Nottingham City Local Retail Centres

Survey (2009)

Summary Report March 2010

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Background

The 2009 Local Centres Survey follows on from 2 previous ones undertaken in 1998/9 and 2005. In light of the then draft PPS4 ('Planning for Sustainable Economic Growth') and the need for the establishment of a robust evidence base for the Core Strategy, a new Survey was required to review the shopping centre hierarchy, and inform both Development Management and Planning Policy decisions and responses to applications received and policy to be written, - including proposed Interim Retail Planning Guidance (IRPG).

The 2009 Local Centres Survey is more comprehensive than the 2 previous ones. The 2005 survey sought to rank centres via scoring the amenities and transport whilst giving further information on parking, environment, and activity.

The 'saved' policies of the Nottingham Local Plan (adopted in 2005) provide the current adopted planning framework for the City, - this highlights 65 diverse local centre areas within Nottingham City. All of these were surveyed in Autumn 2009 and a scoring system devised to give objective weightings to identify a hierarchy.

The 4 main centres (Bulwell, Sherwood, Hyson Green and Clifton) total 100,000sqm, -about the same as the Victoria Centre and 40% more than the 5 retail parks in the City. Although the survey has regard to the City Centre, out of town retail parks, and centres outside the City it does not specifically look at them in detail. Retail Parks are not included as PPS6 ('Planning for Town Centres') and its replacement PPS4 are clear that they are not to be regarded as centres.

The Local Centres Survey forms part of an emerging evidence base to be used with other data and proposals eg Strategic Regeneration Frameworks/Neighbourhood Plans and the Greater Nottingham Retail Study (GNRS).

Methodology and Scoring Protocol

In order to review the centres and produce a comparable timeline, it was agreed that existing information from previous studies should be used to initially populate an access database and allow a trend to be established for each centre. It is noted that previous studies do not necessarily contain all the details required under the PPS4 guidance. The 2009 survey looked at quantitative and qualitative information for the following (further details are in Appendix 1):

- Pedestrian flows
- Transport
- Parking
- Environment

- Potential for expansion
- Sustaining vitality
- Proportion of vacant street level properties
- Unit detail

The Nottingham Local Retail Centres Survey has led to the proposed revised hierarchy:

Town Centres: Bulwell

District Centres: Clifton, Hyson Green, Sherwood

Local Centres:
Alfreton Road, Aspley Lane, Beckhampton Road, Bracebridge Drive, Bramcote Lane, Bridgeway Centre, Carrington, Mansfield Road, Nuthall Road, Robin Hood Chase, Sneinton Dale and Strelley Road.

