

## Appendix 4 – Newcastle-under-Lyme Borough: Town Centre Vitality and Viability

This Appendix assesses the health of Newcastle-under-Lyme and Kidsgrove town centres. The vitality and viability assessments are undertaken in accordance with the Town Centre Health Check Indicators at Annex D of PPS4.

### Borough Overview

#### The Shopping Hierarchy

Newcastle-under-Lyme Town Centre is the principal shopping centre in Newcastle-under-Lyme Borough, followed by the town centre of Kidsgrove. The Borough also contains a network of 3 Rural Service Centres, 19 Local Urban Centres and 7 Villages that provide for more localised shopping needs.

The sub-region contains the dominant shopping centre of Stoke-on-Trent (Hanley), 4km to the northeast, and the centres of Crewe (16km to northwest), Stafford (23km to south) and Congleton (17km to north) and the other potteries towns of Stoke-upon-Trent, Tunstall, Burslem, Longton and Fenton. The Newcastle-under-Lyme sub-region is located in-between the major regional shopping centres of Manchester (50km to north) and Birmingham (60km to south), that serve a wide catchment area.

Table 1: Management Horizons Europe's UK Shopping Index 2008<sup>1</sup>

Centre	MHE Score	Location Grade	Rank 2008
Birmingham	660	Major City	3
Manchester	655	Major City	4
Wolverhampton	256	Major Regional	52
Stoke-on-Trent	235	Regional	73
Crewe	180	Sub-Regional	132
Stafford	179	Sub-Regional	139
<b>Newcastle-under-Lyme</b>	<b>116</b>	<b>Major District</b>	<b>258</b>
Congleton	78	District	434
Longton	90	Major District	361
Tunstall	67	District	511
<b>Kidsgrove</b>	<b>23</b>	<b>Local</b>	<b>1535</b>

Management Horizons Europe (MHE) publishes a UK Shopping Index (2008) which ranks retail centres based on a weighted score for multiple retailers represented in each centre. MHE's ranks for centres the sub-region are shown in Table 1.

This index ranks Newcastle-under-Lyme as the main centre in Newcastle-under-Lyme Borough and 258<sup>th</sup> of all centres in the UK. Kidsgrove is ranked as Newcastle-under-Lyme's second centre at 1535<sup>th</sup> in the UK.

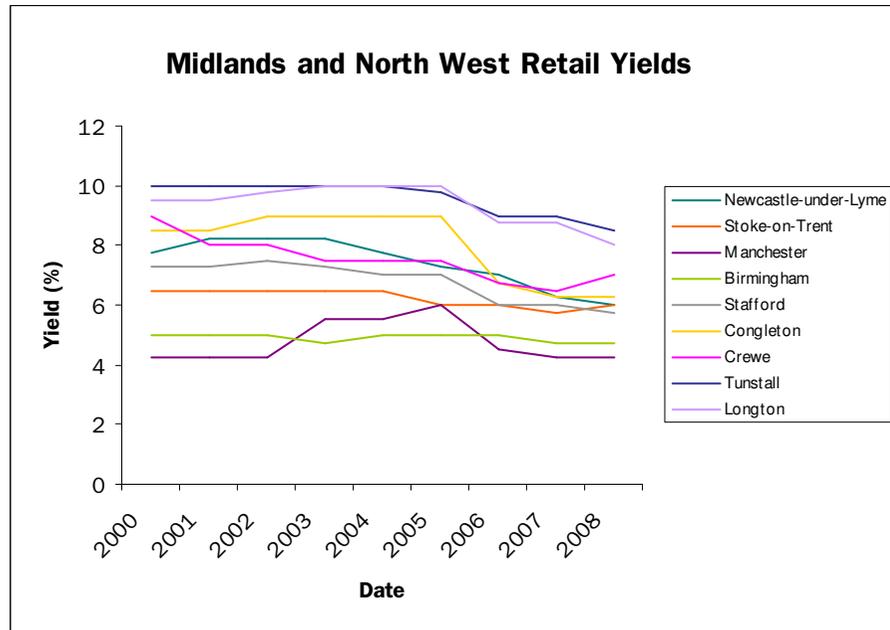
The MHE rankings reflect Newcastle-under-Lyme's geographical location, in-between the 'Major Cities' of Manchester and Birmingham and within 4km of Stoke-on-Trent (Hanley), which is the dominant centre for comparison retail shopping in the sub-region.

<sup>1</sup> Data obtained from Management Horizons Europe's UK Shopping Index 2008.

