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Sunderland Retail Needs Assessment 2016

Sunderland City Council

Volume 3 – Technical Papers – Final

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Contents for Volume 3 – Technical Papers

TECHNICAL PAPER 1 – PEDESTRIAN SURVEY FINDINGS

Introduction

1.1 In this Technical Paper, we present the findings of a survey of pedestrians in Sunderland City Centre, and in Washington and Houghton-le-Spring Town Centres, undertaken by NEMS Market Research, in February 2016. NEMS interviewed 251 pedestrians in Sunderland City Centre, 148 pedestrians in Washington Town Centre and 151 pedestrians in Houghton-le-Spring Town Centre. The questionnaire used in the survey is reproduced in Volume 2 of our report, which also contains the Excel database of all of the survey findings.

1.2 The findings of the survey form a key input into the NPPG's 'customers' views and behaviour' health check indicator. The findings also relate to other NPPG health check indicators such as '*accessibility*', '*perception of safety and occurrence of crime'* and the '*state of the town centre's environmental quality*'.

1.3 We focus, in particular, on the visitor satisfaction ratings in relation to a number of factors relating to the retail, leisure and service offer in each of the centres; a range of factors relating to their environmental quality and perceptions of personal safety; and a range of factors relating to accessibility by a variety of means of travel. We start, however, with a resume of the findings in relation to: mode of travel to the centre; likes, dislikes and suggestions for improvement; and identification of the food, non-food and leisure facilities which are said to be lacking in the centres.

Mode of Travel

1.4 There is some variation across the centres in terms of mode of travel for visitors, whether expressed as a proportion of trips to the centre, or as a proportion of people visiting the centre[1]. Some difference is to be expected, given the variation in car ownership and

[1] If Person A visits a town centre 5 times per week and Person B visits once per week, then Person A is 5 times more likely to be interviewed in a pedestrian survey than Person B. Thus, the un-weighted findings become a sample of trips to the centre. In order to express the findings as a proportion of people who visit the centre, the results need to be weighted by the inverse of the frequency of visit. For mode of travel, both weighted and un-weighted results are relevant, but for all other questions we utilise the un-weighted results, which express the findings as a proportion of trips.

wealth in the catchment areas of each of the centres. In particular, we note that the 2011 Census findings show that a higher proportion of households with no car (above the Sunderland average of 35.1% and the North East average of 31.5%) are located in the Wards nearest to Sunderland City Centre and in the Washington North Ward. However, the other Wards surrounding Washington have a lower than average proportion of households with no car and this is also true for all of the Wards directly adjoining/surrounding Houghton-le-Spring.

1.5 Thus, the pedestrian survey confirms (Table 1) that in terms of trips (un-weighted):

- Sunderland City Centre is most reliant on public transport, which accounts for almost half of the trips, and least reliant on private car transport which accounts for only a third of the trips;
- Washington Town Centre is most reliant on car borne trips (54.7 per cent) and least reliant on public transport; and that
- Houghton-le-Spring Town Centre is the most reliant on walk-in trips.

Table 1: Mode of Travel to Centre (% of Trips)

Centre	Car-Driver	Bus	Train/ Metro	Taxi	Bicycle	Walk	Other	Total
Sunderland	33.5	43.4	6.0	2.0	0.4	14.7	0.0	100.0
Washington	54.7	31.1	0.0	2.0	0.0	11.5	0.7	100.0
Houghton-le-Spring	37.8	39.1	0.0	0.0	0.7	22.5	0.0	100.0

1.6 In terms of people (weighted), Table 2 confirms that:

- Sunderland City Centre is again most reliant on public transport, with 42.2 per cent of people visiting the centre dependent on bus and train modes;
- Sunderland City Centre and Houghton-le-Spring Town Centre are equally reliant on walk in trade; and that
- both Washington and Houghton-le-Spring have high proportions of people dependent on the private car mode.