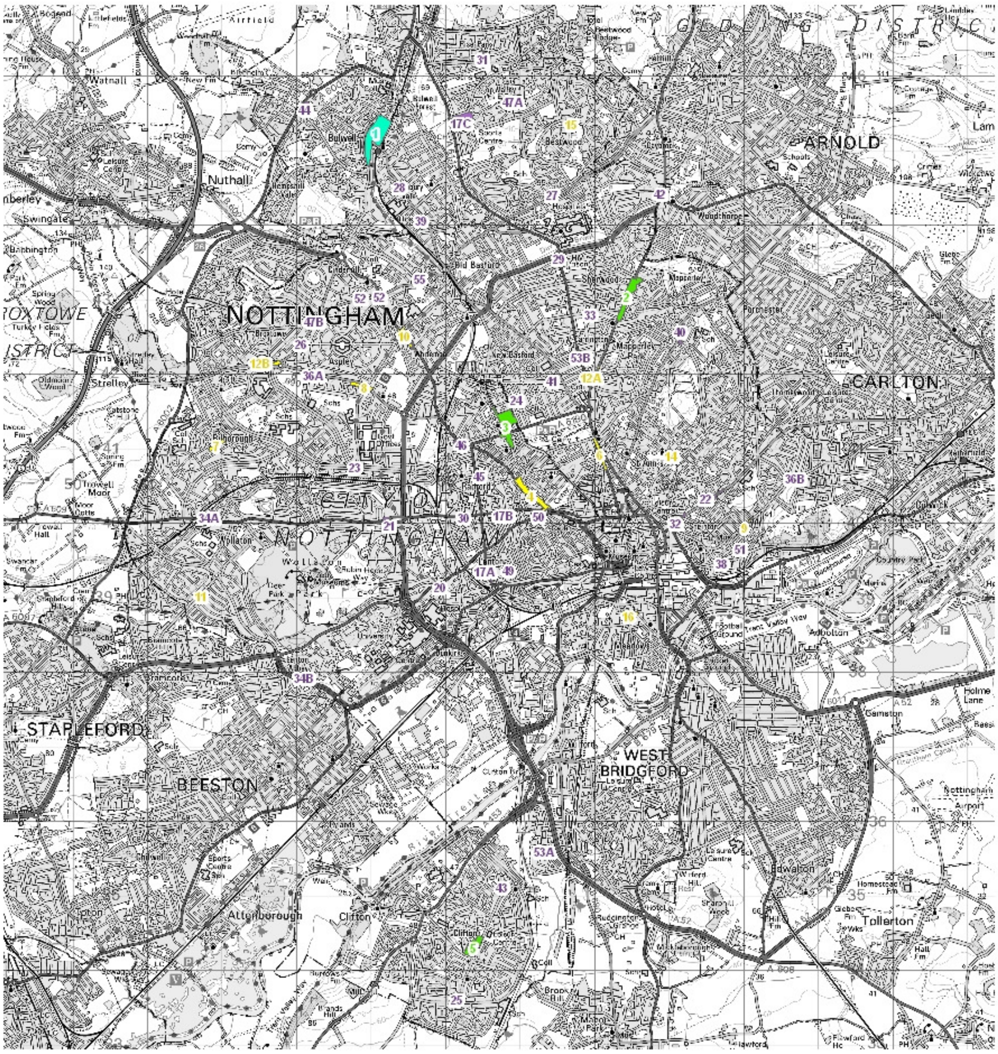
Centres of Neighbourhood Importance:
Arnold Road, Aspley Lane/Glencairn Drive, Beech Avenue, Beechdale Road, Berridge Road, Bobbersmill, Broxtowe Lane, Broxtowe Lane/Coleby Road, Broxtowe Lane/Sherborne Road, Carlton Road, Carlton Road South, Church Square, Daybrook, Derby Road/Arnesby Road, Derby Road Top, Farnborough Road, Hartley Road, Haydn Road, Hermitage Square, Highbury Road/Bedford Grove, Highbury Road/Broomhill, Hucknall Road/Carrington, Hucknall Road/Valley Road, Ilkeston Road West, Lenton Boulevard, Lenton Sands, Middleton Boulevard, Mill Road/BagnallRoad, Monksway, Oakdale Road, Old Farm Road, Rise Park, Sellers Wood Drive, Sneinton Boulevard, Top Valley Way, Trowell Road, Varney Road, Woodborough Road, Woodside Road

Significant Findings
2009 ranking for each centre (based on 2009 scoring)