The relative performance of town centres can be demonstrated by reviewing commercial yields and Zone A rental levels achieved for retail property<sup>2</sup>.

Commercial yields broadly represent the market's evaluation of risk and return attached to the income stream of shop rents. Broadly speaking, low yields indicate that a centre is more likely to attract investment and rental growth than a centre with high yields.

Figure 1: Midlands and North West Retail Yields



Source: Valuation Office Agency 2000-2008

On the basis of yield data, Newcastle-under-Lyme town centre is identified as broadly comparable to Crewe, although its position has strengthened in comparison since 2007. Manchester and Birmingham are identified as more attractive to investors than Newcastle-under-Lyme. Stoke-on-Trent (Hanley) was notably more attractive in 2000 but by 2008 it had not improved at the same rate as other centres.

Zone A rental levels provide an insight into the demand for retail property. A higher rent represents a higher demand for retail property in the centre.

Figure 2: Midlands and North West Zone A Rents



Source: Colliers CRE Prime In-Town Retail Rents 2010

Newcastle-under-Lyme achieved similar rents to Crewe from 2000 to 2010, following a similar pattern to retail yields. Stoke-on-Trent (Hanley) has achieved higher rents than Newcastle-under-Lyme throughout the last decade, reflecting its position as the main retail destination in the sub-region. Retail premises were in greatest demand in Manchester and Birmingham, the main regional centres in the Midlands and North West, with Birmingham out-performing Manchester between 2005 and 2010.

<sup>2</sup> Data on retail yields obtained from VOA 2000-2008. Data on Zone A Rents obtained from Colliers CRE Prime In-Town Retail Rents 2010.

## Newcastle-under-Lyme Borough Town Centres: Views and Behaviour of Shoppers and Visitors

A summary of the views and behaviour of shoppers and visitors to Newcastle-under-Lyme and Kidsgrove, based upon the June 2011 In-Street Survey, is shown below:-

### 1. Purpose of Visits to Town Centres<sup>3</sup>

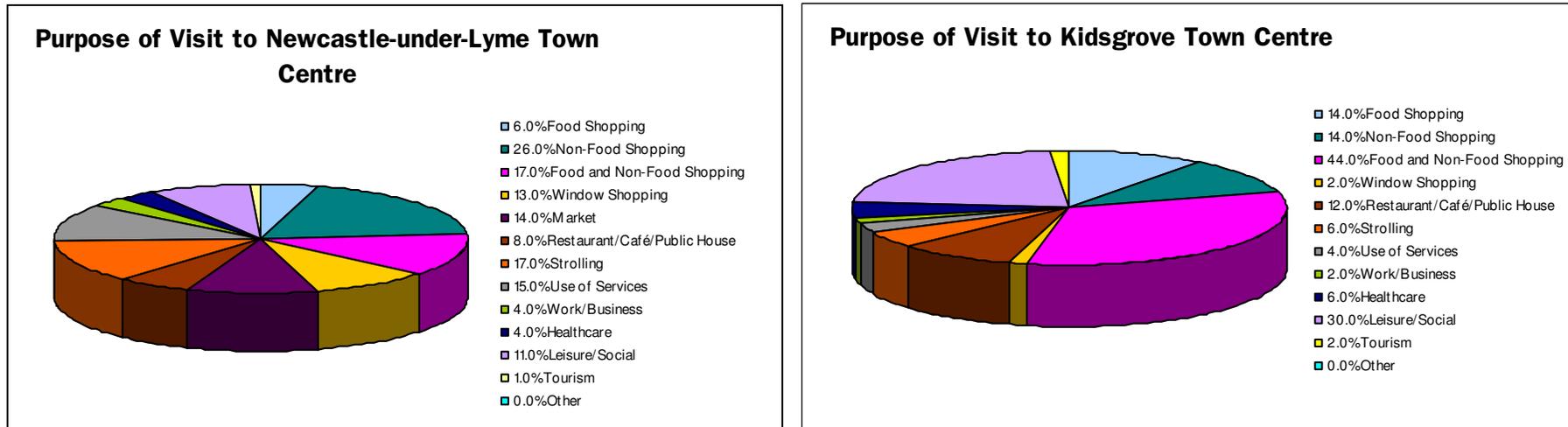


Figure 1 illustrates that in both centres the most commonly cited activity is shopping. A greater proportion of shoppers in Newcastle-under-Lyme were shopping specifically for non-food goods, whilst in Kidsgrove the highest proportion of people were shopping for both food and non-food goods. A significant proportion of respondents in Kidsgrove were there for leisure/social reasons, whereas this was less of a draw to Newcastle-under-Lyme.

