9% of units within the centre, below the UK average of 9.3%. In terms of floorspace, there is less than a third of what would be expected with reference to the UK average of 15.6%. Unlike several other centres in the area, Burslem lacks a mid to large format supermarket within or to the edge of the centre. The loss of Farmfoods has reduced the convenience retail floorspace in the centre by 460 sqm.
93. The retail services outlets are dominated by health & beauty operators (14 of the total 18). Other services include an opticians and Post Office. Retail services as a proportion of both total outlets and total floorspace in the centre are below the UK average.
94. The 39 leisure service outlets account for 24.4% of the total units within the centre, which is broadly in line with the UK average. These outlets however only account for 16.8% of the total centre's floorspace, compared to a UK average of 26.7%.
95. In total, 12 outlets and 2,040 sqm of floorspace are occupied by financial & business services. As a proportion of the total centre, the provision is broadly in line with the UK average level. Accountants, solicitors and estate agents are all on offer. However, the loss of Lloyds in 2018 has Burslem without a high street bank.
96. Overall, land use composition in Burslem has remained broadly similar to that identified by the Retail and Leisure Study 2019 (which was based on an August 2018 land use survey). The most significant change in representation relates to the leisure service category which comprised 43 units and 9,170 sqm of floorspace at 2018. This has now reduced to 39 units and 5,640 sqm of floorspace dedicated to leisure service use.

**Figure 27: Food & Beverage Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Burslem	UK Average		Burslem	UK Average
Bars & Wine Bars	3	1.9%	2.3%	490	1.5%	2.4%
Cafes	3	1.9%	5.1%	270	0.8%	2.9%
Fast Food & Take-Away	11	6.9%	6.1%	850	2.5%	3.1%
Public Houses	8	5.0%	2.6%	1,220	3.6%	3.4%
Restaurants	9	5.6%	5.1%	1,540	4.6%	4.3%
<b>Total</b>	<b>34</b>	<b>21.3%</b>	<b>21.2%</b>	<b>4,370</b>	<b>13.0%</b>	<b>16.1%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

97. There are 34 food & beverage outlets within Burslem, which represents 21.3% of all outlets in the centre. This as a proportion of the total is in line with the UK average.
98. The most common food & beverage outlet type is fast food & take-away, which includes Jamaican/American fast-food operator Queens Chick that opened along Queen Street in November 2023. The 11 units represents almost 7% of total outlets within the centre.
99. Cafes are particularly under-represented within the centre, whilst there is a strong provision of pubs, despite the loss of both The Leopard pub along Market Place

(which was severely damaged in a fire in 2022 and remains boarded up) and The White Hart (which re-opened in 2019 following a refurbishment but was then lost again during the pandemic period).

100. Cuisines on offer from the nine restaurants in Burslem include Indian, British, African and Afghan.

### Vacancies

101. There are a total of 57 vacant outlets in Burslem which represents over a third (35.6%) of the outlets within the centre. This compares starkly to the UK average of 14.1%. Almost 15,000 sqm of floorspace is sat vacant, which represents 44.3% of the floorspace in the centre. The vacancy rate in respect of floorspace is exceptionally high and is clearly an issue in respect of Burslem's appearance and ongoing role and function.
102. The Burslem Diversity of Uses plan above illustrates the location and sizes of these vacant units. Vacancies can be seen to be spread throughout the centre, varying in sizes.
103. Some of the larger vacant units include the George Hotel at Swan Square (1,260 sqm), the former market site (1,160 sqm) and what was once Tile Giant (1,100 sqm). The market has been closed since 2003 when the roof collapsed but was given listed status in 2023 with hopes now building that the space may be brought back to life in the not-too-distant future.

**Figure 28: The George Hotel Building**



Source: LSH Site Visit

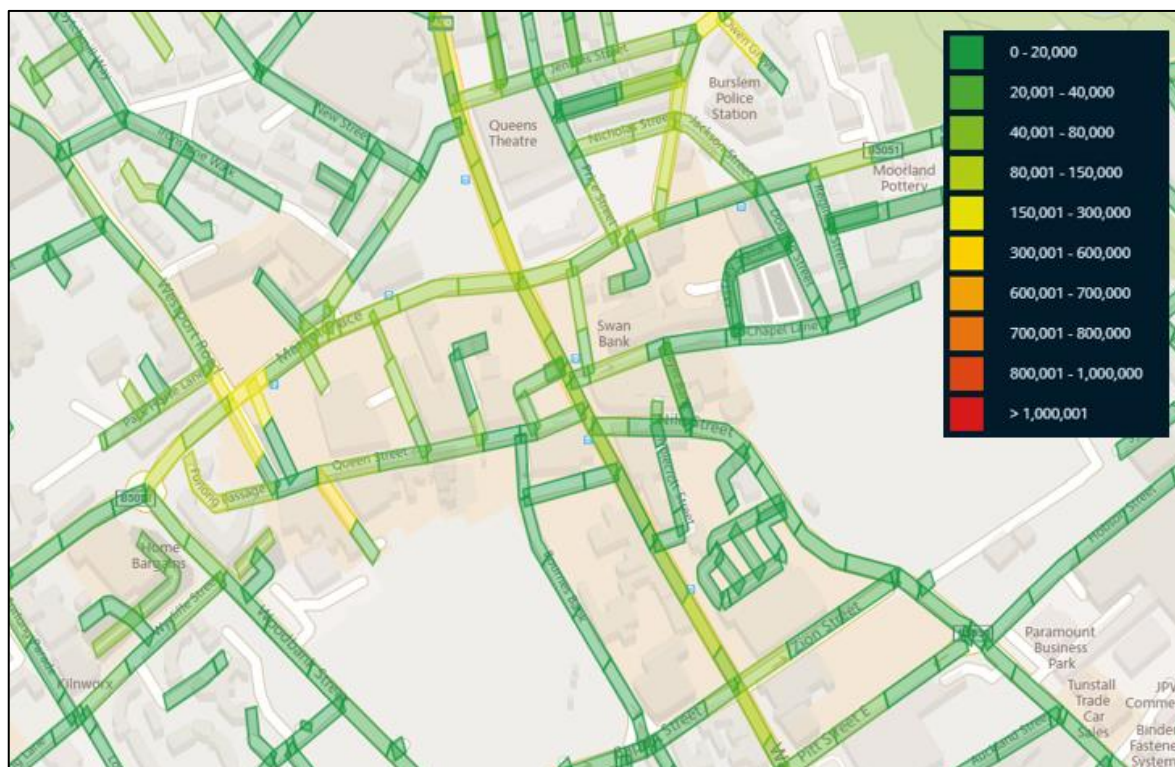
## Commercial Property Indicators

- 104. Information sourced from the Valuation Office Agency indicates a broad estimate prime A rental level in the region of £160/sqm (£15/sqft) - £215/sqm (£20/sqft) within Burslem.
- 105. Given the limited availability of transactional evidence, we are unable to report on the current level of prime retail unit shop yields for Burslem.

## Pedestrian Flows

- 106. The figure below illustrates the pedestrian flows for Burslem in the form of a heat map and shows a particular concentration of footfall to the west of the centre, in the Westport Road/ Market Place/St John's Square area.

**Figure 29: Burslem Footfall Heat Map, August 2024**

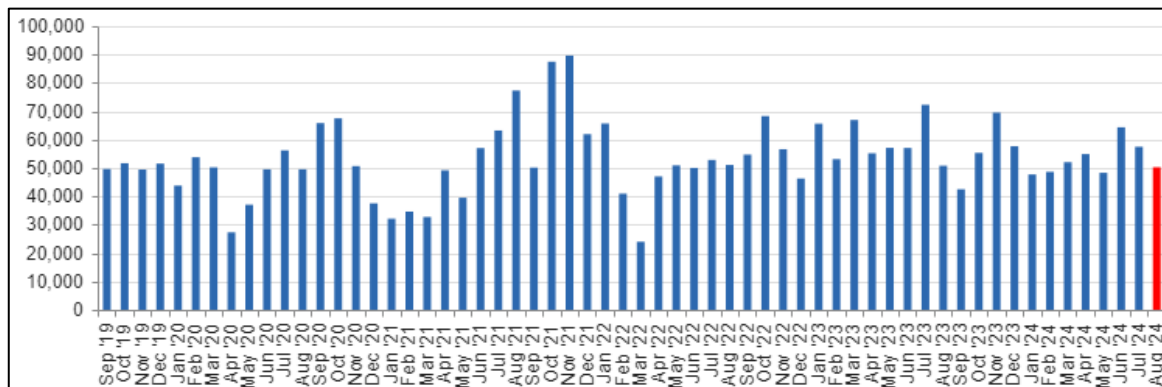


Source: MSCI

- 107. A central location along Market Place (by the Post Office) has been sampled to obtain information on how footfall levels have changed between September 2019 and August 2024.
- 108. As can be seen in the figure below, footfall levels have been reasonably stable throughout this period, even during the pandemic.
- 109. August through to November of 2021 saw record pedestrian activity in the area, with monthly numbers surpassing 70,000 on three occasions. 2024 is showing no particular signs of growth or decline when comparing to 2023. The more consistent performance of Burslem in respect of post-pandemic footfall is consistent with its

day-to-day role as a smaller town centre, and the propensity for people to work from home in greater numbers in recent years.

**Figure 30: Monthly Footfall Graph, September 2019 - August 2024, Market Place**



Source: MSCI

### Accessibility

110. Burslem is well connected by road, with the A50 cutting through from north to south and the B5051 from east to west. The A50 can be followed north to Tunstall and south to Hanley and beyond. The B5051 leads west in the direction of the A500 which allows for southward connections to be made into Stoke town centre and Newcastle-under-Lyme.
111. The largest car park in the area is Chapel Lane car park with a total of 58 spaces. Although this is located outside of the centre boundary to the east, there are convenient pedestrian linkages to the centre. Parking bays can be found at Market Place and St John's Square whilst on street parking is available in parts (including Queen Street, Swan Square and Westport Road).
112. Bus services can be picked up within the centre with routes travelling north through Burslem and as far as Crewe as well as south to Hanley and beyond.
113. Cycle parking can be found in a few locations across the centre, including at the eastern end of Queen Street and by the former town hall building, whilst pedestrian accessibility is supported by several traffic light crossings. Traffic can be heavy however, particularly along Market Place, Wedgwood Street and Swan Square, with multiple lanes of traffic making navigation challenging for both pedestrians and cyclists in these areas.

**Figure 31: Cycle Parking Provision**

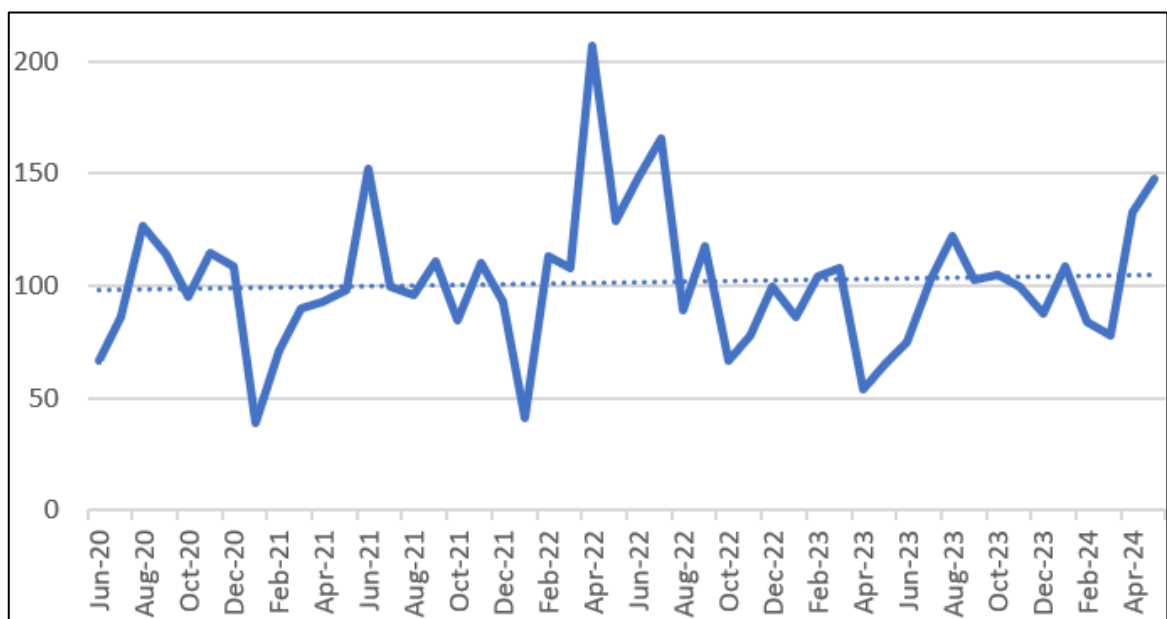


Source: LSH Site Visit

### Crime and Safety

- 114. A central postcode within Burslem was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 115. As can be seen, there have been several fluctuations in recorded crime numbers during this period. The trend line however indicates that crime levels overall have been stable.

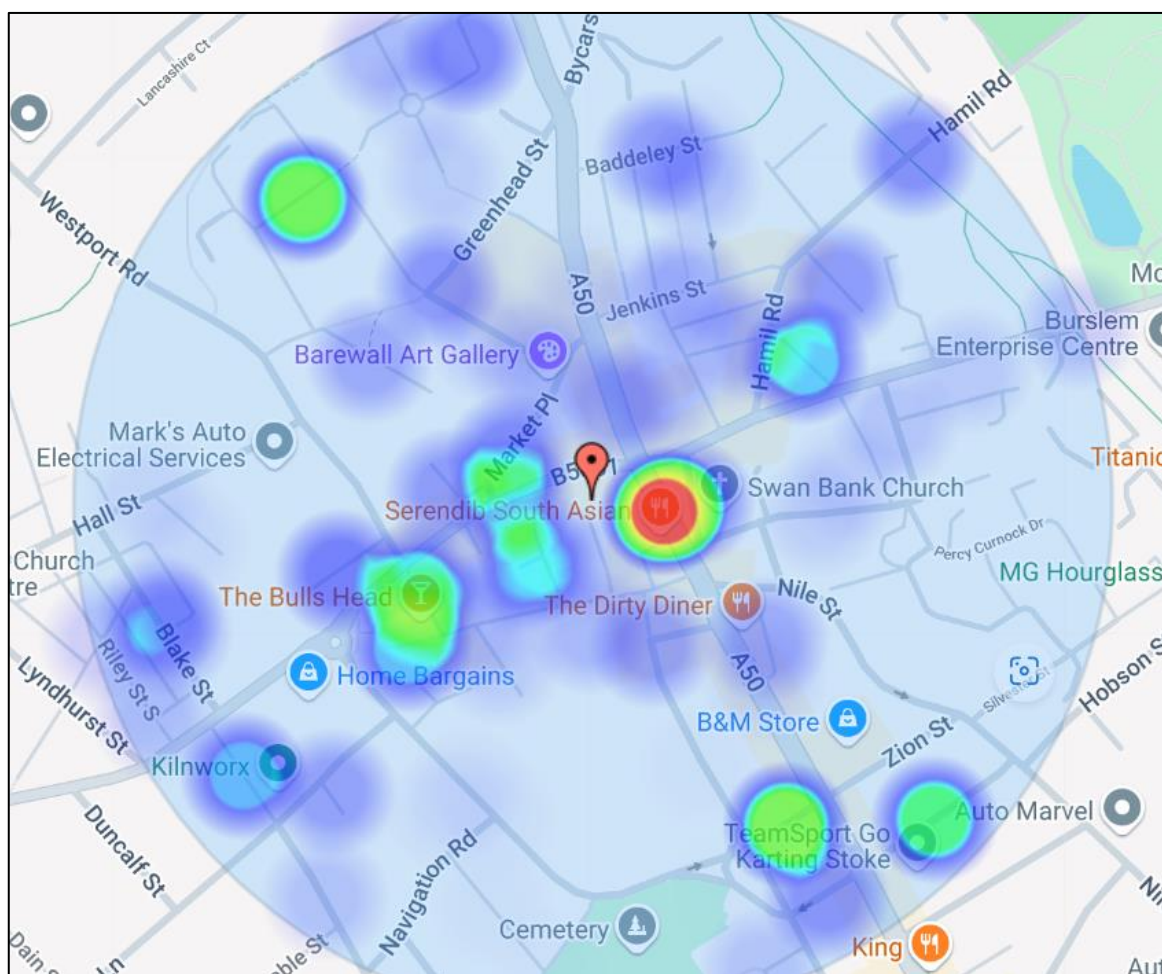
**Figure 32: Burslem Recorded Crime, June 2020 - May 2024**



Source: UKCrimeStats

116. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is predominately concentrated just south of the A50/ B5051 junction, by the now vacant The George Hotel. A further cluster can also be seen to the west of the centre, where a notable number of pubs, bars, restaurants and takeaways are/ have been located.
117. The top three types of crimes recorded within this area during this period are violence & sexual offences (852 recorded incidences), anti-social behaviour (507 recorded incidences) and shoplifting (261 recorded incidences).

**Figure 33: Burslem Crime Heat Map, June 2020 - May 2024**



Source: UKCrimeStats

### Environmental Quality

118. The environmental quality of Burslem is mixed, with elements of character and charm yet areas of neglect that are hard and lack vibrancy.
119. There are several designated Listed Buildings and Buildings of Special Local Interest within the centre, such as Burslem Market Hall, the former Town Hall and The George Hotel which add to/have the potential to contribute to the charm,

character and identity of Burslem through their architectural and historic significance.

**Figure 34: The Former Town Hall Building**



Source: LSH Site Visit

120. Open pedestrian spaces located at St John's Square, by the former Town Hall and by the Queen Street/Swan Square junction corner create areas for people to sit and spend time. However, further efforts could be made to improve the vibrancy and greenery of these spaces, making them more pleasant and enjoyable through the use of features such as planters and hanging baskets.
121. With regards to street furniture, bins can be found across the centre, helping to keep the streets clean. Provision of seating can be found in multiple locations allowing visitors to sit and rest. Bike racks are also present, allowing safe and convenient storage for those who wish to cycle to and from the area.

### Barriers to Business

122. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of their control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address

them, as these can also result in opportunities. The major challenges facing businesses in Burslem include:

- Economic Factors – a decline in manufacturing employment opportunities and a shift to lower paid health and social care work is playing its part in a substantial number of workers in the area having to supplement low incomes through welfare (as outlined in the Stoke-on-Trent Economic Development Strategy). These economic conditions can affect consumer spending power and demand for retail goods and leisure services.
- High Street Decline – high vacancy rates within the centre will be negatively impacting the appeal and draw of Burslem as a destination. This helps to create a challenging environment for new businesses to prosper.
- Skills Shortage – the area lags behind regional and national averages in skills, particularly digital skills (as set out in the Stoke-on-Trent Economic Development Strategy). A workforce lacking essential skills can impede business operations and growth, especially as the retail and leisure sectors increasingly incorporate digital technologies.
- Economic Inactivity – a notable portion of the local population is economically inactive, many due to long-term health conditions. This can limit the available talent pool for businesses seeking to hire staff.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

### Evening and Night Time Economy

123. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Burslem have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

**Figure 35: The Bulls Head Pub**



Source: LSH Site Visit

124. As outlined below, and within the food & beverage review previously, Burslem 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.

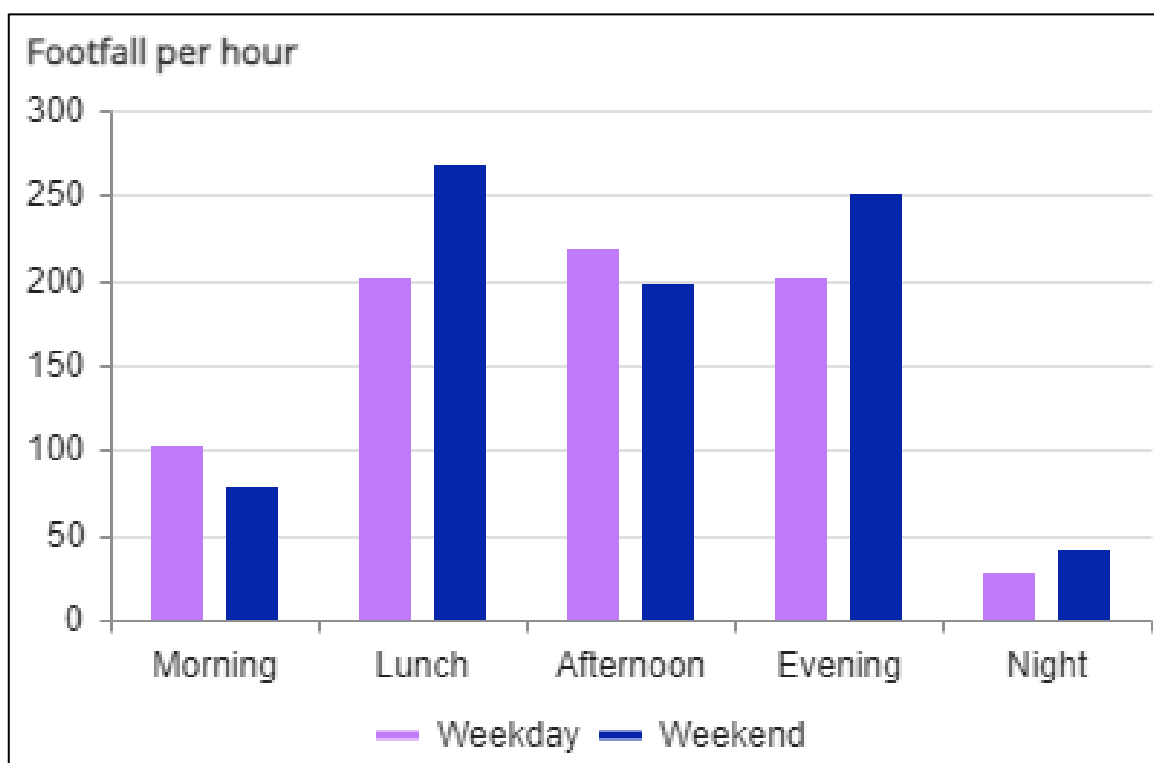
**Figure 36: Leisure Operator Sample**

Retailer Name	Type	Open	Close
Priscilla's Bar	Bar	11am-8pm	11pm-1am
The Bulls Head	Pub	12-3pm	10-11pm
Johnys Micro Pub	Pub	12-4pm	8-10pm
The New Inn	Pub	12pm	11pm-12am
The Clayhanger	Pub	11am	11pm-12am
India Cottage	Indian Restaurant	5pm	10pm-11pm
Sapphire	Fine Dining Restaurant	5:30pm	10-10:30pm
Kismet	Indian Restaurant	5pm	11pm-12am

Source: LSH research

125. The figure below shows how footfall levels differ across different parts of the day where St John's Square meets Market Place. As can be seen, footfall in an evening (5pm – 11pm) matches the levels seen across lunch and afternoon. This is a reflection of the strong provision of pubs, restaurants and bars that are on offer relative to the size of the town.

**Figure 37: Footfall by time-of-day, St John's Square/ Market Place**



Source: MSCI

## Conclusion

126. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows.

### 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
- Education establishments boosting footfall and spend

### 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 and Queens Theatre
- 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

127. We therefore conclude that 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 repurposes buildings and drive activity.
128. 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.

## 4. Fenton Town Centre Health Check

### Overview

129. Fenton town centre is largely located along City Road, with offshoots to the north along Manor Street and to the south along both Christchurch Street and Glebedale Road.
130. Its nearest neighbouring centre is Stoke which can be accessed via the A5007 (City Road), 1.4km to the west. The A50 (Victoria Road) to the east of the centre can also be joined providing a direct connection north to Hanley (c.2.8km).
131. Although there is a limited offer of retail and leisure within Fenton, well-known retailers such as Co-op Food and Coral are present, along with a Post Office and Theartbay Gallery & Fine Art Publishing. Fenton is, however, of a limited scale for a town centre and performs a day-to-day convenience retail and service role, supplemented by a modest range of niche comparison retailers.
132. Fenton Town Hall sits at the southern edge of the centre with an accompanying town square (Albert Square) to the front with seating and a Grade II-listed war memorial monument.