1	Bulwell Town Centre
2	Sherwood District Centre
3	Hyson Green District Centre
4	Alfreton Road
5	Clifton District Centre
6	Mansfield Road
7	Bracebridge Drive
8	Aspley Lane
9	Sneinton Dale
10	Nuthall Road
11	Bramcote Lane
12A	Strelley Road
12B	Carrington
14	Robin Hood Chase
15	Beckhampton Road
16	Bridgeway Centre
17A	Top Valley Way
17B	Lenton Sands
17C	Lenton Boulevard
20	Derby Road/Arnesby Road
21	Middleton Boulevard
22	Carlton Road
23	Beechdale Road
24	Berridge Road
25	Farnborough Road
26	Broxtowe Lane/Coleby Road
27	Arnold Road
28	Highbury Road/Broomhill
29	Hucknall Road/Valley Road
30	Ilkeston Road West
31	Rise Park
32	Carlton Road South
33	Haydn Road
34A	Woodside Road
34B	Trowell Road
36A	Oakdale Road
36B	Aspley Lane/Glencairn Drive
38	Hermitage Square
39	Highbury Road/Bedford Grove
40	Woodborough Road
41	Beech Avenue
42	Daybrook
43	Varney Road
44	Sellers Wood Drive
45	Hartley Road
46	Bobbersmill
47A	Old Farm Road
47B	Broxtowe Lane
49	Church Square
50	Derby Road Top
51	Sneinton Boulevard
52	Broxtowe Lane/Sherborne Road
53A	Monksway
53B	Hucknall Road/Carrington
55	Mill Road/Bagnall Road

January 2010

Local Centres Survey 2009



Key

- Town
- District
- Local
- Coni

Scale: 1:56,777

Map Produced on: 01/02/2010 by: Planning Policy Team.
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Nottingham City Council
Environment and Regeneration

- The main reason for the revision to the hierarchy is to reflect an alignment with the other centres in Greater Nottingham. The 2009 Methodology places the cut-off between Local Centres and Centres of Neighbourhood Importance at those centres scoring 100 points.

- In accordance with the new methodology for the 2009 Local Centres Survey Hot Food Takeaways (HFTAs) have been viewed as less a draw to a Centre. Thus the new scoring system awards HFTAs less points. It is fair to say that the growth of HFTAs in a centre detrimentally affect the centre (i.e. they lose their position in the rankings) and that those centres with an above average number of HFTAs (11%) are those that dominate the bottom portion of the rankings table.

- A general and unsurprising trend that has come to light following the 2009 Local Centres Survey is that a centre is detrimentally affected by the loss of shops (A1 Retail units). This is highlighted in Centres such as Broxtowe Lane which has lost 5% of its' shops and has also lost 20 places in the rankings. Berridge Road and Hartley Road also present such a trend with a loss of 13% and 7% respectively causing Berridge Road to drop 7 places and Hartley Road 10 places.

- As with the trend seen amongst shops, a decline in A1 Service (i.e. hair dressers/beauty salons) leads overall to centre decline. It is apparent by-and-large that those centres that experience a loss of service units are those losing shop units. This may highlight in those Centres either contraction, competition from elsewhere or a general decline in the local economy.

- Restaurants and cafes (A3 units) play a major part in the examination of a Centre, - from one of the poorest quality Centres (Church Square) to one of the most successful (Mansfield Road). They show how successful a Centre may be but they do not operate within the confines of the Centre's economy as such. Restaurants and cafes do not need the Centre but a Centre could benefit greatly from a Restaurant and cafe.

- Drinking establishments (A4 units) make up the smallest numbers both in 2005 and in 2009. With numbers as low as 56 in 2005 and then lower still in 2009 with only 25.

Specific Centres

The top 5 Centres

<u>Bulwell Town Centre (1)</u>

Bulwell Town Centre has come out on top of the rankings in 2009 as it did in 2005. This is highlighted by the distinction of being named in the 2009 survey as a Town Centre rather than a District Centre.

When the survey was carried out there was no large superstore in Bulwell. However, Tescos has gained planning permission in December 2009 for nearly 10,000sqm (gross) / over 5,000sqm (internal) development in centre which should have a positive impact on the centre and help it compete with the retail park to the north of Bulwell.

Although there was a contraction of the Centre from 149 units in 2005, to 118 units in 2009, this decline in unit numbers is largely a result of the focus being shifted to the units operating on Bulwell's Main Street. This has led to the exclusion of units operating on Hazel Street, Coventry Road, Carey Road, and Station Road.