The In-Street survey queried whether respondents not identifying shopping as a reason for being in the town centre intended to undertake any shopping that day. A significant proportion (43.1%) responded 'yes' in Newcastle-under-Lyme whilst the majority (92.9%) responded 'no' in Kidsgrove. Figure 1, illustrates that Kidsgrove particularly performs a wider role than simply as a retail destination.

<sup>3</sup> Interviewees were asked to give up to three responses. Multiple answers mean that percentages add up to greater than 100%.  
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## 2. Shopping Intentions<sup>4</sup>

The In-Street survey queried the goods that shoppers intended to buy. For both centres, the largest proportion of respondents cited that they intended to buy 'food and groceries; 46.5% in Newcastle-under-Lyme and 80.6% in Kidsgrove. As would be expected, the widest range of intentions was recorded in Newcastle-under-Lyme, with 32.4% intending to buy 'clothing and footwear', 12.7% 'other household goods', 14.1% 'gifts, jewellery, china and glass' and 15.5% 'health/beauty/chemist'. This compares to Kidsgrove where a majority of respondents intended to buy convenience goods: food and groceries (80.6%), newspapers and magazines (88.9%) or confectionary and tobacco (52.8%).

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<sup>4</sup> Interviewees were asked to give up to three responses. Multiple answers mean that percentages add up to greater than 100%.

### 3. Frequency of visit

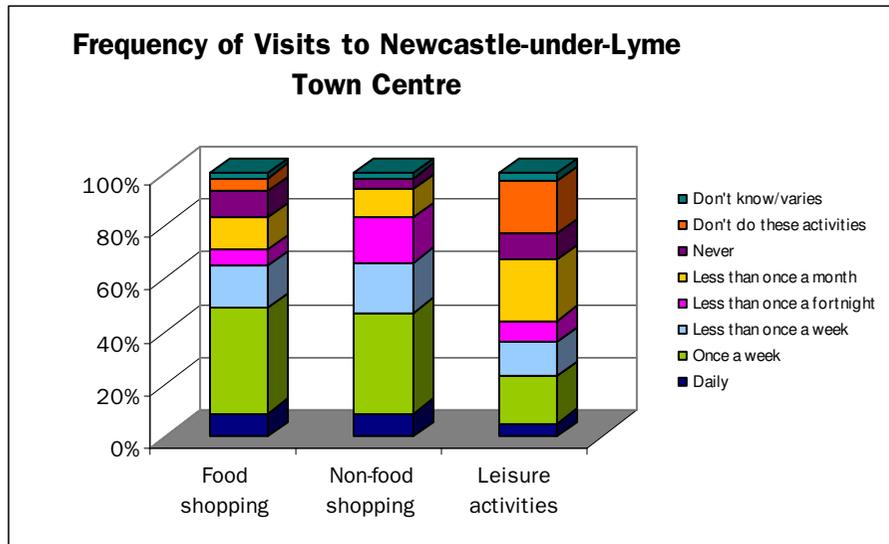
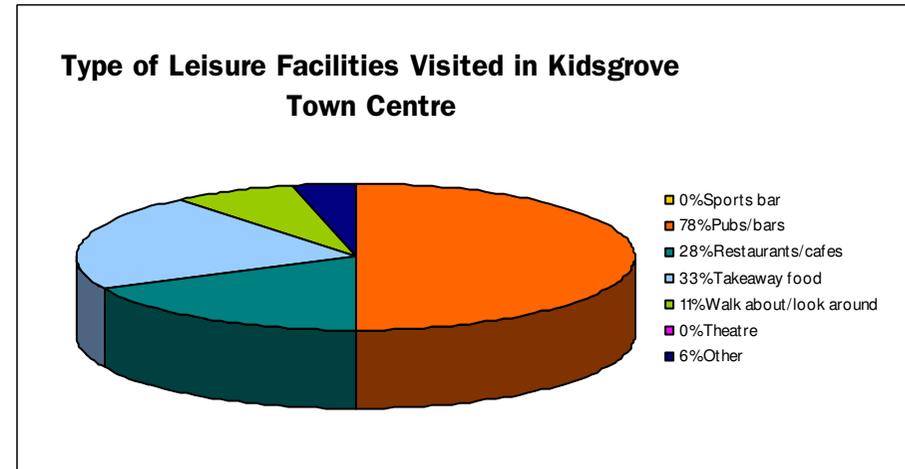
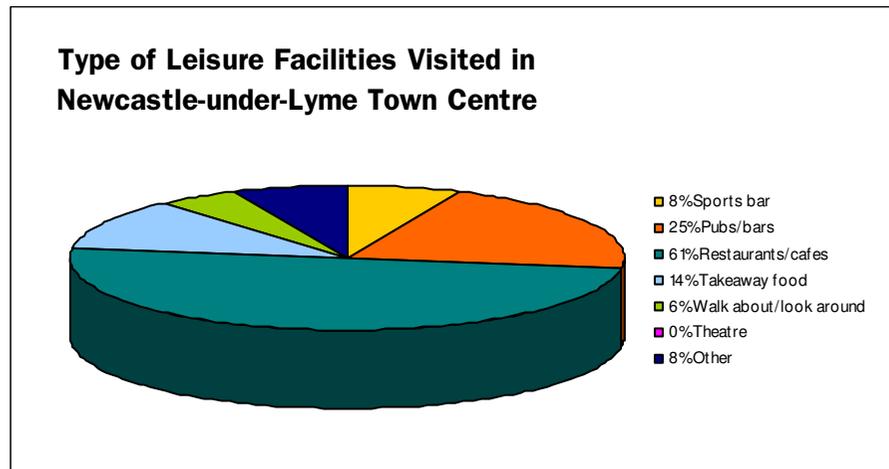