**Figure 38: Fenton Centre Boundary (Adopted)**

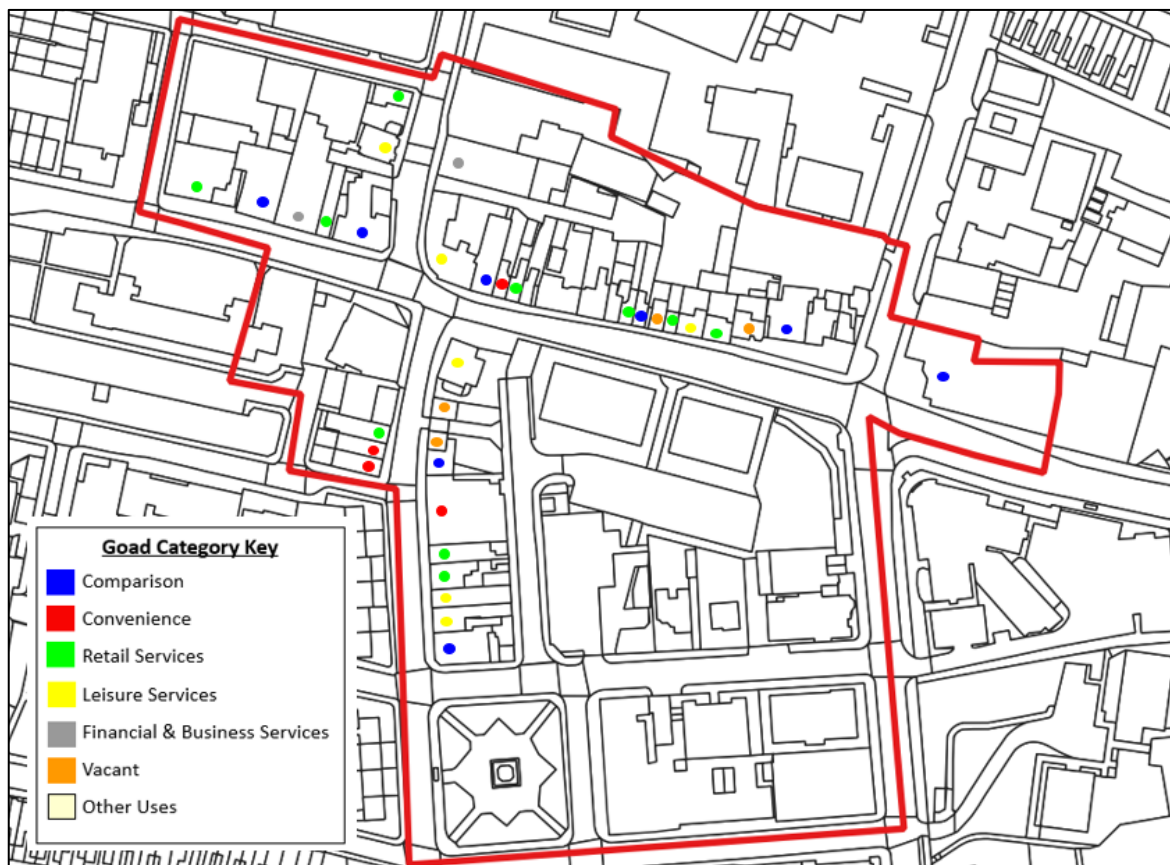


Source: Boundary provided by Stoke-on-Trent City Council and mapped by LSH

## Diversity of Uses

133. Fenton town centre is not covered by Goad and so a diversity of uses review has been carried out based on LSH site visits across July and August 2024. The figure below provides a visual representation of the diversity of uses across the centre.

**Figure 39: Fenton Diversity of Uses Map**



Source: LSH Site Visits (July & August 2024)

134. The table below shows that Fenton has a total of 34 outlets and an overall quantum of 8,144 sqm in floorspace.

**Figure 40: Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Fenton	UK Average		Fenton	UK Average
Comparison Retail	8	23.5%	26.4%	2,391	29.4%	29.4%
Convenience Retail	4	11.8%	9.3%	672	8.3%	15.6%
Retail Services	10	29.4%	15.9%	2,210	27.1%	7.3%
Leisure Services	6	17.6%	25.8%	930	11.4%	26.7%
Financial & Business Services	2	5.9%	8.3%	1,590	19.5%	6.3%
Vacant	4	11.8%	14.1%	351	4.3%	14.2%
<b>Total</b>	<b>34</b>	<b>100.0%</b>	<b>100.0%</b>	<b>8,144</b>	<b>100.0%</b>	<b>100.0%</b>

Source: LSH Site Visits (July & August 2024), Council Data and LSH Floorspace Calculations

135. Comparison retail makes up almost a quarter of the units within Fenton, and just under 30% of the floorspace. A J Philpott & Sons (hardware shop) accounts for

almost half comparison retail floorspace. Other operators include a florist, pet shop, and furniture shops.

- 136. The four convenience retail outlets represent 11.8% of all units within the centre, which is above the UK average of 9.3%. However, the proportion of floorspace is much lower than the UK average (8.3% vs 15.6%). The largest of the four units is the Co-op convenience store located along Christchurch Street which has a free-to-use ATM, offers food delivery services, and has a Costa Coffee machine. The Co-op is accompanied by two smaller mini market shops and a butchers.
- 137. Retail services are the most common of the Goad uses when it comes to number of outlets. The proportion of retail services operators is almost double what can be seen for the UK average (29.4% vs 15.9%). The majority of these outlets are health & beauty services, with a Post Office and vehicle rental also on offer.
- 138. There has been limited change in Fenton’s land use composition since the publication of the previous Retail and Leisure Study 2019 (which was based on an August 2018 land use survey), with one additional convenience retail unit, one additional retail services unit, one additional leisure services unit and two additional financial & business services units.

**Figure 41: Food & Beverage Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Fenton	UK Average		Fenton	UK Average
Bars & Wine Bars	1	2.9%	2.3%	230	2.8%	2.4%
Cafes	1	2.9%	5.1%	150	1.8%	2.9%
Fast Food & Take-Away	1	2.9%	6.1%	65	0.8%	3.1%
Public Houses	1	2.9%	2.6%	230	2.8%	3.4%
Restaurants	0	0.0%	5.1%	0	0.0%	4.3%
<b>Total</b>	<b>4</b>	<b>11.8%</b>	<b>21.2%</b>	<b>675</b>	<b>8.3%</b>	<b>16.1%</b>

Source: LSH Site Visits (July & August 2024), Council Data and LSH Floorspace Calculations

- 139. Fenton lacks any restaurant provision, which is contributing to a much lower representation of food & beverage operators in the centre when compared to the UK average.
- 140. Ye Olde Manor Inne and The Musician are the two largest units within the food & beverage offer – both above 200 sqm in size. The Musician sits on the corner of the City Road/Manor Street junction, whilst Ye Olde Manor Inne can be found further along Manor Street. Both of these are rather traditional licensed premises and there may be the potential for more modern family-orientated café provision to be supported in Fenton.

### Vacancies

- 141. There are a total of four vacant outlets in Fenton which represents 11.8% of the overall outlets (lower than the UK average of 14.1%). This is a reduction of five vacant units when comparing to the Retail and Leisure Study 2019 (which was based on an August 2018 land use survey), which recorded nine vacant outlets. In

total, just 4.3% of the floorspace in Fenton is vacant, with the largest of the four units being 144 sqm.

142. The Fenton Diversity of Uses plan above illustrates where vacant units are located in Fenton at the time of the LSH site visits in July & August 2024. As can be seen, two of these units can be found to the northern end of Christchurch Street, either side of the pedestrian passage that leads through to new residential units at Beardsmore Court and Sutherland Court.
143. The remaining vacant units are located along City Road, to the east of the centre, one of which was previously operated as The Sandwich Box (a sandwich shop).

### Commercial Property Indicators

144. Information sourced from the Valuation Office Agency indicates a broad estimate prime A rental level in the region of £110/sqm (£10/sqft) - £160/sqm (£15/sqft) within Fenton.
145. Given the limited availability of transactional evidence, we are unable to report on the current level of prime retail unit shop yields for Fenton.

### Pedestrian Flows

146. On the day of visit (Wednesday 14 August 2024), Fenton was the subject of low levels of footfall. Some operators present on City Road have a niche, specialist offer which encourages trips to buy a particular item rather than general browsing and circulation throughout the centre. Very limited footfall was evident along City Road. The greatest level of activity was observed around key anchors, including Fenton Health Centre on Glebedale Road and the Co-op at Christchurch Street.
147. Fenton town centre is a of a limited scale, and the amount of footfall is reflective of its role and function. It is a centre which serves day-to-day retail and service needs, which impacts on the likelihood of visitors lingering and making linked trips to more than one attraction.

### Accessibility

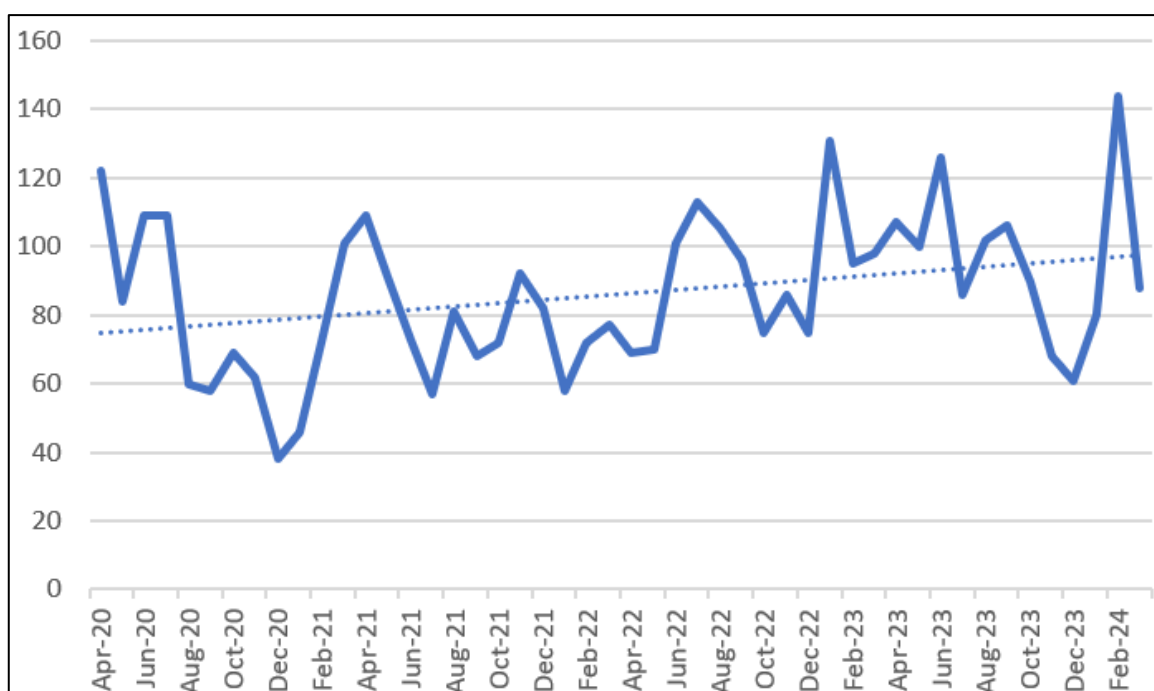
148. Several bus routes run through Fenton, with connections provided to the larger centres in the region – Hanley, Stoke and Longton as well as to Newcastle-under-Lyme.
149. The A5007 (City Road) feeds through Fenton from east to west, providing connections to and from Longton to the east and Stoke to the west. The new City Road car park (accessed via Baker Street) provides the centre with 19 spaces, whilst limited on-street parking can be found along Christchurch Street with further provision along Baker Street and Gimson Street. City Road does not have on-street parking, and the aforementioned parking options are not directly accessible via City Road due to the restricted access to Christchurch Street.

- 150. Whilst a lack of cycle parking was noted on the LSH site visit, access to Christchurch Street from City Road is limited to bus and cycle access only, showing consideration for those looking to navigate the centre by bike.
- 151. Pedestrian access is good within the southern section of the centre, where low levels of traffic, wide pavements, footpaths and seating combine to support those on foot. The northern section of the centre however poses challenges to pedestrians looking to navigate the centre when faced with the high levels of road traffic along City Road. Traffic light crossings are present by the Coral betting shop and at the City Road/Fountain Road/Glebedale Road junction to assist movement through the centre.

### Crime and Safety

- 152. A central postcode within Fenton was used to review total crime data within a ¼ mile radius between April 2020 and March 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 153. As can be seen, recorded crime levels have steadily grown during this period. February 2024 represents the peak month with 144 crimes recorded during the month.

**Figure 42: Fenton Recorded Crime, April 2020 - March 2024**



Source: UKCrimeStats

- 154. The top three types of crimes recorded within this area during this period are violence & sexual offences (793 recorded incidences), anti-social behaviour (510 recorded incidences), and criminal damage & arson (198 recorded incidences).

## Environmental Quality

155. The environmental quality of Fenton is mixed. Albert Square was the subject of significant investment in respect of its public realm in 2021. The £450,000 project provided new landscaping, tree planting, and the installation of Yorkstone paving across the square. Albert Square now provides an attractive and significantly improved environment to sit and enjoy the Town Hall. Fenton Local Market, which is an outdoor market operating on Thursdays, operates from the City Road car park to the north of the Town Hall. The car park opened in 2020 and incorporates new tree planting and is surfaced with brick paviours; it also generally makes a positive contribution to the quality of the local environment. Christchurch Street and Albert Square benefit from good quality street furniture, with attractive benches, bins, and street lighting complementing recent public realm investment.
156. Whilst there are some attractive period properties along Christchurch Street, the contribution these make to the local area has been significantly diminished by the addition of unsympathetic and poor quality shopfronts and signage. Some operators along Christchurch Street have boarded over their windows and a number of units would benefit from refurbishment.
157. The same is true of commercial premises along City Road, with a number of units being in need of investment and refurbishment. Two new residential apartment buildings which front City Road were completed in 2022. The apartments generally make a positive contribution to the local area and provide surveillance to the north along City Road and to the south towards Baker Street.

## Barriers to Business

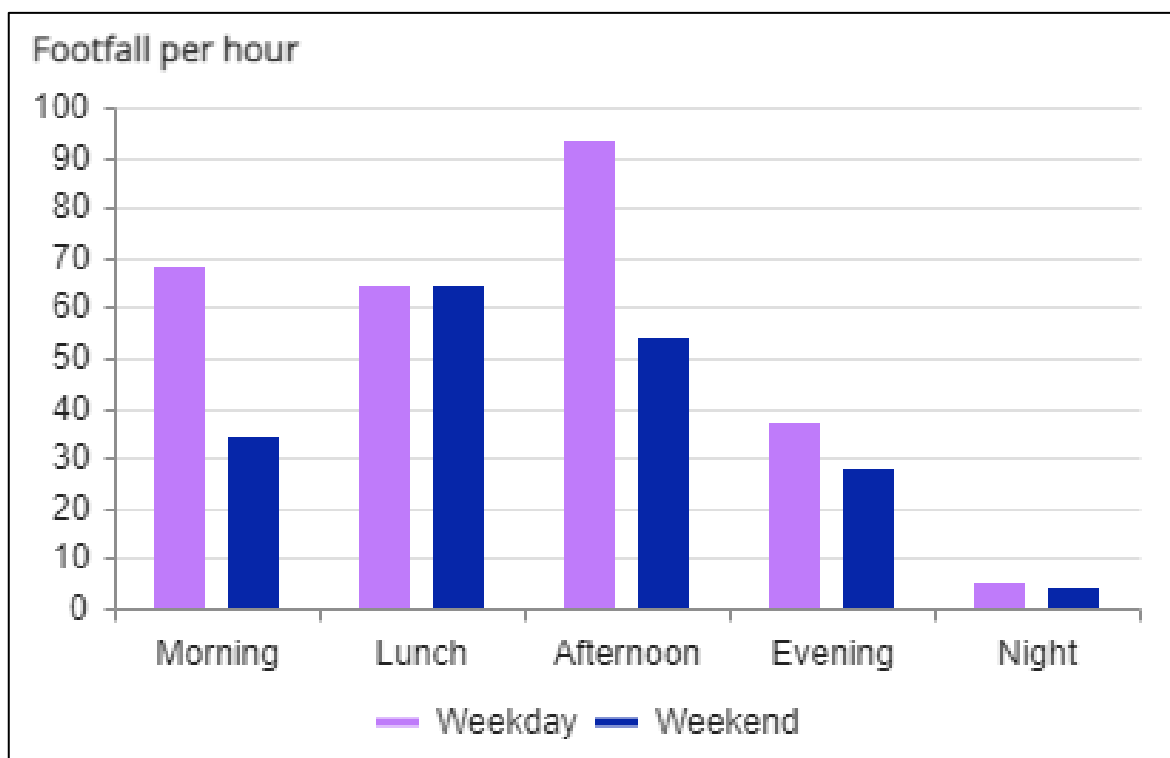
158. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of their control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges facing businesses in Longton include:
- Economic Factors – a decline in manufacturing employment opportunities and a shift to lower paid health and social care work is playing its part in a substantial number of workers in the area having to supplement low incomes through welfare (as outlined in the Stoke-on-Trent Economic Development Strategy). These economic conditions can affect consumer spending power and demand for retail goods and leisure services.
  - Skills Shortage – the area lags behind regional and national averages in skills, particularly digital skills (as set out in the Stoke-on-Trent Economic Development Strategy). A workforce lacking essential skills can impede business operations and growth, especially as the retail and leisure sectors increasingly incorporate digital technologies.

- Economic Inactivity – a notable portion of the local population is economically inactive, many due to long-term health conditions. This can limit the available talent pool for businesses seeking to hire staff.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

### Evening and Night Time Economy

159. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre.
160. There is a limited provision of evening establishments within the centre. Ye Olde Manor Inne (bar) and The Musician (bar) are located within close proximity of one another and remain open until 11pm. Marmaris Kebabs and Pizza (fast food & takeaway) and Co-op Food add to the short list of operators that remain open later into the evening and help to generate some footfall at this time.
161. The figure below shows how footfall levels differ across different parts of the day at the junction where Manor Street and City Road meet. As can be seen, footfall levels in an evening (5pm – 11pm) notably drop off from the figures seen across morning (weekdays), lunch (both weekdays and weekends) and afternoon (weekday and weekends).

**Figure 43: Footfall by time-of-day, City Road/ Manor Street**



Source: MSCI

## Conclusion

162. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Convenience offer fronted by Co-op Food and supported by mini markets and a butchers
- Strong provision of retail services
- High environmental quality to the south where improvements have been made in the Town Hall/Albert Square area

### Weaknesses

- 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

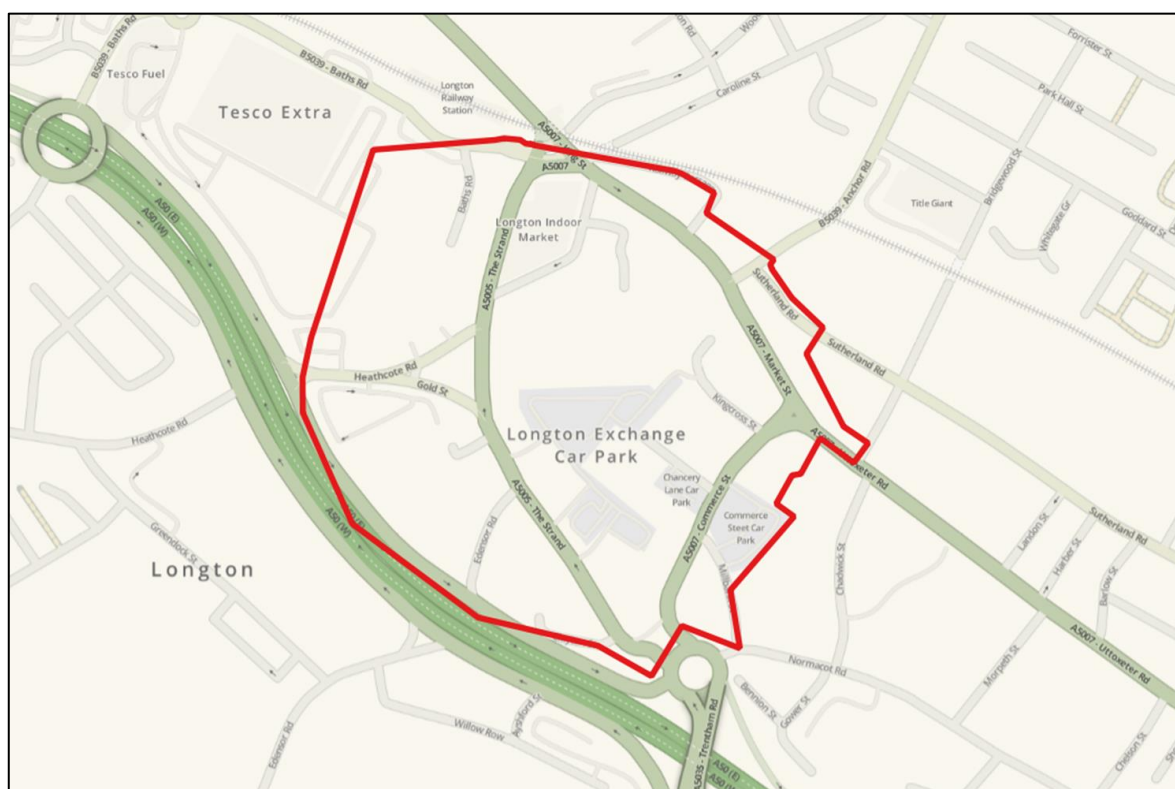
163. We therefore conclude that Fenton adequately serves the day to day needs of its immediate catchment through its convenience and retail services offer, whilst perhaps being unable to capitalise on passing trade due to inconvenient parking options and unable to draw from beyond this catchment due to its scale and overall offer. Improvements to shop frontages across Fenton would provide a welcome boost to the appearance of the centre.

## 5. Longton Town Centre Health Check

### Overview

164. Longton is one of the larger centres within Stoke, with further retail and leisure provision nearby in the form of a Tesco Extra store as well as Pheonix Retail Park to the west of the centre.
165. Longton is sandwiched between two of the smaller centres in Stoke – Meir and Fenton. Stoke town centre itself is approximately 3.6km to the west, whilst Hanley is around 4.7km north west of Longton.
166. The A50 wraps around the southern border of the centre which supports the centre in its connectivity, whilst the bus station to the north west of the centre and the train station just beyond the centre boundary provide key transport hubs for the town.
167. To the southern edge of the centre, the redevelopment of the Crown Works site (former pottery factory) is set to deliver 58 residential units (for over-55s) and an improved gateway into the centre from the south. The scheme is partially funded by the government’s Levelling Up Fund (£6.3 million).

**Figure 44: Longton Centre Boundary (Adopted)**



Source: Boundary provided by Stoke-on-Trent City Council and mapped by LSH

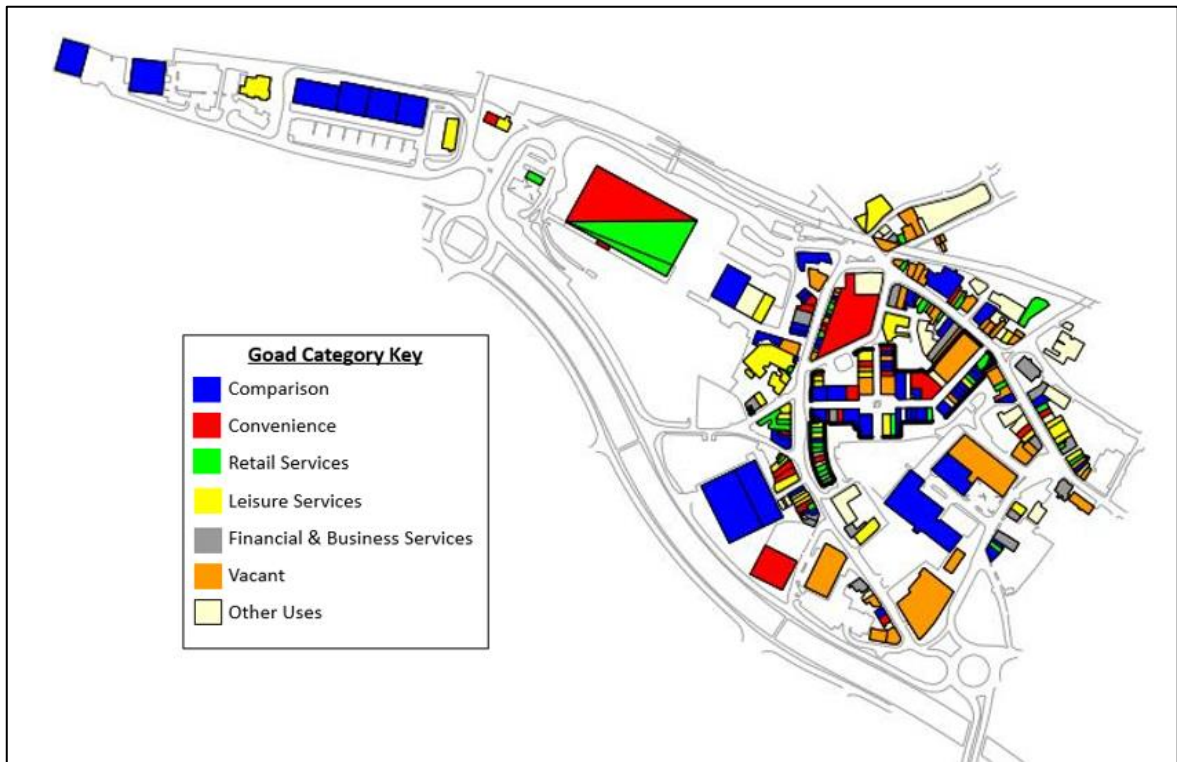
### Diversity of Uses

168. In order to assess the diversity of uses for the centre, Goad data from November 2023 was taken and updated based on LSH site visits across July and August 2024

to provide an updated view of the retail and leisure mix. The figure below indicates the area covered by Goad as well giving a visual representation of the diversity of uses.