With the reduction of unit numbers Bulwell has also experienced a decline in vacant unit numbers. For Bulwell the vacant units have gone from 8% in 2005 down to 5% in 2009. This compares favourably to the Nottingham averages of 12% and 11% for 2005 and 2009 respectively.

A noted failing of Bulwell Town Centre following the 2009 Local Centre Survey appears to be the relatively low provisions for a night time economy. It seems that this was also a problem in 2005 but has over the four years gotten slightly worse. A comparison of Restaurants and cafes (A3), Drinking establishments (A4) and HFTAs (A5) units in Bulwell (making the majority of night time economy units) shows a moderate decline in these provisions, with units falling from 17 units (12% of all units) in 2005 down to 13 units (11%) in 2009.

<u>Sherwood District Centre (2)</u>

Sherwood District Centre is made up of two banks of shops stretched along a key radial route. In many ways Sherwood District Centre performs the role of a traditional high street. It currently provides a good independent retail offer, however there are some prominent vacancies. Sherwood should continue to reinforce its offer of a traditional high street with a 'village feel.

Sherwood District Centre has expanded since 2005 boasting 142 units with a 6% (9 units) vacancy rate rather than 133 units with an 8% (11 units) vacancy rate. The boundaries of the Centre have been extended slightly to include more of Mansfield Road.

With below average A1 and A5 units but above average A2, A3 and A4 Sherwood District Centre does not appear to have a strong enough focus on a day-time economy or retail experience. Where this Centre succeeds is on its night time provisions of restaurants and pubs. Sherwood District Centre is the counter for Bulwell Town Centre. A well provisioned Centre that is the almost the complete opposite to Bulwell and yet almost as successful.

Sherwood District Centre has moved up one place in the 2009 rankings over Hyson Green District Centre. This has in large part been due to the contraction of Hyson Green rather than the expansion of Sherwood District Centre.

<u>Hyson Green District Centre (3)</u>

Hyson Green District Centre has acutely contracted since 2005 with a 32% drop in unit numbers in the Centre. This contraction of the centre resulting in 59 units no longer being considered lowers considerably the number of vacant units within Hyson Green.

Hyson Green has a wide range of specialist services catering for the ethnically diverse residents of Nottingham and in particular the Hyson Green area. Twinned with Berridge Road, Hyson Green draws people from across the city to use the specialist services provided.

Ranking well in 2009 Hyson Green has lost one place in the rankings being overtaken by Sherwood District Centre. However, it is still a strong centre and a good example of what a District Centre would need.

<u>Alfreton Road (4)</u>

Alfreton Road has a higher score than Clifton, but is close to the City Centre and Hyson Green and not considered appropriate to currently classify as a District Centre. Alfreton Road Local Centre benefits and suffers from its proximity to the City Centre but is often over looked due to its poor environmental quality.

<u>Clifton District Centre (5)</u>

Clifton District Centre is a relatively small centre, especially compared to the other District Centres and even against some of the other Local Centres (in terms of unit numbers).

Clifton has the same number of vacant units in the 2005 and 2009 Local Centre Studies. In fact is seems that Clifton has not changed very much at all over the past four years with all unit counts roughly matching up to the 2005 levels. Moving up one place in the comparable rankings Clifton is benefitted from the deterioration of the Mansfield Road Local Centre.

Despite its size Clifton is a well used Centre, providing the right amount and range of services to Clifton residents who often find it simpler to travel there than out to West Bridgford or the City Centre. This is represented through the transport links which crisscross the area bringing people from across it to this District Centre.

<u>Other Centres</u>

<u>Centres just making it into the Local Centres classification</u>

There are several centres which just made it into the Local Centres Category eg Beckhampton Road (15), Bridgeway Centre (16), Robin Hood Chase (14) and Strelley Road (12B). These centres should all be enhanced and strengthened in order to maintain their position.

