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North Tyneside Council

Retail and Leisure Study

Volume 2: Performance Analyses

Report | December 2011

RTP Job No: 25320-002

CONTENTS

1 DETAILED WRITE-UPS

Introduction

1.1 We have undertaken a 'performance analysis' (commonly referred to as a 'health check') of each of the four defined Town Centres[1] as well as the eight existing and proposed District Centres[2] in North Tyneside. Wherever possible, we have analysed each centre's performance using time-series data, which is more useful than simply presenting current data. The exercise serves two purposes: it informs the assessment of 'need' in the retail and commercial leisure sectors, as detailed in our main report; and it will provide the base position for future monitoring of the various centres' vitality and viability.

Overview of the Indicators Used for the Performance Analyses

1.2 In undertaking our performance analyses, we have covered most of the Town Centre Health Check Indicators listed in Annex D of PPS4, with some exceptions. For instance, detailed survey work would be required in order to identify the amount of retail, leisure and office floorspace in edge- and out-of-centre locations (i.e. Indicator A2 from Annex D of PPS4) across the whole of North Tyneside. Furthermore, our experience is that the findings are not particularly informative.

1.3 Table BD4 in the Council's latest Annual Monitoring Report shows that there was no completed floorspace within Use Classes A1 (shops), A2 (financial and professional services), B1a (offices other than those falling with Use Class A2) or D2 (assembly and leisure), either in town centre locations or elsewhere in the Borough. In the previous reporting year (2008/09), there was also no completed floorspace in town centre locations in any of these sectors, although 1,484 sq.m of A1 floorspace was completed at Northumberland Park District Centre and a 1,091 sq.m Lidl store was also completed in an out-of-centre location.

1.4 Similarly, no A1, A2 or B1a floorspace was completed in town centre locations during the 2007/08 reporting year, although 345 sq.m of D2 floorspace was completed in Whitley Bay Town Centre. There was also a relatively modest amount of retail floorspace that was completed in out-of-centre locations (543 sq.m). Some 20,224 sq.m of B1a floorspace was completed in various parts of the Borough in 2007/08, all of which was in out-of-centre locations.

1.5 Thus, no new retail or office floorspace was completed in town centre locations between 2007/08 and 2009/10, and only a small amount of leisure floorspace was completed over the same period. Whilst the amount of retail development generally has been limited in recent years, what development has taken place has been outside of the Borough's town centres, and all of the recent office development has taken place in out-of-centre locations.

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[1] Killingworth, North Shields, Wallsend and Whitley Bay.

[2] Battle Hill, Forest Hill, Longbenton, Monkseaton Northumberland Park, Preston Grange, Tynemouth and Whitley Lodge.

1.6 It will be important for the Council to continue to embrace the strong 'town centres first' message of PPS4 when considering the most appropriate locations for retail and leisure development. Whilst offices are also one of the defined town centre uses in PPS4 at the time of writing, the Government is proposing to remove offices from the sequential test and so, assuming this proposal is carried through into the final version of the National Planning Policy Framework then there will be no requirement for promoters of new office floorspace in out-of-centre locations to prove that no more central sites are available.

1.7 We have incorporated an additional indicator that is not listed in Annex D of PPS4, namely movement in the national retail rankings.

1.8 Below, we provide a brief overview of the various indicators that we covered in our performance analyses, together with details of the data sources that we used. The detailed performance analysis data are contained in other Appendices (as specified). Due to a lack of published data for some smaller centres, it has not been possible in every case to provide a detailed analysis based on all of the indicators. Where this applies, we have instead provided a succinct overview of performance and general health based on our on-foot surveys and using any data that are available.

Movement in the National Retail Rankings

1.9 We have charted the movement in the UK retail rankings experienced by the North Tyneside study centres, as shown in Table 2.1 of Section 2, using time-series data from Management Horizons Europe's (MHE) *UK Shopping Index* (for the years 2000/01, 2003/04, and 2008). In an email to RTP on 15 August 2011, MHE advised that it will not be publishing an update of its Shopping Index until 2012 and so, at the time of writing, MHE's 2008 Index is the latest available.

1.10 The 2008 version of the MHE Index is based on a weighted count of retailer presence by location, which considers anchor stores, speciality stores, service operators, supermarkets, out-of-town formats and factory outlets. Anchor stores, such as John Lewis, Marks & Spencer and Debenhams, are given a higher score than other multiple operators in order to reflect their major influence on non-food shopping patterns. Thus, for example, the presence of a Debenhams store would provide a centre with 10 points, a Primark store is worth 7 points, and a Next store is worth 3 points.

1.11 The 2008 MHE Index also for the first time scores restaurants, coffee shops and high street food and drink outlets (for example, McDonalds, Starbucks and Greggs). As a result of this change to the scoring, caution must be exercised when comparing a centre's absolute score in MHE's 2008 Index with those in previous Indexes. However, the relative rankings can generally still be usefully compared.

1.12 Whereas MHE's 2003/04 Index ranked the UK's top 1,672 retail centres, some 6,720 centres across the UK were covered in the 2008 Index. Care therefore needs to be taken when considering slippage in the retail rankings of low-ranked centres between 2003/04 and 2008, which might in part be due to the greater number of centres included in the later Index, rather than a particular deterioration of the centre's retail offer.

1.13 It is also worth emphasising that the MHE Index is based on the presence of national multiple outlets, with no credit given for the presence of independent operators. Thus, analysis of a centre's movement in the national retail rankings can be a rather blunt tool, and so other indicators – which consider the presence and quality of independent operators – are also of utility in the case of centres which contain few multiple outlets.

Diversity of Main Town Centre Uses (by Number, Type and Amount of Floorspace)

1.14 PPS4 advises that LPAs should monitor the amount of space in use for different functions, such as offices, shopping, leisure, cultural and entertainment activities, pubs, cafés and restaurants, and hotels.

1.15 The standard source of data on the diversity of retail uses is Experian's Goad Centre Reports, although in North Tyneside these are only available for North Shields, Wallsend and Whitley Bay. For the remaining study centres, we therefore undertook our own on-foot land use audits in June 2011 to identify the diversity of uses. The data in relation to diversity of retail uses for the study centres are provided as Tables 5.1 to 5.3 of Section 5.

1.16 The Goad tables only cover retail uses and so our thoughts regarding the diversity of non-retail uses in the various study centres are based on our observations from our visits to the study centres.

Retailer Representation and Intentions to Change Representation

1.17 Whilst analysis of the diversity of uses tables is important, by itself the exercise is of limited utility because it focuses on numeric representation only. It is therefore necessary to also consider the quality and type of retailers that are present in each centre in order to build up a picture of the strength of the centre's diversity of uses.

1.18 In some cases, a centre might achieve above-average representation in numeric terms but there might still be qualitative deficiencies. For instance, the general quality of the offer might be skewed towards the lower end of the retail market or there might be specific gaps in key sub-sectors. Conversely, some centres might have below-average representation in numeric terms but the overall offer can still be strong. It is also important to take account of the presence of independent traders in a centre, which is not possible through analysis of the diversity of uses tables or the retail rankings.

1.19 For the larger centres, it is possible to refer to the 'Fashion Market Position' as recorded in MHE's Shopping Index, which places each 'fashion' retailer in a centre into one of six categories ('luxury', 'upper', 'upper middle', 'middle', 'lower middle' and 'value') and then uses this to categorise the centre's overall fashion retail offer.

1.20 As well as assessing the quality of the existing retail offer in each study centre, we have also sought to establish the possible level of interest in the various centres. It should be noted at the outset, though, that the level of demand for any centre is always influenced by whether any new development schemes are proposed. Therefore, if a major new development scheme was to emerge, the number of requirements would be expected to show a noticeable increase at that time.

1.21 We have sourced information on published operator interest from the commercial organisation, FOCUS, which collects data on documented retailer and leisure requirements (for national multiple operators), and publishes the data twice-yearly. FOCUS also produces Town Reports for main centres, which include time-series data on the number of retail requirements, and we refer to this information wherever appropriate.

The Retail Property Offer

1.22 We have also undertaken an assessment of the retail property offer available in the study centres. This has included consideration of the quality of retail property and its suitability for meeting the requirements of modern retail operators.

The Potential Capacity for Growth or Change of Centres

1.23 We have undertaken on-foot surveys of each study centre to identify physical opportunities for town centre uses. This exercise was supplemented by speaking to a variety of key stakeholders in the centres where there is likely to be the greatest potential for change. In undertaking this exercise we have also been mindful of prevailing market conditions and potential market interest in these sites.

Shopping Rents and Yields

1.24 Of Tyneside's defined centres, published time-series data on the movement in Zone A retail rents are only available for North Shields, Wallsend and Whitley Bay Town Centres, and only up to 2009. We have therefore spoken to local stakeholders and property market agents who have provided anecdotal evidence of on local rental levels.

1.25 Furthermore, data on movement in retail yields[3] are now only available in the Valuation Office Agency's (VOA) Property Market Report for the larger centres, and the last published data for North Shields, Wallsend and Whitley Bay Town Centres are for the year 2008. We have therefore discussed recent trends with locally active agents.

1.26 Information on rents and yields is generally not available for the smaller centres.

Proportion of Vacant Street Level Property

1.27 The standard source of vacancy data for larger centres is Experian's Goad Centre Reports, although in North Tyneside these are only available for North Shields, Wallsend and Whitley Bay. For the remaining study centres, we therefore undertook our own land use audit in June 2011, when we also took the opportunity to update the Experian surveys for the larger centres.

Pedestrian Flows (Footfall)

1.28 The Council has utilised the services of Pedestrian Market Research Services Limited (PMRS) in recent years to undertake town centre footfall surveys in the Borough's main centres. PMRS monitors weekly footfall trends as well as trends for Fridays and Saturdays. We report on the trends from the PMRS surveys for the larger centres, whereas for the smaller centres our comments are based on the general levels of 'busyness' that we observed when we visited the centres.

[3] Yield is a measure of the confidence of investors in the long term profitability of the town centre for retail and other commercial developments; the lower the yield the greater the level of investment confidence.

Accessibility

1.29 If we identified any particular accessibility issues when we undertook our on-foot surveys of the centres, then appropriate commentary is provided in the relevant performance analysis.

Customer and Residents Views and Behaviour

1.30 Whilst attitudinal surveys were not commissioned as part of the study we have drawn on the findings of the Residents Survey, undertaken on behalf of the Council by Alchemy Research Associates in September 2009. The telephone survey of households also asked respondents to name the best and worst features of the town centre they visit most frequently. Furthermore, the household survey recorded residents' shopping and leisure habits, which also included various attitudinal questions as explained in our main report.

State of Town Centre Environmental Quality

1.31 Under this indicator we provide our assessment of the physical appearance of the centres, based on our visits to in June 2011.

Performance Analysis of North Shields Town Centre

Context

1.32 North Shields Town Centre is located some eight miles to the east of Newcastle on the north bank of the River Tyne. The centre encompasses the Beacon Shopping Centre which contains some national comparison retailers including New Look, Boots, Wilkinsons and B&M Bargains. The main convenience retailers within the town centre are Co-operative Food, Iceland and Asda (formerly Netto), and the centre also includes a number of other uses such as the library, Post Office, service uses and several business.

Movement in National Retail Rankings

1.33 North Shields Town Centre experienced considerable slippage in MHE's Shopping Index between 2001 and 2008, falling from 398th position in 2001 to 491st position by 2004, and by a further 90 places to 581st position in 2008. It is important to note that the slippage of North Shields in the rankings is not unique, with only one of the centres that feature in Table 2.1 of Section 2 (South Shields) actually improving its position since 2004, but North Shields' 183-place slippage in the rankings between 2001 and 2008 is nevertheless a cause for concern.

1.34 The slippage of North Shields in the national retail rankings reflects the continued low representation from national multiple operators and the lack of any significant retail development in the town centre in recent years.

Diversity of Uses

1.35 Experian's latest Goad survey of North Shields Town Centre was undertaken in August 2010, which we updated to a June 2011 base date following our own on-foot survey of the centre. The Goad boundary for North Shields Town Centre is presented in Figure 3.1 of Section 3, and it excludes areas which are primarily residential in character.

1.36 North Shields Town Centre contained 26 convenience retail outlets in June 2011 (Table 5.1 of Section 5), equating to 10.6 per cent of the total units in the centre, slightly above the UK average of 9.5 per cent. Table 5.1 also shows that the 26 convenience outlets together provide a total of 7,480 sq.m of gross floorspace, which represents 16.9 per cent of all retail/service floorspace in the town centre, close to the UK average of 17.5 per cent.

1.37 We thus consider that North Shields Town Centre has a reasonably sized convenience sector for its size and provides a range of food and grocery outlets, including an Asda supermarket (which re-opened in the former Netto outlet on 7 September 2011), a Co-operative Food outlet and an Iceland in addition to five bakeries, four butchers, four grocers, two health food shops, a frozen food retailer, and a fishmongers.

1.38 Table 5.1 in Section 5 shows that North Shields Town Centre contains 99 comparison goods outlets, equating to 40.4 per cent of total units, which is slightly below the UK average of 42.0 per cent. Table 5.2 in Section 5 also shows that the 99 comparison retail outlets together provide a total of 22,340 sq.m of gross floorspace, which represents 50.5 per cent of all retail floorspace available in the town centre, above the UK average of 47.5 per cent.

1.39 However, the range of comparison goods stores in North Shields is not extensive and the town centre is under-represented in the following sub-categories: *'footwear and repairs'; 'men's and boy's wear'; 'women's, girl's, children's clothing'; mixed and general clothing'; 'booksellers, arts/crafts, stationers/copy bureaux'; 'DIY, hardware and household goods'; 'gifts, china, glass and leather goods'; 'chemists, toiletries and opticians'; 'variety, department and catalogues showrooms';* and *'jewellers, clocks & repair'.* Furthermore, the comparison retail sector in North Shields is focused on the discount/value end of the retail spectrum, with the largest sub-category of comparison retail within the town centre being *'charity shops, pet and other comparison'*, which accounts for 17 outlets (6.9 per cent against a UK average of 3.7 per cent). Of these 17 outlets, eleven are charity shops, three are second hand goods outlets, two are pet shops, and one is an adult shop.

1.40 The comparison retail offer in North Shields is, therefore, narrow and insufficient to meet a number of local needs, particularly for clothing and footwear, pharmaceutical goods and specialist items. The performance of the clothing and footwear sub-categories is especially important in determining a town centre's attractiveness to shoppers and we note that this is a key deficiency in North Shields' retail offer, which reduces the attractiveness of the town centre as a comparison shopping destination. Centres which benefit from a good mix of clothing and footwear retailers are likely to attract more shoppers than centres that have a weaker fashion retail offer. North Shields has below-average representation (in terms of both the proportion of units and floorspace) in all four of the footwear and clothing sub-categories (*'footwear and repair', 'men's and boy's wear'*, *'women's, girls, children's clothing'* and '*mixed and general clothing*').

1.41 The proportion of service outlets in North Shields is slightly is below the UK average, with such uses accounting for 32.2 per cent of town centre units, compared to the UK average of 34.7 per cent (and accounting for 20.9 per cent of town centre floorspace, compared to a UK average of 22.9 per cent).

1.42 North Shields benefits from several banks and building societies (including Barclays, Halifax, NatWest, HSBC, Yorkshire Building Society and Santander), a good range of hairdressers and beauty salons, as well as national travel and estate agents. However, North Shields is under-represented in the following sub-categories: *'restaurants, cafés, coffee bars, fast food and take-aways'; 'laundries and drycleaners'; 'banks and financial services';* and *'estate agents and auctioneers'.* Whilst the under-representation of food and drink outlets in North Shields may be partly explained by the recent development of restaurants at the Fish Quay, the quality of the food and drink outlets located in the town centre is generally low and as such reduces the attractiveness of the centre to shoppers.

1.43 North Shields Town Centre contains some other non-retail/service uses such as the central library, the Exchange Theatre, Beach Bingo, a range of office units and several pubs.

Presence of National Multiples and High Profile Retailers

1.44 The convenience goods offer in North Shields Town Centre includes six national multiple operators, namely Co-operative Food, Asda (which recently converted from a Netto), Heron Frozen Foods, Iceland, Holland and Barrett and Greggs (two outlets). Whilst there is a slightly wider range of comparison retail multiples in the town centre, representation is still limited, with operators including Wilkinsons, Shoe Zone, JD Sports, Bonmarché, New Look, Dorothy Perkins, Peacocks, M & Co, Birthdays, Card Factory, Boots, Lloyds Pharmacy, Superdrug, Brighthouse, B&M Bargains and Home Bargains.