Table 2: Mode of Travel to Centre (% of People)

Centre	Car-Driver	Bus	Train/ Metro	Taxi	Bicycle	Walk	Other	Total
Sunderland	47.7	27.0	15.2	3.3	0.0	6.8	0.0	100.0
Washington	69.6	23.2	0.0	4.1	0.0	2.9	0.2	100.0
Houghton-le-Spring	66.0	27.5	0.0	0.0	0.1	6.4	0.0	100.0

Frequency of Visits to each Centre for Any Purpose

1.7 Table 3 records the frequency of visits to each centre for any purpose. All three centres have a high frequency of visits, with a quarter of respondents in each case visiting at least four times a week. Indeed, in Washington and Houghton-le-Spring, approximately 10 per cent of respondents visit every day.

Table 3: Frequency of Visits to Centre – for Any Purpose (% of Trips)

Centre	Everyday	4 to 6 Days a week	2 to 3 Days a week	1 day a week	Once or Twice a Month	Less than once a month	First Time	Total
Sunderland	5.6	19.5	36.7	17.1	13.2	7.2	0.4	100.0
Washington	10.8	14.2	33.8	19.6	12.9	8.8	0.0	100.0
Houghton-le-Spring	9.3	15.9	40.4	21.9	9.9	2.0	0.7	100.0

Main Purpose of Visit

1.8 Table 4 records the findings in relation to the main purpose of visit to each of the three centres surveyed, and it shows that:

- Houghton-le-Spring Town Centre is most reliant on shoppers buying food and groceries (51.0 per cent), but with Washington Town Centre also recording a high proportion of food and grocery purchases (35.8 per cent);
- Sunderland City Centre has the highest proportion of work based visitors (10. 0 per cent); and that
- Although non-food shopping was the most frequently cited 'main purpose of visit' in Sunderland City Centre, such shoppers account for only a quarter of the trips to the City Centre.

Table 4: Main Purpose of Visit to Centre (% of trips)

	Top 5 Responses - % of Total Responses in Each Centre				
Centre	**1**	**2**	**3**	**4**	**5**
Sunderland	To buy non-food goods (25.5%)	To buy food and groceries (21.5%)	To window shop (11.2%)	For work/ business purposes (10%)	For Personal Services (7.6%)
Washington	To buy food and groceries (35.8%)	To buy non-food goods (29.1%)	To window shop (11.5%)	To meet somebody (8.1%)	For Personal Services (6.8%)
Houghton-le-Spring	To buy food and groceries (51%)	To buy non-food goods (10.6%)	For Personal Services (9.9%)	To meet somebody (6.6%)	To window shop (4.6%)

Like, Dislikes and Suggestions for Improvement

1.9 The pedestrian survey also canvassed customers' likes, dislikes and suggestions for improvements in each of the centres and the findings are set out in Tables 5 to 7.

1.10 In Sunderland City Centre (Table 5), it is somewhat disappointing that the top 'likes' were *'near to home/convenient'* and *'nothing in particular'*. Of the dislikes, the most notable response in Sunderland City Centre was *'lack of choice/poor quality of independent shops*' and the need for a '*better choice/quality of independent shops'* was the most frequently cited suggestion for improvements in the city Centre.

1.11 It is surprising that '*remove litter/clean streets more'* featured in the top five ways of improving the City Centre, as Sunderland Council have a dedicated street cleaning team, which was ever present during our fieldwork visits. In addition, during our consultations with key stakeholders, the cleanliness of Sunderland City Centre was commended, but concern was expressed with respect to the impact that budget cuts will have on the current street cleaning initiatives.

Table 5: Sunderland City Centre - Likes, Dislikes and Suggestions for Improvement

Rank	Factor	Proportion of Trips (%)
Aspects most liked in Sunderland City Centre		
1	Near to home/convenient	38.6
2	Nothing in particular	21.1
3	Good choice/quality of non-food multiples	7.6
4	Good range of places to eat	6.4
5	Good choice/quality of independent shops	6.0
Aspects most disliked in Sunderland City Centre		
Rank	**Factor**	**Proportion of Trips (%)**
1	Nothing in particular	33.1
2	Lack of choice/poor quality of independent shops	17.9
3	Dirty streets/car parks/footpaths	14.3
4	Lack of choice/poor quality of non-food multiples	11.6
5	Too many vacant shops	9.6
How could Sunderland best be improved?		
Rank	**Factor**	**Proportion of Trips (%)**
1	Better choice / quality of independent shops	26.3
2	Don't know / None mentioned	24.3
3	Improve appearance of the buildings & landscaping and more non-food multiple stores / high street chains	16.7
4	Remove litter / clean streets more often	13.1
5	Better choice / quality of shops in general	12.4

1.12 In Washington Town Centre (Table 6), the most frequently cited 'likes', apart from '*near to home/convenient*' were '*good choice/quality of independent shops*', '*good range of places to eat*', '*general cleanliness of shopping streets*', '*character/atmosphere*' and '*parking is free*'.