Figure 3 identifies that in Newcastle-under-Lyme the activity undertaken most regularly by respondents was 'food shopping', with 49% undertaking the activity once a week or more. 47% of respondents undertook 'non-food shopping' in the centre regularly (more than once a week). In Kidsgrove 'non-food shopping' was the activity undertaken most regularly by respondents and 48% of respondents undertook 'non-food shopping' more than once a week. This is marginally higher than the proportion that undertook 'food shopping' regularly in the centre (44%). This reflects the dual role of both town centres as comparison and convenience retail destinations. With regard to leisure, the highest proportion of those questioned in Newcastle-under-Lyme undertook leisure activities in the centre 'less than once a month', whereas in Kidsgrove the highest proportion 'never' undertook such activities in the centre (34%). 26% of respondents in Kidsgrove cited engaging in leisure activities 'once a week or more', suggesting that those who do use Kidsgrove for leisure activities, are likely to partake in them regularly.

#### 4. Type of Leisure Facilities Visited<sup>5</sup>



The In-Street survey identified that the majority of respondents were not intending on participating in leisure activities in the study centres on the day of the survey. The proportion involved in such activities on the day of the survey was 36% in both centres. Figure 4 demonstrates that the most popular leisure activity in Newcastle-under-Lyme on the day of the survey was 'restaurants/cafes' (61%) and in Kidsgrove it was 'pubs and bars' (78%).

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<sup>5</sup> Interviewees were asked to give up to three responses. Multiple answers mean that percentages add up to greater than 100%.