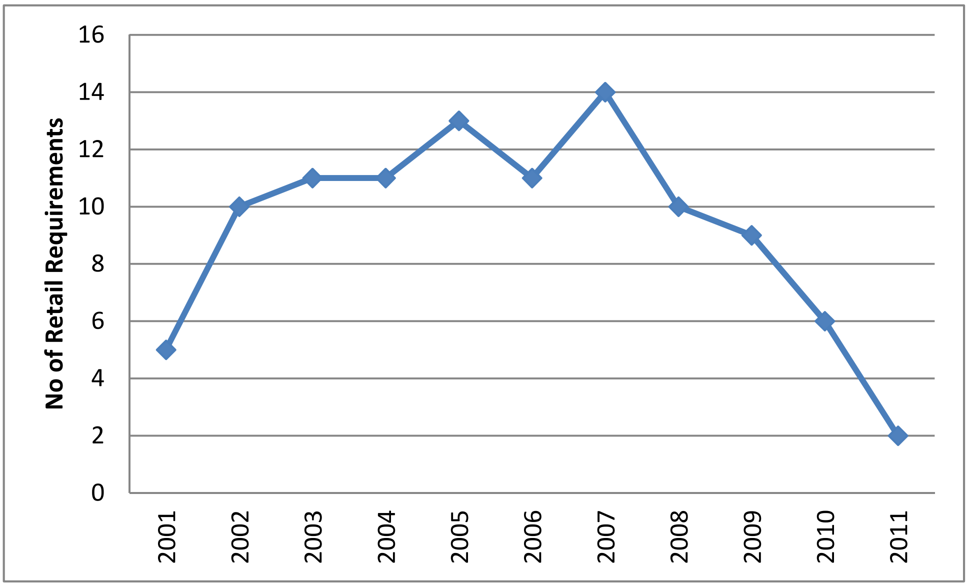
1.45 The majority of the comparison retail outlets in North Shields, including the fashion stores, are focused at the lower end of the retail market. There is limited representation from specialist comparison shops, whilst there is above average representation from charity shops. Indeed, North Shields attains a 'lower' fashion market rating in MHE's 2008 Shopping Index and MHE's 'Fashion Count' indicates that only five per cent of the town centre's 'fashion' retailers can be described as 'middle' order, with the remainder classified as 'lower-middle' (58 per cent) or 'value' (37 per cent).

1.46 The town centre contains a better range of service sector multiples, with several banks occupying premises in North Shields, together with three national travel agencies and an estate agency. However, apart from the McDonalds outlet in the Beacon Shopping Centre, there is no representation from national fast food, restaurant, café or pub/bar chains.

Operator Demand

1.47 Figure 1.1 below shows the change in the number of retailer operators with requirements in North Shields over the last ten years. The number of requirements has declined considerably since a peak of 14 in 2007, to just two in 2011. However, it is worth emphasising that whilst the number of requirements is at a very low level this is in line with general trends experienced in town centres nationally as a consequence of the recession and subsequent economic downturn.

Figure 1.1 Change in the Number of Published Retailer Requirements for North Shields 2001-2011



Source: Focus (2011)

The Retail Property Offer

1.48 The town centre is focused on the Beacon Shopping Centre and the purpose built retail units along Bedford Street. The shopping centre is now considerably dated and in need of significant refurbishment works. Whilst the owner of the Beacon Centre, Barongates Estates Ltd, has previously indicated an aspiration to reconfigure the units within the centre there is no indication as to the possible timescale for bringing forward such a scheme. The remainder of the retail properties in North Shields (with the exception of Asda) are largely converted buildings, rather than purpose-built retail units, and much of the retail property in the town centre appears to be in generally poor condition.

1.49 The 99 comparison retail units in North Shields Town Centre have an average size of 226 sq.m gross, which translates to an 'average' net sales area of approximately 158 sq.m. If the largest unit in the town centre, currently occupied by Wilkinson, is discounted then this average size falls to some 180 sq.m gross. Units of this size are below the floorspace requirements of most comparison goods multiple operators, although they may be attractive to independent traders. Accordingly, there remains a qualitative need for new, higher quality, larger floorplate units in North Shields, if the key deficiency in the town's comparison retail sector, namely the provision of mainstream clothing stores and higher quality outlets, is to be addressed.

The Potential Capacity for Growth or Change of Centres

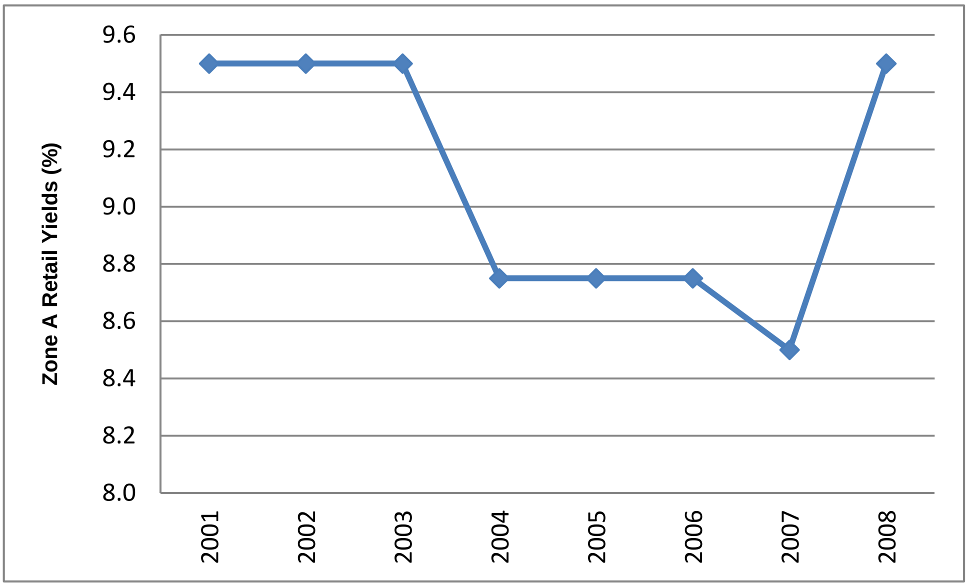
1.50 The Beacon Centre offers the most significant opportunity for change within North Shields Town Centre, however as we note above in the current market there is considerable uncertainty surrounding a potential scheme to redevelop this site. There are other potential development sites located in secondary locations. These sites may be more suited to non-retail development such as residential. There is potential for a mixed use development creating an enhanced gateway addressing the poor relationship between station and street.

The Bingo Hall site will be included as part of any comprehensive redevelopment proposal. The HSBC building and adjacent vacant site could comprise a redevelopment scheme to maximises its town centre location and provide a new mixed use office and residential scheme. Northumberland Square is the key green space within the town centre and would benefit from improved design integration, enhancing pedestrian connections and a improvement in public realm quality. The attractiveness and purpose of the square would be enhanced by active ground floor uses to the west and south. This could be complemented by residential development in the surrounding area.

Retail Yields

1.51 Published data from the Valuation Office Agency (VOA) on yields are no longer available for North Shields Town Centre. We have therefore recorded the trends for retail yields based on the last published data in July 2008 in Figure 1.2 below.

Figure1.2 Movement in North Shields Retail Yields, 2001-2008



Source: VOA Property Market Report

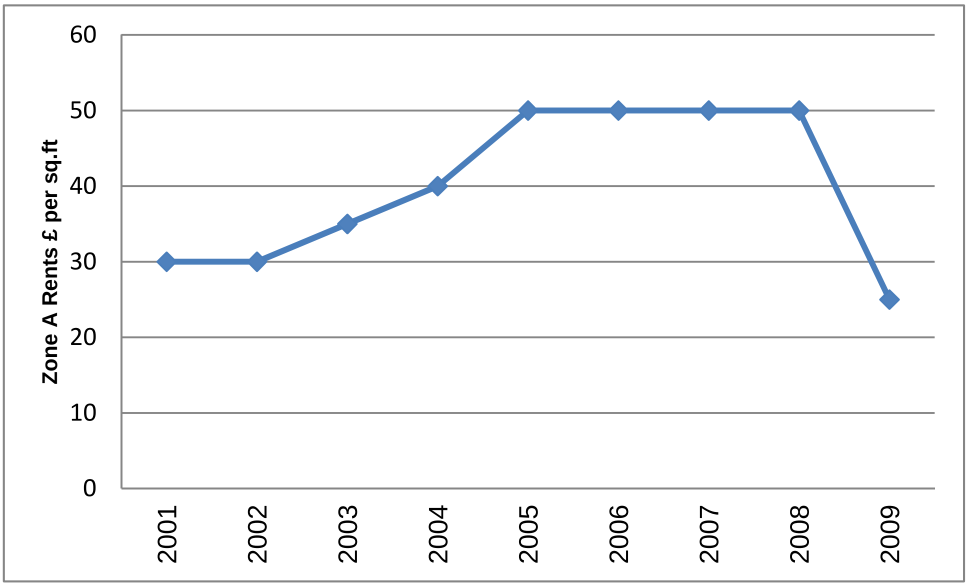
1.52 The data in Figure 1.2 above demonstrates that after falling (improving) between 2003 and 2007, prime retail yields rose (worsened) considerably to 9.5 per cent. The rise in yields, which can largely be attributed to the impact of the recession and subsequent economic downturn, is in line with general trends experienced in similar town centres nationally.

1.53 We have also discussed trend in retail yields with property agents active in the local market. It is important to note that yields are covenant dependant and will be considerably lower for larger multiples. Our discussions indicate that yields in North Shields could currently be as high as 10 to 11 per cent, depending on the occupier.

Changes in Prime Zone A Shopping Rents

1.54 Time-series rental data were last published for North Shields Town Centre in 2009, as shown below in Figure 1.3. In order to provide more up to date figures we consulted local stakeholders and property market agents, who provided some anecdotal evidence on local rental levels in the absence of more recent published data.

Figure 1.3 Changes in North Shields Prime Zone A Shopping Rents, 2001-2009



Source: Focus (2011)

1.55 The data in Figure 1.3 above show that after being relatively stable at £50 per sq.ft, Zone A rents fell significantly in North Shields between 2008 and 2009 to £25 per sq.ft. The decline, which can largely be attributed to the impact of the recession and subsequent economic downturn, is in line with general trends experienced in similar town centres nationally.

1.56 Our consultations with local agents have demonstrated that Prime Zone A shopping rents in North Shields are currently ranging from £12 per sq.ft to £35 per sq.ft. The current market for retail lettings is very challenging and significant incentives and rent free periods are required in order to secure interest. As such we consider that Prime Zone A shopping rents are unlikely to see any significant upward movement in the short to medium term.

Proportion of Vacant Street Level Property

1.57 There were 40 vacant units in North Shields at the time of our on-foot survey of the town centre (June 2011), which equates to a vacancy rate of 16.3 per cent, considerably above the UK average vacancy rate of 12.7 per cent. In terms of town centre floorspace the vacancy rate is lower, with 11.5 per cent of town centre floorspace vacant in June 2011, slightly higher than the national average of 11.1 per cent.

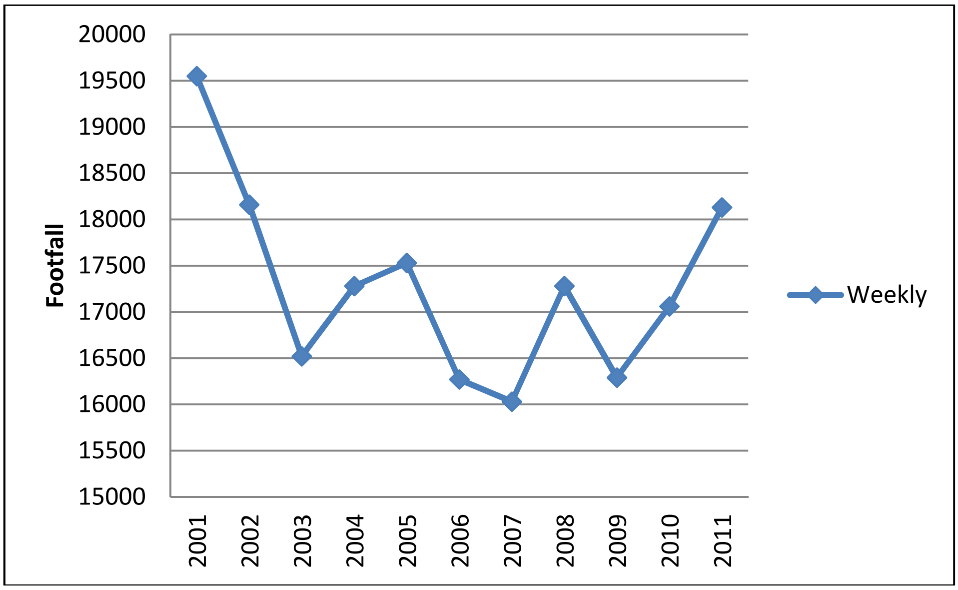
1.58 At the time of the last health check in 2007, there were 31 vacant units in North Shields Town Centre. The subsequent rise in vacancies can in part be explained by the period of recession and economic uncertainty which affected the whole country since 2008, and which has resulted in the closure of many chain stores and independent shops nationwide. Indeed, this is reflected by the fact that the UK average vacancy rate (proportion of units) rose from 10.6 per cent in 2007 to 12.7 per cent in 2011.

1.59 Despite the rising number of vacancies in North Shields since 2007 there are some signs of improvement with new lettings in 12 previously vacant units since the last Experian Goad survey in August 2010. It is also evident that the currently vacant units are generally dispersed throughout the town centre, as shown in Figure 1 of Section 4, with no major concentrations of void premises. The majority of vacant units are small, with only four having a gross floorspace of 200 sq.m or more.

Pedestrian Flows

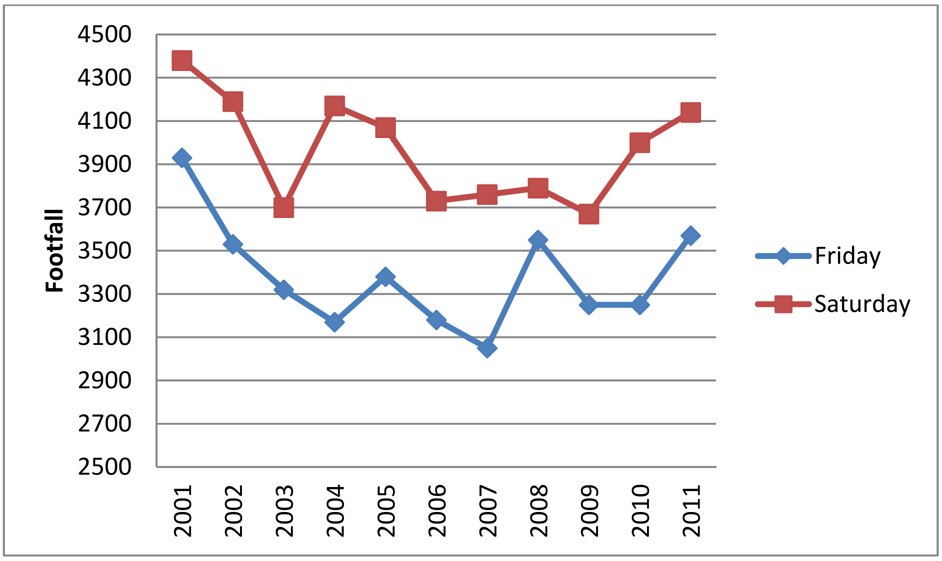
1.60 Figures 1.4 and 1.5 below, which are based on the pedestrian flow data supplied by the Council, demonstrate that following a period of general decline between 2001 and 2007, footfall levels in North Shields Town Centre have recovered in 2011 to their highest level since 2002. The footfall trends for Friday and Saturday largely mirror the trends for weekly footfall, although it is notable that the rate of growth in footfall between 2010 and 2011 was lower for Saturdays than the rate of growth for Fridays and on a weekly basis.

Figure 1.4 North Shields Weekly Footfall Trends



Source: PMRS/North Tyneside Council

Figure1.5 North Shields Friday and Saturday Footfall Trends



Source: PMRS/North Tyneside Council

1.61 As would be expected, pedestrian flows in North Shields Town Centre are highest on Bedford Street and the pedestrianised areas surrounding the Beacon Shopping Centre, which is illustrated graphically on the plan in Section 6.

Customer and Residents Views and Behaviour

1.62 In our household survey 25.2 per cent of respondents cited North Shields as the town centre they visited most frequently. The three best features cited for North Shields were, 'near/convenient' (37.3 per cent), 'nothing in particular' (25.8 per cent) and 'selection/choice of independent or specialist shops' (16.7 per cent). The worst features were 'nothing in particular' (32.1 per cent), 'dirty shopping streets' (18.7 per cent) and 'general lack of choice of multiple shops (15.9 per cent). The household survey then asked whether there were any shops the town centre was lacking with 58.7 per cent responding 'yes', 37.7 per cent 'no' and 3.6 per cent 'don't know'. The three most cited shops lacking from North Shields Town Centre were, 'women's, girls and children's clothing' (41.9 per cent), 'men's and boyswear' (31.1 per cent), and 'grocery and frozen foods' (19.6 per cent).