169. It should be noted that the Goad area does not perfectly align with the town centre boundary, with the main discrepancy being that Goad’s coverage stretches west to include the Tesco Extra store as well as Phoenix Retail Park.

**Figure 45: Longton Diversity of Uses Map**



Source: Experian Goad and LSH Site Visits (July & August 2024)

170. The table below shows that Longton has a total of 225 outlets and an overall quantum of 64,860 sqm of floorspace.

**Figure 46: Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Longton	UK Average		Longton	UK Average
Comparison Retail	61	27.1%	26.4%	22,790	35.1%	29.4%
Convenience Retail	26	11.6%	9.3%	10,920	16.8%	15.6%
Retail Services	34	15.1%	15.9%	7,060	10.9%	7.3%
Leisure Services	35	15.6%	25.8%	7,540	11.6%	26.7%
Financial & Business Services	21	9.3%	8.3%	3,400	5.2%	6.3%
Vacant	48	21.3%	14.1%	13,150	20.3%	14.2%
<b>Total</b>	<b>225</b>	<b>100.0%</b>	<b>100.0%</b>	<b>64,860</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

171. The proportion of comparison retail outlets in Longton is broadly in line with the UK average, whilst the floorspace is notably above. Of the 61 outlets, some of the higher-profile operators include Argos, Boots, Next, and Home Bargains.

172. Phoenix Retail Park to the west (beyond the town centre boundary) accounts for some of the larger format, national multiple comparison retail brands including TK Maxx, Currys and Smyths (toy store), which is significantly contributing to the 22,790 sqm of total comparison retail floorspace.
173. The proportion of convenience retail outlets and floorspace are both broadly in line with the UK average. The Tesco Extra store falls outside of the town centre boundary but is the largest of the convenience outlets at 4,130 sqm. Longton Market which is located along The Strand and is open every Wednesday, Friday and Saturday accounts for 2,800 sqm. Other operators include Farmfoods, Heron Foods, and Iceland.
174. The 34 retail services outlets represent 15.1% of all units within Longton, which is in line with the UK average. 21 of these retail services fall under the category of health & beauty, with services ranging from beauty salons and beauty salons to barbers and tattoo parlours. A range of opticians (including Specsavers and Vision Express), a Post Office, and some travel agents can also be found.
175. There are 35 leisure services outlets in Longton which accounts for 7,540 sqm of floorspace in the centre. As a proportion of the total area, these are both considerably lower than the UK averages. The food & beverage element of leisure services is covered below, but beyond that there are two betting offices (Ladbrokes and William Hill), a hotel (The Crown), a gym (Fitness Zone) and more.
176. The proportion of financial & business services outlets and floorspace are both broadly in line with the UK average. The high street banks present in Longton are Halifax, Lloyds, NatWest and TSB. Insurance services, accountants and a range of estate agents can also be found.

**Figure 47: Food & Beverage Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Longton	UK Average		Longton	UK Average
Bars & Wine Bars	4	1.8%	2.3%	570	0.9%	2.4%
Cafes	6	2.7%	5.1%	1,160	1.8%	2.9%
Fast Food & Take-Away	12	5.3%	6.1%	1,530	2.4%	3.1%
Public Houses	3	1.3%	2.6%	1,380	2.1%	3.4%
Restaurants	2	0.9%	5.1%	530	0.8%	4.3%
<b>Total</b>	<b>27</b>	<b>12.0%</b>	<b>21.2%</b>	<b>5,170</b>	<b>8.0%</b>	<b>16.1%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

177. There is a low proportion of food & beverage operators in Longton when compared to the UK average (12% vs 21.2%). This trend can be seen across all food & beverage operator types.
178. Whilst fast food & take-aways and bars & wine bars only fall marginally below the UK average when it comes to proportion of outlets, cafes, public houses and restaurants in Longton sit well below what would be expected.
179. The same story can be seen for the floorspace that these outlets cover, with all food & beverage operator types taking up less proportional space of the centre than would be expected when comparing to the UK averages.

180. Notable operators in the centre include McDonald's, Subway and Costa Coffee. Smaller operators such as Kiln (café) and The Coffee House can be found in the heart of the centre, within Longton Exchange.

### Vacancies

181. Based on the Goad plan for Longton, there are a total of 48 vacant outlets in Longton which represents 21.3% of the overall outlets (higher than the UK average of 14.1%). A total of 20.3% of the floorspace in Longton is vacant.
182. The Longton Diversity of Uses plan above illustrates where vacant units are located in Longton. As can be seen, the vacant units are almost exclusively found within the town centre boundary.
183. As a result of this and the nature of the units that fall beyond the centre boundary (but are included on the Goad plan), we have also calculated the vacancy rates specifically for the town centre, which indicate that 21.8% of outlets within the centre are vacant, and 26.5% of floorspace is vacant.
184. A cluster of empty units are located along Market Street, while some of the larger vacancies include the former Wilko (2,060 sqm) and Woolworths (1,290 sqm) stores. The Wilko store closed in 2023 following the company falling into administration, whilst the Woolworths store is a long-term vacancy within the town, having closed down in 2008.

**Figure 48: Vacant Former Woolworths Unit**



Source: LSH Site Visit

## Multiple and Independent Representation

185. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Longton has a good range of national multiples including Next, Argos, Home Bargains, Matalan, Sports Direct and Boots.
186. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Longton has a range of independent outlets, including This Witchy Needs (gift shop), Bombs R Us (health & beauty), Kiln (café and workshop), and So Very Dog (pet shop).

## Market

187. Longton's indoor market is accessible via The Strand. The market is open every Wednesday, Friday and Saturday between 9am and 5pm. A variety of goods are on offer across almost 80 stalls, including fruit & veg, meat, clothing, shoes, decorations, cards, toys, books, stationery, flowers and jewellery.

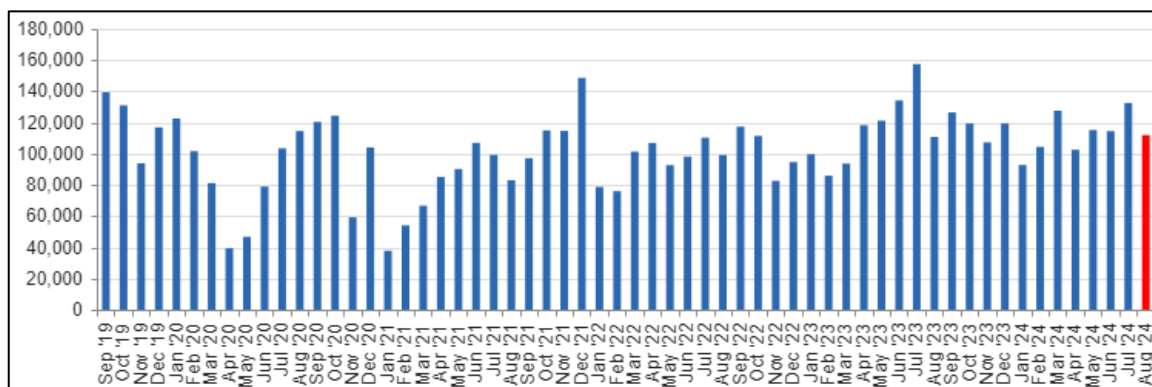
## Commercial Property Indicators

188. Information sourced from the Valuation Office Agency indicates a broad estimate prime A rental level in the region of £160/sqm (£15/sqft) - £215/sqm (£20/sqft) within Longton.
189. Given the limited availability of transactional evidence, we are unable to report on the current level of prime retail unit shop yields for Longton.

## Pedestrian Flows

190. Based on LSH's site visit, The Strand and Longton Exchange Shopping Centre were identified as the two busiest areas within the centre. Both locations have therefore been sampled for their monthly figures over recent years in order to identify/understand any trends.
191. The figure below shows how monthly footfall figures have changed between September 2019 and August 2024 along The Strand (by the market entrance).
192. As can be seen in the figure below, footfall levels have been particularly stable throughout this period, with the exception of the pandemic periods that saw the strictest restrictions on travel and movement.
193. The peak month for this period came in July 2023, with a monthly count of just under 160,000. Monthly movements for 2024 have consistently been above 100,000 (with the exception of January).

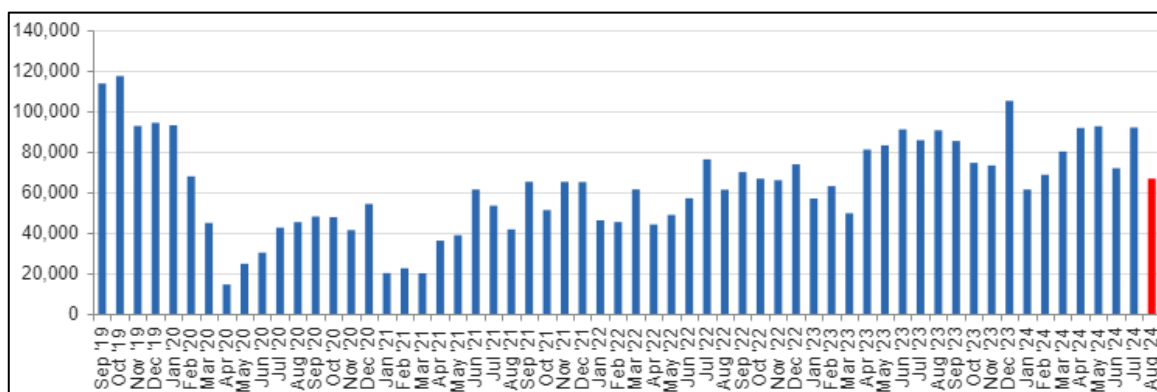
**Figure 49: Monthly Footfall Graph, September 2019 - August 2024, The Strand**



Source: MSCl

- 194. The figure below shows how monthly footfall figures have changed between September 2019 and August 2024 in the central public square at Longton Exchange Shopping Centre.
- 195. As can be seen in the figure below, footfall levels dropped dramatically in line with the beginning of the pandemic period. Pedestrian activity has taken a while to grow back, but figures from April 2023 onwards indicate that footfall levels within the shopping centre area have recovered and are approaching what was seen pre-pandemic.

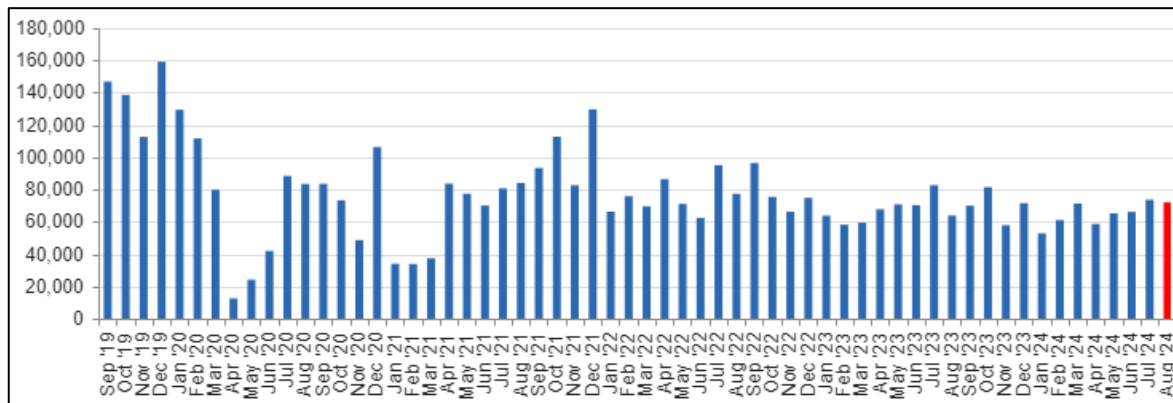
**Figure 50: Monthly Footfall Graph, September 2019 - August 2024, Longton Exchange Shopping Centre**



Source: MSCl

- 196. Strand Passage has also been sampled to understand the pedestrian flows between The Strand and the larger format retail units to the west (Tesco Extra, Next and Argos).
- 197. As can be seen in the figure below, footfall during this period has declined significantly. Numbers were recovering from the pandemic promisingly in late 2021, but then dropped back off and have now stabilised in the region of 60,000 – 80,000.
- 198. Based on site visit observations and footfall data (MSCl), pedestrian activity between Tesco Extra and Pheonix Retail Park is very limited, which is unsurprising due to the lack of a direct and pedestrian friendly route.

**Figure 51: Monthly Footfall Graph, September 2019 – August 2024, Strand Passage**



Source: MSCI

### Accessibility

199. Longton train station is located just beyond the northern boundary of the centre. The station is well positioned to provide access to the town centre as well as Phoenix Retail Park and has a small, nine-space car park. Services typically run hourly from each platform, with direct services available to places such as Crewe, Stoke (in 6 minutes), Nottingham and Derby.
200. Found to the north west of the centre, Longton Transport Interchange provides passengers with a sheltered waiting area and a range of bus services that provide connections to other major centres within Stoke-on-Trent and beyond, including Hanley, Stoke and Newcastle-under-Lyme.

Figure 52: Public Transport Signage



Source: LSH Site Visit

201. Longton is well-connected by road, with the A50 accessible via The Strand and Commerce Street. King Street feeds into the centre from the north and links Longton with Stoke and Hanley (via Victoria Road). The larger format stores to the edges of the centre (Argos, Next, Matalan, Farmfoods, B&M and Home Bargains) have convenient parking provision. Longton Exchange car park (240 spaces) with direct access routes into Longton Exchange shopping centre.
202. There are some limited examples of cycle lanes and cycle parking within the centre, whilst the pedestrianised Longton Exchange shopping centre provides a safe and enjoyable space for visitors to enjoy with various seating spaces available. Several traffic light pedestrian crossings as well as a pedestrian island crossing can be found along The Strand to support pedestrians when navigating the two lanes of one-way traffic. Pedestrian connectivity between The Strand and Argos, Next & Tesco Extra to the west of the centre is good, with Strand Passage providing a direct pedestrian cut-through, whilst linkages by foot beyond Tesco Extra in the direction of Pheonix Retail Park become more challenging.

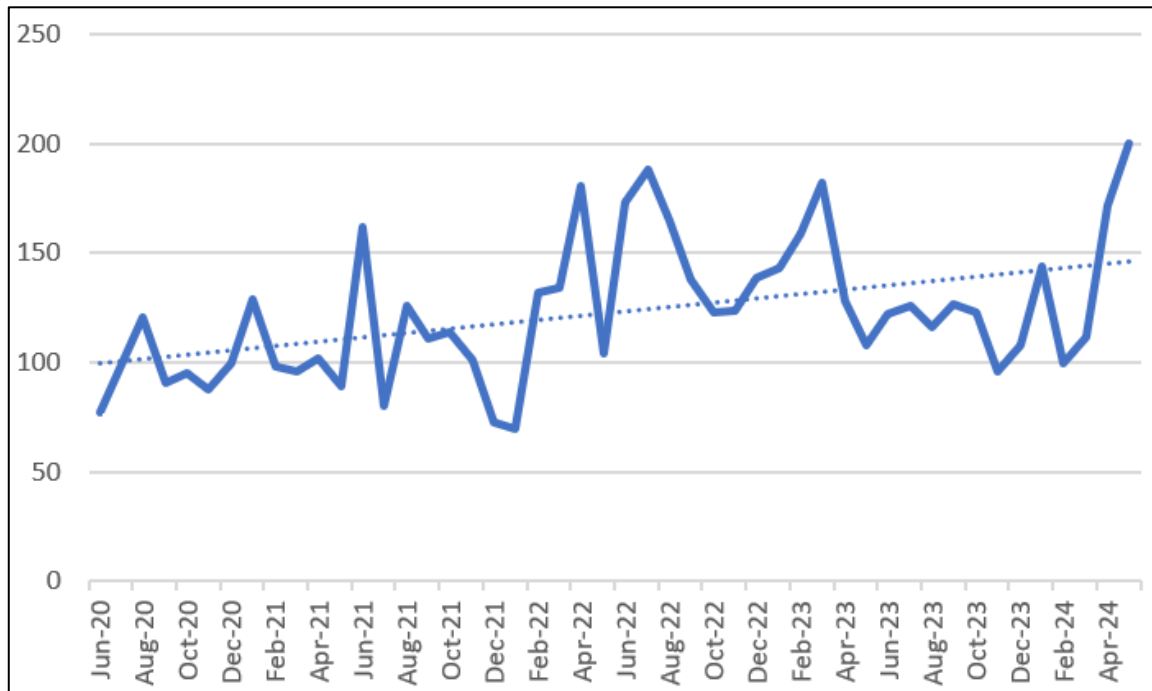
### Crime and Safety

203. A central postcode within Longton was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total

crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

204. As can be seen, recorded crime levels have been steadily rising during this period, with the most recent month representing the peak (May 2024, 200 crimes).

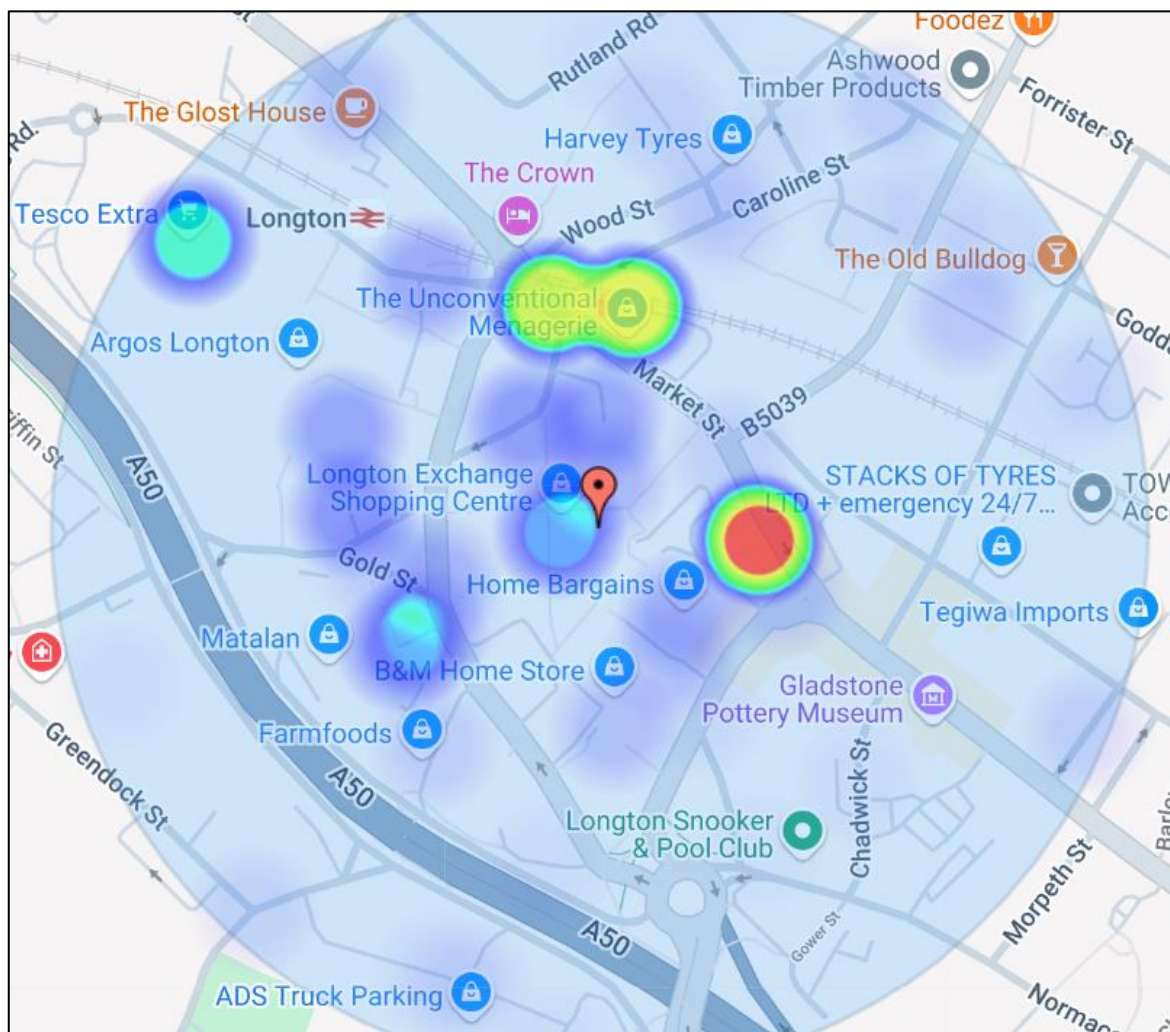
**Figure 53: Longton Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

205. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is predominately concentrated to the east of the centre, along Market Street.
206. The top three types of crimes recorded within this area during this period are anti-social behaviour (690 recorded incidences), violence & sexual offences (643 recorded incidences) and public order offences (432 recorded offences).

Figure 54: Longton Crime Heat Map, June 2020 - May 2024



Source: UKCrimeStats

### Environmental Quality

207. The overall environmental quality of Longton is considerably impacted by areas of unkept, neglected buildings such as along Market Street and to the south eastern end of The Strand. Many of these buildings are long-term vacancies that are deteriorating into disrepair.
208. Longton has a Partnership Schemes in Conservation Areas (PSiCA), undertaken as part of the wider Stoke-on-Trent Heritage Action Zone (HAZ) project. External refurbishment works are being carried out to four buildings on or around Market Street - works to two of the buildings are ongoing (nearing completion).
209. Efforts are also being made as part of the Place Making Programme for Longton (High Streets Task Force) to improve the appearance of the area. Planters, hanging baskets and colourful building exteriors at Longton Exchange shopping centre (particularly at the Market Street entrance) have helped to create a more vibrant and welcoming space. Despite these efforts, there remains a general lack of greenery, green space and vibrancy in the centre as a whole, and more of this good work

needs to be done to create an appealing and enjoyable centre to visit and spend time in.

**Figure 55: Improvements to Longton Exchange Shopping Centre**



Source: LSH Site Visit

210. There are several designated Listed Buildings and Buildings of Special Local Interest within the centre, such as Longton Town Hall and Market, Longton Central Methodist Hall and commercial units along The Strand which add to the charm, character and identity of Longton through their architectural and historic significance, which in turn boosts the area's environmental quality. However, the appeal of some of Longton's attractive buildings is reduced through the need for investment and improved maintenance.

### Barriers to Business

211. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of their control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges facing businesses in Longton include:
- Economic Factors – a decline in manufacturing employment opportunities and a shift to lower paid health and social care work is playing its part in a substantial number of workers in the area having to supplement low incomes through welfare (as outlined in the Stoke-on-Trent Economic Development Strategy). These economic conditions can affect consumer spending power and demand for retail goods and leisure services.