1.13 It is noteworthy that almost two-thirds of respondents were unable to cite any particular 'dislike' in Washington. Of the minority with 'dislikes' the most frequently cited were '*difficulties in parking/busyness of car parks/not car friendly*', '*lack of choice/poor quality of independent shops*', '*lack of choice/poor quality of non-food multiples*' and '*undesirables*'.

1.14 When asked how could Washington best be improved, almost one half of all visitors to the centre were unsure as to how the centre could be improved. However, those that did answer cited '*better choice/quality of independent shops*', '*more parking/more car-*

friendly', '*better choice/quality of shops in general*', '*more non-food multiples/high street chains*' and '*more public toilets*'.

Table 6: Washington Town Centre - Likes, Dislikes and Suggestions for Improvement

Rank	Factor	Proportion of Trips (%)
Aspects most liked in Washington Town Centre		
1	Near to home/convenient	54.7
2	Good choice/quality of independent shops and good range of places to eat	16.9
3	General cleanliness of shopping streets	14.2
4	Character/atmosphere and	12.2
5	Parking is Free	12.2
Aspects most disliked in Washington Town Centre		
Rank	**Factor**	**Proportion of Trips (%)**
1	Nothing in particular	58.1
2	Difficulties in parking/busyness of car parks/not car friendly	6.8
3	Lack of choice/poor quality of independent shops	6.1
4	Lack of choice/poor quality of non-food multiples	4.1
5	Undesireables	4.1
How could Washington best be improved?		
Rank	**Factor**	**Proportion of Trips (%)**
1	Don't know / None mentioned	48.7
2	Better choice / quality of independent shops	10.1
3	More parking / make more car-friendly and better choice / quality of shops in general	7.4
4	More non-food multiple stores / high street chains	6.8
5	More public toilets	4.7

1.15 In Houghton-le-Spring (Table 7), the most frequently cited 'likes', apart from '*near to home/convenient*' were '*good accessibility by bus*', '*good range of places to eat and drink*', '*good choice/quality of non-food multiples*' and '*good choice/quality of foodstores*'.

1.16 Almost one third of visitors surveyed in Houghton-le-Spring stated that they did not have a particular dislike. However, it is clear that there is some level of dissatisfaction with the shopping offer including the '*need for a larger supermarket*', the '*choice/quality of shops in general*' and the '*lack of choice of non-food multiples*'.

1.17 Given the recent closure of the Co-op it is unsurprising that a '*bigger/better supermarket*' was the primary response in terms of how the centre could best be improved. We note, however, that Lidl is now proceeding with the construction of a new supermarket on this site of the former Co-op.

Table 7: Houghton-le-Spring Town Centre - Likes, Dislikes and Suggestions for Improvement

Aspects most liked in Houghton-le-Spring Town Centre		
Rank	**Factor**	**Proportion of Trips (%)**
1	Near to home/convenient	62.3
2	Good accessibility by bus	10.6
3	Good range of places to eat & drink	10.6
4	Good choice/quality of non-food multiples	7.6
5	Good choice/quality of foodstores	6.0
Aspects most disliked in Houghton-le-Spring Town Centre		
Rank	**Factor**	**Proportion of Trips (%)**
1	No opinion / Nothing in particular	29.8
2	Lack of a larger supermarket	13.3
3	Dirty streets / car parks / footpaths	13.3
4	Choice / quality of shops in general is inadequate	12.6
5	Lack of choice / poor quality of non-food multiple stores / high street chains	9.9
How could Houghton-le-Spring best be improved?		
Rank	**Factor**	**Proportion of Trips (%)**
1	Bigger / better supermarket	28.5
2	Don't know / None mentioned	22.5
3	Better choice / quality of shops in general	19.9
4	Improve appearance of the buildings and landscaping	13.9
5	Better choice / quality of independent shops	12.6