1.63 In the 2009 Residents Survey the three main strengths identified for North Shields Town Centre were, 'variety of shops' (28 per cent), 'shops are good' (7 per cent) and 'shops close together/compact' (7 per cent). The three main weaknesses were 'litter/untidy/dirty/needs cleaning' (26 per cent), 'too many cheap shops' (17 per cent), and 'the people/scruffs/rowdy' (13 per cent).

State of Town Centre Environmental Quality

1.64 The quality of the physical environment within North Shields Town Centre is mixed. The centre benefits from a number of attractive historic buildings and Northumberland Square provides an attractive green space in the heart of the centre which is surrounded by attractive buildings. The Beacon Shopping Centre and some of the purpose built retail units set along the pedestrianised section of Bedford Street are in need of enhancement and refurbishment works. This forms the Primary Shopping Area and the poor quality of the physical environment therefore impacts negatively on the functioning of the town centre.

1.65 In particular, the Beacon Shopping Centre suffers from a poor quality of façade and ground floor units that do not relate well to the streetscene. There are several other landmark buildings that contribute negatively to the physical environment in North Shields Town Centre, notably the Beach Bingo building, the YMCA building and the HSBC building. Several of the secondary retail areas within the town centre also contain clusters of poor quality retail buildings.

1.66 The Metro Station provides a key gateway into the town centre and at the time of our health check this facility was under-going significant refurbishment works. Improving this key public space will have a vital role in enhancing the first impressions of visitors to North Shields.

1.67 The town centre does benefit from some attractive being landscaping and planters, with some creative examples of landscaping used to minimise the negative impact of certain areas in the town centre, such as blank brick facades onto the street. However, overall the physical environment in North Shields Town Centre suffers from negative perceptions, areas of poor quality public realm, poor signage, and inadequate gateways into the centre.

The town centre also fails to link positively with the Fish Quay area due to a combination of the steep gradient, sub-standard signage and poor public transport linkages.

1.68 In order to improve the quality of the town centre's physical environment, a strategy that delivers enhanced public realm and improved signage is essential. There may be scope to enhance the attractiveness of the town centre as a retail destination by improving the linkages of the Primary Retail Area with physical assets such as Northumberland Square. Furthermore, the connection with the Fish Quay could be improved by better signage, improved marketing, enhanced lighting, public realm improvements and better public transport. Whilst there may be aspirations for some form of funicular rail linkage with the Fish Quay, in the current economic climate this is unlikely to be deliverable and resources would be better directed to the core retail area.

Summary of the Performance of North Shields Town Centre

1.69 Most of the health check indicators suggest that North Shields Town Centre is not a particularly strong town centre. We note, for instance, the following:

- North Shields has experienced significant slippage in the MHE Index, which reflects the lack of recent development and new store openings in the town centre, albeit it is worth noting that this trend is not unique amongst North Tyneside's centres.
- Worsening retail rents and yields, diminishing levels of operator interest in the town centre and rising vacancy levels, although again this is reflective of trends across many medium and smaller town centres across the country given the reducing demand for retail space as a consequence of the recession and ensuing economic downturn.
- A limited comparison retail offer which is focused on the discount end of the market and a disappointing food and drink offer, with the prospects of improving the latter in particular seemingly slim given the close proximity of the Fish Quay area which provides an array of food and drink outlets.
- A property offer throughout the town centre that is out-dated and out-moded, with unit sizes typically small.
- Mixed environmental quality, with some quite attractive parts of the town centre undermined by other areas that are in need of significant intervention.

1.70 More positively, the town centre has a reasonably varied convenience retail offer – albeit the town centre supermarkets tend towards the lower end of the size spectrum – and footfall levels appear to be rising. However, our overall assessment is that if the retail offer cannot be improved, for instance through the redevelopment of the Beacon Centre, then it is likely that the position of North Shields in the sub-regional retail hierarchy will continue to deteriorate further.

Performance Analysis of Wallsend Town Centre

Context

1.71 Wallsend Town Centre is situated on the north bank of the River Tyne approximately five miles to the east of Newcastle-upon-Tyne. The retail uses within the centre are focused around the High Street and the Forum Shopping Centre. The 2007 Retail Assessment highlighted limited representation from multiple retailers and low levels of operator demand, The position has worsened since 2007, particularly with the loss of two prominent retailers, namely Woolworths and Co-operative, which previously anchored the Forum Centre.

Movement in the National Retail Rankings

1.72 The retail rankings indicate that Wallsend Town Centre's position in the MHE Index slipped between 2001 and 2008. Wallsend ranked 461st nationally in 2001, improving slightly to 452nd position by 2004, but it then fell 383 places to 835th position in 2008. Whilst the slippage of Wallsend in the rankings is not unique it is worth noting that the centre has experienced the most significant decline of the centres that feature in Table 2.1 of Section 2.

1.73 The slippage of Wallsend in the national retail rankings reflects the low representation from national multiple operators, large vacant units (both at the Forum Shopping Centre and the former Woolworths unit), and the lack of any significant retail development and notable store openings in the town centre in recent years.

Diversity of Uses

1.74 Wallsend Town Centre contained 29 convenience retail outlets in June 2011 (Table 5.1 of Section 5), equating to 13.3 per cent of the total units in the centre, above the UK average of 9.5 per cent. However, Table 5.2 shows that the 29 convenience outlets together provide a total of 4,660 sq.m of gross floorspace, which represents 15.2 per cent of all retail/service floorspace available in the town centre, below the UK average of 17.5 per cent. This demonstrates that the majority of convenience outlets in Wallsend Town Centre are located in small retail units. However, since the closure of Co-operative Food approximately two years ago, the town centre has lacked a main food anchor.

1.75 The convenience retail operators in Wallsend include a Netto supermarket (which will close prior to conversion into an Asda outlet on 24 September 2011), an Iceland, seven bakers, three butchers, two confectionary stores, a fishmonger, seven grocers and a health food shop.

1.76 Table 5.1 in Section 5 shows that Wallsend Town Centre contains 75 comparison goods outlets, equating to 34.4 per cent of total units, which is below the UK average of 42.0 per cent. Table 5.2 also shows that the 75 comparison outlets together provide a total of 13,340 sq.m of gross floorspace, which represents 42.3 per cent of all retail/service floorspace available in the town centre, below the UK average of 47.5 per cent.

1.77 The range of comparison goods stores in Wallsend is limited and the town centre is under-represented in the following sub-categories: *'footwear and repairs'; 'men's and boy's wear'; 'women's, girl's, children's clothing'; 'mixed and general clothing'; 'booksellers, arts/crafts, stationers/copy bureaux'; 'gifts, china, glass and leather goods'; 'florists and gardens'; 'sports, toys, cycles and hobbies'; and 'jewellers, clocks & repair'.* The comparison retail sector in Wallsend is focused heavily on the discount/value end of the retail spectrum, with some ten retail outlets comprising either charity or second hand goods shops.

1.78 The weakness of the offer in the clothing and footwear sector, in particular, has a significant negative effect on the attractiveness of the town centre as a comparison shopping destination. Centres which benefit from a good mix of clothing and footwear retailers are likely to attract more shoppers than centres that have a weaker fashion retail offer. Wallsend has below-average representation (in terms of both the proportion of units and floorspace) in all four of the footwear and clothing sub-categories (*'footwear and repair', 'men's and boy's wear'*, *'women's, girls, children's clothing'* and '*mixed and general clothing*').

1.79 The proportion of service sector outlets in Wallsend is on a par with the UK average, with such uses accounting for 34.4 per cent of town centre units, compared to the UK average of 34.7 per cent (and accounting for 22.1 per cent of town centre floorspace, compared to a UK average of 22.9 per cent).

1.80 Wallsend benefits from several banks and building societies (including Barclays, Lloyds TSB, Halifax, Nationwide and Leeds Building Society), a mix of hairdressers and beauty salons, as well as national travel and estate agents. However, the food and drink offer within the town centre is focused at the lower end of the market, consisting primarily of cafés and take-aways.

1.81 Wallsend Town Centre also benefits from some other non-retail/service uses such as the Post Office, a library, Mecca Bingo, various community facilities, a range of office units and several pubs.

Presence of National Multiples and High Profile Retailers

1.82 Wallsend's convenience goods offer includes four national multiple operators, namely Netto (soon to become an Asda store), Iceland, Greggs (two outlets) and Thorntons[4]. Whilst there is a slightly wider range of comparison retail multiples in the town centre, representation is still limited, with operators including Greenwoods, Bonmarché, Claires Accessories, New Look, Brighthouse, Card Factory, Boots, Superdrug and Specsavers. There is limited representation from specialist comparison shops, whilst there is above average representation from charity shops. Wallsend, therefore, attains a 'lower' rating in MHE's 'Fashion Market' index, which places 57 per cent of the town centre's 'fashion' retailers into the 'lower-middle' band with the remaining 43 per cent classified as 'value'.

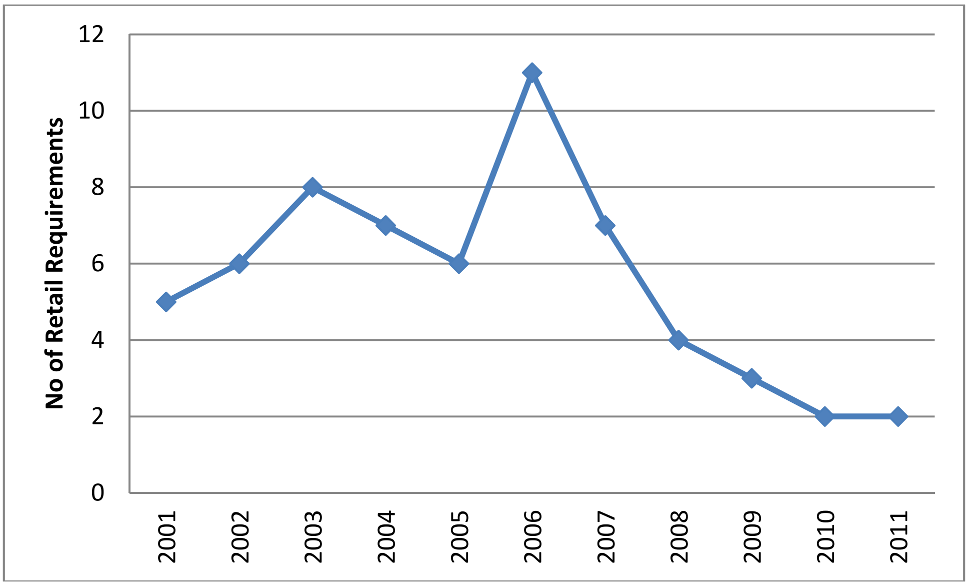
1.83 The town centre contains a better range of service sector multiples, with several banks occupying premises in Wallsend, together with three national travel agencies, an estate agency, a KFC and a Subway outlet.

Operator Demand

1.84 The most recent FOCUS data for Wallsend (2011) shows that the number of published retail requirements currently stands at two, which represents a significant fall form the peak of 11 in 2006. As we have already explained, however, this reflects national trends.

[4] Confectioners are categorised as convenience retailers by Experian, although in reality operators such as Thorntons are not convenience retailers.

Figure 1.6 Change in the Number of Published Retailer Requirements for Wallsend 2001-2011



Source: Focus (2011)

The Retail Property Offer

1.85 The retail uses in Wallsend Town Centre are focused in the Forum Shopping Centre and in a mixture of purpose built retail units and converted buildings along High Street West, High Street East and Station Road. The majority of retail units throughout the town centre now appear dated and are in poor physical condition. Whilst there are some very poor quality units in the retail core, the standard of the retail property offer is considerably worse towards the more secondary retail areas.

1.86 In April 2011, a Memorandum of Understanding was signed between the Council and the developer, NewRiver Retail, to pursue a scheme comprising significant refurbishment works and an extension of the Forum Shopping Centre. The proposed redevelopment could include a new 55,000 sq.ft anchor foodstore to take the place of the vacant Co-operative Food supermarket, and an additional 65,000 sq.ft of retail space creating larger units suitable for modern retail requirements.

1.87 The successful delivery of new larger, high quality units in Wallsend would help to meet key deficiencies in the town centre's convenience and comparison retail offer.

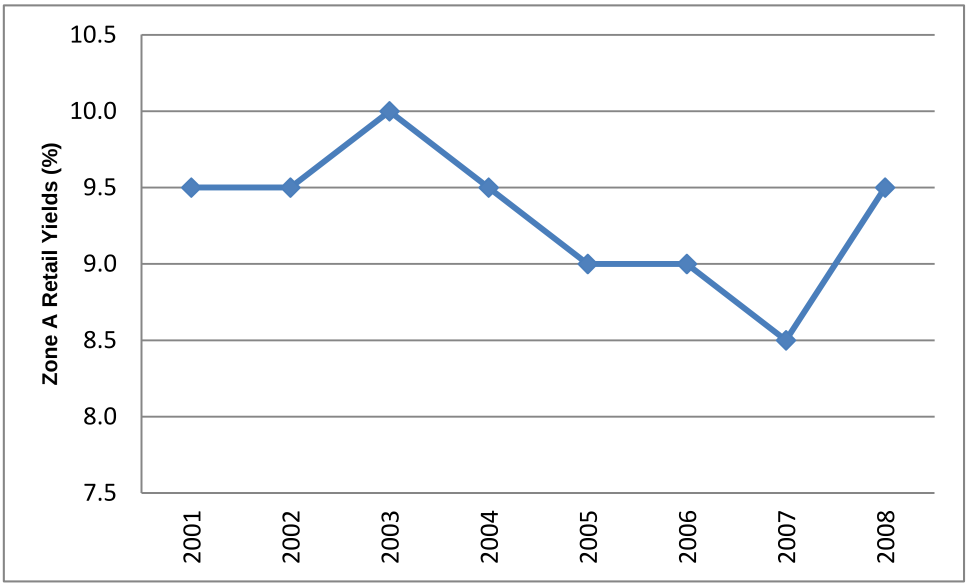
The Potential Capacity for Growth or Change of Centres

1.88 As discussed above the redevelopment of the Forum Shopping Centre provides the major redevelopment opportunity within Wallsend Town Centre. We consider that the prospects for this development are good, with New River Retail currently consulting on potential options prior to the submission of a planning application. There may be further opportunities to consolidate the town centre uses into a more compact area and enhance linkages to the River Tyne through the Strategic Development Framework Plan for River Tyne North Bank.

Retail Yields

1.89 The data in Figure 1.7 demonstrate that after falling (improving) between 2003 and 2007, prime retail yields rose (worsened) in Wallsend Town Centre from 8.5 per cent to 9.5 per cent between 2007 and 2008. The rise in yields, which can largely be attributed to the impact of the recession and subsequent economic downturn, is in line with general trends experienced in similar town centres nationally.

Figure1.7 Movement in Wallsend Retail Yields, 2001-2008



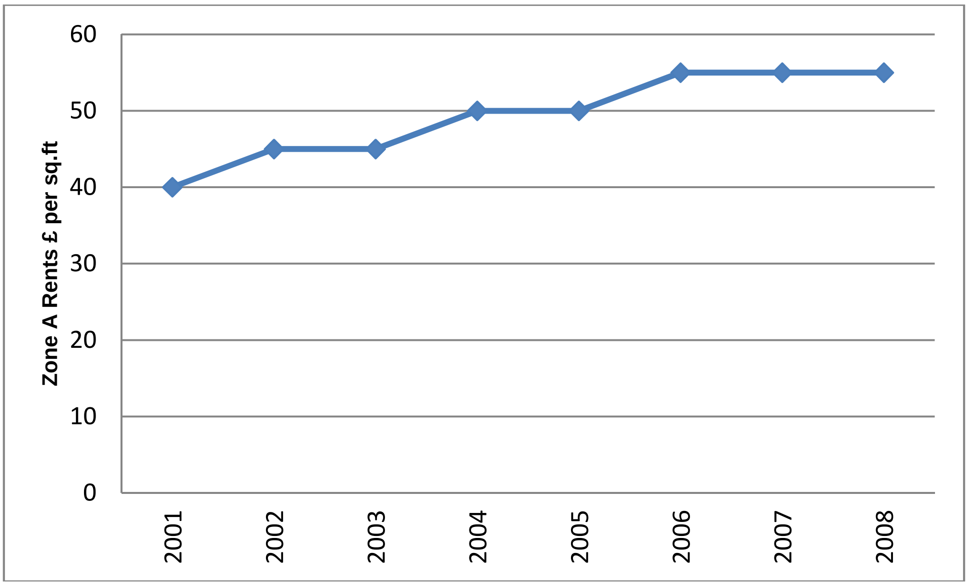
Source: VOA Property Market Report

1.90 We have also discussed trends in retail yields with property agents active in the local market. As we have already noted yields are covenant dependant and will be considerably lower for larger multiples. Our discussions indicate that yields in Wallsend could currently be as high as 10 to 11 per cent, depending on the occupier.