- High Street Decline – high vacancy rates within the centre will be negatively impacting the appeal and draw of Longton as a destination. This helps to create a challenging environment for new businesses to prosper.
- Skills Shortage – the area lags behind regional and national averages in skills, particularly digital skills (as set out in the Stoke-on-Trent Economic Development Strategy). A workforce lacking essential skills can impede business operations and growth, especially as the retail and leisure sectors increasingly incorporate digital technologies.
- Economic Inactivity – a notable portion of the local population is economically inactive, many due to long-term health conditions. This can limit the available talent pool for businesses seeking to hire staff.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

### Evening and Night Time Economy

212. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Longton have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.
213. As indicated by the below table, there is a limited number of leisure operators in the centre, mainly consisting of a handful of restaurants and pubs, with a lack of diversity when it comes to cuisines.

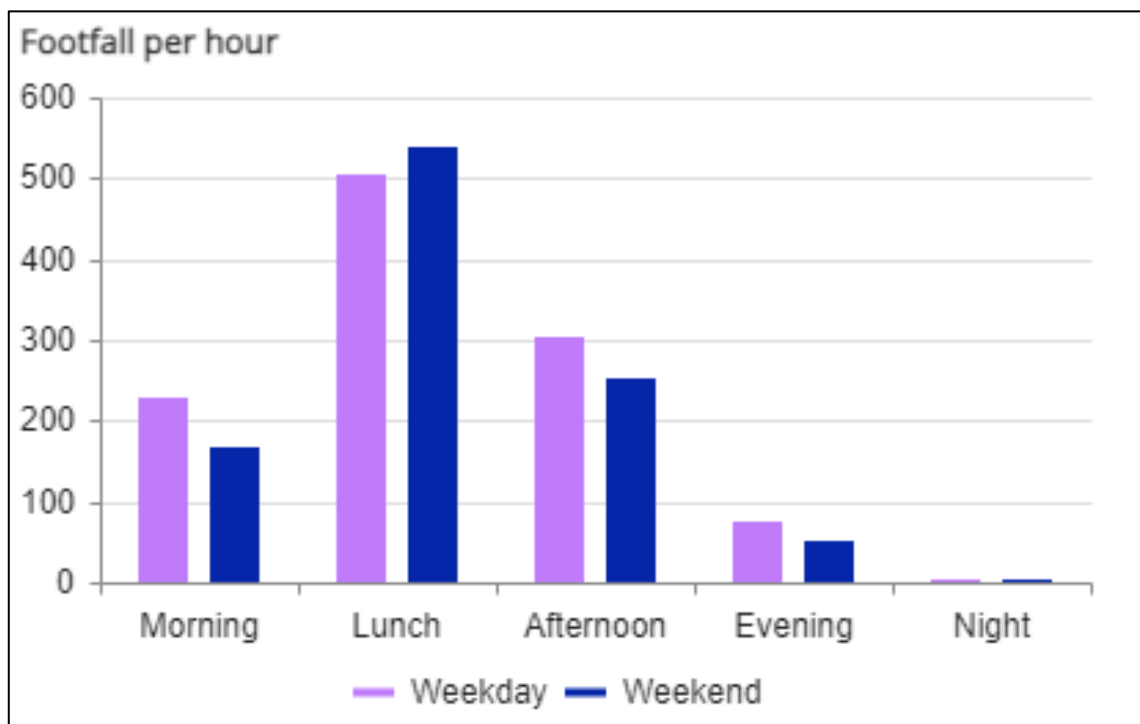
**Figure 56: Leisure Operator Sample**

Retailer Name	Type	Open	Close
Namaste Dine	Indian Restaurant	4:30-5pm	10-11pm
The Strand	Pub	11am	8-11pm
George & Dragon	Pub	9am	11pm-12am
The Last Post	Pub	10-11am	7-8pm
Ali's Kitchen	Bangladeshi & Indian Restaurant	4:45pm	11-11:30pm
Saghir Express	Indian Restaurant	5pm	10:30pm

Source: LSH Research

214. The figure below shows how footfall levels differ across different parts of the day. As can be seen, footfall in an evening (5pm – 11pm) drops dramatically from the levels recorded during lunch and afternoon. This reflects the limited range of food & beverage and other evening-related leisure operators outlined above.

**Figure 57: Footfall by time-of-day, The Strand**



Source: MSCI

## Conclusion

215. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### 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)
- Crown Works re-development to provide an improved entrance/ gateway to the centre from the south, as well as boosting the catchment population and expenditure within the area
- Many retailers accommodated at Phoenix Retail Park are generally complementary to the town centre offer and consideration should be given to the ability to provide for an improved pedestrian linkage between the retail park and Longton Exchange Shopping Centre

## Threats

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

216. We therefore conclude that Longton 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.

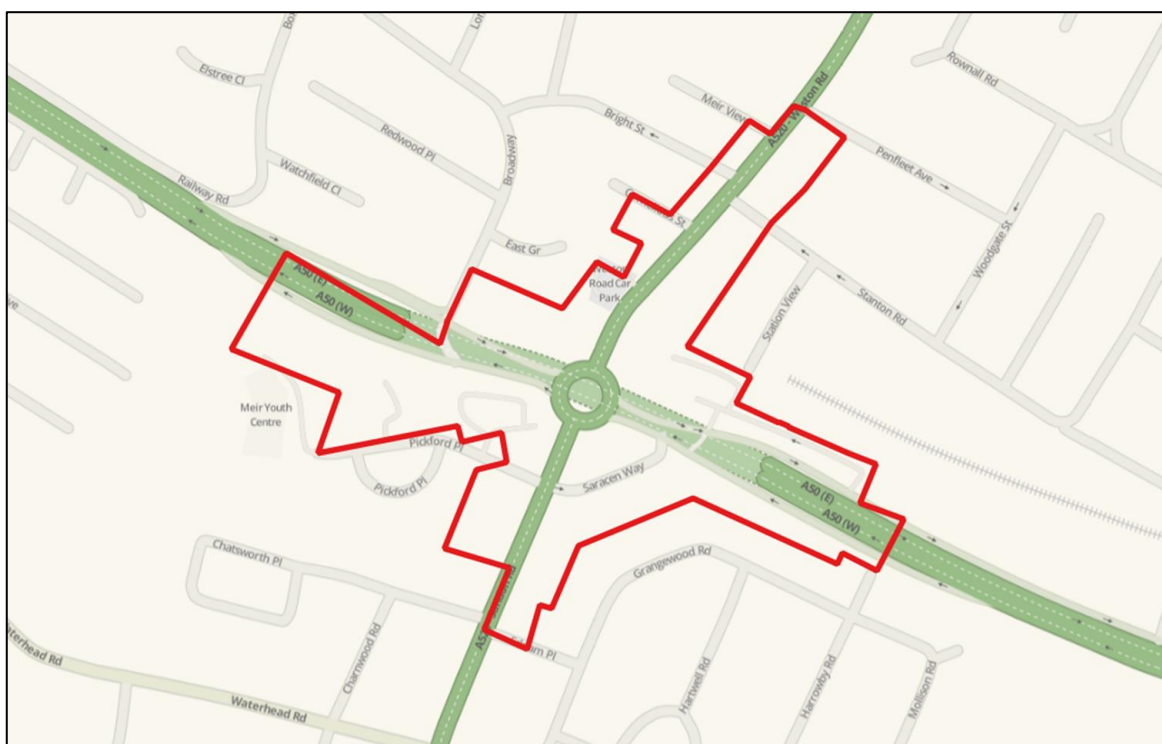
217. The number of vacant units, quantum of vacant floorspace and low environmental quality in parts are however a cause for concern. Alternative uses such as residential, healthcare and education should be explored in an attempt to address the vacancy rate, whilst initial efforts to improve the environmental quality in Longton Exchange Shopping Centre should be extended throughout the centre to make the town a more welcoming and enjoyable place to visit and spend time.

## 6. Meir Town Centre Health Check

### Overview

- 218. Meir is the eastern most centre within Stoke, sitting 2.6km along the A50 from Longton.
- 219. With the A50 running north west to south east and the A520 running south west to north east, Meir is centred around a large roundabout junction and finds itself dominated by its road networks and the subsequent traffic.
- 220. The centre stretches off in four directions, with pockets of provision found along Sandon Road and Uttoxeter Road, but with the majority of Meir’s offer located along Weston Road. The centre is of modest scale and is focused around meeting day-to-day needs.
- 221. Meir Primary Care Centre is located at the heart of the centre, supported by a few pharmacies.

**Figure 58: Meir Centre Boundary (Adopted)**

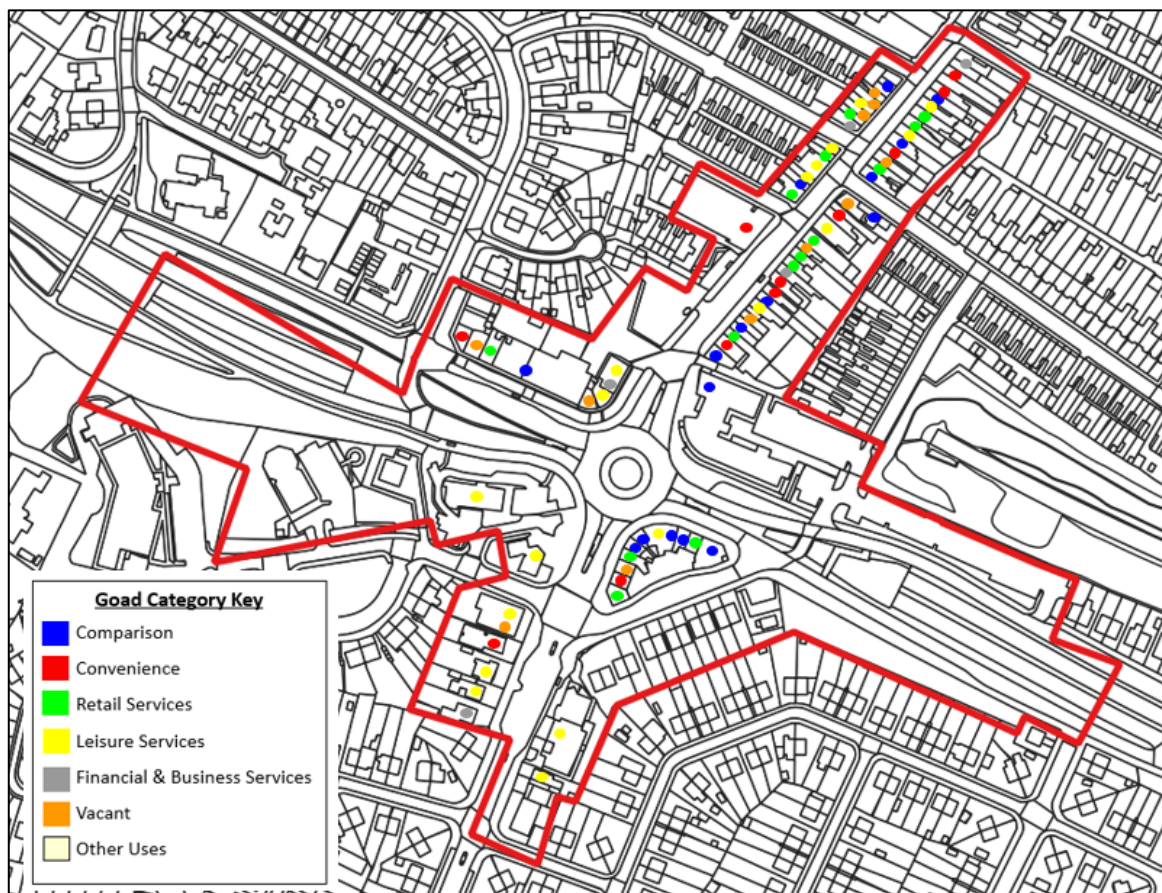


Source: Boundary provided by Stoke-on-Trent City Council and mapped by LSH

### Diversity of Uses

- 222. Meir town centre is not covered by Goad and so a diversity of uses review has been carried out based on LSH site visits across July and August 2024. The figure below provides a visual representation of the diversity of uses across the centre.

**Figure 59: Meir Diversity of Uses Map**



Source: LSH Site Visits (July & August 2024)

223. The table below shows that Meir has a total of 75 outlets and an overall quantum of 9,340 sqm in floorspace.

**Figure 60: Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Meir	UK Average		Meir	UK Average
Comparison Retail	16	21.3%	26.4%	2,157	23.1%	29.4%
Convenience Retail	11	14.7%	9.3%	1,834	19.6%	15.6%
Retail Services	14	18.7%	15.9%	1,091	11.7%	7.3%
Leisure Services	18	24.0%	25.8%	2,393	25.6%	26.7%
Financial & Business Services	5	6.7%	8.3%	863	9.2%	6.3%
Vacant	11	14.7%	14.1%	1,001	10.7%	14.2%
<b>Total</b>	<b>75</b>	<b>100.0%</b>	<b>100.0%</b>	<b>9,340</b>	<b>100.0%</b>	<b>100.0%</b>

Source: LSH Site Visits (July & August 2024), Council Data and LSH Floorspace Calculations

224. Comparison retail provision in Meir falls below the UK averages for both proportion of outlets and floorspace. The 16 units make up 2,157 sqm of floorspace, with the offer including three pharmacies, two charity shops, and two card shops. The DougieMac charity shop occupies one of the larger units in the centre.
225. Meir has 11 convenience retail outlets, which represents a higher proportion of the centre (14.7%) than the UK average (9.3%). The largest of these is the new Nisa

Local store, located along Weston Road, in what was previously the Co-operative Food unit. The rebranding reflects the Co-op's purchase of Nisa in 2018. The store has a free-to-use ATM and is located nearby to the Weston Road car park. Accompanying this offer within Meir are a range of smaller newsagents and convenience stores, as well as a butchers (Parkers of Meir) and bakeries (Broadway Oatcakes and Wrights).

**Figure 61: Nisa Local Store, Weston Road**



Source: LSH Site Visit

226. There is a higher proportion of retail services outlets in Meir when compared to the UK average. The 14 units represents 18.7% of the 75 outlets in the centre. These services are dominated by health & beauty, with a range of barbers, hairdressers and beauty salons available.
227. Almost one in four outlets in Meir come under the leisure services use. Away from food & beverage operators (which are covered below), there is a Coral betting office located at the southern end of Weston Road.
228. Financial & business services outlets as a proportion of total outlets in the centre are below the UK average (6.7% vs 8.3%). These include a solicitors, an accountants, and a couple of building supplies and services operators.
229. The most significant difference in representation since the undertaking of the previous Retail and Leisure Study 2019 relates to comparison retail. The previous Study identified that nine commercial units were dedicated to this use in August 2018, which compares to 16 units at the present time. Meir also 'bucks the trend' in respect of financial & business services uses which have increased from two in August 2018 to five at the present time.

**Figure 62: Food & Beverage Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Meir	UK Average		Meir	UK Average
Bars & Wine Bars	0	0.0%	2.3%	0	0.0%	2.4%
Cafes	1	1.3%	5.1%	50	0.5%	2.9%
Fast Food & Take-Away	14	18.7%	6.1%	1,666	17.8%	3.1%
Public Houses	1	1.3%	2.6%	412	4.4%	3.4%
Restaurants	1	1.3%	5.1%	135	1.4%	4.3%
<b>Total</b>	<b>17</b>	<b>22.7%</b>	<b>21.2%</b>	<b>2,263</b>	<b>24.2%</b>	<b>16.1%</b>

Source: LSH Site Visits (July & August 2024), Council Data and LSH Floorspace Calculations

230. The food & beverage provision in Meir is dominated by fast food & take-away outlets (14 of the total 17). A total of 18.7% of all outlets in Meir are fast food and take-aways. Swiftys (pub/bar) and KFC are the two largest food & beverage operators. Smaller establishments include Tigerbite (pizza, burgers and more), Jade Palace (Chinese Takeaway), and Broadway Fish Bar.

### Vacancies

231. There are a total of 11 vacant outlets in Meir which represents 14.7% of the overall outlets (slightly above the UK average of 14.1%). A total of 10.7% of the floorspace in Meir is vacant, with the average vacant unit being approximately 90 sqm. The vacancy rate has decreased significantly since August 2018 when it equated to 23.5% of units and 15.9% of floorspace.
232. The Meir Diversity of Uses plan above illustrates where vacant units are located in Meir. As can be seen, seven are located along Weston Road, with two found on Sandon Road as well as two on the DougieMac parade that fronts Uttoxeter Road.

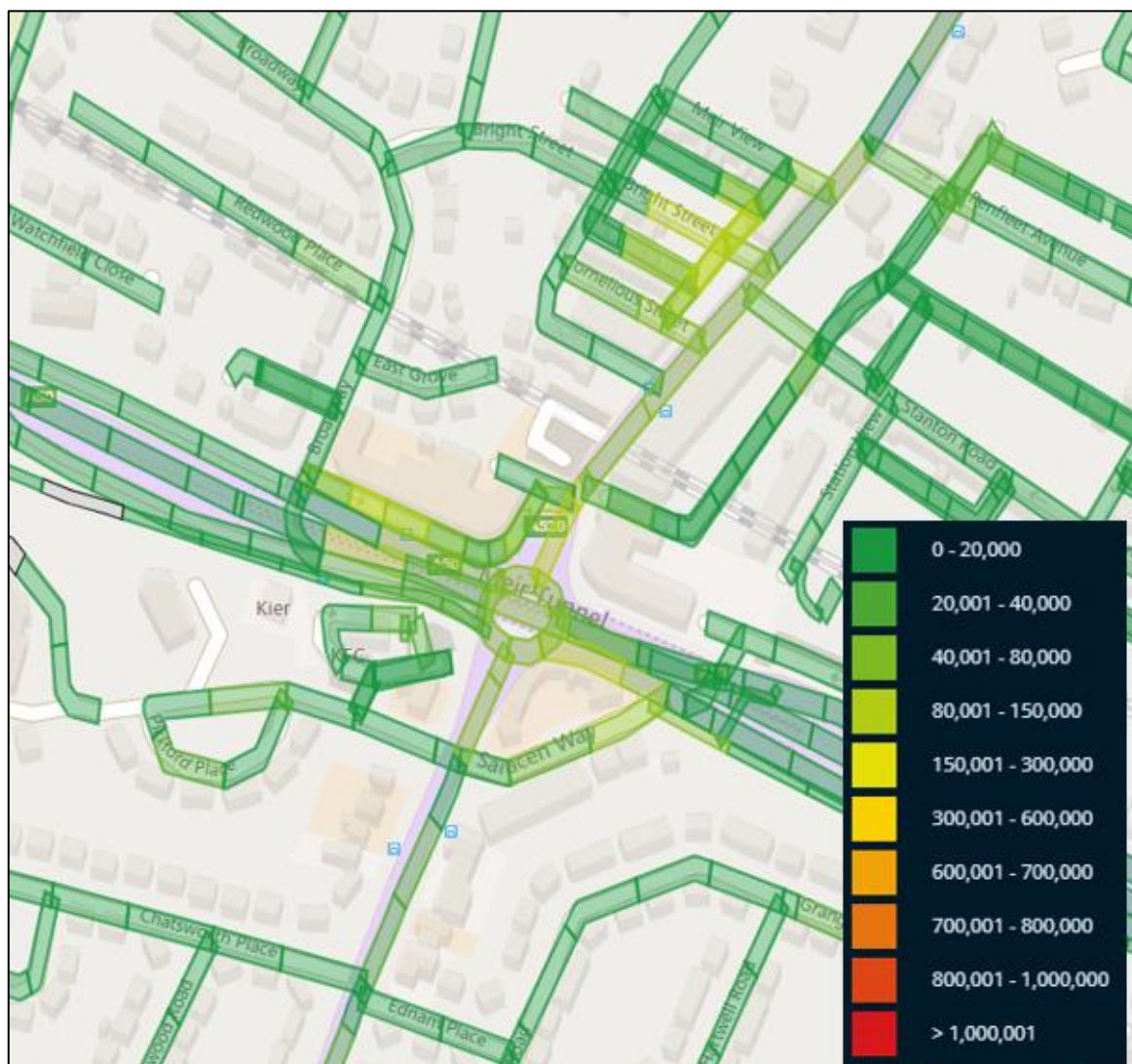
### Commercial Property Indicators

233. Information sourced from the Valuation Office Agency indicates a broad estimate prime A rental level in the region of £110/sqm (£10/sqft) - £160/sqm (£15/sqft) within Meir.
234. Given the limited availability of transactional evidence, we are unable to report on the current level of prime retail unit shop yields for Meir.

### Pedestrian Flows

235. The figure below illustrates the pedestrian flows for Meir in the form of a heat map, showing relatively low levels of footfall across the centre.

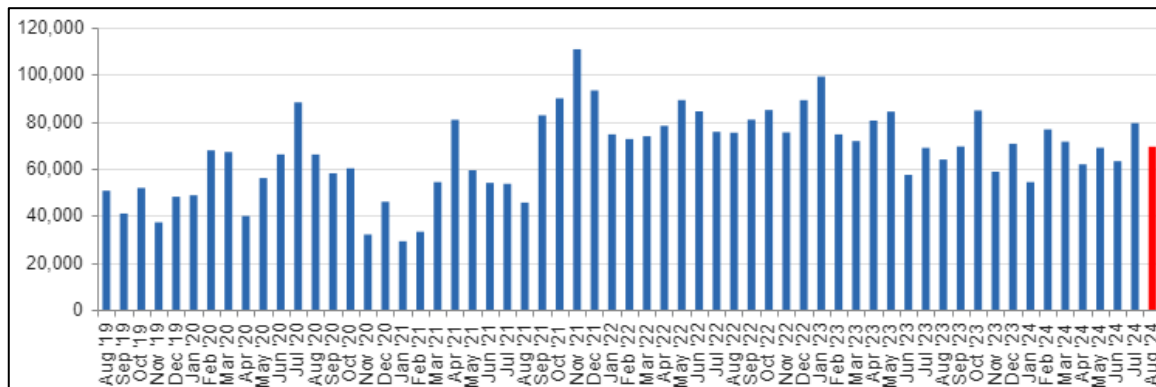
Figure 63: Meir Footfall Heat Map, August 2024



Source: MSCI

236. A section of Meir, located along Weston Road (by Nisa Local), was sampled to obtain information on how footfall levels have changed between September 2019 and August 2024.
237. As can be seen in the figure below, footfall levels have risen in recent years. Figures in the 40,000 – 50,000 monthly movements range seen in late 2019 have now turned into 60,000+ for most months of 2024. A peak for this period came in November 2021 when the total surpassed 100,000.
238. This trend may be attributable to the propensity to work from home and frequent smaller centres with a good range of day-to-day retailers and service providers.

**Figure 64: Monthly Footfall Graph, September 2019 - August 2024, Weston Road**



Source: MSCI

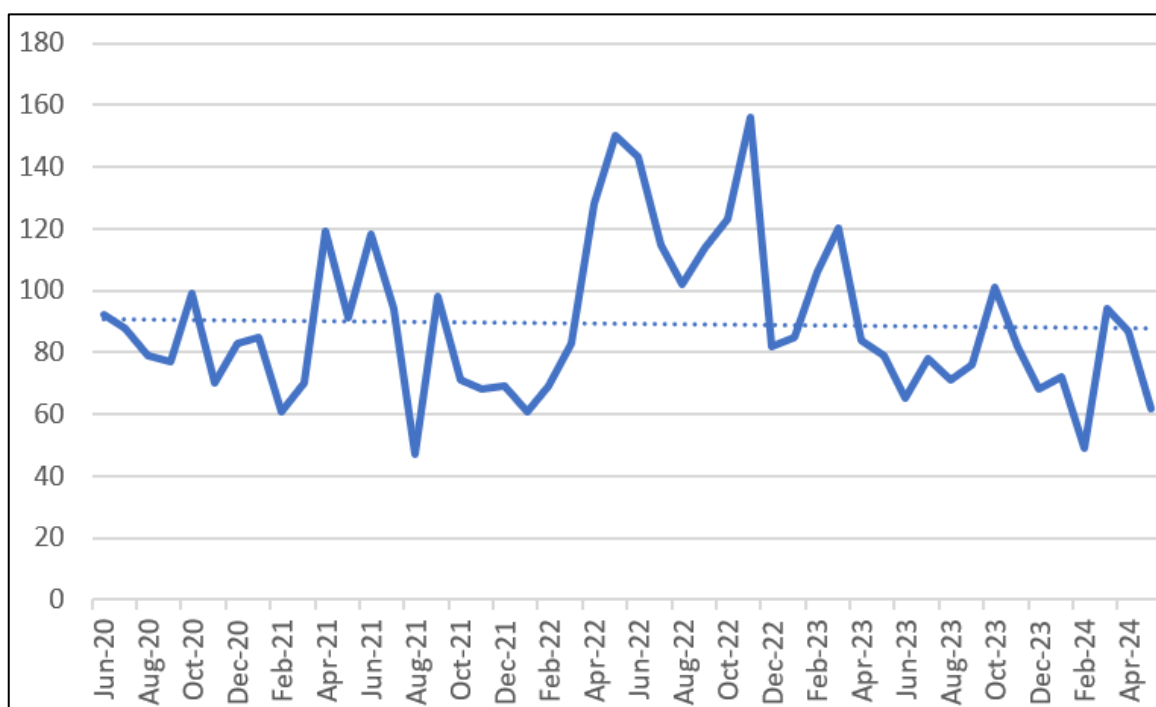
### Accessibility

- 239. Bus services can be picked up across the centre, with connections provided in all directions to places including Blythe Bridge train station, Longton, Hanley, Stoke, and Newcastle-under-Lyme.
- 240. The A50 feeds through the centre from east to west, with a subway tunnel at the heart of Meir. Connections can be made to Uttoxeter to the east and west to Longton and beyond. The A520 runs north to south through Meir, with a roundabout junction at the heart of the centre connecting the two A road routes. The KFC unit has dedicated parking, whilst Meir’s main car park, Weston Road car park, is located just south of the Nisa Local store with 32 spaces available. On street parking can also be found along the Dougie Mac store parade as well as along Saracen Way.
- 241. Whilst cycle parking is provided across the centre, the nature of the busy A roads that cross through Meir make the area challenging to navigate for both cyclists and pedestrians.