## 5. Amount Spent on Different Activities

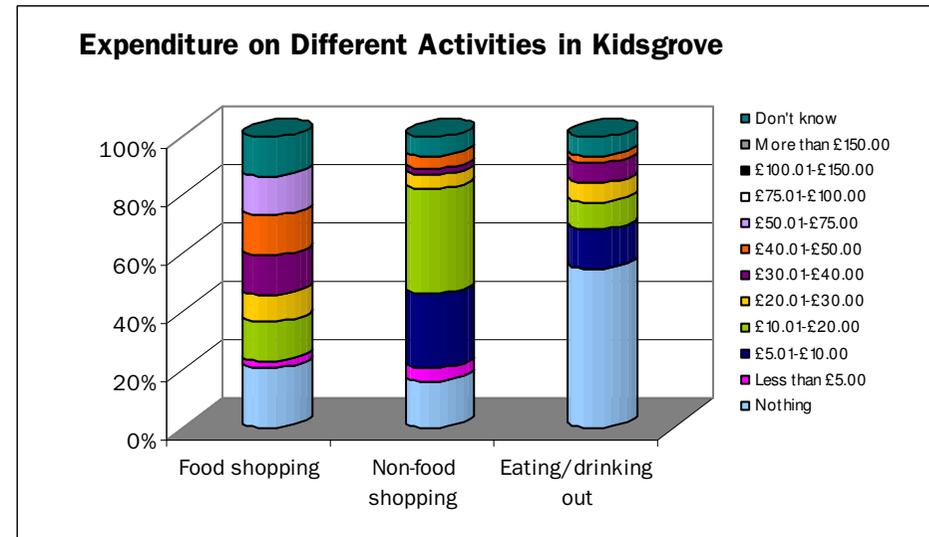
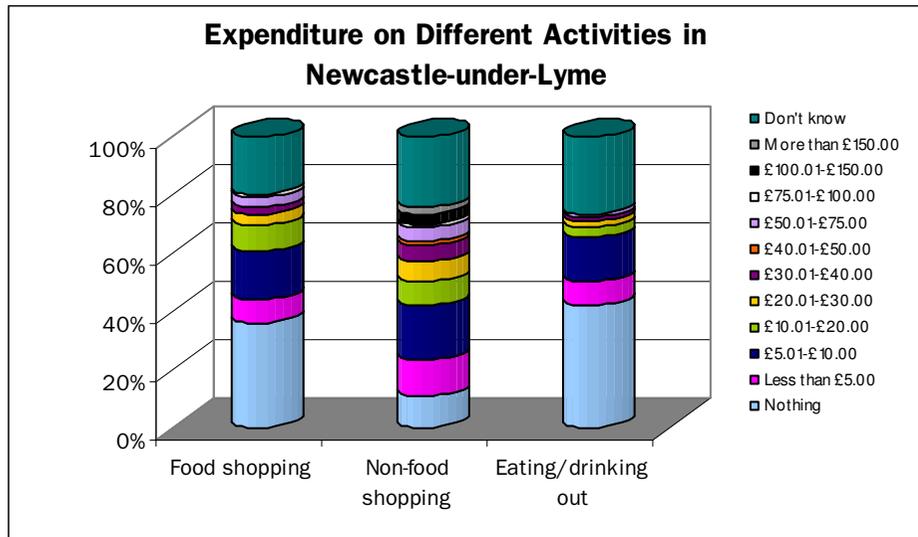
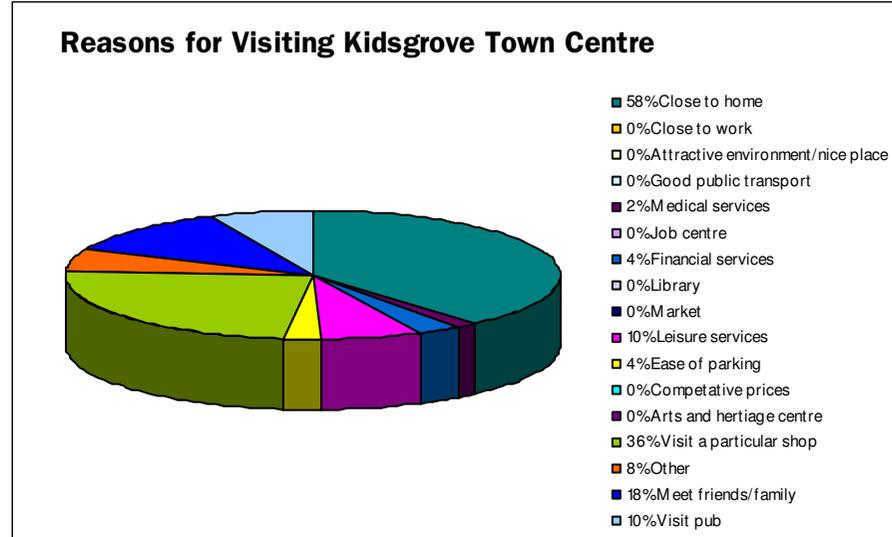
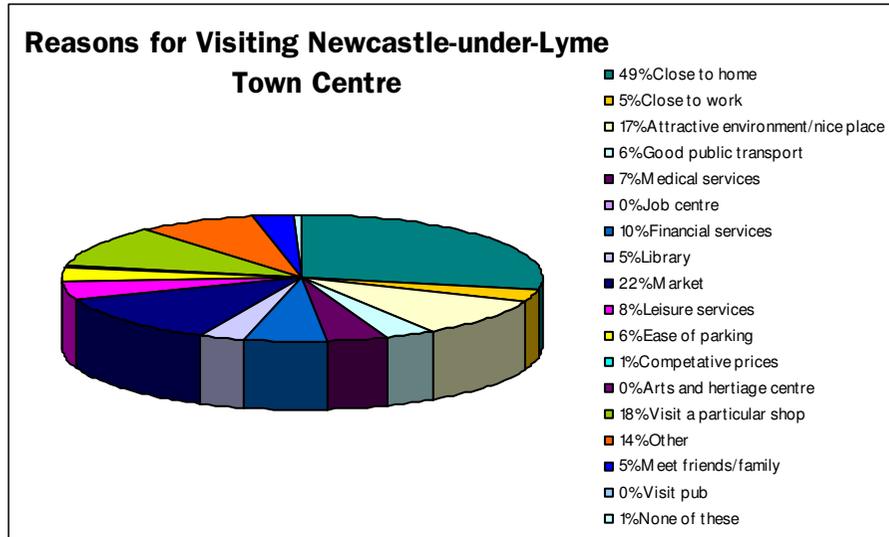