Changes in Prime Zone A Shopping Rents

1.91 Time-series rental data were last published for Wallsend Town Centre in 2008, and are shown below in Figure 1.8. In order to provide more up to date figures we have spoken to local stakeholders and property market agents, who provided some anecdotal evidence on local rental levels in the absence of more recent published data.

Figure1.8 Changes in Wallsend Prime Zone A Shopping Rents, 2001-2008



Source: Focus (2011)

1.92 The data in Figure 1.8 show that prime Zone A shopping rents in Wallsend were relatively stable between 2004 and 2008 at £40 per sq.ft. However, our consultations with local agents indicate that Zone A shopping rents have fallen significantly in Wallsend since data were last published and are currently ranging from £10 per sq.ft to £30 per sq.ft. The decline is in line with general trends experienced in similar town centres elsewhere. The current market for retail lettings is very challenging and significant incentives and rent free periods are required in order to secure interest. As such we consider that Prime Zone A shopping rents are unlikely to see any significant upward movement in the foreseeable future.

Proportion of Vacant Street Level Property

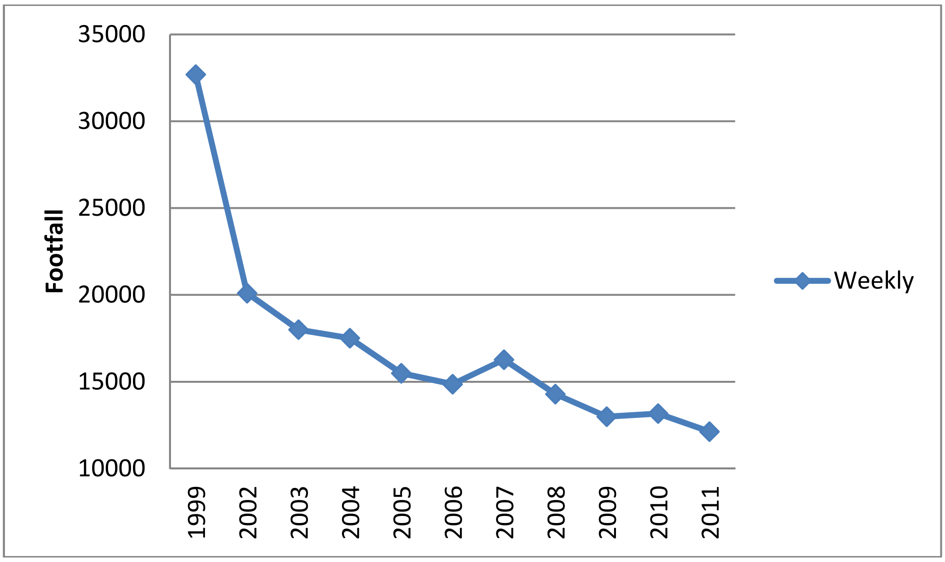
1.93 Wallsend Town Centre contained 38 vacant units in June 2008,which equates to a vacancy rate of 17.4 per cent, considerably above the UK average vacancy rate of 12.7 per cent. In terms of town centre floorspace the vacancy rate is lower, with 20.8 per cent of town centre floorspace vacant in June 2011, but this is still considerably above the national average of 11.1 per cent. At the time of the last health check in 2007, Wallsend Town Centre contained 26 vacant units.

1.94 The vacant units are generally dispersed throughout the town centre, although there are some concentrations towards the more secondary retail areas along High Street East and High Street West, as shown in Figure 4.2 of Section 4. Furthermore, there are two significant vacancies, namely the former Co-operative Food building and the former Woolworths unit (which was occupied until recently by Well Worth It). In order to reduce the negative image that vacant units can exert on the town centre it would be advisable to consider options for conversion to non-retail uses, such as residential, in those areas towards the edge of the town centre.

Pedestrian Flows

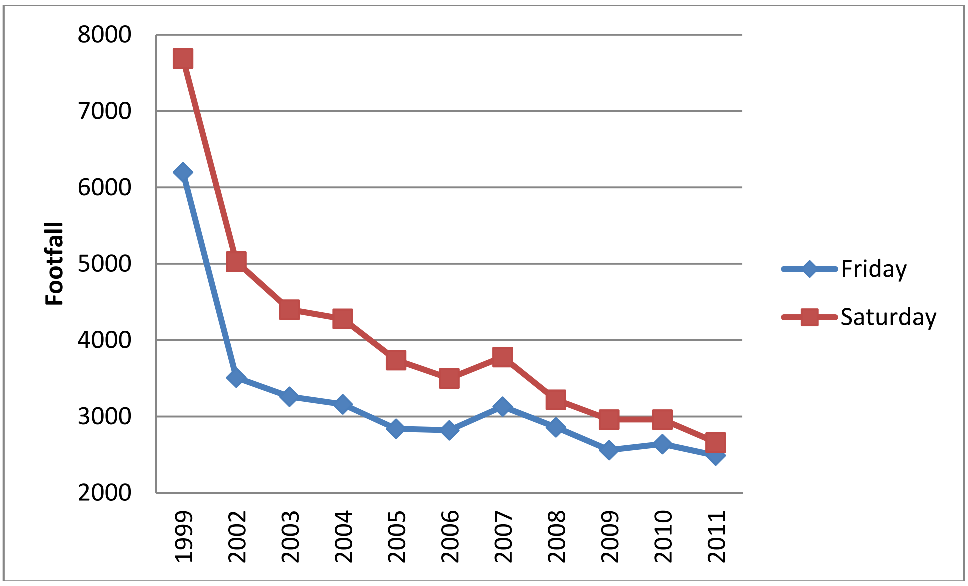
1.95 Figures 1.9 and 1.10 demonstrate that footfall has declined significantly in Wallsend Town Centre since 1999. No data are available for 2000 or 2001 but between 1999 and 2002 Wallsend experienced a 39 per cent reduction in weekly footfall. This decline has continued with a further reduction in weekly footfall of 33 per cent between 2002 and 2011. The footfall trends for Friday and Saturday largely mirror the general decline in weekly footfall from 1999 to 2011.

Figure 1.9 Wallsend Weekly Footfall Trends



Source: PMRS/North Tyneside Council

Figure 1.10 Wallsend Friday and Saturday Footfall Trends



Source: PMRS/North Tyneside Council

1.96 The highest levels of pedestrian flows in Wallsend Town Centre are found in the Forum Shopping Centre, although footfall in other parts of the town centre is noticeably lower, as shown by Figure 6.2 in Section 6.

Customer and Residents Views and Behaviour

1.97 In our household survey 14.1 per cent of respondents cited Wallsend as the town centre they visited most frequently. The three best features cited for Wallsend were, 'nothing in particular' (49.7 per cent), 'near/convenient' (34.0 per cent), and 'selection/choice of independent or specialist shops' (5.0 per cent). The worst features were 'general lack of choice of multiple shops' (36.9 per cent), 'lack of a large supermarket' (36.9 per cent) and 'general lack of independent or specialist shops' (23.4 per cent). The household survey then asked whether there were any shops the town centre was lacking with 83.0 per cent responding 'yes', 14.9 per cent 'no' and 2.1 per cent 'don't know'. The three most cited shops lacking from Wallsend Town Centre were, 'women's, girls and children's clothing' (39.3 per cent), 'grocery and frozen foods' (38.5 per cent) and 'men's and boyswear' (31.6 per cent).

1.98 In the 2009 Residents Survey the three main strengths identified for Wallsend Town Centre were, 'variety of shops' (16 per cent), 'it's ok/I like it' (10 per cent) and 'convenient/handy' (8 per cent). The three main weaknesses were 'not enough quality/decent shops' (19 per cent), 'litter/untidy/dirty/needs cleaning' (19 per cent), and 'too many charity shops' (18 per cent).

State of Town Centre Environmental Quality

1.99 The quality of the physical environment throughout Wallsend Town Centre is generally poor. A large number of retail units are in a very poor condition and are in need of urgent enhancement and refurbishment works. The poor quality of the Forum Shopping Centre and adjacent buildings in the heart of the town centre has a substantial negative effect on the perception of Wallsend as a retail destination.

1.100 If the town centre is to improve its performance then new retail development focused on addressing the poor quality of the Forum Shopping Centre and the surrounding retail units, alongside a coherent strategy to improve public realm, will be vital.

Summary of the Performance of Wallsend Town Centre

1.101 The health check indicators suggest that Wallsend Town Centre is an underperforming centre in decline. We note for instance the following:

- The significant decline of Wallsend in the MHE retail rankings between 2004 and 2008. Furthermore weekly footfall within the town centre is in decline.
- The town centre has lacked a main food anchor since the closure of the Co-operative Food two years ago. There are key deficiencies in the comparison retail offer which is focused on the discount end of the market.
- Worsening retail rents and yields, diminishing levels of operator interest in the town centre and rising vacancy levels, although again this is reflective of trends across many medium and smaller town centres across the country given the reducing demand for retail space as a consequence of the recession and ensuing economic downturn.
- The majority of retail units are dated and in poor physical condition. The Forum Shopping Centre is in need of significant refurbishment works.

- The public realm and physical environment is of poor quality and this contributes to negative perceptions of the town centre.

Performance Analysis of Whitley Bay Town Centre

Context

1.102 Whitley Bay Town Centre is situated on the North Sea coast approximately nine miles to the north east of Newcastle. Whilst the centre operates as a convenience and comparison shopping destination it also fulfils an important tourism role. The Park View Shopping Centre, which opened in 2004, provides the retail focal point in the town centre and includes several national retailers including Sainsbury's, Boots and Clintons Cards.

Movement in the National Retail Rankings

1.103 Whitley Bay Town Centre's position in the national retail rankings slipped significantly between 2001 and 2008. Whitley Bay ranked 474th in MHE's 2001 Shopping Index, but the centre slipped to 624th position by 2004, and it slipped a further 45 places to 669th position in 2008. The slippage of Whitley Bay in the rankings is not unique and it is worth noting that the centre has experienced the smallest decline over the period 2004 to 2008 of any of the four town centres in North Tyneside.

1.104 Whitley Bay's deterioration in the national retail rankings reflects the loss of several national multiple operators. However, as we explained earlier, the MHE Shopping Index is based on a count of national multiple outlets, with no credit given for the presence of independent operators. In Whitley Bay there is a strong presence of good quality independent operators, particularly along Park View, and it is important to bear this in mind when assessing the overall health of the town centre. We do this below.

Diversity of Uses

1.105 Whitley Bay Town Centre contained 23 convenience retail outlets in June 2011 (Table 5.1 of Section 5), equating to 7.6 per cent of the total units in the centre, below the UK average of 9.5 per cent. Table 5.2 shows that the 23 convenience outlets together provide a total of 8,050 sq.m of gross floorspace, which represents 20.4 per cent of all retail/service floorspace available in the town centre, above the UK average of 17.5 per cent. This is largely due to the presence of a 4,510 sq.m (gross) Morrisons store at Hillheads Road, which falls within the Goad boundary for the town centre. We thus consider that Whitley Bay largely has sufficient convenience retail provision with a good range of food and grocery outlets, albeit the Morrisons store is effectively in an edge-of-centre location and there is no main grocery store in the central part of the town centre since the closure of Co-operative, which previously occupied a prominent unit at the junction of Marden Road and Whitley Road.

1.106 The convenience retail operators in Whitley Bay include the Morrisons, Sainsbury's Local, Tesco Express, Co-operative Food, and Iceland stores, as well as seven bakers, two butchers, three confectionary stores, four grocers and four health food shops.

1.107 Table 5.1 in Section 5 shows that Whitley Bay Town Centre contains 127 comparison retail outlets, equating to 42.1 per cent of total units, which mirrors the UK average of 42.0 per cent. However, Table 5.2 shows that the 127 comparison outlets together provide a total of 14,870 sq.m of gross floorspace, which represents 37.7 per cent of all retail/service floorspace available in the town centre, below the UK average of 47.5 per cent.

1.108 The town centre's independent retail offer is particularly strong, with an excellent mix of good quality independent retailers concentrated along Park View.

1.109 The proportion of service sector outlets in Whitley Bay is above the UK average, with such uses accounting for 37.4 per cent of town centre units, compared to the UK average of 34.7 per cent (and accounting for 30.0 per cent of town centre floorspace, compared to a UK average of 22.9 per cent).

1.110 As well as several banks and building societies (including Barclays, HSBC, Lloyds TSB, Halifax, Nat West, Northern Rock and Santander), the town centre benefits from a good mix of hairdressers and beauty salons, as well as national travel and estate agents. The food and drink offer within the town centre is generally geared to the tourist market and evening economy with a focus on take-aways and cafes, although there are some higher quality restaurants. There is also a large number of bars and pubs (which are not categorised by Experian Goad), within the town centre that cater largely for the stag/hen party sector.

Presence of National Multiples and High Profile Retailers

1.111 Whitley Bay's convenience retail offer includes eight national multiple operators, namely Morrisons, Sainsbury's, Tesco, Co-operative Food, Iceland, Greggs, Holland and Barratt, and Thorntons (although the latter two are not really convenience retailers). There is a slightly narrower range of comparison retail multiples in the town centre, with operators including Clarks, Claires Accessories, Clinton Cards, Card Factory, Home Bargains, Poundstretcher and Boots. However, as noted above, whilst the number of comparison retail multiples is fairly low within Whitley Bay, particular importance should be attached to the strength of the independent comparison retail offer.

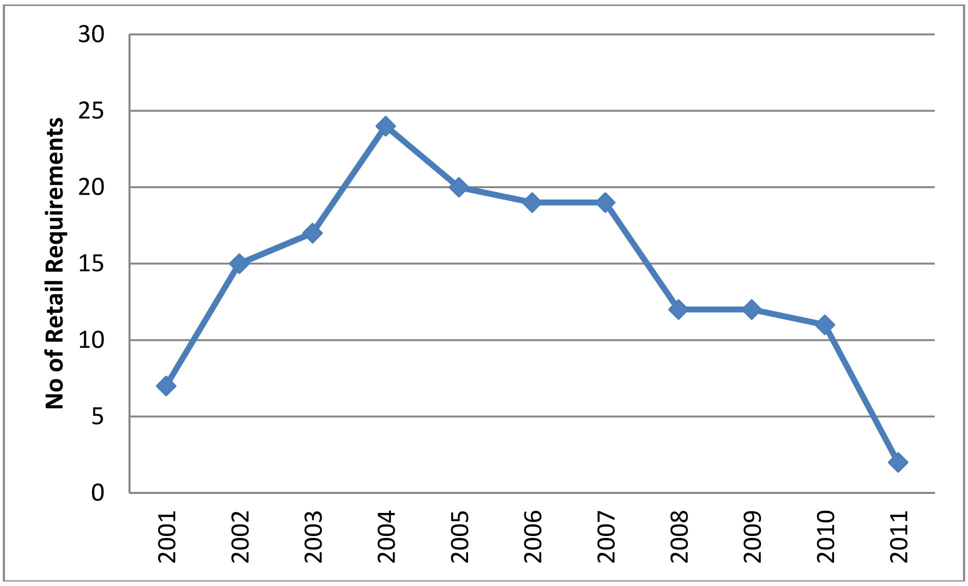
1.112 Park View contains around 100 independent traders including florists; shops selling ladieswear, children's and babies' clothing; shoe shops; household goods outlets; gift shops; jewellers and other specialist retailers. The independent retail offer along Park View is complemented by an array of coffee shops, cafés and restaurants and a variety of service sector uses including hairdressers/beauty salons and picture/photo framing, alongside professional services such as travel agents, accountants and financial advisers. The vacancy rate in this part of the town centre is notably low and the street has an upmarket feel.

1.113 Other parts of the town centre contain a range of service sector multiples, including several banks, three national travel agencies, an estate agency, Pizza Hut, Costa Coffee and a Subway outlet.

Operator Demand

1.114 As in North Shields and Wallsend Town Centres, the number of published retail requirements in Whitley Bay is very low, and substantially below the peak from a few years ago. Again, however, this is consistent with national trends rather than a reflection of the town centre's health.

Figure 1.11 Change in the Number of Retailer Requirements for Whitley Bay 2001-2011



Source: Focus (2011)

The Retail Property Offer

1.115 The retail property in Whitley Bay Town Centre includes a mix of Victorian and Edwardian buildings alongside purpose built modern retail units such as those in the Park View Shopping Centre, which provides a good mix of units with several larger floorplate units suitable for modern retailer requirements. The majority of the premises appear to be in good condition and well maintained. However there is a notable deterioration in building condition in more secondary retail areas, such as Whitley Road, heading east from the town centre. There are also several vacant buildings, most notably the former Co-operative Food outlet, that will require some modernisation and upgrading if they are to be reoccupied.