### Crime and Safety

- 242. A central postcode within Meir was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 243. As can be seen, despite a spike in criminal activity through 2022, levels have since dropped and as such, the trendline indicates a stable level of crime across this period.

**Figure 65: Meir Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

244. The top three types of crimes recorded within this area during this period are violence & sexual offences (818 recorded incidences), anti-social behaviour (592), and criminal damage & arson (217).

### Environmental Quality

245. The environmental quality of Meir is hampered by the dominance of the road network that crosses through the centre. With high levels of traffic heading in all directions, the area can be challenging to navigate whilst noise and air pollution levels are negatively impacted.
246. Elsewhere, there is a general lack of greenery, open space and vibrancy, in part due to the aforementioned dominance of the road network, although limited attempts to brighten the environment through planters and flowers are present.
247. The general condition of the buildings across the centre is deemed to be adequate, with no particular areas of concern, likely in part due to a low number of long-term vacant units.
248. Bins, seating and cycle parking can be found across the centre, contributing to Meir’s cleanliness and accessibility.

### Barriers to Business

249. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of their control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address

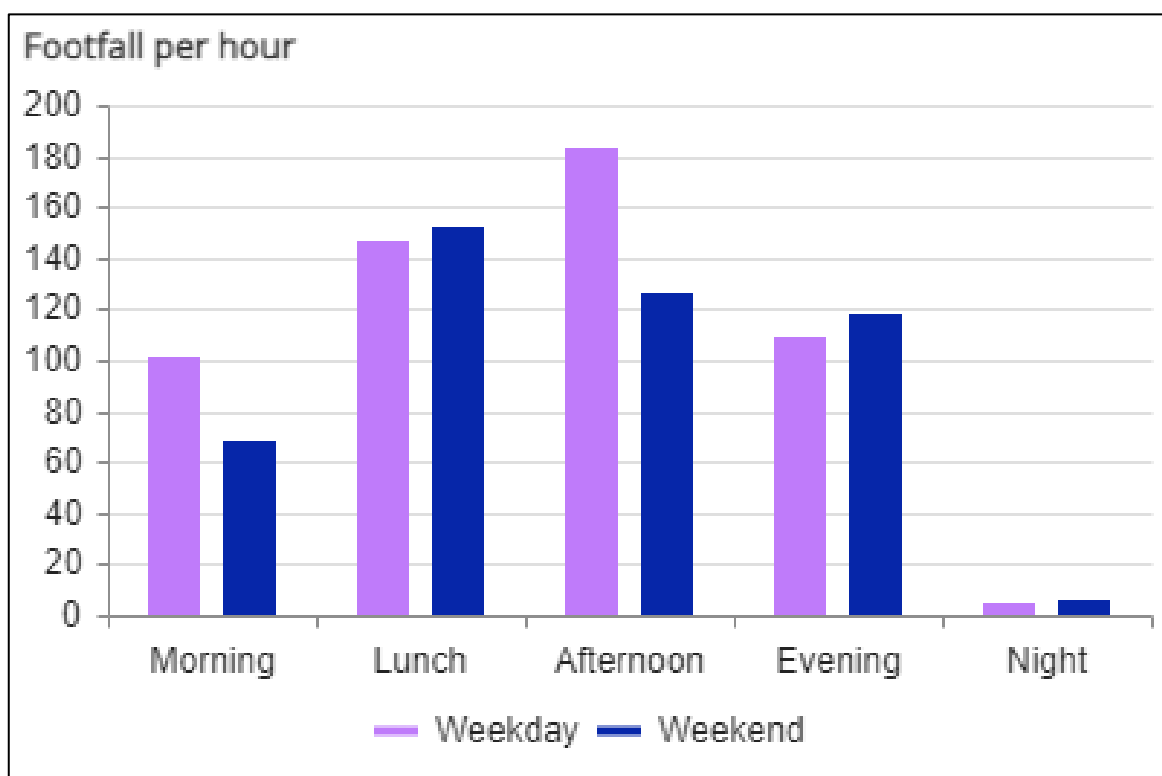
them, as these can also result in opportunities. The major challenges facing businesses in Meir include:

- Economic Factors – a decline in manufacturing employment opportunities and a shift to lower paid health and social care work is playing its part in a substantial number of workers in the area having to supplement low incomes through welfare (as outlined in the Stoke-on-Trent Economic Development Strategy). These economic conditions can affect consumer spending power and demand for retail goods and leisure services.
- Skills Shortage – the area lags behind regional and national averages in skills, particularly digital skills (as set out in the Stoke-on-Trent Economic Development Strategy). A workforce lacking essential skills can impede business operations and growth, especially as the retail and leisure sectors increasingly incorporate digital technologies.
- Economic Inactivity – a notable portion of the local population is economically inactive, many due to long-term health conditions. This can limit the available talent pool for businesses seeking to hire staff.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

### Evening and Night Time Economy

250. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre.
251. There is a limited provision of evening establishments within the centre. Swiftys (bar pub), now located along Sandon Road, and Taste of India on Weston Road are the main provision of evening-focused leisure outlets in the centre.
252. Whilst there are a range of takeaways in Meir that operate well into the evening, the nature of their delivery services will result in a lack of genuine footfall traffic contribution for the centre. The Nisa Local store closes at 10pm every day.
253. The figure below shows how footfall levels differ across different parts of the day along Weston Road (by Nisa Local). As can be seen, footfall in an evening (5pm – 11pm) drops off slightly, but not significantly, with hourly figures surpassing 100 people per hour both on weekdays and weekends.

Figure 66: Footfall by time-of-day, Weston Road



Source: MSCI

## Conclusion

254. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Good road network/ connectivity
- Proportion of vacant floorspace below UK 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

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## Threats

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

255. We therefore conclude that Meir 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.
256. The passing trade and the presence of Meir Primary Care Centre keep visitor numbers strong, with footfall up in recent years, and a resulting low proportion of vacant floorspace.

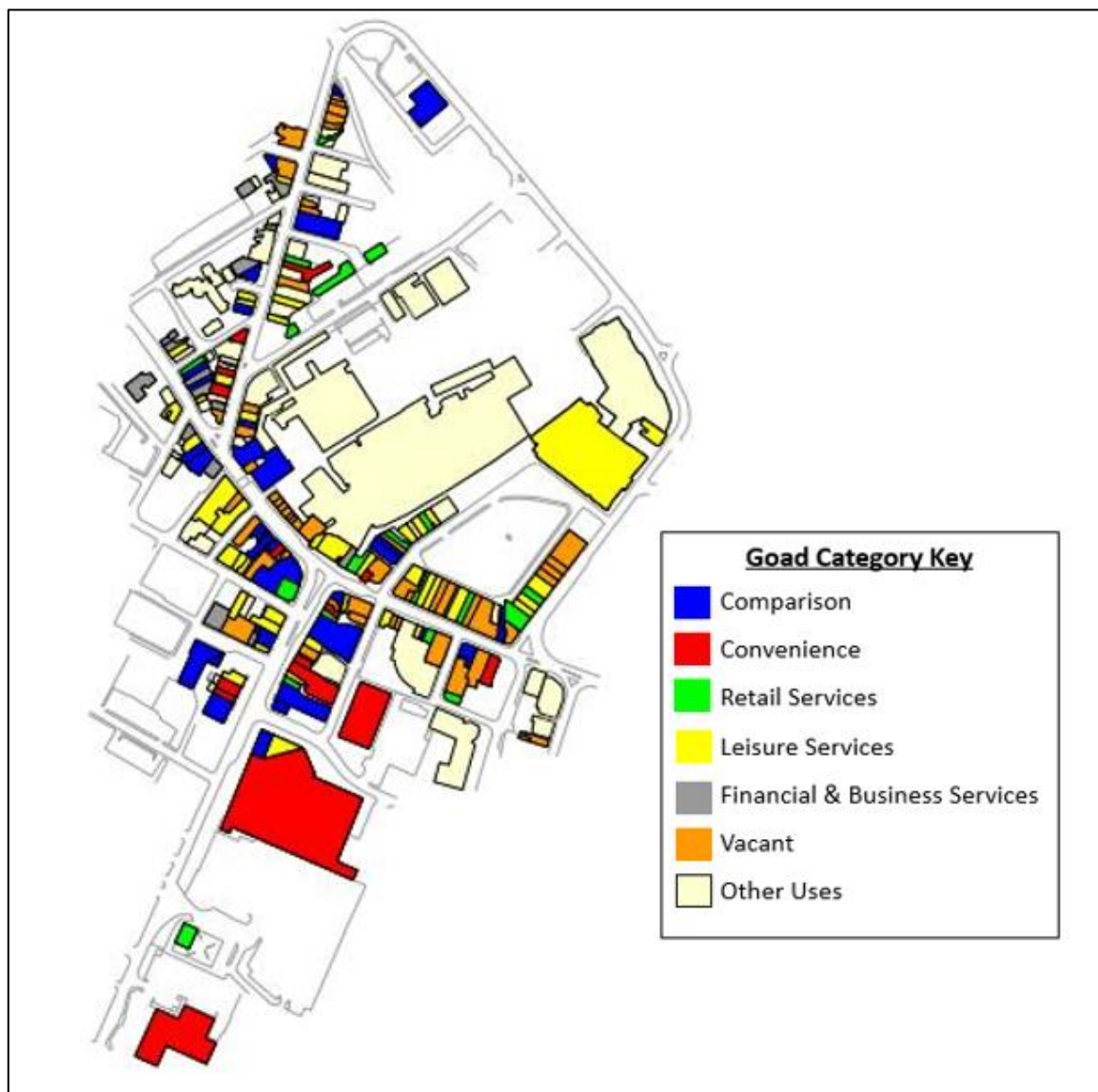
## 7. Stoke Town Centre Health Check

### Overview

257. Bordered by the A500 to the east and with Stoke train station to the north, Stoke is an accessible and centrally located centre within the Stoke-on-Trent area that plays a key role for the region when it comes to its retail and leisure provision as well as other civic and community services.
258. The indoor market sits to the south of the centre, near to the library which can be accessed along Church Street and South Wolfe Street. A cluster of historically, religiously and culturally significant buildings can be found to the north eastern area of the centre – Stoke Minster, King’s Hall (events hall), Stoke Town Hall, and Civic Centre.
259. Large format convenience retail provision can be found just beyond the southern border with a Sainsbury’s store neighboured by Lidl along London Road.
260. Plans to turn a section of the former Spode site into a creative technology hub have been approved which will bring the space back to life with start-up firms, art studios, a theatre and a museum.
261. The Goods Yard site that sits just beyond the northern edge of the centre boundary (next to Stoke-on-Trent railway station) is being redeveloped, with plans to deliver 174 homes, circa 2,800 sqm of commercial space and a public square. The site is being developed by Capital & Centric.
262. Various student accommodation buildings can be found in and around the town centre, resulting in a notable student population within the area.



Figure 68: Stoke Diversity of Uses Map



Source: Experian Goad and LSH Site Visits (July & August 2024)

265. The table below shows that Stoke has a total of 174 outlets and an overall quantum of 43,060 sqm in floorspace.

Figure 69: Outlets and Floorspace

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Stoke	UK Average		Stoke	UK Average
Comparison Retail	32	18.4%	26.4%	7,980	18.5%	29.4%
Convenience Retail	15	8.6%	9.3%	12,140	28.2%	15.6%
Retail Services	19	10.9%	15.9%	2,610	6.1%	7.3%
Leisure Services	42	24.1%	25.8%	10,710	24.9%	26.7%
Financial & Business Services	15	8.6%	8.3%	2,010	4.7%	6.3%
Vacant	51	29.3%	14.1%	7,610	17.7%	14.2%
<b>Total</b>	<b>174</b>	<b>100.0%</b>	<b>100.0%</b>	<b>43,060</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

266. There are 32 comparison retail units in Stoke, which share a combined floorspace of 7,980 sqm. For both outlet number and floorspace, the proportion of comparison retail in Stoke is considerably lower than the UK averages. BargainBuys along Campbell Place occupies the largest of the comparison retail units (920 sqm), whilst operators such as Card Factory and Poundstretcher are also present in the centre.
267. The convenience offer is dominated by the Sainsbury's and Lidl stores that fall just beyond the town centre boundary. They combine to make up 8,870 sqm of the 12,140 sqm convenience floorspace in the area. Within the centre itself, the Stoke Indoor Market represents the largest convenience retail unit.

**Figure 70: Lidl Store, London Road**



Source: LSH Site Visit

268. Roughly 1 in 10 outlets within the centre fall under retail services, with just under half of them offering health & beauty related services. Opticians, photo processing, travel agents, and vehicle repairs & services are also on offer.
269. The provision of leisure services in Stoke is broadly in line with the UK average, both for number of outlets (24.1% vs 25.8%) and floorspace (24.9% vs 26.7%). Beyond food & beverage operators (which are covered below), there are three

betting offices (Betfred, Coral and Paddy Power) as well as a couple of casino/amusement operators.

270. The 15 business & financial services outlets represent 8.6% of the total outlets in the centre, which is in line with the UK average. Lloyds, located along Hide Street, is the only high street bank available. Other related services include solicitors, accountants and estate agents.
271. The most significant difference in representation since the undertaking of the previous Retail and Leisure Study 2019 relates to leisure service provision. The previous Study identified that 37 commercial units and 5,910 sqm of floorspace were dedicated to this use in August 2018, which compares to 42 units and 10,720 sq.m of floorspace at the present time.

**Figure 71: Food & Beverage Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Stoke	UK Average		Stoke	UK Average
Bars & Wine Bars	1	0.6%	2.3%	70	0.2%	2.4%
Cafes	10	5.7%	5.1%	1,060	2.5%	2.9%
Fast Food & Take-Away	12	6.9%	6.1%	1,260	2.9%	3.1%
Public Houses	7	4.0%	2.6%	2,210	5.1%	3.4%
Restaurants	6	3.4%	5.1%	840	2.0%	4.3%
<b>Total</b>	<b>36</b>	<b>20.7%</b>	<b>21.2%</b>	<b>5,440</b>	<b>12.6%</b>	<b>16.1%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

272. The total provision of food & beverage operators in Stoke (36) is broadly in line with the UK average as a proportion of the whole centre (20.7% of outlets in Stoke compared to a UK average of 21.2%).
273. The most common food & beverage operator type in Stoke is fast food & take-away with 12 outlets. This provision is slightly above the UK average (6.9% in Stoke compared to 6.1% UK average).
274. The provision of 10 cafes includes Starbucks which is located within the Sainsbury's store.
275. Of the six restaurants in the centre, there is a dominance of Indian cuisine.

## Vacancies

276. There are a total of 51 vacant outlets in Stoke which represents 29.3% of the overall outlets (more than double the UK average of 14.1%). In total, 17.7% of the floorspace in Stoke is vacant. The proportion of units which are vacant has increased since the undertaking of the previous Retail and Leisure Study 2019, but the proportion of floorspace which is vacant has decreased significantly (at August 2018, 26.2% of units and 35.2% of floorspace was recorded as vacant).
277. The Stoke Diversity of Uses plan above illustrates where vacant units are located in Stoke. As can be seen, the vacancies are distributed across the centre, with clusters found along Liverpool Road (beyond the town centre boundary) and Church Street.

- 
278. As indicated by the discrepancy between the percentage of vacant outlets (29.3%) compared to the percentage of vacant floorspace (17.7%), the vacant units are of small to medium size, with the two largest vacant units each covering 490 sqm.

### Multiple and Independent Representation

279. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Stoke has a limited range of national multiples including Card Factory, Poundstretcher and Lloyds bank as well as betting shops Paddy, Betfred and Coral. National grocery retailers Sainsbury's and Lidl fall just beyond the southern border of the current town centre boundary.
280. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Stoke has a range of independent outlets, including The Card & Gift Company, London Road Café, Aisle of Brides (bridal shop), and Hippe at Heart (gift shop).

### Market

281. Stoke's indoor market can be found on South Wolfe Street, adjacent to the South Wolfe Street car park. The market is open every Wednesday, Friday and Saturday between 9am and 5pm. A range of goods are on offer, whilst arts and crafts workshops and other events have also been hosted in recent times.

Figure 72: Stoke Indoor Market



Source: LSH Site Visit

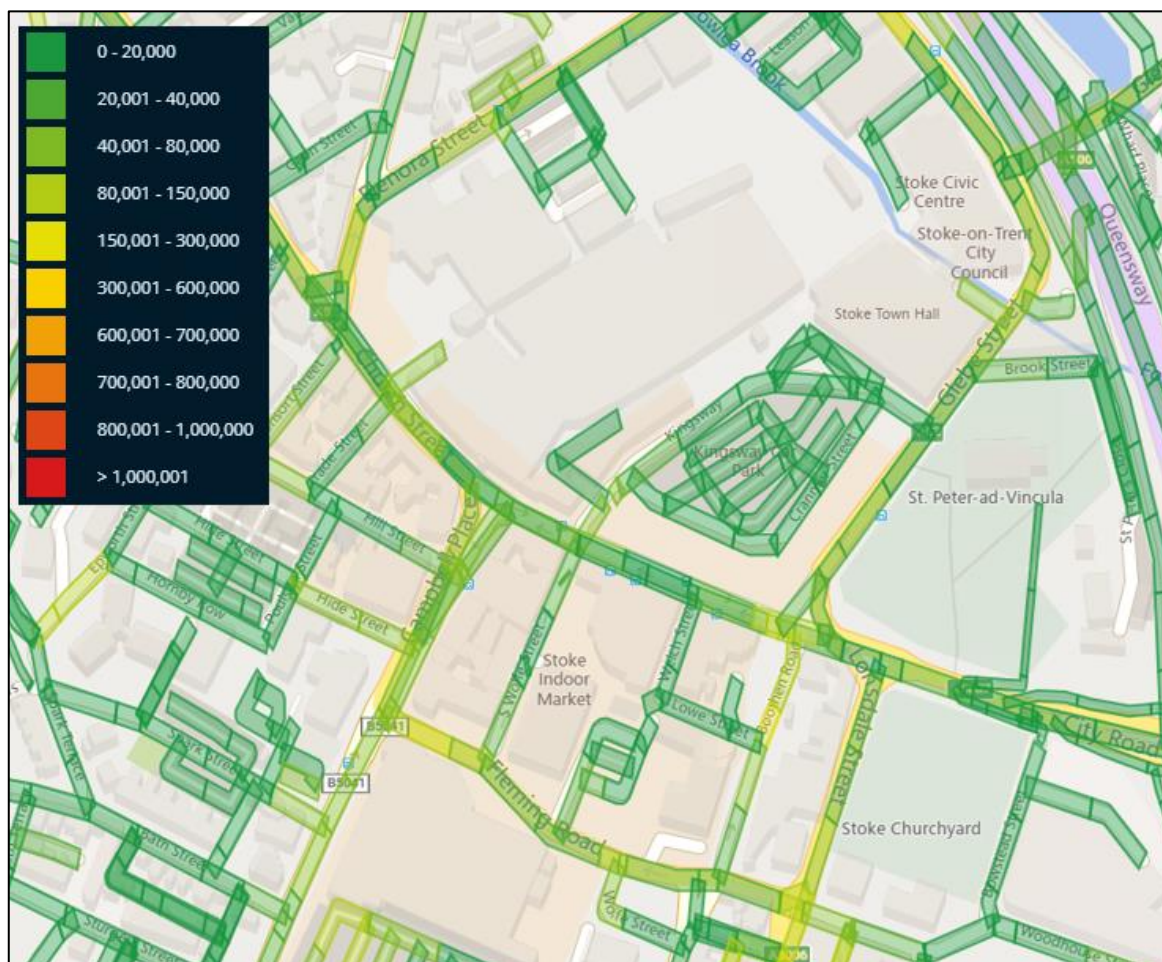
### Commercial Property Indicators

- 282. Information sourced from the Valuation Office Agency indicates a broad estimate prime A rental level in the region of £110/sqm (£10/sqft) -£160/sqm (£15/sqft) within Stoke.
- 283. Given the limited availability of transactional evidence, we are unable to report on the current level of prime retail unit shop yields for Stoke.

### Pedestrian Flows

- 284. The figure below illustrates the pedestrian flows for Stoke in the form of a heat map and show an even spread of relatively low footfall across the centre, with no particular hot spots/areas of concentration.

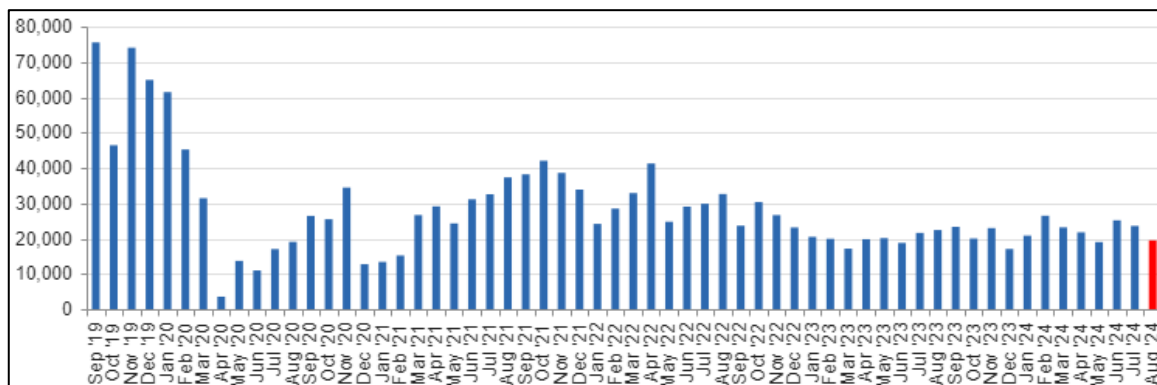
Figure 73: Stoke Footfall Heat Map, August 2024



Source: MSCI

285. A section of Stoke, located along Church Street (by the library entrance), was sampled to obtain information on how footfall levels have changed between September 2019 and August 2024.
286. As can be seen in the figure below, footfall levels dropped significantly at the beginning of the pandemic period (April 2020) and have struggled to recover ever since. There were signs of progress in 2021 with monthly figures touching (and occasionally surpassing) 40,000 monthly movements, but monthly figures for 2023 and 2024 have peaked at just 26,000 (February 2024).