Types of Shops and Leisure Facilities Perceived to be Lacking

1.18 Respondents were asked whether there were any types of food shops that each of the centres were lacking in. The highest level of dissatisfaction arises in Houghton-le-Spring where the majority of respondents (58.9 per cent) replied in the affirmative. Conversely the highest level with satisfaction of the food offer would seem to be in Washington, where only 22 per cent of respondents replied in the affirmative. It is a little surprising that only 27 per cent of respondents in Sunderland City centre replied in the affirmative, given the absence of any large supermarket in the City Centre.

1.19 For those respondents who felt that the centres were lacking in food shops, Table 8 shows that:

- Those respondents who felt that the City Centre was lacking in a food shop, most frequently cited Asda, followed by 'supermarket', 'takeaways/fast food shops', 'food market' and a 'Morrisons';
- In Washington, of the 32 respondents who perceived a food store deficiency, eight were calling for 'Morrisons' and six were calling for an Aldi, which is surprising given the presence of Aldi within the Galleries Retail Park. There were also four mentions each for Lidl and Tesco; and that
- There is a high degree of dissatisfaction in Houghton-le-Spring, with a third of the 89 respondents who replied in the affirmative calling for more choice in supermarkets in general, and with 'Asda', 'Aldi', 'Morrisons' attracting 24, 15 and 14 respondents, respectively.

Table 8: Food Shops Lacking (% of trips)

	Top 5 Responses - % of Total 'yes' Responses in Each Centre				
Centre	**1**	**2**	**3**	**4**	**5**
Sunderland	Asda (19.4%)	Supermarket (13.4%)	Takeaways/ fast food shops (13.4%)	Food market (10.5%)	Morrisons (10.5%)
Washington	Morrisons (25%)	Aldi (18.8%)	Lidl (12.5%)	Restaurants (12.5%)	Tesco (12.5%)
Houghton-le-Spring	Supermarket (33.7%)	Asda (27.0%)	Aldi (16.9%)	A Morrisons (15.7%)	Co-op (7.9%)

1.20 Respondents were also asked if there were any types of non-food shops that the centres were lacking in. The responses to this question show that visitors were divided in opinion, with 42.6 per cent in Sunderland responding in the affirmative, 45.9 per cent in Washington and 47.7 per cent in Houghton-le-Spring.

1.21 For those respondents who felt that the centres were lacking in non-food shops, their responses, which are set out in Table 9, show that:

- the main perceived requirement in Sunderland City Centre is for another 'department store' and for a better choice of ladies and children clothing shops and clothing shops in general;

- 'Primark' is the most desired of the missing stores in Washington together with clothing shops in general, mens' clothes shops, together with 'Debenhams' and 'River Island'; and that
- in Houghton-le-Spring, the main requirements are for a 'shoe shop', 'hardware store', ladies and men's clothing and an 'electrical shop'

Table 9: Non-Food Shops Lacking (% of trips)

	Top 5 Responses - % of Total 'yes' Responses in Each Centre				
Centre	**1**	**2**	**3**	**4**	**5**
Sunderland	Department store (21.5%)	Ladies clothes shop (12.2%)	Clothing shops in general (11.2%)	Childrens clothes shop (10.3%)	Independent retailers (10.3%)
Washington	Primark (39.7%)	Clothing shops in general (11.8%)	Mens clothes shop (10.3%)	Debenhams (8.82%)	River Island (8.82%)
Houghton-le-Spring	Shoe shop (27.8%)	Hardware shop (18.1%)	Ladies clothes shop (15.3%)	Mens clothes shop (15.3%)	Electrical shop (11.1%)

1.22 The survey then asked whether there were any leisure facilities lacking in each of the three centres. By far, the most significant affirmative response was in Sunderland City Centre where the loss of the Crowtree Leisure Centre is reflected in the specification of the facilities requested, with the most frequently cited being a *'leisure centre'*, '*swimming pool*' and an '*ice rink*'.

1.23 In Washington, only 10 per cent perceived any inadequacy in terms of leisure facilities, half of whom were calling for a cinema. We note, however, that there is an extant consent for a cinema and restaurant mixed use development.