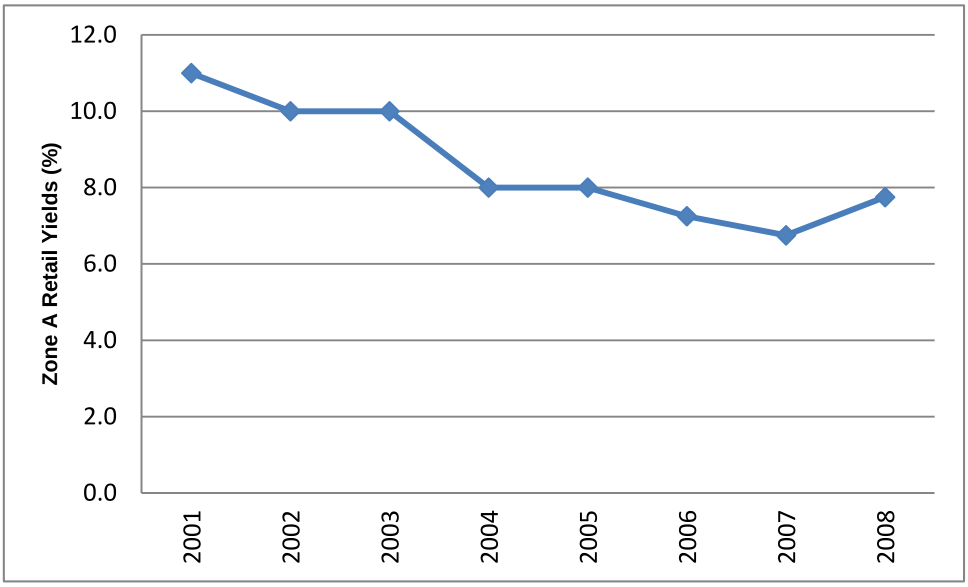
The Potential Capacity for Growth or Change of Centres

1.116 The Spanish City development has the opportunity has the potential to redefine the identity of Whitley Bay as a seaside town. The led developer, Robertson, is currently undertaking public consultation on plans to provide a cultural and leisure hub. The other development opportunities within Whitley Bay comprise the larger vacant units, notable the former Co-operative Food and T&G Allan units. We consider that given the current poor condition of these properties any potential occupier may require significant incentives.

Retail Yields

1.117 The data in Figure 1.12 demonstrate that after falling (improving) between 2003 and 2007, prime retail yields rose (worsened) from 6.75 per cent to 7.75 per cent between 2007 and 2008. Our discussions with locally active property market agents indicate that yields in Whitley Bay could currently be as high as 9 to 10 per cent, depending on the occupier.

Figure 1.12 Movement in Whitley Bay Retail Yields, 2001-2008

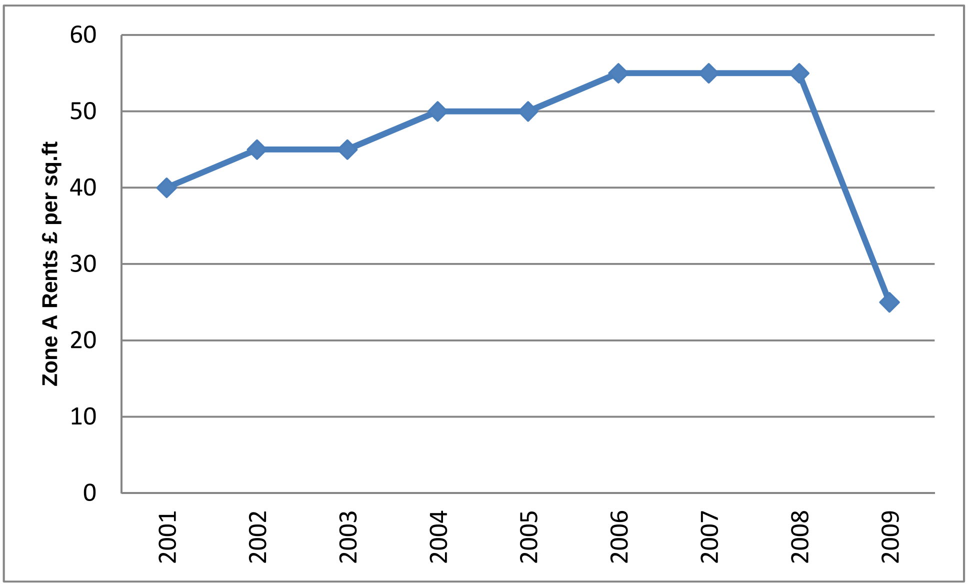


Source: VOA Property Market Report

Changes in Prime Zone A Shopping Rents

1.118 Time-series Zone A rental data were last published for Whitley Bay Town Centre in 2009, shown below in Figure 1.13. In order to provide more up to date figures we consulted with local stakeholders and property market agents, who provided some anecdotal evidence on local rental levels in the absence of more recent published data.

Figure 1.13 Changes in Whitley Bay Prime Zone A Shopping Rents, 2001-2009



Source: Focus (2011)

1.119 The data in Figure 1.13 show that after being relatively stable at £50 per sq.ft, Zone A rents fell significantly in Whitley Bay between 2008 and 2009 to £25 per sq.ft.

1.120 Our consultations with local agents indicate that Zone A rents in Whitley Bay are currently ranging from £12 per sq.ft to £35 per sq.ft. The current market for retail lettings is very challenging and significant incentives and rent free periods are required in order to secure interest; this is a particular issue with regards to larger vacant units across the town centre and those in the Park View Shopping Centre. As such we consider that prime Zone A shopping rents are unlikely to see any significant upward movement in the short to medium term.

Proportion of Vacant Street Level Property

1.121 There were 39 vacant units in Whitley Bay Town Centre at the time of our health check in June 2011. This equates to a vacancy rate of 12.9 per cent, which is only slightly above the UK average vacancy rate of 12.7 per cent. In terms of town centre floorspace the vacancy rate was 11.9 per cent in June 2011, also close to the national average of 11.1 per cent.

1.122 At the time of the 2007 study there were 28 vacant units in Whitley Bay. However, it is also worth noting that the number of vacant units in Whitley Bay at the time of the last Experian Goad survey in March 2010 stood at some 52 units. This decline in the number of vacant units since March 2010 is encouraging, particularly when set against the trend experienced nationally during a period of recession and economic uncertainty, which has resulted in the closure of many chain stores and independent shops nationwide. The recent decline in the vacancy rate in Whitley Bay and the attraction of some major retailers, such as Sainsbury's and B&M Bargains, demonstrates that there is still some retailer interest in the town centre, and it also highlights the success of the Council's proactive approach towards supporting the independent retail sector, which is particularly noticeable along Park View where there are a number of newly opened retail businesses.

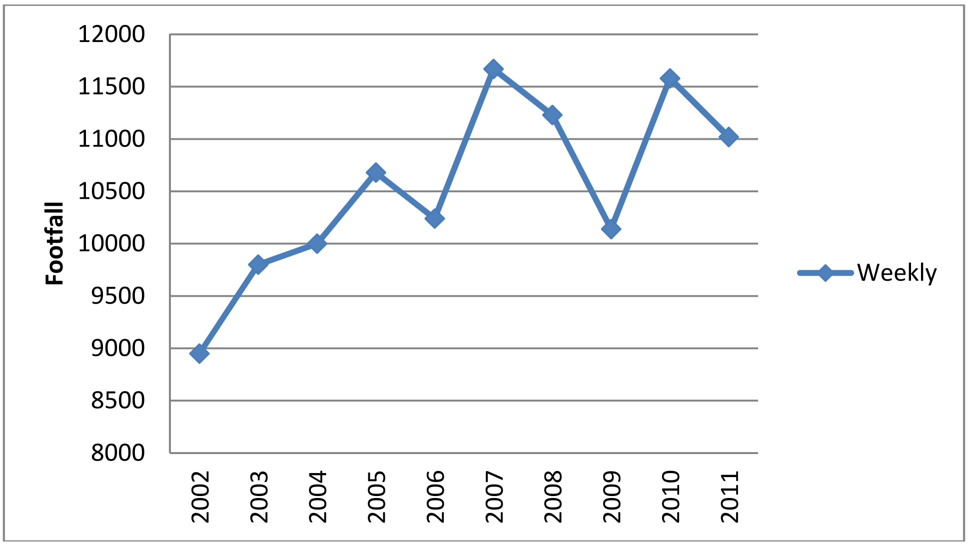
1.123 Figure 4.3 in Section 4 demonstrates that while there are no major concentrations of vacancies within the town centre, Station Road and the eastern end of Whitley Road are more challenging areas. The former Co-operative Food and T&G Allan units, both on Whitley Road, are significant vacancies and consideration should be given to reducing the negative image that these vacant units can exert on the town centre.

1.124 There is also a large vacant site on York Road, previously occupied by the New Coliseum Theatre, where the Council is developing a new Joint Services Centre that will include re-provision of the existing Whitley Bay Library.

Pedestrian Flows

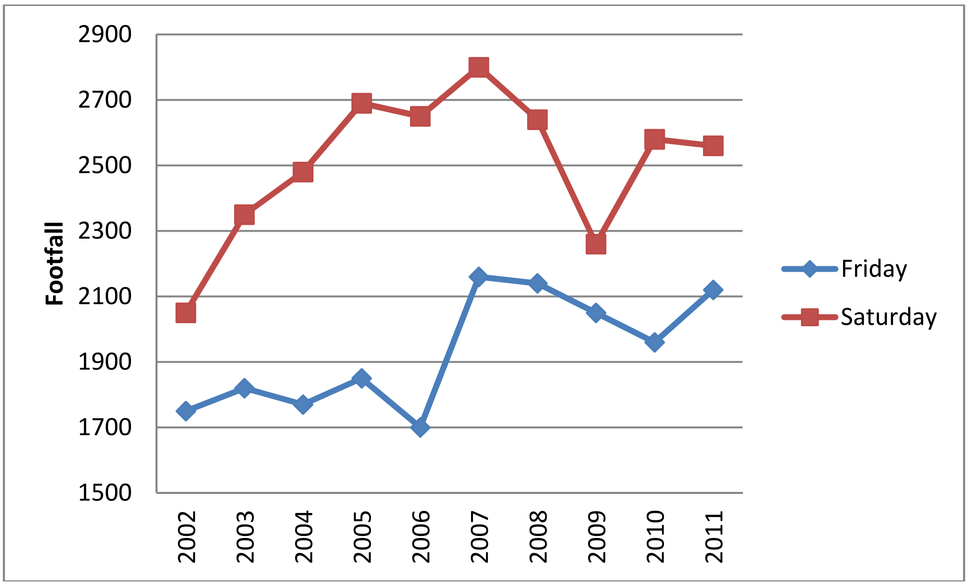
1.125 Figures 1.14 and 1.15 demonstrate that footfall within Whitley Bay Town Centre has seen a general trend of increase since 2002, with only three years out of the last ten experiencing a higher level of footfall than 2011. Whilst the footfall levels on Saturdays are largely in line with weekly trends, footfall levels on Fridays fell slightly between 2002 and 2006 and then increased slightly between 2010 and 2011, contrary to trends on a weekly basis and on Saturdays.

Figure 1.14 Whitley Bay Weekly Footfall Trends



Source: PMRS/North Tyneside Council

Figure 1.15 Whitley Bay Friday and Saturday Footfall Trends



Source: PMRS/North Tyneside Council

1.126 As expected, footfall levels in Whitley Bay Town Centre are highest in the Park View Shopping Centre and at the junction of Park Avenue and Whitley Road which forms the core of the shopping area.

Customer and Residents Views and Behaviour

1.127 In our household survey 26.1 per cent of respondents cited Whitley Bay as the town centre they visited most frequently. The three best features cited for Whitley Bay were, ‘near/convenient’ (39.9 per cent), ‘selection/choice of independent or specialist shops’ (20.3 per cent) and ‘nothing in particular’ (16.5 per cent). The worst features were ‘general lack of choice of multiple shops’ (22.2 per cent), ‘nothing in particular’ (18.0 per cent) and ‘difficulties in parking’ (13.8 per cent). The household survey then asked whether there were any shops the town centre was lacking with 68.2 per cent responding ‘yes’, 28.7 per cent 'no' and 3.1 per cent 'don't know'. The three most cited shops lacking from Whitley Bay Town Centre were, 'women's, girls and children's clothing' (38.8 per cent), 'men's and boyswear' (23.6 per cent) and 'booksellers, arts/crafts, stationary/copy bureaux' (14.6 per cent).

1.128 In the 2009 Residents Survey the three main strengths identified for Whitley Bay Town Centre were, 'shops are good' (19 per cent), 'variety of shops' (17 per cent) and 'convenient/handy' (7 per cent). The three main weaknesses were 'too many vacant/boarded shops' (48 per cent), 'needs modernisation/run down' (28 per cent), and 'too many charity shops' (22 per cent).

State of Town Centre Environmental Quality

1.129 Whilst there are a number of attractive Victorian and Edwardian buildings within Whitley Bay, the town centre suffers from some areas of poorer quality public realm in both the Primary Shopping Area and along the promenade. The town centre would benefit from upgraded street furniture implemented as part of a consistent public realm strategy that also addresses the design of shop frontages. Where buildings are lying vacant and poorly maintained action should be taken to address their negative impact on the physical environment of Whitley Bay. The redevelopment of the former New Coliseum Theatre site on York Road as a Joint Customer Services centre will address the negative impact of this vacant site on the physical environment.

1.130 Whitley Bay's coastal location is a significant asset, although at present the town centre fails to make an effective and vibrant connection to the seafront. Public realm enhancements could provide a corridor of movement that reinforces the connection between the town centre core and the seafront, especially once the redevelopment of the Spanish City is completed.

1.131 The Whitley Bay Metro Station is a high quality building that makes a positive contribution to the townscape. However this gateway point currently has poor linkages into the town centre, particularly along Station Road. Improved signage into the town centre from the Station, alongside a strategy to improve public realm and the retail/leisure offer on Station Road, would provide a more effective linkage into Whitley Bay.

Summary of the Performance of Whitley Bay Town Centre

1.132 Whitley Bay Town Centre performs a dual function as both a retail centre and a seaside resort. A key challenge is to tackle the negative perceptions of the evening economy and the role of the town as a destination for stag and hen parties. The Spanish City site and its potential as a leisure attraction within an enhanced seafront and promenade form important components of this strategy.

1.133 Overall we consider Whitley Bay to be a reasonably healthy centre, however we note the following:

1.134 The elongated form of the town centre affects its attractiveness as retail offer to an extent by dispersing the shopping provision over too wide an area. It would therefore be desirable to strengthen the Primary Shopping Area whilst considering carefully the future role of more peripheral retail parts of the town centre, particularly to the east along Whitley Road. The catchment of Whitley Bay contains some of the more affluent areas of North Tyneside but its town centre retail offer does not fully reflect this. The strong independent retail sector provides a unique appeal and is one of the town centre's key strengths. Building on this strength and providing a more consolidated retail offer alongside an improved physical environment along the seafront would enable Whitley Bay to better realise its full potential as a thriving and prosperous destination for tourists and shoppers alike.

Performance Analysis of Killingworth Town Centre

Context

1.135 Killingworth Town Centre comprises the purpose built Killingworth Shopping Centre, which includes some 30 retail units and is anchored by a Morrisons store.

Movement in the National Retail Rankings

1.136 Killingworth Town Centre first appeared in the MHE Index in 2004, when it ranked 1,120th nationally, but the centre slipped to 1,207th position by 2008, a fall of some 87 places. Whilst the slippage of Killingworth in the rankings is not unique it is worth noting again that only one of the centres that feature in Table 2.1 of Section 2 has improved its position since 2004.

Diversity of Uses

1.137 Experian does not publish Goad data for Killingworth Town Centre. Therefore we have undertaken our own assessment of the diversity of uses in Killingworth Town Centre using data collected from our on-foot survey of the centre in June 2011.

1.138 Killingworth Town Centre contained three convenience retail outlets in June 2011 (Table 5.3 of Section 5), equating to 10.0 per cent of the total units in the centre, slightly above the UK average of 9.5 per cent. The convenience retail operators in Killingworth are a Morrisons store, Greggs bakery and Thorntons (the latter being a confectioner rather than a 'convenience' retailer). The Morrisons store provides the main convenience retail shopping destination for the local population.

1.139 Table 5.3 in Section 5 shows that Killingworth Town Centre contains 13 comparison goods outlets, equating to 43.3 per cent of total units, which is similar to the UK average of 42.0 per cent. The comparison retail offer provides a reasonable mix of footwear, clothing, stationery and gifts, chemist goods, toiletries and opticians and household goods. The Matalan and Wilkinson stores are the key comparison anchor stores which both provide a wide range of goods.