**Figure 74: Monthly Footfall Graph, September 2019 - August 2024, Church Street**



Source: MSCI

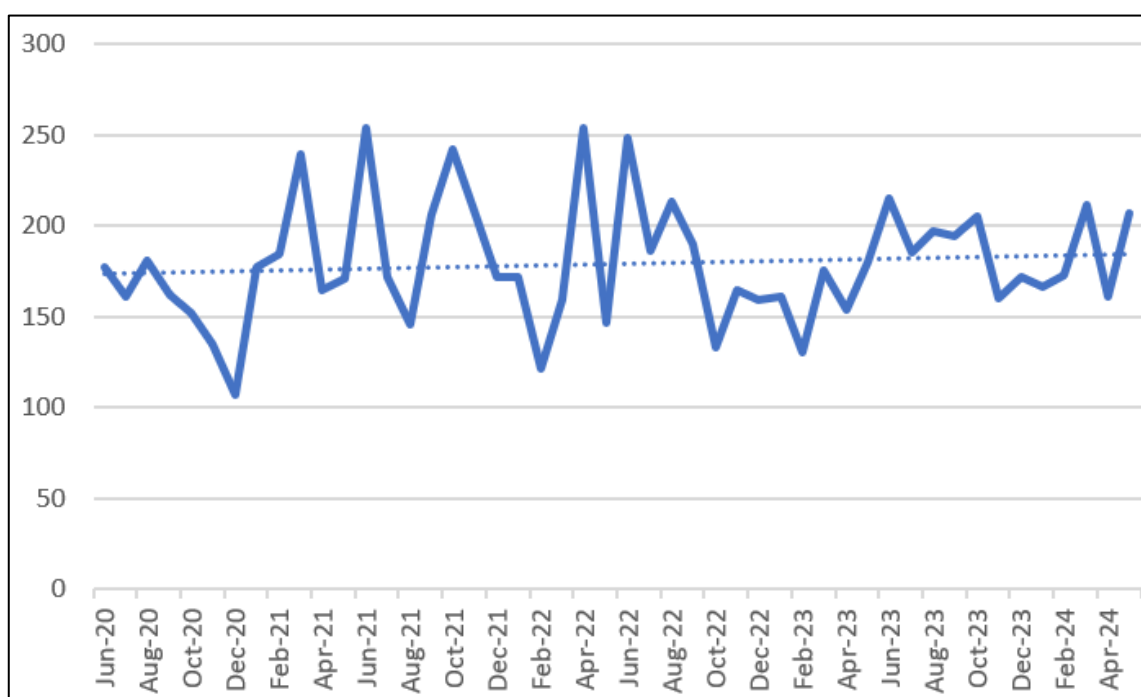
### Accessibility

287. Stoke-on-Trent railway station is located just to the north of the centre – approximately a five-minute from the Stoke-on-Trent City Council building along Copeland Street and a 11-minute walk from the centre boundary along Liverpool Road. The station is located along the West Coast Main Line and as such provides frequent and fast connections to Birmingham, Manchester, Liverpool, London, and more.
288. Works to transform the railway station began in 2024, with plans to enhance the building itself, remodel Winton Square, implement traffic restrictions and generally create a safe and welcoming station gateway.
289. Bus services can be picked up within the centre, providing local connections to Fenton, Hanley and Longton as well as to Newcastle-under-Lyme.
290. The A500 (Queensway) wraps around the town centre to the east with Liverpool Road, Copeland Street and Church Street being the main connectors of the two. The A500 provides linkages in the direction of Crewe to the north west and the M6 to the south west.
291. The three main car parks within the centre are: Kingsway (185 spaces), Hide Street (78 spaces), and South Wolfe Street (77 spaces). These car parks have a combined capacity of 340 spaces and are spread across the centre. On-street parking can also be found, including along Kingsway and Trade Street.
292. A limited offer of cycle lanes can be found in the centre, with provision mainly found along minor roads (Kingsway and South Wolfe Street). Cycle parking provision can be found by the library, the market and by the Campbell Place/ Hide Street junction. There is a lack of truly pedestrianised areas, when comparing to Hanley and Longton. Traffic light crossings and pedestrian islands can be found to assist, although it is noted that there is a lack of pedestrian crossing support along Church Street.

## Crime and Safety

293. A central postcode within Stoke was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
294. As can be seen, recorded crime levels have been relatively stable during this period. Peaks in criminal activity came across 2021 and 2022, with approximately 250 crimes recorded across several months. Figures have since declined, with no signs of a return to the previous highs.

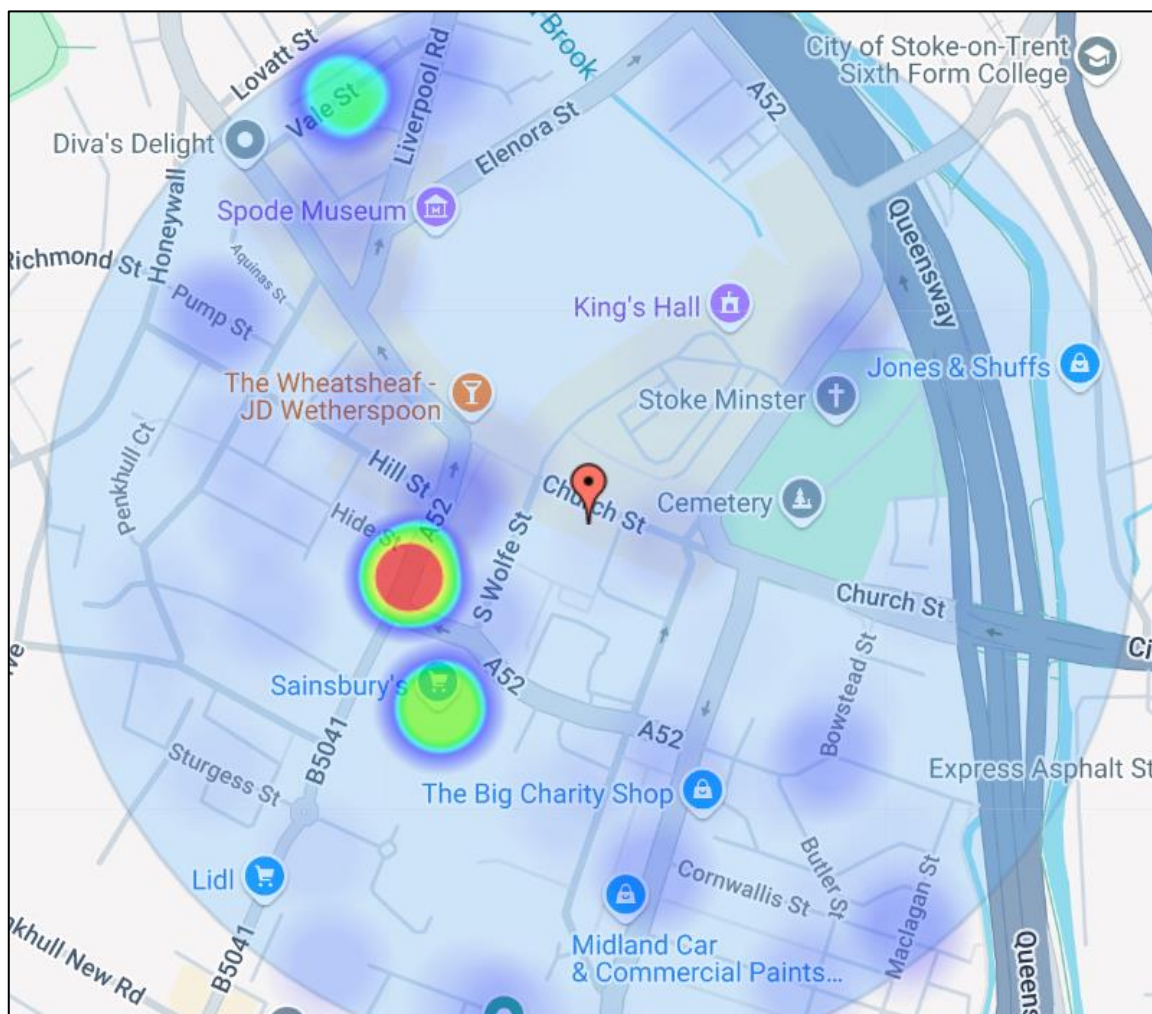
**Figure 75: Stoke Recorded Crime, June 2020 - May 2024**



Source: UKCrimeStats

295. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is predominately concentrated along Campbell Place, just north of the Fleming Road junction.
296. The top three types of crimes recorded within this area during this period are violence & sexual offences (1,237 recorded incidences), anti-social behaviour (1,212 recorded incidences), and shoplifting (469 recorded incidences).

Figure 76: Stoke Crime Heat Map, June 2020 - May 2024



Source: UKCrimeStats

### Environmental Quality

297. The overall environmental quality of Stoke town centre is generally quite moderate, despite examples of characterful, architecturally significant buildings. There are several designated Listed Buildings and Buildings of Special Local Interest within the centre, such as Kings Hall & Stoke Town Hall, the former Spode Pottery Factory and Church of St Peter Ad Vincula which add to the charm, character and identity of Stoke through their architectural and historic significance, which in turn boosts the area's environmental quality.
298. However, there are a high number of vacant units some of which are deteriorating in appearance. Furthermore, buildings such as the indoor market are of low architectural appeal. Frontages across the centre could benefit from efforts to improve their appearance.
299. Open spaces, such as by the library and market buildings, are not capitalised upon with the provision of spaces for people to spend time and enjoy. Linked to this is a general lack of greenery, green space, and vibrancy within the centre.

Figure 77: Open Space by Stoke Library



Source: LSH Site Visit

### Barriers to Business

300. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of their control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges facing businesses in Stoke include:
- Economic Factors – a decline in manufacturing employment opportunities and a shift to lower paid health and social care work is playing its part in a substantial number of workers in the area having to supplement low incomes through welfare (as outlined in the Stoke-on-Trent Economic Development Strategy). These economic conditions can affect consumer spending power and demand for retail goods and leisure services.

- High Street Decline – high vacancy rates within the centre will be negatively impacting the appeal and draw of Stoke as a destination. This helps to create a challenging environment for new businesses to prosper.
- Skills Shortage – the area lags behind regional and national averages in skills, particularly digital skills (as set out in the Stoke-on-Trent Economic Development Strategy). A workforce lacking essential skills can impede business operations and growth, especially as the retail and leisure sectors increasingly incorporate digital technologies.
- Economic Inactivity – a notable portion of the local population is economically inactive, many due to long-term health conditions. This can limit the available talent pool for businesses seeking to hire staff.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

### Evening and Night Time Economy

301. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Stoke have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

**Figure 78: The Kings Way Pub, Kingsway**



Source: LSH Site Visit

302. As outlined below, several establishments 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. Whilst there is a selection of restaurants to choose from, there is a lack of diversity when it comes to cuisines.

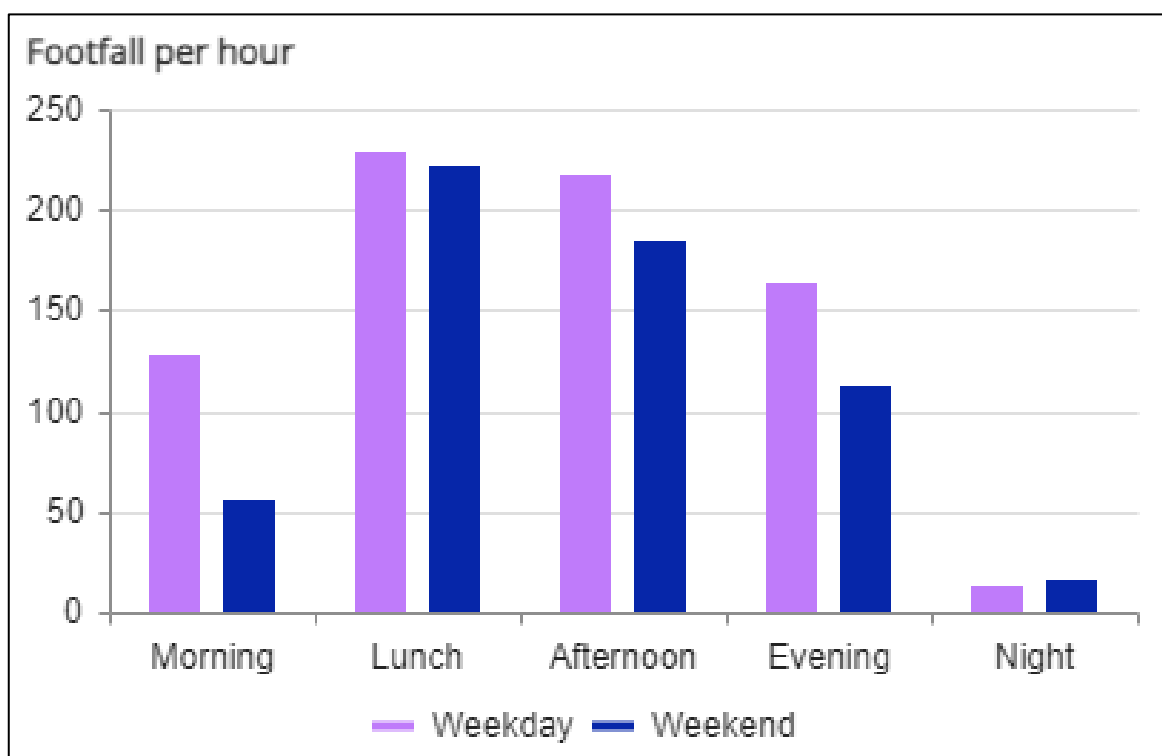
**Figure 79: Leisure Operator Sample**

Retailer Name	Type	Open	Close
bru	Craft & Cocktails Bar	2-4pm	12-12:30am
Crafty Lion	Pub	4pm	10pm-12am
The Glebe	Pub	12pm	10:30pm-12am
The Wheatsheaf	Pub	8am	12-1am
The King's Way	Pub	12-2pm	8pm-1am
Planet Bollywood	Restaurant	5pm	12-1am
Sangam	Indian Restaurant	5pm	10:30-11:30pm
Tandoori Knights	Indian Restaurant	5pm	10:30pm

Source: LSH Research

303. The figure below shows how footfall levels differ across different parts of the day along Church Street (by Crafty Lion and The Liquor Vaults). As can be seen, footfall declines in an evening (5pm – 11pm), but there is not a particularly significantly drop in figures, particular on weekdays, where hourly numbers go from around 220 movements in the afternoon to approximately 160 in the evening.

**Figure 80: Footfall by time-of-day, Church Street**



Source: MSCI

## Conclusion

304. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Strong convenience offer in the area
- 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

### 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)
- The redevelopment of the former Spode site as a hub for creativity and innovation, bringing employment space and consequentially additional footfall to the centre
- 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

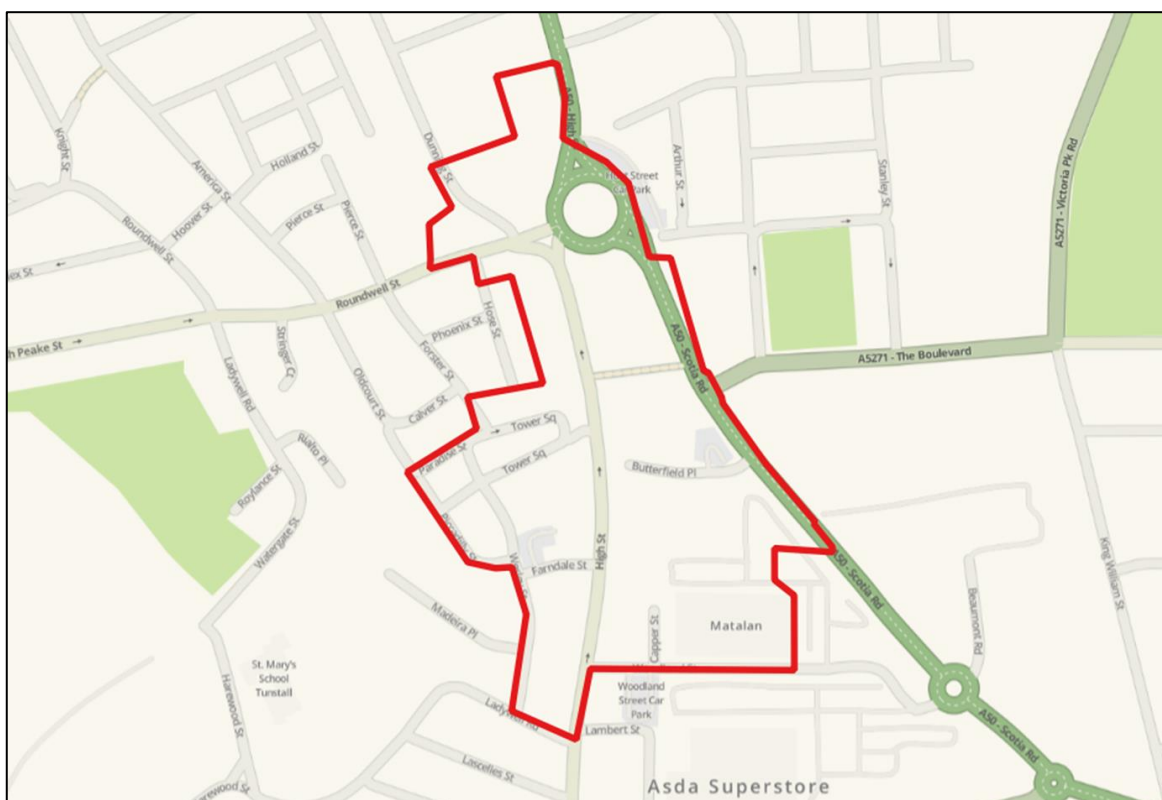
305. We therefore conclude that Stoke continues to face challenges and threats to its vitality and viability, largely characterised by its high vacancy rate and subsequent environmental quality concerns.
306. Whilst the Sainsbury's and Lidl stores provide a significant draw to the area, the centre in 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 clear scope for the market to evolve and strengthen its offer in a way that generates interest and attraction.
307. The Capital & Centric development at Goods Yard has the potential to change perceptions, improve investor confidence, and bring new operators to the centre, whilst the planned redevelopment of the Spode site is hoped to foster creativity and innovation in the centre whilst boosting footfall and spend.

## 8. Tunstall Town Centre Health Check

### Overview

- 308. Tunstall is the northern most town centre in Stoke-on-Trent, with Burslem its nearest neighbouring town (1.7km south east). Hanley can be accessed from Burslem via the A50, which runs along the eastern edge of the centre.
- 309. 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 eastern boundary (Alexandra Park) now make up a significant part of the area's draw.
- 310. 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.
- 311. Just beyond the eastern boundary of the centre, plans are progressing for the development opportunity of the former Tunstall Library and Baths building. Current proposals set out a mix of residential, commercial leisure and community uses.

**Figure 81: Tunstall Centre Boundary (Adopted)**



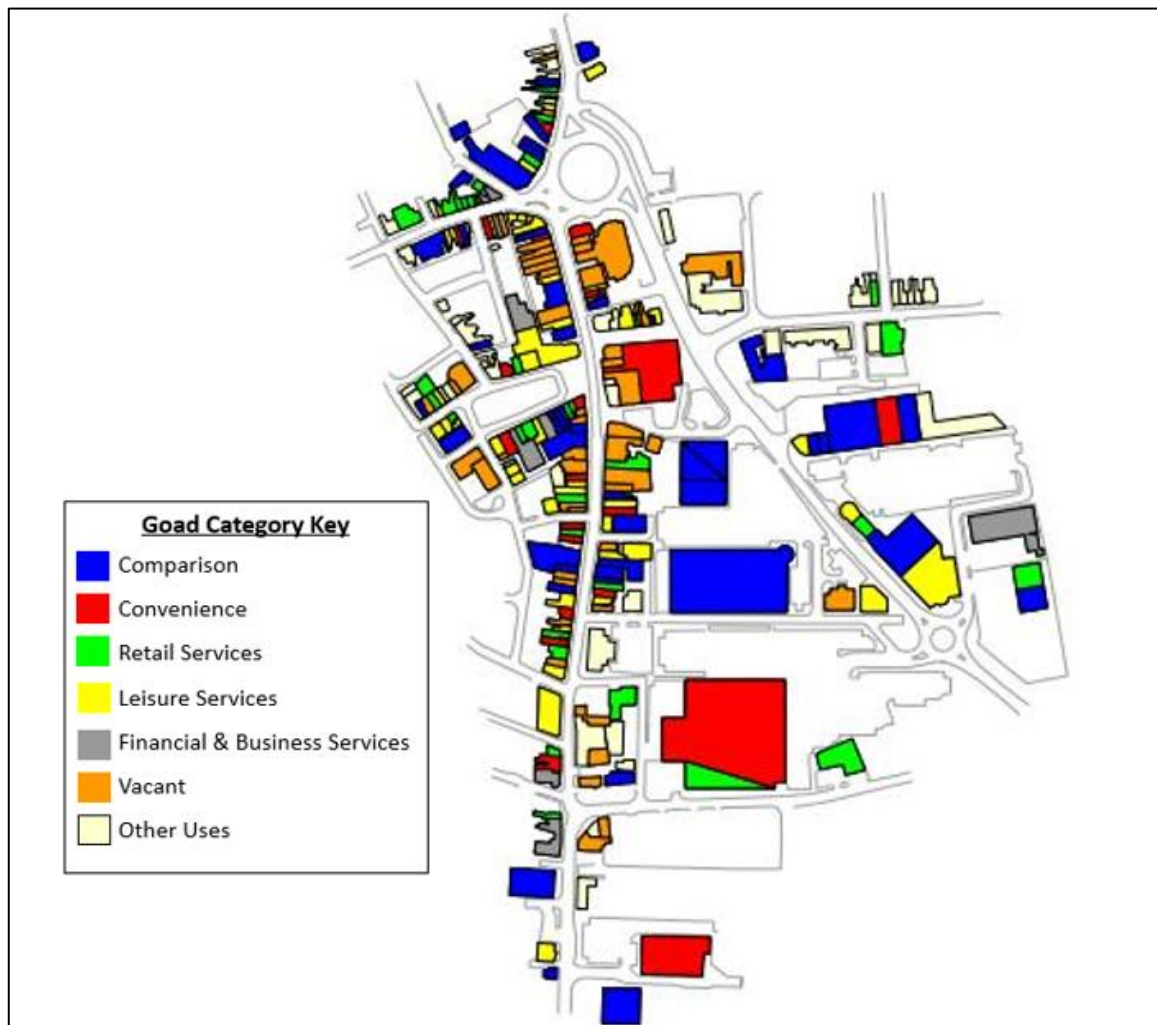
Source: Boundary provided by Stoke-on-Trent City Council and mapped by LSH

### Diversity of Uses

- 312. In order to assess the diversity of uses for the centre, Goad data from October 2023 was taken and updated based on LSH site visits across July and August 2024 to provide an updated view of the retail and leisure mix. The figure below indicates the area covered by Goad as well giving a visual representation of the diversity of uses.

313. To note that the Goad area does not perfectly reflect the town centre boundary with Goad’s coverage stretching east of Scotia Road (to include Alexandra Park) as well as further south along High Street (including ALDI and Asda).

**Figure 82: Tunstall Diversity of Uses Map**



Source: Experian Goad and LSH Site Visits (July & August 2024)

314. The table below shows that Tunstall has a total of 209 outlets and an overall quantum of 56,199 sqm in floorspace.

**Figure 83: Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Tunstall	UK Average		Tunstall	UK Average
Comparison Retail	47	22.5%	26.4%	19,111	34.0%	29.4%
Convenience Retail	21	10.0%	9.3%	12,150	21.6%	15.6%
Retail Services	36	17.2%	15.9%	5,305	9.4%	7.3%
Leisure Services	43	20.6%	25.8%	7,303	13.0%	26.7%
Financial & Business Services	12	5.7%	8.3%	3,440	6.1%	6.3%
Vacant	50	23.9%	14.1%	8,890	15.8%	14.2%
<b>Total</b>	<b>209</b>	<b>100.0%</b>	<b>100.0%</b>	<b>56,199</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

315. Comparison retail outlets as a percentage of the total provision in Tunstall falls below the UK average, whilst the proportion of floorspace is somewhat higher relative to the national average position. This is in part due to the inclusion of large-format units beyond the town centre boundary on Alexandra Park (retail park) such as Home Bargains (1,460 sqm), and Sports Direct (1,270 sqm), but is also largely a result of the 4,530 sqm Matalan store within the centre itself. Comparison retail is the dominant use when it comes to floorspace in the centre, occupying more than a third of the total.
316. In total, one in 10 units in the centre are occupied by convenience retail operators, which is broadly in line with the UK average. The largest of these units is the Asda store (6,450 sqm) located just beyond the southern edge of the town centre boundary. Aldi, Tunstall Market, and Iceland are the other major occupiers of convenience floorspace in the centre. Asda's additional offers and services includes a pharmacy, an opticians, and a café. Tunstall Market opens every Wednesday, Friday and Saturday between 9am and 5pm and can be accessed via High Street.
317. Retail services occupy a greater percentage of outlets and floorspace when compared to the UK average. Of the 36 outlets, 19 are categorised as health & beauty (hairdressers, barbers, beauty salons, tattoo parlours). Dry cleaners, opticians (including Specsavers), dog groomers, travel agents, a Post Office, and more can also be accessed in the centre.
318. Leisure services occupy one in five outlets in the centre (43 in total). As a proportion of the total floorspace however, they combine to make up 13%, which is less than half of the UK average (26.7%). Beyond the two gyms (Everlast and Apex) and Sneyd Arms Hotel, the leisure units in the centre are all between 20 sqm and 370 sqm in size.
319. Financial & business services occupy 12 outlets in Tunstall and 3,440 sqm of floorspace. Lloyds is the only remaining high street bank in the centre, with other services including tool & machinery hire, estate agents, and building supplies (windows).
320. The most significant different in representation since the undertaking of the previous Retail and Leisure Study 2019 relates to comparison goods retail and leisure service provision. The previous Study identified that 58 commercial units and 18,640 sqm of floorspace were dedicated to comparison retail in August 2018, which compares to 47 units and 19,111 sqm at the present time. Whilst the number of comparison retail units has decreased there has been an overall increase in the quantum of floorspace dedicated to this use over the past six years. In terms of leisure service, there has been an increase in units (from 33 to 43) and floorspace (from 6,050 sqm to 7,303 sqm) over the past six years.