Figure 5 highlights that average comparison goods spend in Newcastle-under-Lyme is greater than the average for Kidsgrove, which reflects its role as the highest order centre in the Borough. Shoppers in Kidsgrove are more inclined to spend greater amounts on 'food shopping' than shoppers in Newcastle-under-Lyme. In Newcastle-under-Lyme a significant proportion of respondents intended to spend 'nothing' on 'food shopping' on the day of the survey. For both centres the highest proportion of respondents intended to spend '£5.01-£10.00' on 'eating and drinking out' on the day of the survey.

## 6. Reasons for Choosing to Visit the Town Centre<sup>6</sup>



The most commonly identified reason for visiting both of the town centres was 'close to home'. Respondents in Newcastle-under-Lyme had the widest range of reasons for choosing the town centre, which is to be expected, given the broader catchment area and the wider range of services provided in the centre.

<sup>6</sup> Interviewees were asked to give up to three responses. Multiple answers mean that percentages add up to greater than 100%.

## 7. Other Shopping Centres, Towns or Retail Parks Visited Regularly

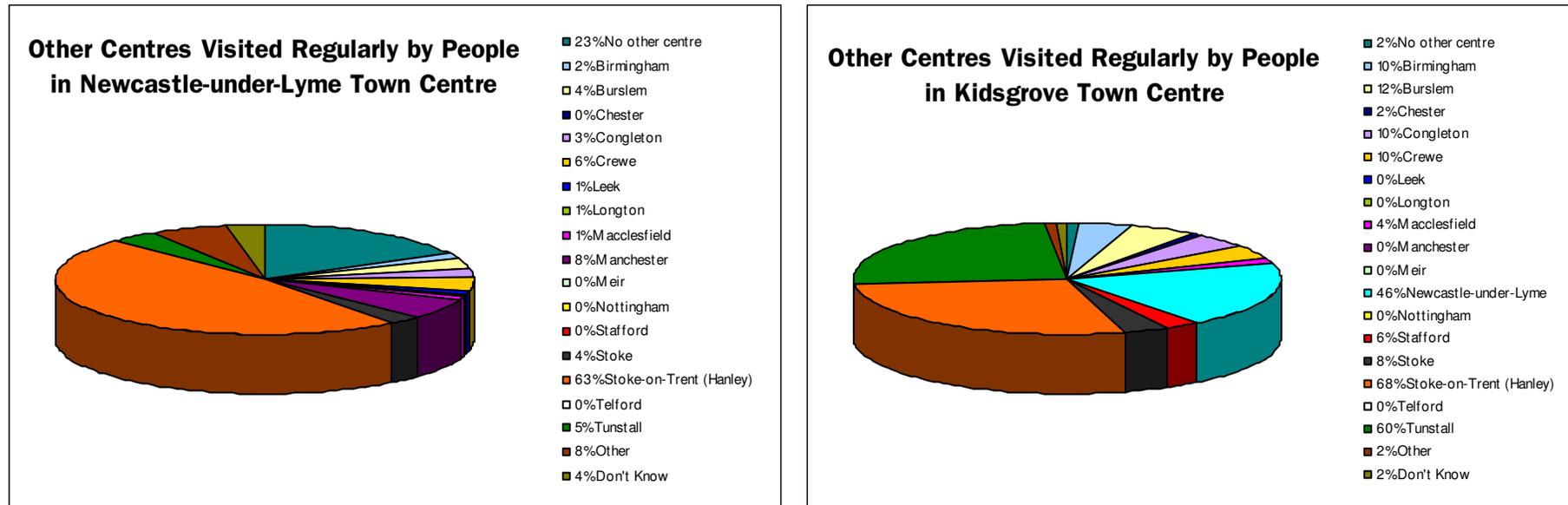


Figure 7 illustrates that Stoke-on-Trent (Hanley) is visited regularly by visitors to both of the Borough town centres. A significant proportion of those surveyed in Newcastle-under-Lyme do not visit any other centre regularly. It is common for Kidsgrove residents also to use Newcastle-under-Lyme (46%) and for visitors to both centres to use Stoke on Trent (Hanley), reflecting the proximity of the urban areas.