1.140 Killingworth Town Centre does not include some of the uses normally associated with more traditional town centres. The proportion of service outlets in Killingworth is therefore relatively low, with such uses accounting for 26.7 per cent of town centre units, compared to the UK average of 34.7 per cent. The only food and drink outlets are the McDonalds and KFC fast food restaurants. The other service sector uses are two hairdressers, two travel agents, a pawnbroker and an estate agent. The centre does not have a bank or building society, although cash machines are available outside the Morrisons store..

1.141 Killingworth also contains a Post Office, JobCentre Plus and the White Swan Centre which contains a library and a range of other community facilities.

Proportion of Vacant Street Level Property

1.142 At the time of our survey only one unit was vacant in Killingworth Town Centre. This suggests that Killingworth is a relatively successful centre and does not have any surplus of retail floorspace.

Pedestrian Flows

1.143 We are not aware of any surveys of pedestrian flows that have been undertaken in Killingworth Town Centre. However at the time of our June 2011 health check we observed that the centre, which provides an attractive and covered shopping environment, was relatively busy with pedestrians.

State of Town Centre Environmental Quality

1.144 Killingworth Town Centre takes the form of an enclosed shopping centre, with some units fronting onto an extensive area of surface car parking. The physical environment is clean, tidy and well maintained.

Summary of the Performance of Killingworth Town Centre

1.145 Killingworth Town Centre is purpose-built and is not really affected by the same issues as more traditional town centres, and is healthy.

Performance Analysis of Battle Hill District Centre

1.146 Battle Hill District Centre comprises some 13 units in a new purpose built shopping centre, known as Coastway Shopping Centre. The new units were constructed adjacent to the former shopping precinct that had suffered considerable decline and problems of anti-social behaviour. The former shopping precinct has now been demolished to make way for new residential development.

1.147 Battle Hill achieved a ranking of 1,716th in the 2008 MHE Shopping Index, which represented a considerable decline since 2004, when the centre ranked 1,268th. However, the latest ranking pre-dated the opening of the new centre and so this indicator is not really relevant here.

1.148 Battle Hill contains a mix of convenience retail uses including a Tesco Express, Nisa Local, Greggs and a butchers. There is also a newly constructed free standing Lidl foodstore, which is directly adjacent to the shopping parade.

1.149 The only comparison retail outlet at the centre is Thompsons Opticians. The centre also contains three takeaways, a hairdresser, a bookmaker and a taxi company. Other local services are provided at the adjacent Battle Hill Library and an NHS walk-in centre.

1.150 At the time of our health check in June 2011 there was one vacant retail unit.

1.151 Access to the centre by public transport is restricted to the bus routes that run along Battle Hill Drive. The retail units benefit from an area of surface car parking in front of the shopping parade and the Lidl supermarket car park.

1.152 The physical environment of the centre is pleasant, clean and well maintained, reflecting its recent construction. There are areas of soft landscaping including trees, planters and benches.

1.153 Overall, Battle Hill District Centre provides a good level of provision for local top-up shopping and service sector needs. .

Performance Analysis of Forest Hall District Centre

1.154 Forest Hall is a linear centre set along Station Road North. The centre contains some 43 units in addition to the Irving House office block. The centre is also served by the Forest Hall library, which is located to the rear of Station Road North on Whitefield Road. The majority of buildings in the centre date from the Victorian period with the exception of the Sainsbury's and Nisa supermarkets and the 1960s Irving House office block.

1.155 Forest Hall achieved a ranking of 4,666th in the 2008 version of MHE's Shopping Index, which was the first time the centre featured in the rankings.

1.156 The centre contains a mix of convenience retail uses including Jamieson's Bakers and Deli, West View Bakery, Greggs, The Fruit Shop, Mills newsagents, Sainsbury's Local (formerly Kwik Save) and a Nisa Local. The two supermarkets play an important role in providing local top-up convenience shopping for local residents. We understand that the Mills outlet will convert to a One-Stop convenience store by the end of 2011.

1.157 The comparison retail offer in Forest Hall is much narrower. The eight comparison retail units comprise two chemists, two opticians, a florist, a PC repair shop and two charity shops. A ladies clothes shop has closed since the last health check of Forest Hall was completed in 2007.

1.158 There are numerous service sector outlets in the centre including four hairdressers, Barclays Bank, three estate agents, and a Post Office. There are also several offices, a taxi firm and two bookmakers. There is a total of nine food and drink outlets which comprise two cafes, a Subway sandwich shop and five takeaways. The centre also includes The Flying Scotsman public house.

1.159 At the time of our health check in June 2011 there were two vacant retail units. In addition we observed one vacant office on Station Road North and several vacant office suites were advertised in Irving House. The centre benefits from free on-street parking and a car park adjacent to The Flying Scotsman, and it is well served by local bus routes which stop in the heart of the centre.

1.160 The physical environment of Forest Hall is generally pleasant and attractive. The buildings are in good condition, with the exception of Irving House, and many have interesting architectural features. The street furniture includes planters, benches and several street trees.

1.161 Our Overall assessment is that Forest Hall District Centre provides a good level of provision for local top-up shopping needs and contains a number of service uses. Whilst the centre as a whole has an attractive environment this could be further enhanced by improvements to the exterior of Irving House, the condition of which detracts from the appearance of the centre.

Performance Analysis of Longbenton District Centre

1.162 Longbenton District Centre comprises some 14 retail units in a relatively new purpose built shopping centre called The Boulevard on West Farm Avenue.

1.163 Longbenton achieved a ranking of 1,364th in the 2008 MHE Shopping Index. The centre was previously ranked 1,268th by MHE in 2003-04, but it did not feature in the 2000/01 Shopping Index.

1.164 The centre contains a mix of convenience retail uses including Greggs, Findlays, Bargain Booze, Booze Buster, Heron Foods and Farmfoods. The convenience retail provision is focused on the budget/value end of the market and largely caters for the top-up convenience shopping requirements of local residents. There is an unimplemented consent for a 1,208 sq.m gross Netto foodstore adjacent to The Boulevard. We note that this consent has not been implemented and Netto has now been acquired by Asda; the status of this commitment is therefore uncertain.

1.165 The comparison retail offer comprises Homecare Electricals, Optica Eye Clinic and Boots Pharmacy. The centre also contains three takeaways and a Post Office, which is located within the Findlays/Bargain Booze unit. There are also two bookmakers within the centre. Immediately adjacent to the retail units is the Oxford Centre, which contains Council offices and other local services.

1.166 At the time of our health check in June 2011 there were no vacant retail units.

1.167 The centre is highly accessible by public transport with the Longbenton Metro station located less than 300m to the south. The centre is also well served by a number of bus routes. The retail units are set around a large area of surface car parking.

1.168 The physical environment of the centre is pleasant and well maintained, with areas of soft landscaping including street trees, planters and benches. The paving is in good condition and there are no problems observed related to litter.

1.169 Overall, Longbenton District Centre provides a reasonable level of provision for local top-up shopping needs and contains some service uses. The centre may benefit from a broader mix of comparison uses and a small format foodstore that offers a higher quality of convenience retail than that presently available.

Performance Analysis of Monkseaton District Centre

1.170 There are some 50 retail units in Monkseaton District Centre, in addition to several public houses and some small office space. The centre is linear in nature, running along Front Street/Caudwell Lane from the Monkseaton Metro Station to the junction of Caudwell Lane and Woodleigh Road. The majority of the buildings are Victorian in character although the centre also contains residential dwellings, including several recently constructed apartment blocks, interspersed with the retail units.

1.171 Monkseaton achieved a ranking of 2,356th in the 2008 version of MHE's Shopping Index. The centre was not previously listed by MHE.

1.172 The centre contains a mix of convenience retail uses including Nichols Bakery, Honeycomb Deli, Value Centre off-licence, a Spar and a newsagent. We note that several convenience outlets have closed since the 2007 study including Front Street Bakery, Oddbins Wine Merchant, the greengrocers and the butchers. Given the size of the convenience outlets in the centre, its role is largely confined to providing top-up convenience shopping for local residents.

1.173 The comparison retail offer in Monkseaton comprises some 21 outlets which include florists, a toy shop, a jewellers, chemists, opticians, florists, cards and gifts shops, PC repair, DIY and an embroidery shop. There are also several more specialist retailers including two bridal wear shops, a kitchen showroom and home improvement outlets. We note that the 2007 health check recorded the presence of men's and ladies clothing as part of the Monkseaton comparison retail offer, but these uses are no longer present.

1.174 There are several service sector outlets in the centre which include four food and drink units, seven health and beauty outlets and three estate agents. The centre also includes the Monkseaton library located at the junction of Caudwell Lane and Woodleigh Road. The centre does not contain any banks.

1.175 At the time of our health check in June 2011 there were eight vacant retail units. The vacancy rate in Monkseaton appears to be increasing and the centre has become fragmented due to new residential development and the conversion of former retail units into residential dwellings.

1.176 The centre benefits from on-street parking and is well served by both the Monkseaton Metro Station and local bus.

1.177 Overall, Monkseaton is a pleasant and attractive centre and the majority of buildings are in good condition. The centre provides a good mix of retail uses which cater for local top-up shopping needs and it also includes a range of more specialist shops and service sector uses. However, partly due to its linear nature and blocks of residential dwellings, the centre is slightly fragmented and there are now several vacancies. Monkseaton may benefit from seeking to consolidate its retail provision along Front Street and encouraging other uses such as residential along Caudwell Road.

Performance Analysis of Northumberland Park District Centre

1.178 Northumberland Park (also referred to as Shiremoor) is a new district centre that has been developed in accordance with UDP Policy S5 to provide retail, community and service facilities for a large area of new housing along the A19 corridor. The centre is located adjacent to the newly completed Northumberland Park Metro station and contains ten units, anchored by a Sainsbury's store.

1.179 Northumberland Park was not listed in the 2008 MHE Shopping Index.

1.180 The convenience retail offer in the centre is provided exclusively by the Sainsbury's store, which comprises a sales area of 1,575 sq.m (net) with an estimated 30 per cent of the store's sales area floorspace used for comparison goods.

1.181 The comparison retail offer comprises two charity shops, Northumberland Tiles and Bathroom, Franks Factory Flooring carpet store and a car accessories shop. The centre also contains a takeaway, a cafe and a bookmakers.

1.182 At the time of our health check in June 2011 there were no vacant retail units.

1.183 The centre benefits from good transport links via both the adjacent Metro station and local bus services. There is ample car parking at the centre as well as an adjacent multi-storey Metro park and ride facility. There are also cycle storage facilities that were well used at the time of our health check.

1.184 Overall, Northumberland Park is a clean and modern new centre and the buildings are all in good condition. The size of the Sainsbury's store means it is unlikely to perform a role as a main convenience shopping destination. As more of the new housing still under-construction at Northumberland Park becomes occupied there may be a need to expand retail provision at the centre. The Northumberland Estates website indicates that the company proposes to develop a further 930 sq.m of Grade A retail space which will offer flexible retail space with the potential to attract larger retailers.

Performance Analysis of Preston Grange District Centre

1.185 Preston Grange (also known as The Collingwood Centre) is a purpose built shopping parade comprising some 11 units, anchored by a Morrisons store. The centre is located at the junction of the A1058 and the A192 and largely surrounded by residential uses.

1.186 Preston Grange (listed as The Collingwood Centre) achieved a ranking of 2,247th in the 2008 version of MHE's Shopping Index. The centre was not previously listed by MHE.

1.187 The convenience retail offer in the centre comprises the Morrisons store in addition to a small newsagent. The Morrisons store comprises a sales area of 3,122 sq.m (net) with an estimated 20 per cent of this floorspace devoted to comparison goods.

1.188 The comparison retail offer comprises Blockbuster, Morrisons Pharmacy and a pet shop. The centre also contains a takeaway, a tanning centre, a dry cleaners and a Post Office.

1.189 At the time of our health check in June 2011 there was one vacant retail unit.

1.190 The centre benefits from regular bus services that run along the A192, and it also benefits from a large area of free surface car parking.

1.191 In summary, Preston Grange District Centre essentially amounts to a Morrisons store and a few retail and service sector uses which primarily cater for local residents' needs rather than fulfilling a wider role.

Performance Analysis of Tynemouth

1.192 Tynemouth is not a defined centre in the existing UDP. However, it will be designated as a district centre in the forthcoming Core Strategy.

1.193 Located on the coast to the east of North Tyneside, Tynemouth is an attractive centre that contains some 55 retail units set primarily along Front Street and Percy Park Road. The majority of buildings are Victorian with residential or ancillary uses set above ground floor retail. The centre also contains the Tynemouth Castle and Priory, which is managed by English Heritage.

1.194 Tynemouth achieved a ranking of 3,575th in the 2008 MHE Shopping Index. The centre was not previously listed by MHE.

1.195 The convenience retail offer in the centre comprises the Co-operative Food supermarket on Front Street in addition to a bakery, a delicatessen, a chocolatier and a newsagent. The level of convenience floorspace is unlikely to be sufficient to support anything more than local top-up shopping needs.

1.196 The comparison retail offer is somewhat wider with a focus on high quality independent shops that sell clothing, cards, gifts, antiques, jewellery and homewares. There is also a range of small shops and stalls within the Green Ginger Shopping Arcade. Further comparison provision comprises two opticians, computers, motor accessories, a pharmacy and a florist. Whilst the majority of comparison retailers are of a high quality they are unlikely to meet the main shopping needs of local residents and they primarily cater for the tourist market.

1.197 The Tynemouth Station Market takes place every Saturday and Sunday from 9am until 4pm at the Tynemouth Metro Station, with a farmers' market every third Saturday. The market sells a wide variety of both convenience and comparison goods.

1.198 There are 20 food and drink outlets within Tynemouth, in addition to five public houses. These uses cater primarily for tourists attracted by the beach and the historical remains of the castle and priory. Further service uses within the centre include five health and beauty outlets, a travel agents, two estate agents and the Lloyds TSB bank. The centre also contains a library and a Post Office.

1.199 At the time of our health check in June 2011 there were only two vacant retail units in the centre.

1.200 The centre is highly accessibly by public transport via the Tynemouth Metro Station and regular bus services that run along Percy Park Road and the junction of East Street and Front Street. The centre benefits from car parking provision along Front Street.

1.201 Overall, Tynemouth is a highly attractive centre with a historic character and a strong tourist market. Soft landscaping throughout the centre is well maintained and there are attractive planters. The buildings within Tynemouth are in good condition and have frontages that contribute to a vibrant streetscape. The Tynemouth Metro Station, which is Grade 2* listed, provides an attractive gateway into the centre. Our overall assessment is that Tynemouth is a healthy centre, perhaps the healthiest of the study centre.

Performance Analysis of Whitley Lodge District Centre

1.202 Whitley Lodge District Centre is a purpose built shopping parade with residential or ancillary floorspace above retail units, to the north of Whitley Bay off Claremont Road. The centre contains some 27 units anchored by a Tesco Express unit which was formerly occupied by Kwik Save.

1.203 Whitley Lodge District Centre has not featured in any of MHE's Shopping Indexes.

1.204 The convenience retail offer in the centre comprises the Tesco Express, a bakery, a butchers and a newsagents. The comparison retail offer comprises a pharmacy, a clothing outlet, and a blinds outlet. The service uses in the centre include four take-aways, two cafés, a restaurant, two hairdressers and a laundry/dry cleaners. The centre also contains several other uses including a garage, a Post Office, a soft play centre, a gym, a bookmakers, a physiotherapist, a snooker club and a public house.

1.205 At the time of our health check in June 2011 there were no vacant retail units.

1.206 There is car parking provision at Whitley Lodge, and bus services run along Woodburn Drive and Claremont Road, although the frequency of services is somewhat limited.

1.207 Overall Whitley Lodge is a clean and tidy centre although some of the retail units now appear dated and would benefit from some enhancement works. The centre would also benefit from additional landscaping. Whilst the centre provides a limited number of convenience, comparison and service uses, the lack of vacant units suggests that the centre is reasonably healthy, albeit it clearly serves a localised client base.

Out of Centre Retail

Silverlink Shopping Park

1.208 The Silverlink Shopping Park is located between Wallsend and North Shields on the A1058 and is a purpose built retail park containing approximately 20 units. There are a number of high profile occupiers at Silverlink including, Next, Marks and Spencer, HMV, Argos, Comet, Boots and River Island. Many of these retailers are national high street chains that might ordinarily be found within town centres and therefore the shopping park is likely to draw trade from existing town and district centres. The food and drink provision comprises a Frankie and Benny's, a McDonalds and a Pizza Hut. The lack of vacant units and results of the household survey suggests that Silverlink Shopping Park is commercially successful and draws trade from across North Tyneside.

Royal Quays Factory Outlet

1.209 The Royals Quays Factory Outlet is located to the west of North Shields Town Centre adjacent to the A187. The Factory Outlet forms part of the wider Royal Quays development that also contains leisure uses including a bowling alley, the Wet 'n' Wild centre and a hotel. The Outlet centre contains 52 units with a mix of high profile retailers including Next Outlet, Marks and Spencer Outlet, Gap, Clarks and The Body Shop. The results of the household survey indicate that the Factory Outlet attracts a level of retail expenditure below that which might normally be expects for such a development.