**Figure 84: Food & Beverage Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Tunstall	UK Average		Tunstall	UK Average
Bars & Wine Bars	0	0.0%	2.3%	0	0.0%	2.4%
Cafes	8	3.8%	5.1%	740	1.3%	2.9%
Fast Food & Take-Away	17	8.1%	6.1%	1,353	2.4%	3.1%
Public Houses	6	2.9%	2.6%	860	1.5%	3.4%
Restaurants	3	1.4%	5.1%	590	1.0%	4.3%
<b>Total</b>	<b>34</b>	<b>16.3%</b>	<b>21.2%</b>	<b>3,543</b>	<b>6.3%</b>	<b>16.1%</b>

Source: Experian Goad and LSH Site Visits (July & August 2024)

- 321. Food and beverage units make up 16.3% of the total within Tunstall. Half of the food & beverage outlets are occupied by fast food & take-away operators.
- 322. Bars & wine bars and restaurants fall considerably below the UK average when it comes to both proportion of outlets and floorspace occupied. Pubs and fast food & take-aways occupy a higher proportion of outlets when compared to the UK average.
- 323. The cafes include Costa and Starbucks on Alexandra Park (retail park), although it is noted that the Costa Coffee has closed in September 2024, subsequent to the site visit. This comes following Starbucks opening up in July 2023.

### Vacancies

- 324. There are a total of 50 vacant outlets in Tunstall which represents 23.9% of the overall outlets (significantly higher than the UK average of 14.1%). A total of 15.8% of the floorspace in Tunstall is vacant.
- 325. The Tunstall Diversity of Uses plan above illustrates where vacant units are located in Tunstall. As can be seen, the majority are located along High Street, with a particular cluster just south of the roundabout junction.
- 326. Some of the larger vacant units include the former Bingo venue (Tower Bingo) (1,150 sqm) along High Street and the former Poundland unit (also along High Street) (490 sqm), following Poundland's relocation into the former Next unit.

### Multiple and Independent Representation

- 327. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Tunstall has a range of national multiples including Matalan, Argos and Poundland. National grocery retailers Asda and Aldi fall just beyond the southern border of the town centre, whilst Alexandra Park (just beyond the eastern boundary) is home to additional multiples including Sports Direct, Home Bargains, and Boots.
- 328. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Tunstall has a range of independent outlets, including Doggie Doolittles (pet

shop), Master Grill (Turkish restaurant and take-away), and Solo Boutique (ladies fashion).

### Market

329. Tunstall's indoor market can be accessed along High Street as well as from Butterfield where 6 disabled parking spaces allow for convenient access for those in wheelchairs or with mobility challenges. The market is open every Wednesday, Friday and Saturday between 9am and 5pm. A range of goods are on offer across the 60 stalls, including fruit & veg, meats, gifts, furniture, books, toys, shoes, clothing, pet items, and health & beauty products.

### Commercial Property Indicators

330. Information sourced from the Valuation Office Agency indicates a broad estimate prime A rental level in the region of £110/sqm (£10/sqft) - £160/sqm (£15/sqft) within Tunstall.
331. Given the limited availability of transactional evidence, we are unable to report on the current level of prime retail unit shop yields for Tunstall.

### Pedestrian Flows

332. The figure below illustrates the pedestrian flows for Tunstall in the form of a heat map and shows a particular concentration of footfall where Tower Square meets High Street.

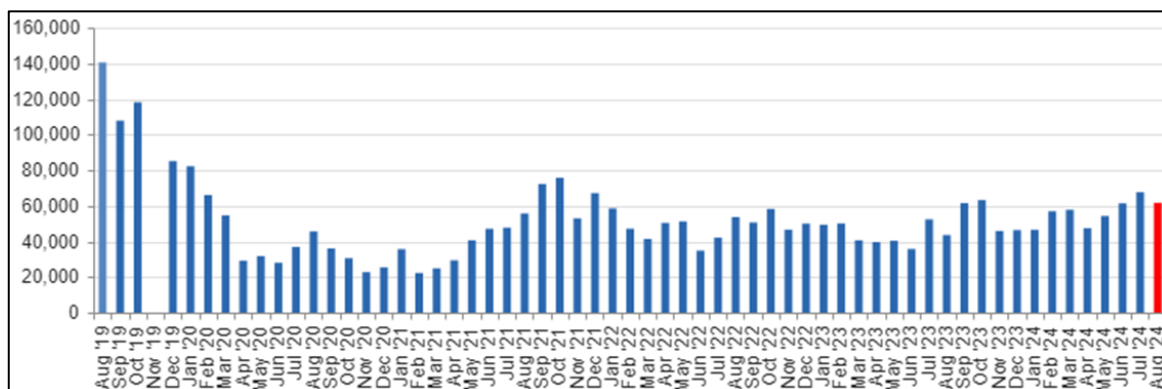
Figure 85: Tunstall Footfall Heat Map, August 2024



Source: MSCI

333. A busy section of Tunstall, located along High Street (by the market entrance), was sampled to obtain information on how footfall levels have changed between September 2019 and August 2024.
334. As can be seen in the figure below, footfall levels dropped significantly at the beginning of the pandemic period (April 2020) and have struggled to recover ever since. 2021 saw signs of progress, with monthly figures growing up until October 2021, but then dropping towards the end of the year. Monthly pedestrian activity now looks to have stabilised, but at a much lower level than seen in late 2019.

**Figure 86: Monthly Footfall Graph, September 2019 - August 2024, High Street**



Source: MSCI

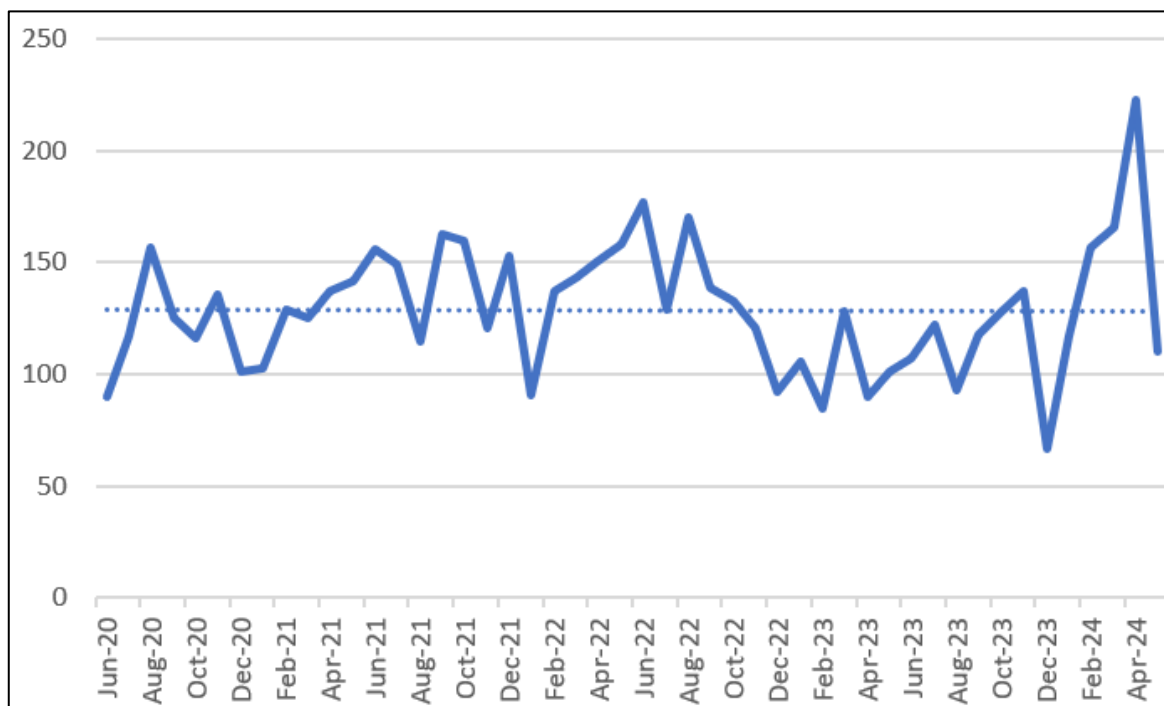
### Accessibility

- 335. Bus services can be picked up along High Street, providing connections south through Burslem in the direction of Hanley, north to Kidsgrove as well as south west to Newcastle-under-Lyme.
- 336. The A50 feeds through the east of the centre and can be used to reach Kidsgrove and beyond to the north and Burslem and Hanley to the south. Butterfield Place car park (accessible from Scotia Road with a capacity of 20 spaces), Farndale Street car park (accessible from High Street with a capacity of 28 spaces) and parking bays at Tower Square provide well-connected town centre parking. These are in addition to the large, shared car park for the Matalan, Argos, and Poundland stores.
- 337. Cycle parking and seating can be found at Tower Square and by the library to support active modes of travel. One way access into Tower Square from High Street helps to minimise traffic in the area, supporting those navigating the centre on foot, as do the multiple traffic light and zebra crossings along High Street. Pedestrian connectivity from the eastern edge of the centre over to Alexandra Park is also accommodated for with a direct pedestrian route available, with a traffic light crossing at Scotia Road.

### Crime and Safety

- 338. A central postcode within Tunstall was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 339. As can be seen, recorded crime levels have been stable across this period, although a little more erratic in since late 2023, with December 2023 representing the lowest month during this time (67 crimes recorded), and April 2024 the highest (223 crimes recorded).

**Figure 87: Tunstall Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

340. The top three types of crimes recorded within this area during this period are violence & sexual offences (869 recorded incidences), anti-social behaviour (727 recorded incidences), and shoplifting (528 recorded incidences).

### Environmental Quality

341. The quality of Tunstall’s environment is impacted by the weak market demand for commercial units and the number of vacancies. Some premises which have been vacant for some time have fallen into a state of disrepair. The lack of investment into the building stock particularly impacts on the quality of the environment along High Street and Tower Square. Tunstall is also characterised by a high amount of operator ‘churn’ and by an above average number of discount retailers and hot food takeaway uses. Shopfronts and signage are often of poor quality and are generally inconsistent. There has been limited private investment in premises on High Street and Tower Square, with a consequential decline in the quality of the visitor experience.
342. The quality of the public realm differs throughout the centre. The public realm along High Street is functional in appearance with little by the way of street furniture (the pedestrian footways are relatively narrow along this stretch with little room for benches) and a general lack of greenery and vibrancy. Some of the paving in Tower Square has been replaced by tarmac and this area would benefit from improvement. There is also an issue with the number of pigeons in the vicinity of the Square which impacts on its amenity as a place to sit and linger.
343. To the east of the centre, Alexandra Retail Park provides a modern, purpose-built large format retail environment. Representation includes Boots, Card Factory,

Home Bargains, and Iceland. Alexandra Retail Park is a managed private development which is focused around a substantial area of surface car parking. It links to High Street via Jasper Square Retail Park which accommodates Argos, Matalan, and Shoezone. One of the key attractors in Tunstall is the Town Hall which also accommodates the Market Hall. The Town Hall building was refurbished in 2022 and houses the library. There was a good level of activity around the Town Hall and Market Hall on the day of visit (Wednesday 14 August 2024), and the building makes an extremely positive impact on the northern part of the town centre.

### Barriers to Business

344. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of their control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges facing businesses in Tunstall include:
- Economic Factors – a decline in manufacturing employment opportunities and a shift to lower paid health and social care work is playing its part in a substantial number of workers in the area having to supplement low incomes through welfare (as outlined in the Stoke-on-Trent Economic Development Strategy). These economic conditions can affect consumer spending power and demand for retail goods and leisure services.
  - High Street Decline – high vacancy rates within the centre will be negatively impacting the appeal and draw of Tunstall as a destination. This helps to create a challenging environment for new businesses to prosper.
  - Skills Shortage – the area lags behind regional and national averages in skills, particularly digital skills (as set out in the Stoke-on-Trent Economic Development Strategy). A workforce lacking essential skills can impede business operations and growth, especially as the retail and leisure sectors increasingly incorporate digital technologies.
  - Economic Inactivity – a notable portion of the local population is economically inactive, many due to long-term health conditions. This can limit the available talent pool for businesses seeking to hire staff.
  - Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

### Evening and Night Time Economy

345. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Tunstall have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

346. As outlined below, the provision is limited to a small selection of food & beverage outlets, largely driven by pubs. Opening times allow for a selection of establishments to choose from late into the evening.

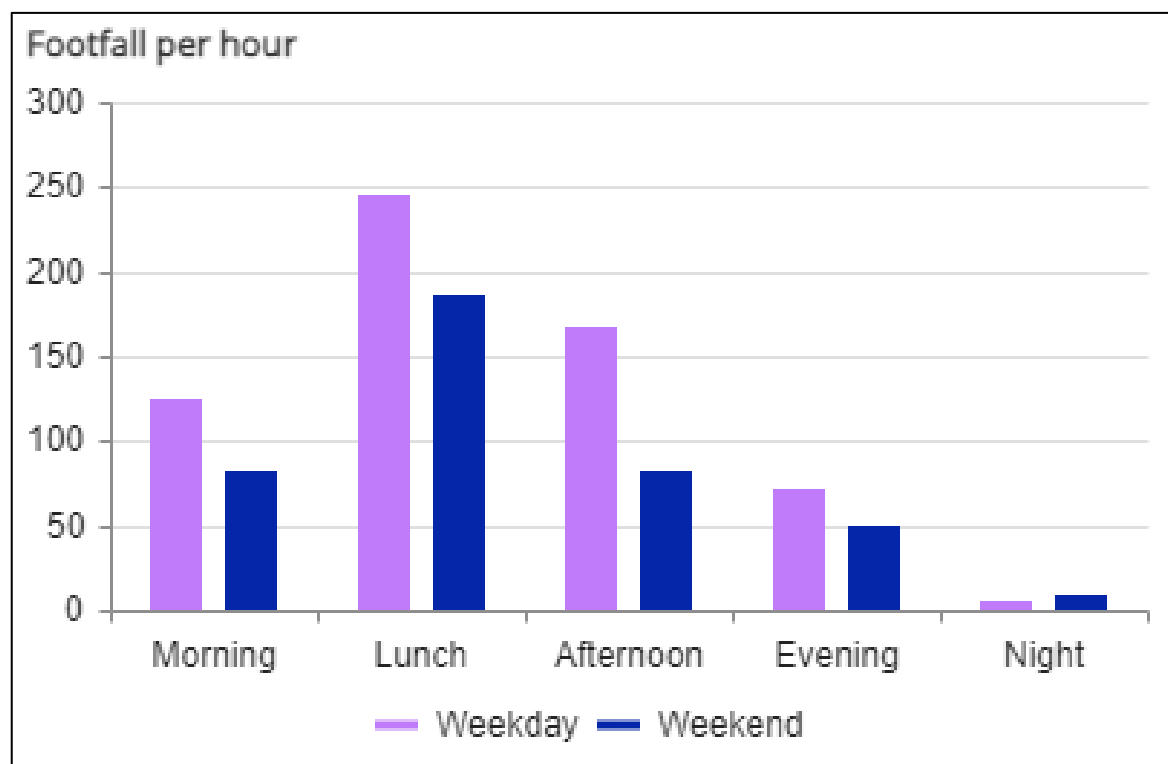
**Figure 88: Leisure Operator Sample**

Retailer Name	Type	Open	Close
The Sneyd Arms Hotel	Hotel & Pub		Until late
The Globe	Pub	11am	9pm-12am
Oddfellows Arms	Pub	10am	1am
Paradise Inn	Pub	12pm	11pm
Pep's Bar and Restaurant	Bar & Restaurant	12-6pm	11pm-1am

Source: LSH Research

347. The figure below shows how footfall levels differ across different parts of the day along High Street (by the market building). As can be seen, footfall in an evening (5pm – 11pm) is much lower than at lunch and notably lower than in the afternoon. Weekday evenings are busier than weekends.

**Figure 89: Footfall by time-of-day, High Street**



Source: MSCI

## Conclusion

348. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Strong convenience 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 around
- 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 (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)
- Redevelopment of the former Tunstall Library and Baths to bring the historic building back to life whilst boosting the centre's local catchment population
- Alexandra Park is located in relatively close proximity to High Street. Further regeneration and an improved offer on High Street would likely increase linked trips between these two areas and help to give Tunstall more of a cohesive feel.

### 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

349. We therefore conclude that Tunstall continues to face challenges to its vitality and viability, which is largely summarised by its persistently high vacancy rate.
350. 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.
351. 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.

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9. Appendix: Centre Boundary and Primary Shopping Area  
Recommendations