Centres missing out on being classified as Local Centres

The main reason for the revision to the hierarchy is to reflect an alignment with the other centres in Greater Nottingham. Many of the centres in Nottingham missing out on being proposed for the Local Centres through the emerging Core Strategy are greater than just a parade of shops and/or are of more than neighbourhood significance.

The survey was just a snap shot in time, and there were some centres (Carlton Road, Sneinton Hermitage, Farnborough Road and Rise Park) which had vacant supermarkets. If the supermarkets had been open the centres would have had a higher score. Indeed the Centre of Carlton Road (22) just misses out on being thought of as a Local Centre mainly due to the closure of the Co-op supermarket. Replacing the aforementioned Co-op with a similar sized supermarket would be welcomed and the combined Carlton Road Centre could be viewed as a Local Centre.

Arnold Road - 'The biggest climber since 2005' (27)

A smaller centre than even Broxtowe Lane, Arnold Road is only 8 units but it has made the very best of them. A good selection of services has ensured that this Centre is well used and it has maintained an environment that makes certain that people will visit the centre. A small but well used Centre, Arnold Road having filled its' vacant units deserves to climb 46 places and ranking 27th.

Appendix 1. Local Centres Survey – Methodology and Scoring Protocol

Pedestrian Flow

Surveys to be conducted between 9 and 4 to avoid commuter flows.

Site yourself at or near the hub of the centre – this may be simply in the middle of the area or a larger store in a particular area. Mark on the map where you stood.

If the latter, or if a larger centre, consider doing 2 pedestrian flow counts in different locations and averaging the flows,

We are more interested in flow within/to the centre rather than simply passing through which may be relevant in some locations (eg Derby Road Top) so discount pedestrians obviously flowing through.

It may be worth speaking to shop employees to establish if there are rush times such as lunches or where there are schools nearby 3:30 onwards. Make brief comments to the right of the Pedestrian flow box on the form. Also not weather at time of visit if this may influence.

Transport

This can be conducted via desk based analysis so just gain an impression of the amount of activity to and from bus stops. Use the following

Low use – indicators would be less than 5 people leaving buses as they arrive or insignificant queues at the stop(s) (if there is more than one stop try to take this into account)

Medium Use – 5-10 or small queues at stops

High Use - over 10 or longer queues at stops.

Consider the time of your visit and any impact this may have.

Record the number of bus stops considered in the No of Stops in centre box and record the usage above in the Number of Bus Routes box.

Parking

Regarding numbers it is important to remember that there may be more than one car park in a centre.

Record a rough estimate of number of spaces serving centre. If there is a mix of pay and free parking record estimates of numbers for each.

Record whether on street or designated car parks and details of any disabled parking available.

Environment

The judgement needs concluding Poor, Ok or Good with evidence to support. Example would be

Poor – Significant litter levels, poor quality buildings/vacancies with broken windows, noticeable graffiti and a general poor impression.

Ok – Bits of litter and a bit run down, vacant units boarded or not impinging on area significantly.

Good – No litter and buildings clean and vibrant – any vacant units presentable and encouraging to potential occupants.

Expansion

You need to consider the extremities of the local centre area (existing Local Plan Centre marked in Red on your maps).

Has the centre expanded? – if so draw new boundary and include new unit details.

Could the centre expand? – if so highlight where, on map and what changes would be needed and what expansion would suit the centre.

Also if centre has contracted mark this on map.

Sustaining Vitality

What would improve the existing centre?
Is there a type of offering missing that is likely to encourage use of the centre? eg Greengrocers, Post Office, Hair Dressers.
Are there any issues keeping people away?
We're after your overall thoughts on what would improve or assist the centre in its continued existence.

Unit Detail – Methodology

The Unit detail sheets are populated with information held on LLPG and Address Point. This may not be accurate and so a space is provided to update with actual premise names.

Reference numbers are shown on the maps if street number and name on the unit summary do not tally to existing units.