Boundary Mills

1.210 Boundary Mills is a large freestanding retail development located in the centre of the Borough close to Shiremoor. The Boundary Mills store provides a wide variety of retail goods including clothing, shoes, home furnishing, arts and crafts, homeware and gifts. The results of the household survey indicate that Boundary Mills attracts shoppers from across North Tyneside. Furthermore, anecdotal evidence suggests that Boundary Mills attracts a significant number of shoppers from outside the Borough.

Whitley Road Retail Park and Surrounding Stores

1.211 The Whitley Road Retail Park contains the Wynsors World of Shoes and XS Superbowl. The Focus DIY store closed in 2011 and is currently vacant. The adjacent North Tyneside Industrial Estate also includes a range of units that sell retail goods to the public including, 1st For Fabrics, Cotterell Light Centres, Cottage Cane Furniture and Absolutely Fabrics. These retail uses are largely dispersed across the North Tyneside Industrial Estate which also contains several retail wholesalers, industrial premises and office units

2 PERFORMANCE ANALYSES TABLES

Table 2.1 – MHE Retail Rankings

Centre	Management Horizons Europe Centre Rankings 1998-2004				Management Horizons Europe Centre Rankings, 2008		
	MHE Location Grade	MHE 1998/99 Rank	MHE 2000/01 Rank	MHE 2003/04 Rank	MHE 2008 Location Grade	Fashion Market Position	MHE 2008 Rank
North Tyneside							
North Shields	District	361	398	491	Minor District	Lower	581
Whitley Bay	Minor District	431	474	624	Minor District	Middle	669
Wallsend	District	418	461	452	Minor District	Lower	835
Killingworth	Local	-	-	1,120	Local	Value	1,207
Longbenton	Local	-	-	1,268	Local	-	1,364
Battle Hill	Local	-	-	1,545	Local	-	1,716
Preston Grange	-	-	-	-	Minor Local	-	2,247
Monkseaton	-	-	-	-	Minor Local	-	2,356
Tynemouth	-	-	-	-	Minor Local	-	3,575
Forest Hall	-	-	-	-	Minor Local	-	4,666
Northumberland Park	-	-	-	-	-	-	-
Whitley Lodge	-	-	-	-	-	-	-
Other Centres							
Newcastle-upon-Tyne	Major Regional	10	10	13	Major Regional	Upper-Middle	16
Sunderland	Regional	77	81	72	Regional	Lower	107
South Shields	Sub-Regional	222	238	217	Sub-Regional	Lower	193
Cramlington	District	587	572	502	District	Lower	532
Gateshead	District	587	484	482	Minor District	Value	629
Jarrow	Minor District	695	644	644	Minor District	Lower	914
Gosforth	Minor District	695	775	863	Minor District	Lower	1018

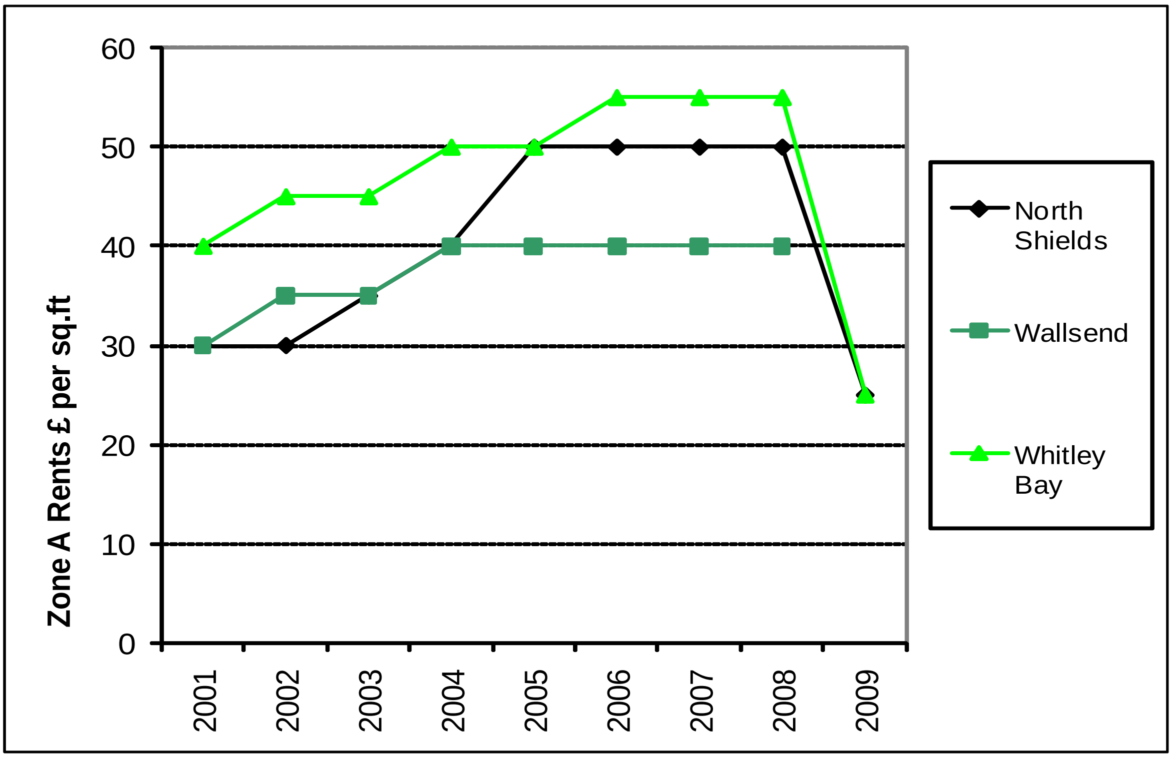
NOTES

We have analysed shopping indexes produced by both MHE in order to assess change in retail rankings over time (1998 - 2008). MHE published a Shopping Index between 1998 and 2003/04, which ranked the UK's top 1,672 retail centres.

More recently, MHE's 2008 Shopping Index now ranks the UK's top 6720 centres.

Table 2.2 – Zone A Retail Rents 2001 to 2009

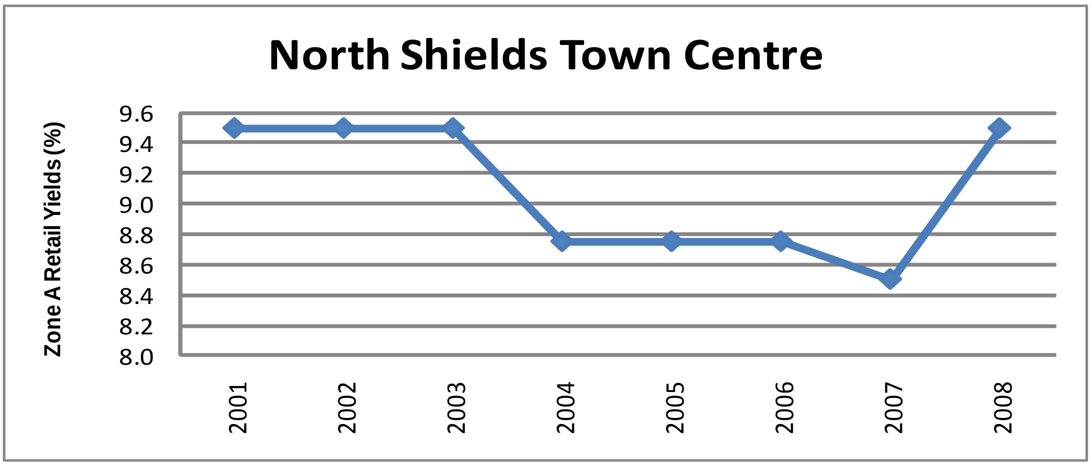
	2001	2002	2003	2004	2005	2006	2007	2008	2009
North Shields	30	30	35	40	50	50	50	50	25
Wallsend	30	35	35	40	40	40	40	40	
Whitley Bay	40	45	45	50	50	55	55	55	25

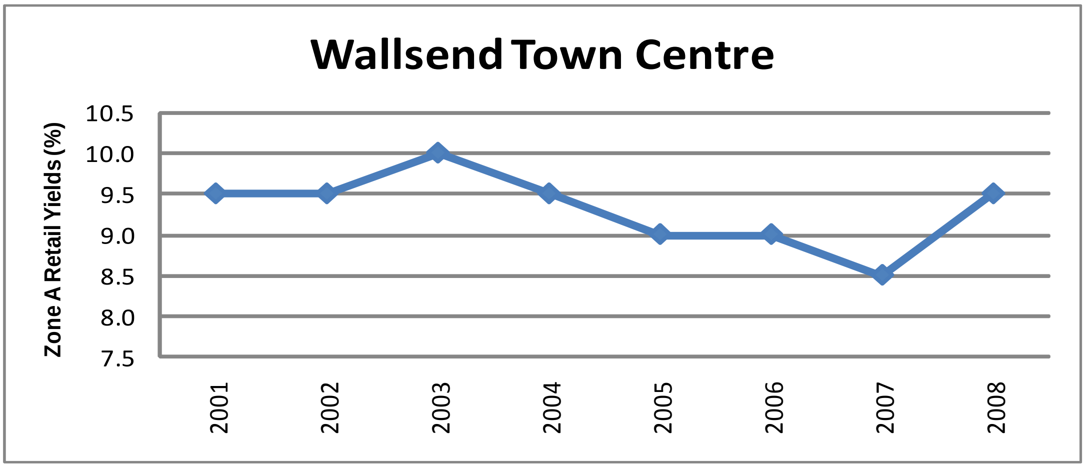


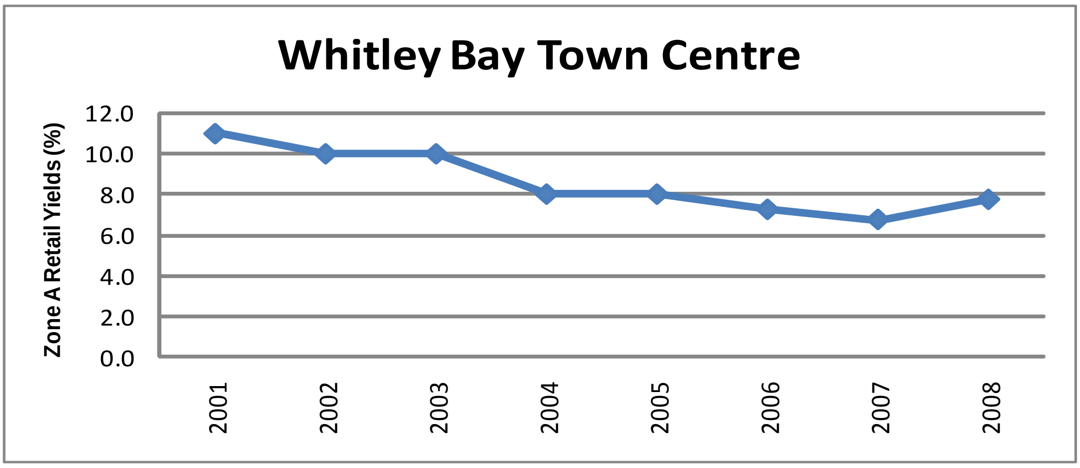
Source: Colliers CRE/Focus Town Reports (2009)

Table 2.3 – Zone A Retail Yields

	2001	2002	2003	2004	2005	2006	2007	2008
North Shields	9.50	9.50	9.50	8.75	8.75	8.75	8.50	9.50
	2001	2002	2003	2004	2005	2006	2007	2008
Wallsend	9.50	9.50	10.00	9.50	9.00	9.00	8.50	9.50
	2001	2002	2003	2004	2005	2006	2007	2008
Whitley Bay	11.00	10.00	10.00	8.00	8.00	7.25	6.75	7.75



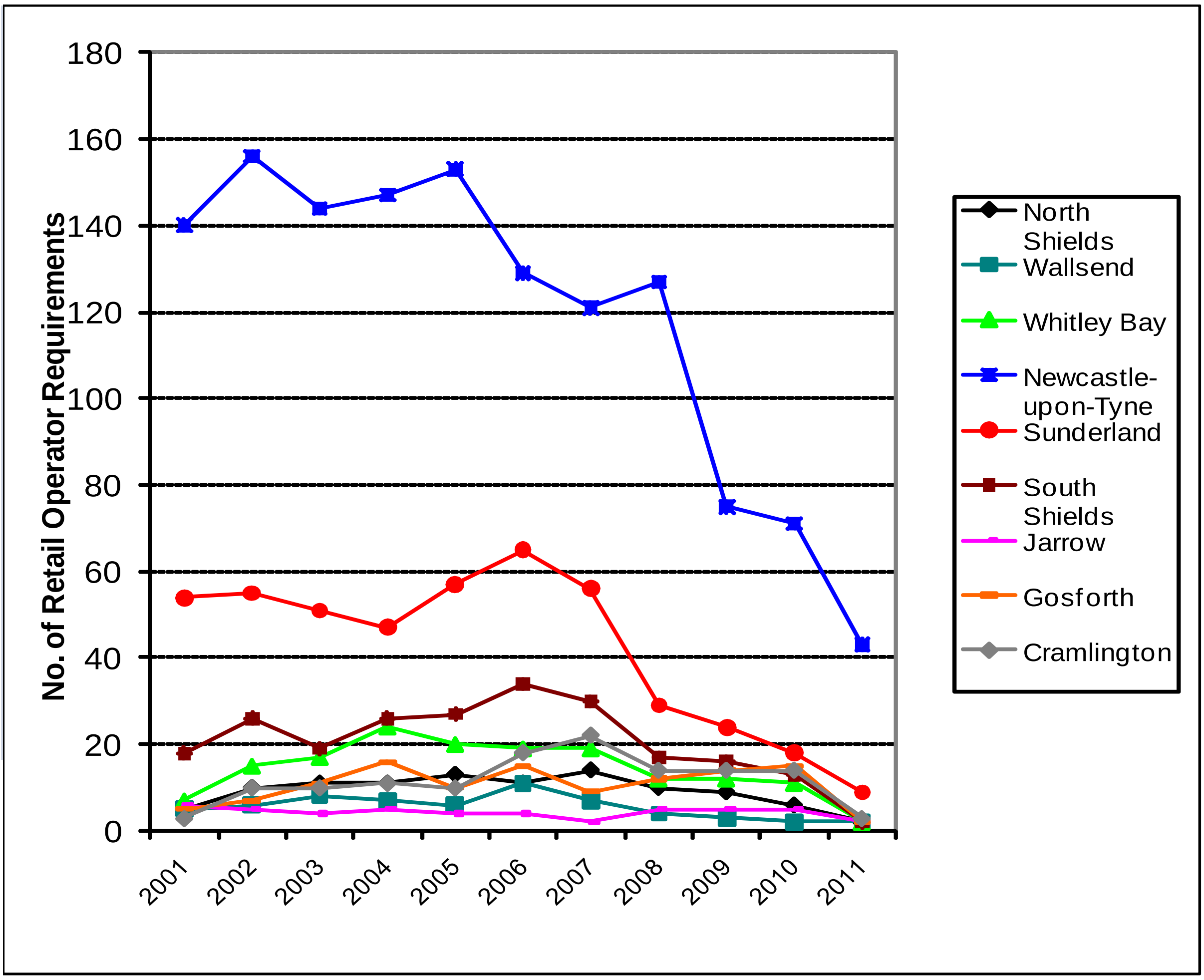




Source: Property Market Report, Valuation Office (January 2008)

Table 2.4 – Retail Requirements

No of Retail	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
North Tyneside											
North Shields	5	10	11	11	13	11	14	10	9	6	2
Wallsend	5	6	8	7	6	11	7	4	3	2	2
Whitley Bay	7	15	17	24	20	19	**19**	12	**12**	**11**	2
Other Centres											
New castle-upon-	140	156	144	147	153	129	121	127	75	**71**	43
Sunderland	54	55	51	47	57	**65**	56	29	24	18	9
South Shields	18	26	19	26	27	**34**	30	17	16	13	2
Jarrow	6	5	4	**5**	4	4	2	5	5	5	2
Gosforth	5	7	11	16	10	15	9	**12**	14	15	2
Cramlington	3	10	10	11	10	18	22	14	14	14	**3**



Source: FOCUS Town Reports, 2011

3 GOAD CENTRE PLANS

Figure 3.1 – North Shields, Experian GOAD Overview Map, August 2010

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Figure 3.2 – Wallsend, Experian GOAD Overview Map, January 2010