Figure 90: Extant City Centre Boundary, Hanley

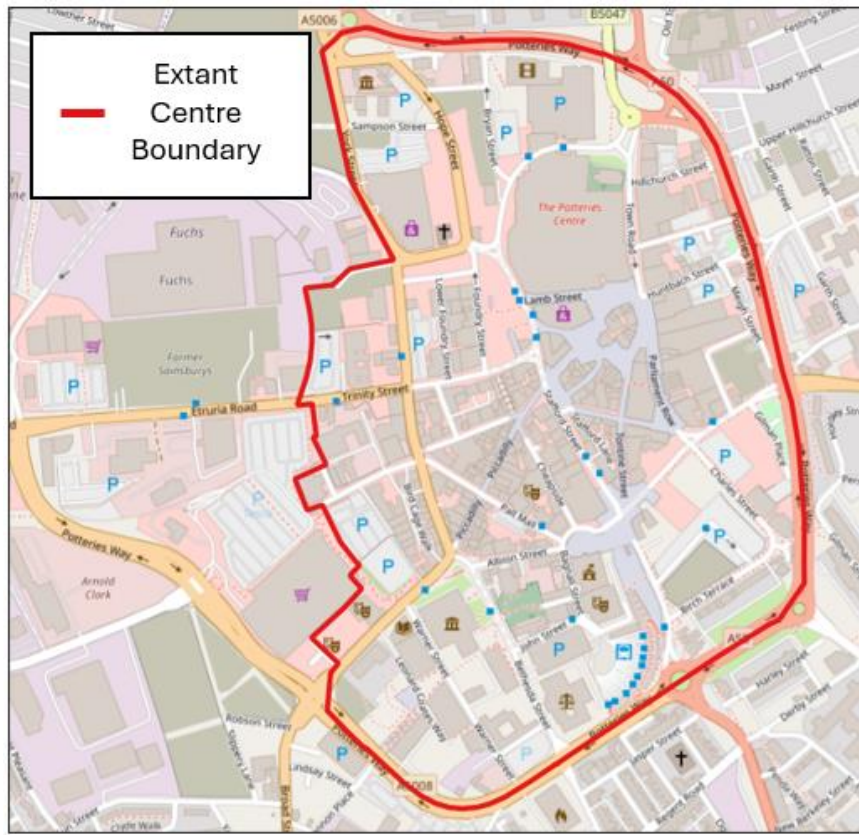


Figure 91: Proposed City Centre Boundary and Primary Shopping Area, Hanley

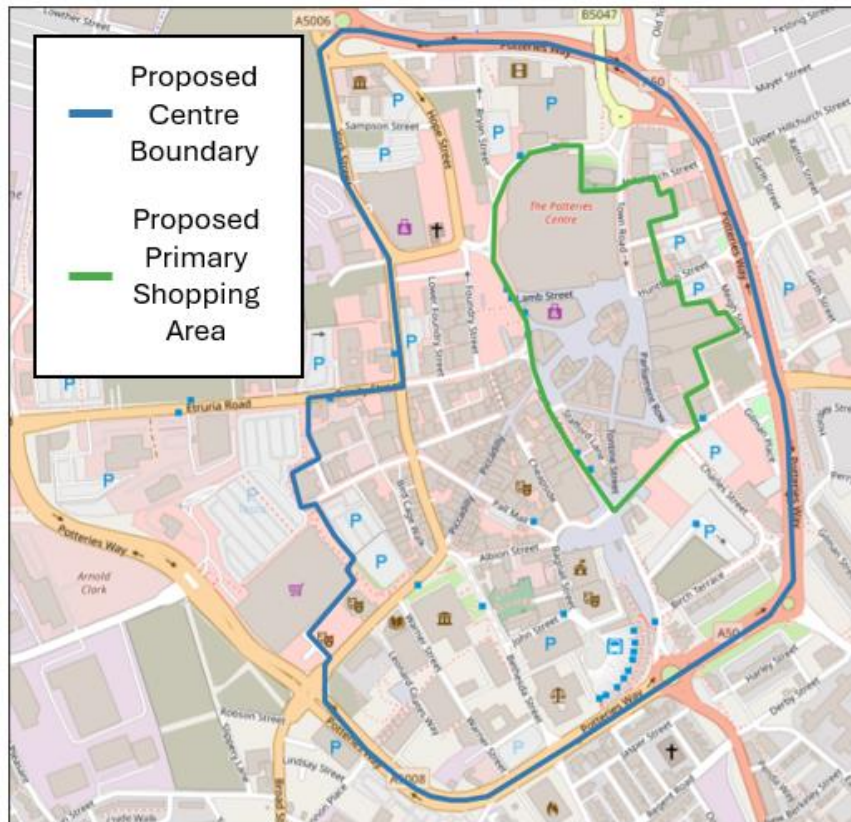


Figure 92: Extant Town Centre Boundary, Burslem

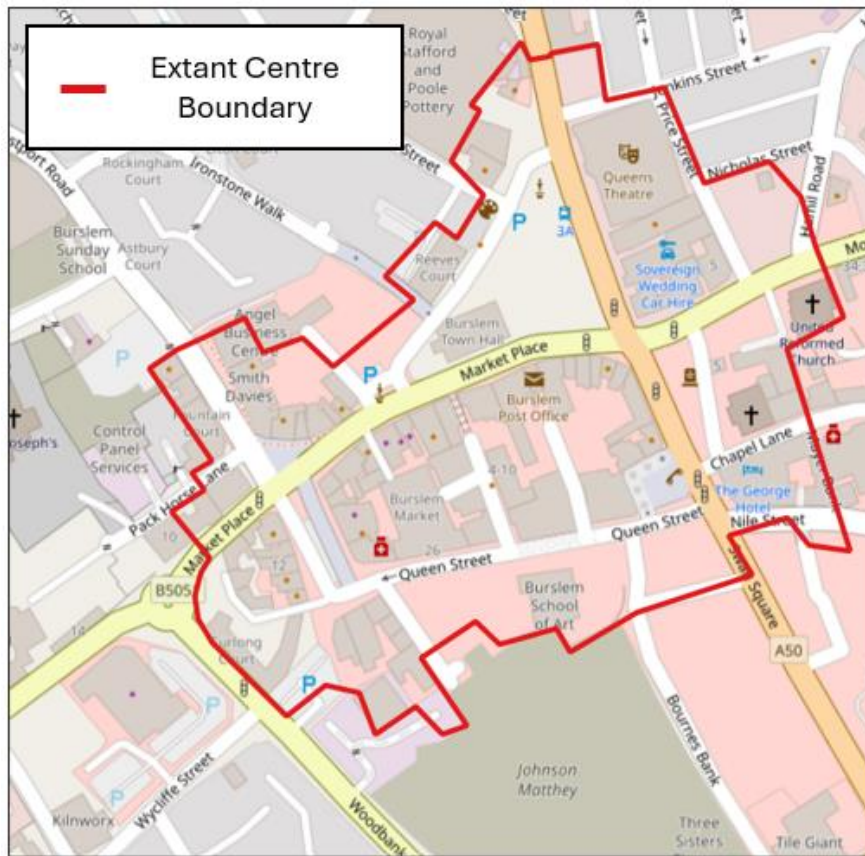


Figure 93: Proposed Town Centre Boundary, Burslem

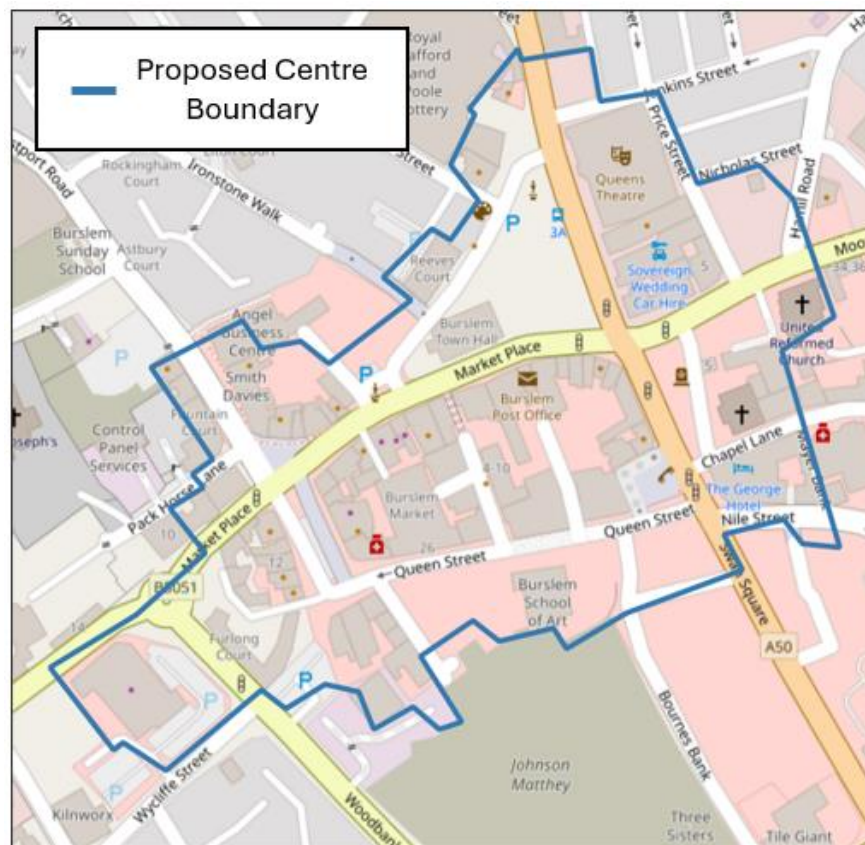


Figure 94: Extant Town Centre Boundary, Fenton

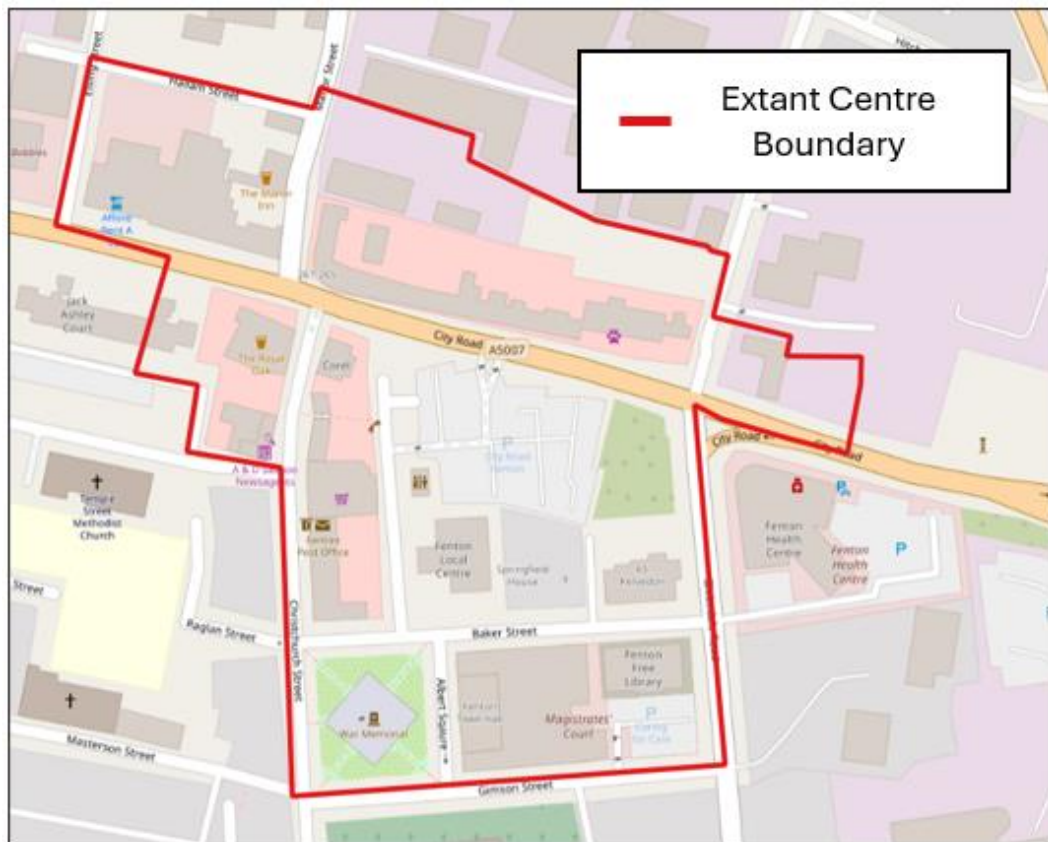


Figure 95: Proposed Town Centre Boundary, Fenton

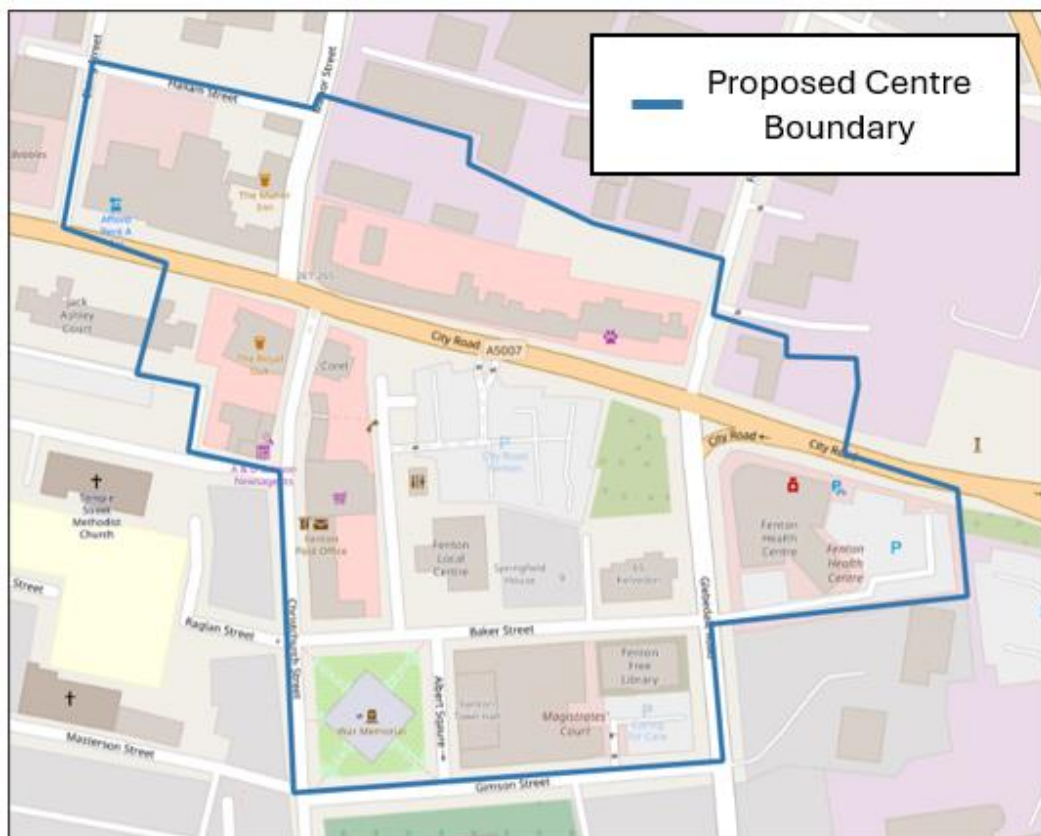


Figure 96: Extant Town Centre Boundary, Longton



Figure 97: Proposed Town Centre Boundary, Longton

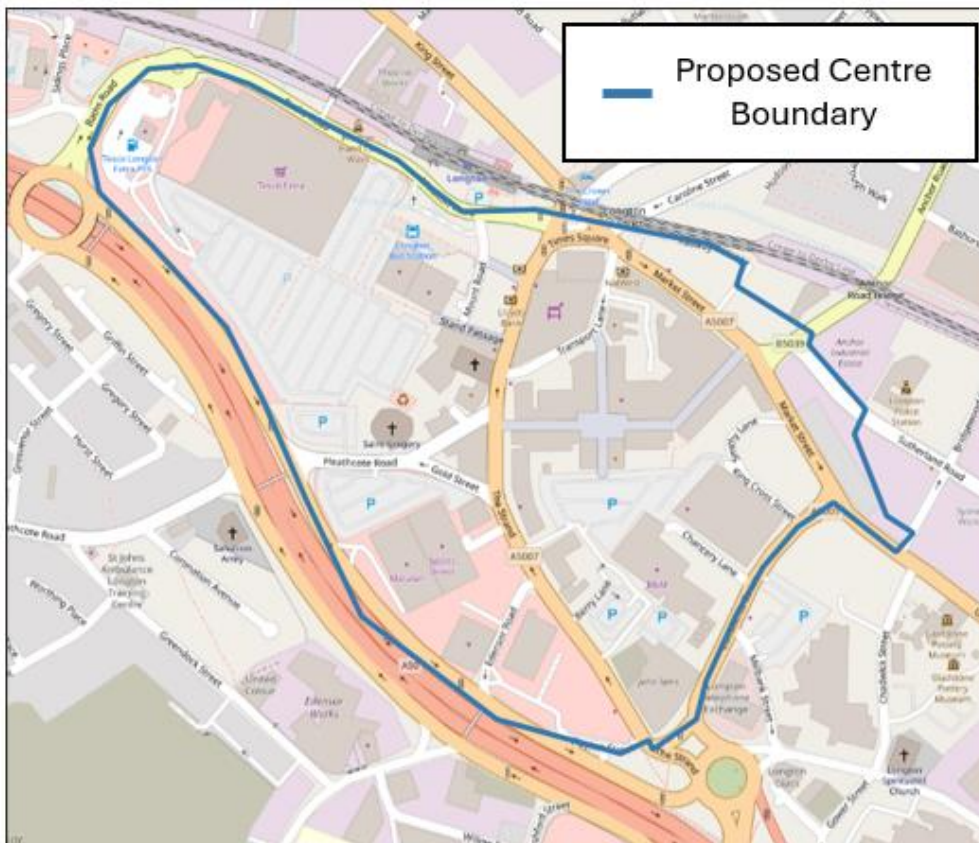


Figure 98: Extant Town Centre Boundary, Meir

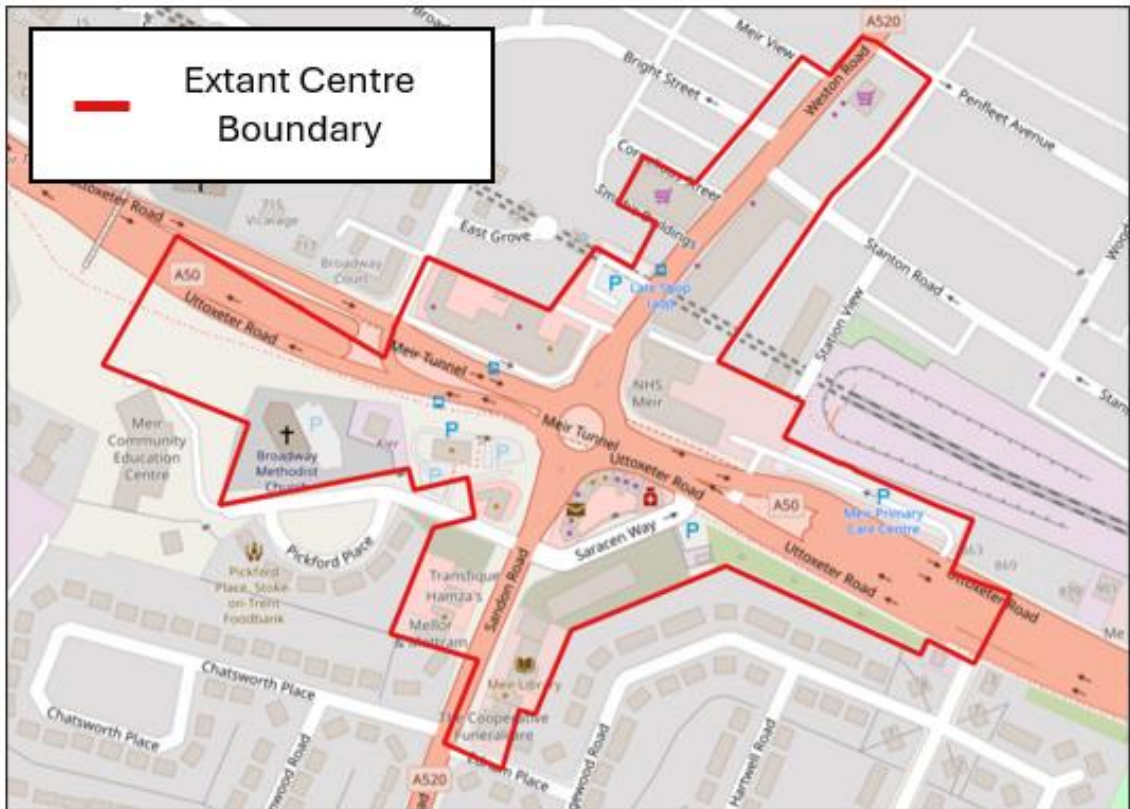


Figure 99: Proposed Town Centre Boundary, Meir

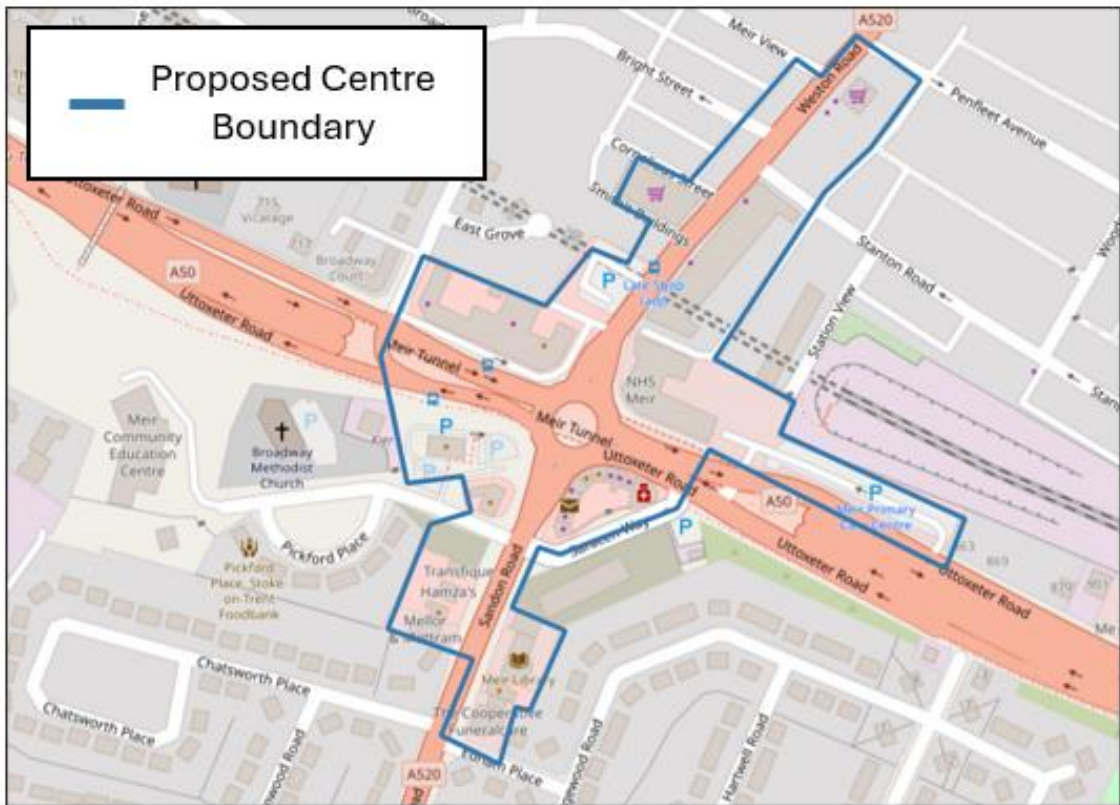


Figure 100: Extant Town Centre Boundary, Stoke

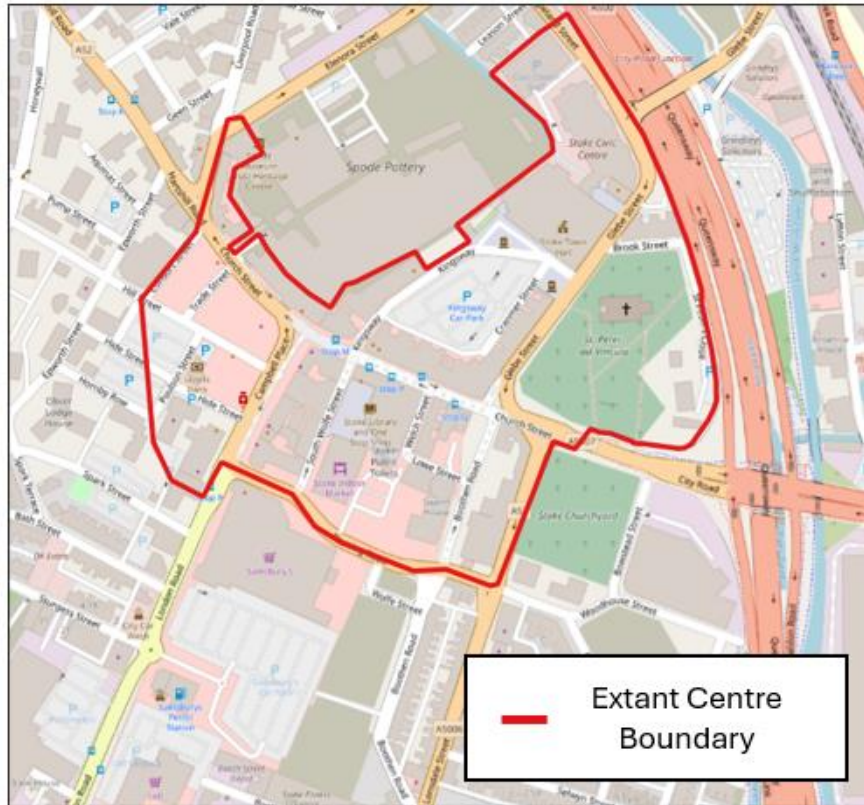


Figure 101: Proposed Town Centre Boundary, Stoke

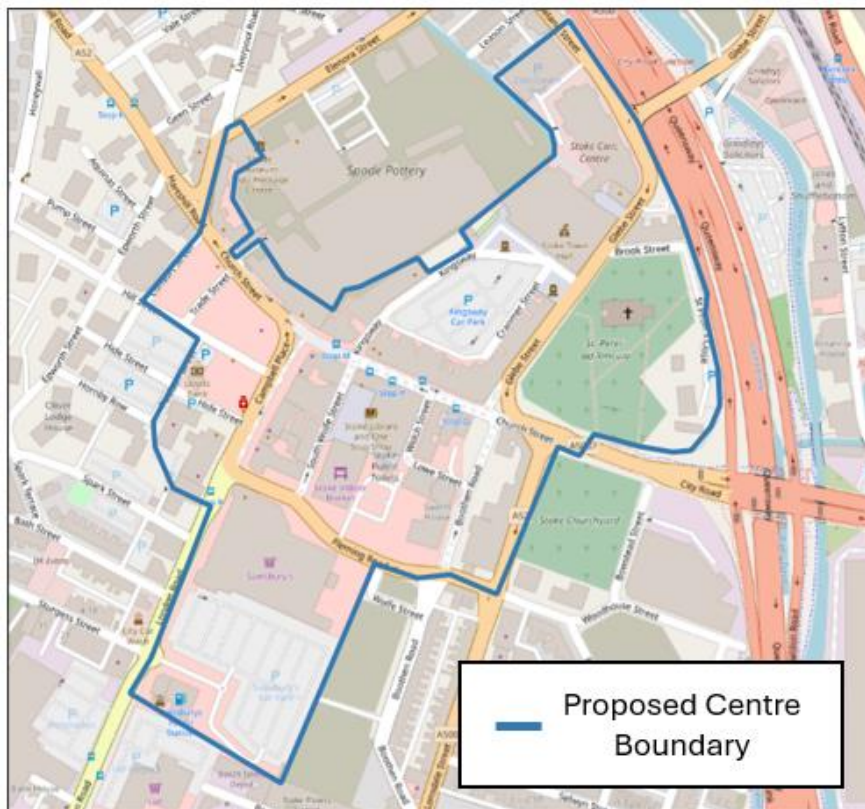


Figure 102: Extant Town Centre Boundary, Tunstall

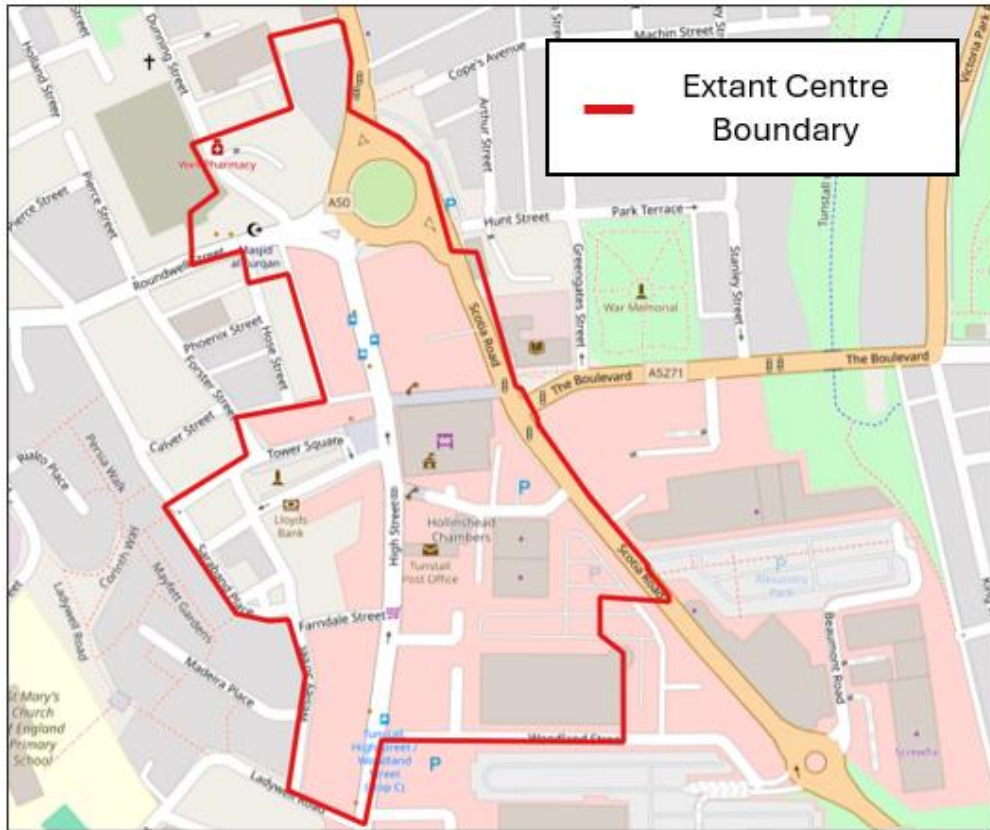


Figure 103: Proposed Town Centre Boundary, Tunstall