## 8. Length of Time Spent in Town Centres

The In-Street survey sought to find out how much time respondents intended to spend in the centre on that day. The greatest proportion of people in Newcastle-under-Lyme intended to spend '1-1 ½ hours' (26%) or 'over 1 ½ - 2 hours' (23%) in the centre. Less time was spent in the lower order centre of Kidsgrove with 26% of respondents intending to spend '31 minute-under 1 hour' and 32% intending to spend '1-1 ½' hours in the town centre, reflecting the more limited retail and leisure offer that the smaller centre provides.

## 9. Comparison of Town Centres in Newcastle-under-Lyme Borough with Other Centres

	Newcastle-under-Lyme	Kidsgrove	Average
<b>Accessibility by car</b>	4.36	3.03	3.70
<b>Availability of parking</b>	4.07	2.87	3.47
<b>Parking charges</b>	2.30	3.46	2.88
<b>Traffic congestion</b>	3.87	2.60	3.24
<b>Accessibility by public transport</b>	4.22	2.75	3.49
<b>Personal safety</b>	4.46	3.26	3.86
<b>Range of non-food shops</b>	3.22	2.71	2.97
<b>Range of food shops</b>	3.33	3.35	3.34
<b>Quality of food shops</b>	3.78	3.61	3.70
<b>Quality of non-food shops</b>	3.52	3.23	3.38
<b>Range of retail warehousing/retail parks</b>	2.59	1.42	2.01
<b>Daytime entertainment/leisure facilities</b>	3.61	1.95	2.78
<b>Evening entertainment and leisure facilities</b>	3.77	1.84	2.81
<b>Theatres</b>	3.53	1.05	2.29
<b>Cinemas</b>	4.11	1.05	2.58
<b>Town Centre Events</b>	3.55	1.37	2.46
<b>Liveliness / streetlife / character</b>	3.82	1.36	2.59
<b>Quality/number of places to eat-drink</b>	3.88	2.04	2.96
<b>General shopping environment</b>	3.91	2.78	3.35
<b>Attractiveness of built environment</b>	3.98	2.89	3.44
<b>Planting/landscaping</b>	4.14	2.83	3.49
<b>Layout of centre</b>	4.09	2.26	3.18
<b>Public toilets</b>	3.40	2.16	2.78
<b>The market</b>	3.58	1.50	2.54

<b>Main Key</b>	
Better than Average	
Average (within 0.2 either side)	
Worse than Average	

<b>Averages Key</b>	
Very Poor (0-1)	
Quite Poor (1-2)	
Neither Poor nor Good (2-3)	
Quite Good (3-4)	
Very Good (4-5)	