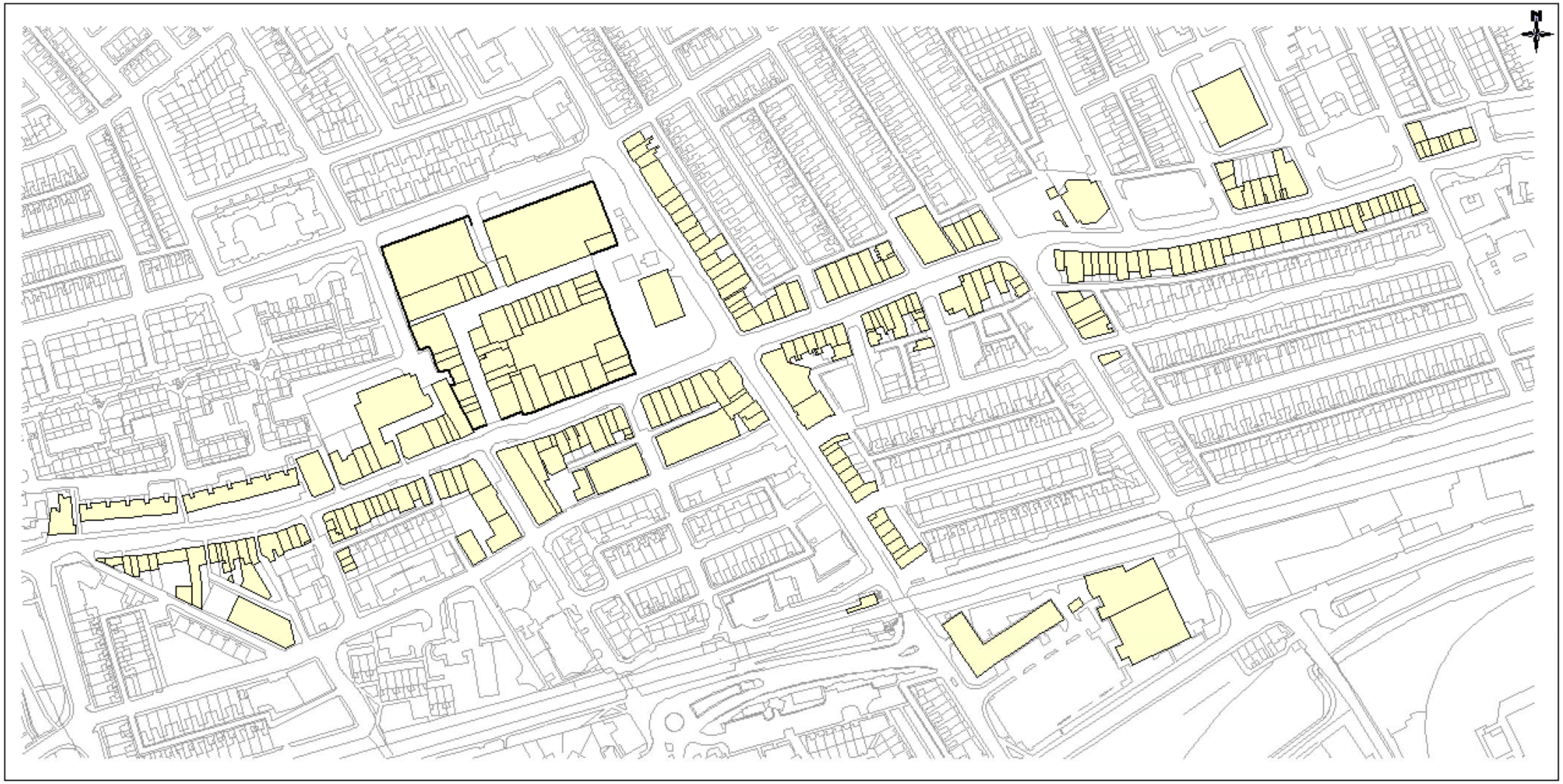

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Figure 3 3 – Whitley Bay, Experian GOAD Overview Map, January 2010

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4 VACANCY PLANS 2011

Figure 4.1 – North Shields Vancant Units

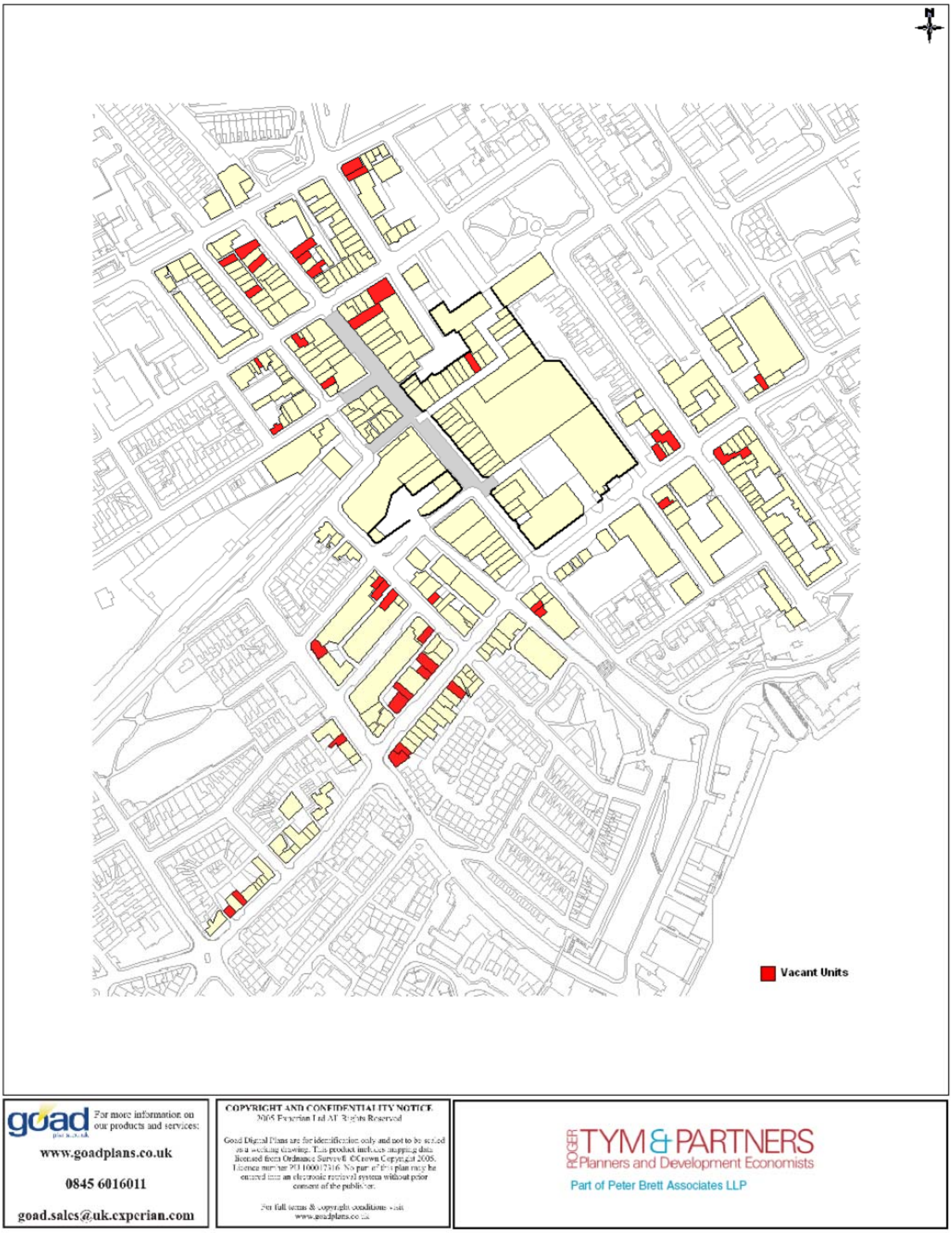

Figure 4.2 – Wallsend Vacant Units

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Figure 4 3 – Whitley Bay Vacant Units

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5 DIVERSITY OF USES

Table 5.1 – Summary of Diversity of Uses (by number of units) - North Tyneside

			North Shields			Wallsend			Whitley Bay		
		UK average, 2010	Units	%	Difference to UK average	Units	%	Difference to UK average	Units	%	Difference to UK average
Convenience goods retailers											
G1A	Bakers	1.97	5	2.04	0.07	7	3.21	1.24	7	2.32	0.35
G1B	Butchers	0.82	4	1.63	0.81	3	1.38	0.56	2	0.66	-0.16
G1C	Greengrocers & fishmongers	0.66	4	1.63	0.97	4	1.83	1.17	1	0.33	-0.33
G1D	Grocery and frozen foods	2.97	8	3.27	0.30	8	3.67	0.70	6	1.99	-0.98
G1E	Off-licences and home brew	0.64	1	0.41	-0.23	0	0.00	-0.64	1	0.33	-0.31
G1F	Confectioners, tobacconists, newsagents	2.41	4	1.63	-0.78	7	3.21	0.80	6	1.99	-0.42
	TOTAL	**9.47**	**26**	**10.61**	**1.14**	**29**	**13.30**	**3.83**	**23**	**7.62**	**-1.85**
Comparison goods retailers											
G2A	Footwear & repairs	1.97	1	0.41	-1.56	1	0.46	-1.51	8	2.65	0.68
G2B	Men's & boys' wear	1.03	0	0.00	-1.03	2	0.92	-0.11	4	1.32	0.29
G2C	Women's, girls, children's clothing	4.96	7	2.86	-2.10	4	1.83	-3.13	13	4.30	-0.66
G2D	Mixed and general clothing	3.44	3	1.22	-2.22	4	1.83	-1.61	7	2.32	-1.12
G2E	Furniture, carpets & textiles	3.76	14	5.71	1.95	16	7.34	3.58	13	4.30	0.54
G2F	Booksellers, arts/crafts, stationers/copy bureaux	3.90	8	3.27	-0.63	4	1.83	-2.07	11	3.64	-0.26
G2G	Electrical, home entertainment, telephones and video	4.05	13	5.31	1.26	8	3.67	-0.38	3	0.99	-3.06
G2H	DIY, hardware & household goods	2.48	6	2.45	-0.03	7	3.21	0.73	11	3.64	1.16
G2I	Gifts, china, glass and leather goods	1.62	0	0.00	-1.62	0	0.00	-1.62	7	2.32	0.70
G2J	Cars, motorcycles & motor accessories	1.31	6	2.45	1.14	2	0.92	-0.39	3	0.99	-0.32
G2K	Chemists, toiletries & opticians	3.92	7	2.86	-1.06	10	4.59	0.67	11	3.64	-0.28
G2L	Variety, department & catalogue showrooms	0.64	1	0.41	-0.23	1	0.46	-0.18	0	0.00	-0.64
G2M	Florists and gardens	1.00	4	1.63	0.63	1	0.46	-0.54	4	1.32	0.32
G2N	Sports, toys, cycles and hobbies	2.16	8	3.27	1.11	0	0.00	-2.16	5	1.66	-0.50
G2O	Jewellers, clocks & repair	2.11	4	1.63	-0.48	2	0.92	-1.19	5	1.66	-0.45
G2P	Charity shops, pets and other comparison	3.65	17	6.94	3.29	13	5.96	2.31	22	7.28	3.63
	TOTAL	**42.00**	**99**	**40.41**	**-1.59**	**75**	**34.40**	**-7.60**	**127**	**42.05**	**0.05**
Services											
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	15.65	33	13.47	-2.18	33	15.14	-0.51	50	16.56	0.91
G3B	Hairdressers, beauty parlours & health centres	8.09	24	9.80	1.71	19	8.72	0.63	30	9.93	1.84
G3C	Laundries & drycleaners	0.99	0	0.00	-0.99	0	0.00	-0.99	2	0.66	-0.33
G3D	Travel agents	1.31	6	2.45	1.14	3	1.38	0.07	4	1.32	0.01
G3E	Banks & financial services (incl. accountants)	4.19	9	3.67	-0.52	8	3.67	-0.52	10	3.31	-0.88
G3F	Building societies	0.60	3	1.22	0.62	3	1.38	0.78	3	0.99	0.39
G3G	Estate agents & auctioneers	3.84	4	1.63	-2.21	9	4.13	0.29	14	4.64	0.80
	TOTAL	**34.67**	**79**	**32.24**	**-2.43**	**75**	**34.40**	**-0.27**	**113**	**37.42**	**2.75**
Miscellaneous and vacant units											
G4A	Employment, careers, Post Offices and information	1.20	1	0.41	-0.79	1	0.46	-0.74	0	0.00	-1.20
G4B	Vacant units (all categories)	12.66	40	16.33	3.67	38	17.43	4.77	39	12.91	0.25
	TOTAL	**100.00**	**245**	**100.00**	**0.00**	**218**	**100.00**	**0.00**	**302**	**100.00**	**0.00**

Table 5.2 – Summary of Diversity of Uses (by floorspace) – North Tyneside

			North Shields			**Wallsend**			**Whitley Bay**		
		UK average, 2010	Total flrsp sq.m gross	%	Difference to UK average	Total flrsp sq.m gross	%	Difference to UK average	Total flrsp sq.m gross	%	Difference to UK average
G1	Convenience goods retailers	17.49	7,480	16.92	-0.57	4,660	15.16	-2.33	8,050	20.38	2.89
G2	Comparison goods retailers	47.53	22,340	50.53	3.00	12,720	41.38	-6.15	14,870	37.66	-9.87
G3	Services	22.94	9,230	20.88	-2.06	6,800	22.12	-0.82	11,860	30.03	7.09
G4A	Employment, careers, Post Offices and information	0.98	100	0.23	-0.75	160	0.52	-0.46	0	0.00	-0.98
G4B	Vacant units (all categories)	11.06	5,060	11.45	0.39	6,400	20.82	9.76	4,710	11.93	0.87
	TOTAL	**100.00**	**44,210**	**100.00**	**0.00**	**30,740**	**100.00**	**0.00**	**39,490**	**100.00**	**0.00**

UK averages sourced from Experian Goad centre report, September 2010.

Table 5.3 – Summary of Diversity of Uses (by number of units) - North Tyneside

			Killingworth		
		UK average, 2010	Units	%	Difference to UK average
Convenience goods retailers					
G1A	Bakers	1.97	1	3.33	1.36
G1B	Butchers	0.82		0.00	-0.82
G1C	Greengrocers & fishmongers	0.66	1	3.33	2.67
G1D	Grocery and frozen foods	2.97		0.00	-2.97
G1E	Off-licences and home brew	0.64		0.00	-0.64
G1F	Confectioners, tobacconists, newsagents	2.41	1	3.33	0.92
	TOTAL	**9.47**	**3**	**10.00**	**0.53**
Comparison goods retailers					
G2A	Footwear & repairs	1.97	1	3.33	1.36
G2B	Men's & boys' wear	1.03		0.00	-1.03
G2C	Women's, girls, children's clothing	4.96		0.00	-4.96
G2D	Mixed and general clothing	3.44	3	10.00	6.56
G2E	Furniture, carpets & textiles	3.76		0.00	-3.76
G2F	Booksellers, arts/crafts, stationers/copy bureaux	3.90	2	6.67	2.77
G2G	Electrical, home entertainment, telephones and video	4.05	1	3.33	-0.72
G2H	DIY, hardware & household goods	2.48	1	3.33	0.85
G2I	Gifts, china, glass and leather goods	1.62		0.00	-1.62
G2J	Cars, motorcycles & motor accessories	1.31		0.00	-1.31
G2K	Chemists, toiletries & opticians	3.92	3	10.00	6.08
G2L	Variety, department & catalogue showrooms	0.64	2	6.67	6.03
G2M	Florists and gardens	1.00		0.00	-1.00
G2N	Sports, toys, cycles and hobbies	2.16		0.00	-2.16
G2O	Jewellers, clocks & repair	2.11		0.00	-2.11
G2P	Charity shops, pets and other comparison	3.65		0.00	-3.65
	TOTAL	**42.00**	**13**	**43.33**	**1.33**
Services					
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	15.65	2	6.67	-8.98
G3B	Hairdressers, beauty parlours & health centres	8.09	2	6.67	-1.42
G3C	Laundries & drycleaners	0.99		0.00	-0.99
G3D	Travel agents	1.31	2	6.67	5.36
G3E	Banks & financial services (incl. accountants)	4.19		0.00	-4.19
G3F	Building societies	0.60	1	3.33	2.73
G3G	Estate agents & auctioneers	3.84	1	3.33	-0.51
	TOTAL	**34.67**	**8**	**26.67**	**-8.00**
Miscellaneous and vacant units					
G4A	Employment, careers, Post Offices and information	1.20	2	6.67	5.47
G4B	Vacant units (all categories)	12.66	1	3.33	-9.33
	Other		3	10.00	
	TOTAL	**100.00**	**30**	**100.00**	**-10.00**

6 WEEKLY FOOTFALL PLANS

Figure 6.1 – North Shields Weekly Footfall

Survey Date : March 2009

Figure 6.2 – Wallsend Weekly Footfall

Figure 6.3 – Whitley Bay Weekly Footfall