Record vacant units and ask neighbouring stores to try to establish length of vacancy. We will also be able to do some desk based work using Business Rates on this.

Premise Type should state what store offers eg Greengrocer, Hair Dressers, Bookmakers

Use Class – Use the Use Class Order sheet provided – majority likely to be one of the A classes.

Floorspace – This will largely be established via desk based analysis but where there are vacant units with agent boards please record the floorspace stated.

Convenience/Comparison – This considers the types of goods provided by the unit. Convenience represents a category of consumer goods which are bought frequently, quickly and with a minimum of emotional involvement; the category includes staples, impulse goods and emergency goods.

Comparison goods can be described as goods that consumers buy at infrequent intervals and normally would compare prices before buying eg. TV, Fridges, clothes etc

Split – larger stores may offer both types of goods and so please consider which is its main offering and a rough split (based on an estimate amount of floorspace given over) to each sort.

Below is the scoring used when establishing the hierarchy in 2005

Old Scoring

Unit Type	Score
Post Office	8
Newsagent	6
General Convenience	6
Small Supermarket	15
Large Supermarket	20
Superstore	25
Pharmacy/Chemist	10
Hairdresser	4
Hot Food Takeaway	6

Video Sales/Rental	4
Greengrocer	6
Butcher	6
Off Licence	4
Bookmaker	3
Laundrette	6
Florist	3
Baker	6
Bank	6
Cash Dispensers	6
Library	10
Health Centre/Doctors Surgery	15
Dentist/Optician	6
Community Centre	6
Leisure Centre	6

When reviewing this for the 2009 survey, with an eye to creating sustainable centres as guided by the Draft PPS4, it was felt that further amenities needed consideration when producing a new score and hierarchy. This new scoring has been applied to the 2005 survey in order to produce a consistent trend analysis.

The new scoring used is on the following page.

New Scoring

Unit Type	Score
Clothes Shop	6
Baker	6
Bank	6
Bookmaker/Amusement Arcades	3
Butcher	6
Café/Restaurant	6
Dentist/Optician	6
Domestic/Electronic Appliances	6
Estate Agent	3
Filling Station	6
Florist	3
Specialist Retail	3
Garage	3
General Convenience	6
General Retail	6
Green grocers	6
Hair dressers/Beauty Salon	4
Health centre/Doctors	15
HFTA/Food Outlet	4
Large Supermarket	20
Laundrette	6
Leisure Centre/Club	6
Library	10
News agent	6
Off Licence	4

Pharmacy/Chemist	10
Post Office	8
Pub/Bar	4
Public/Community Services	6
Small Supermarket	15
Specialist Services – inc Cheques cashing & Hotels	3
Superstore	25
Offices, Training & Advice	3
Charity Shop	3
Market	25

Following discussion with others in the Environment & Regeneration Department a points value has been added for markets located in local centres as an equivalent 'draw' to supermarkets.

The following non retail considerations were also factored into the new scoring as follows.

Each allocated +15 for 'good' and -15 for 'poor'

Consideration	Good	Poor
Pedestrian Flow	greater than 0.75 people per unit	Less than).5 people per unit
Transport	More than 10 people leaving buses as they arrive or significant queues at the stop(s) OR 3+ bus routes/3+ Stops in centre	less than 5 people leaving buses as they arrive or insignificant queues at the stop(s) OR no buses serving centre.
Parking	Judgement based upon survey information provided – eg High level or mixed or off street parking	Judgement based upon survey information provided eg No or low level of on street parking only
Environment	No litter and buildings clean and vibrant – any vacant units presentable and encouraging to potential occupants.	Significant litter levels, poor quality buildings/vacancies with broken windows, noticeable graffiti and a general poor impression.

Vacant Units

These obviously impact on a centre and so we have considered deducting a further 3 points per vacant unit but decided against this on the grounds that it would have a greater adverse effect on larger centres with more units. This is likely to be reflected in the environmental quality if significant.