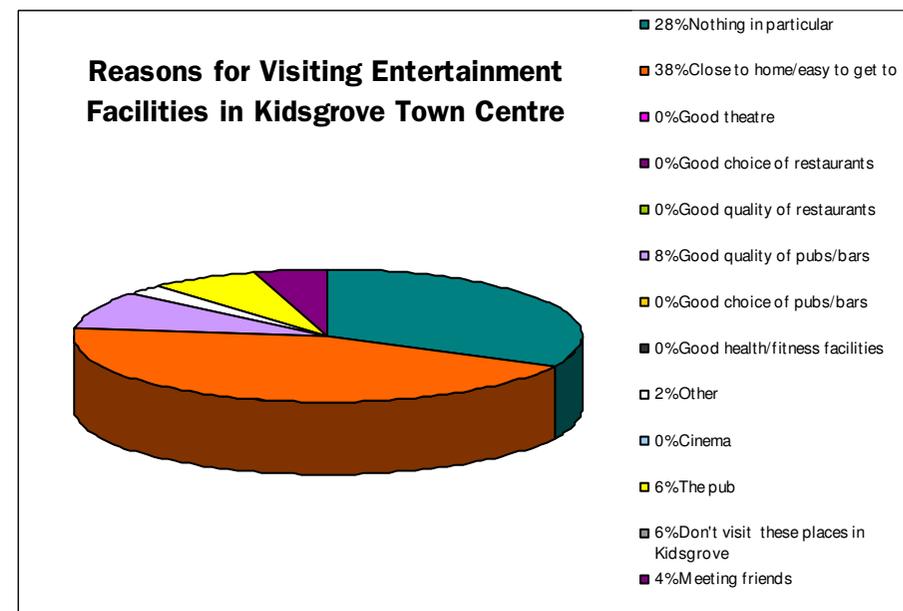
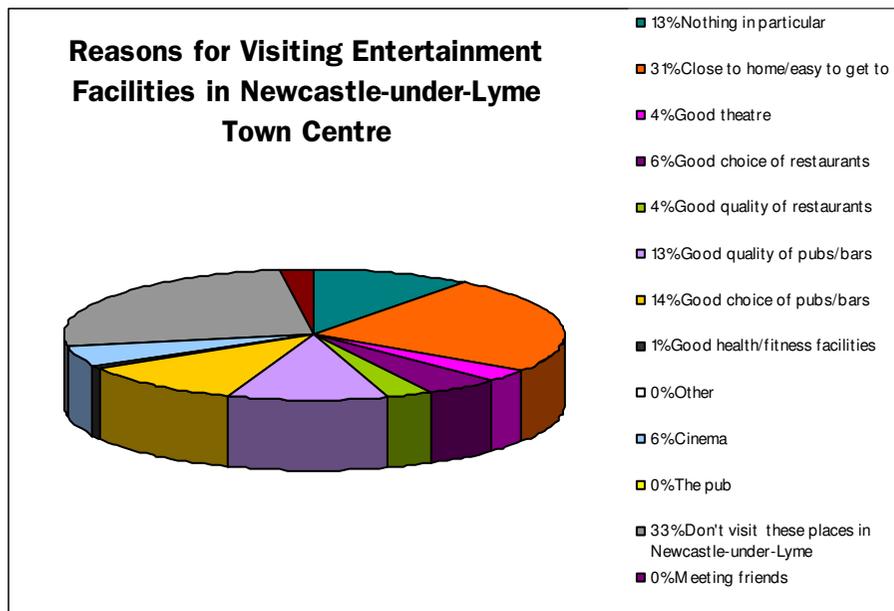
The In-Street Survey asked respondents to compare the Borough's town centres with other centres they visited regularly in respect of a number of factors. Figure 9 highlights that Newcastle-under-Lyme was considered favourably with regard to the majority of factors, where as Kidsgrove compared unfavourably for most factors. The exception is 'parking charges' which compared negatively in Newcastle-under-Lyme and were considered to be better than average in Kidsgrove. Both centres compared favourably with other centres, in terms of 'accessibility by car'.

## 10. Evening Entertainment

The In-Street Survey sought to find out peoples views on the evening entertainment in each centre. The majority of interviewees in Newcastle-under-Lyme (64%) did not visit the Town Centre in the evenings, whereas the majority of people interviewed in Kidsgrove did use the centre in the evenings (58%).

Of those who visit the town centres in the evening the most popular activity in each centre was visiting ‘pubs/bars’ (88.9% of respondents in Newcastle-under-Lyme and 93.1% in Kidsgrove). ‘Restaurants’ are also popular in Newcastle-under-Lyme (52.8%) and ‘takeaway food’ in Kidsgrove (72.4%)<sup>7</sup>.

For those respondents who visit entertainment in Newcastle-under-Lyme and Kidsgrove the proximity to interviewees’ homes was cited as the most important reason for choosing to visit the town centres. The quality and choice of ‘pubs and bars’ was also considered to a significant reason for respondents visiting Newcastle-under-Lyme (27%).



<sup>7</sup> Interviewees could give multiple responses, therefore percentages don't add up to 100%

Interviewees also provided criticisms of the entertainment facilities in the town centres. The highest proportion of respondents in Newcastle-under-Lyme consider that there is 'nothing in particular' wrong with the entertainment facilities (34%). The things that were most disliked were that entertainment facilities were considered to be unsafe or dangerous or with poor security (12%) and that there is a 'lack of parking' (11%). The majority of Kidsgrove interviewees cited that Kidsgrove town centre suffers from a 'poor choice of facilities' (58%) and some stating that it is 'unsafe/has poor security/is dangerous' (8%). The results reflect the higher order nature of Newcastle-under-Lyme as an entertainment destination, which is more likely to encourage a comparison to other larger centres in the sub-region.

## **11. Safety in the Town Centres**

A majority of respondents in both of the town centres stated that they feel safe walking around in the day. However, when asked if they felt safe walking around at night the highest proportion of respondents in both centres said 'don't know' (47% in Newcastle-under-Lyme and 40% in Kidsgrove), followed by 'no' (24% in Newcastle-under-Lyme and 32% in Kidsgrove). Furthermore the majority of respondents in Kidsgrove felt less safe in the centre than they did 12 months ago (62%). In Newcastle-under-Lyme more respondents felt less safe in the centre than 12 months ago (24% than felt safer (22%).