1.24 Similarly, in Houghton-le-Spring only 11 per cent of respondents perceived a gap in the centre's leisure facilities, most of whom were calling for a 'swimming pool'. The high level of satisfaction, with respect to leisure facilities in Houghton, reflects the existence of a sports centre which provides for a range of sports including a first class gym, football, basketball, badminton, soft play, martial arts, dance studio, meeting rooms (which could accommodate (children's activities/youth clubs), indoor bowls and a skate park.

Table 10: Leisure Facilities Lacking (% of trips)

	Top 5 Responses - % of Total 'yes' Responses in Each Centre				
Centre	**1**	**2**	**3**	**4**	**5**
Sunderland	Lesiure Centre (56.84%)	Swimming Pool (20.0%)	Ice Rink (11.6%)	Childrens activities/ youth club (7.4%)	Soft play area (7.4%)
Washington	Cinema (50.0%)	Cafes/ restaurants (21.4%)	Childrens activities/youth club (14.3%)	Nicer pubs (7.1%)	Swimming Pool (7.1%)
Houghton-le-Spring	Swimming Pool (58.8%)	Childrens activities/youth club (17.7%)	Lesiure Centre (5.94%)	Cafes/ restaurants (5.9%)	Nicer pubs (5.9%)

Satisfaction Ratings

1.25 Up until this point, the questions asked of pedestrians had generally been in an open ended manner. However, the survey then asks a series of questions in relation to respondents' satisfaction ratings with respect to a variety of factors relating to the food, leisure and service offer in each centre; various environmental and personal safety considerations; and in relation to various transport and accessibility considerations for all modes. For each factor, respondents were asked to give a score from 1 to 5, with *'very satisfied*' responses scoring 5; '*satisfied'* responses scoring 4; '*neutral'* responses scoring 3; '*dissatisfied'* responses scoring 2; and '*very dissatisfied'* responses scoring 1. '*No opinion'* and *'don't know'* responses were excluded, and this enabled us to calculate a mean score for each factor, so that the higher the mean score, the higher the level of satisfaction.

1.26 The five factors considered in relation to each centre's retail, leisure and service offer were:

- range and quality of shops;
- supermarket offer;
- family entertainment facilities, e.g. cinema, bowling, bingo and so on;
- food and drink offer; and

- range of financial, legal and personal services (e.g. banks, solicitors, hairdressers, beauty parlours and so on).

1.27 Thus, the mean scores and centre rankings for these five retail, leisure and service offer factors are set out in Table 11, which shows that:

- Washington achieves the highest satisfaction ratings in relation to its overall **range and quality of shops**, with Sunderland ranked second and Houghton-le-Spring ranked the lowest of the three;
- Washington also achieves the highest satisfaction ratings in relation to its **supermarket** offer, with Sunderland ranked second and Houghton-le-Spring in third with the lowest mean scoring of 2.43, perhaps reflecting the closure of the Co-op supermarket, pending its replacement by Lidl;
- Washington obtains the top rank again in relation to **family entertainment** and **food and drink**, with Sunderland in second and Houghton-le-Spring in third;
- We see the first change in the rankings when analysing the **range of financial, legal and personal services,** with Washington ranked first, but with Houghton ranked second, with Sunderland in third;

Table 11: Pedestrian Satisfaction Ratings in Relation to the Centres' Retail/Leisure/Services Offer

	Retail/Leisure/Service Offer									
	Range & quality of shops		Supermarket offer		Family entertainment facilities		Food & drink offer		Range of financial, legal & personal services	
	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank
Sunderland	3.14	2	3.10	2	3.57	2	3.73	2	3.92	3
Washington	4.02	1	4.22	1	4.08	1	4.23	1	4.46	1
Houghton-le-Spring	3.03	3	2.43	3	3.31	3	3.69	3	3.99	2

1.28 **The five factors** considered in relation to each centre's environmental quality and personal safety factors were:

- cleanliness of shopping streets;
- personal safety/policing;

- quality and overall appearance of buildings and landscaping;
- shelter from weather; and
- pedestrian safety (which we consider is best treated as a personal safety issue, rather than as a transport/accessibility factor).

1.29 Thus, the mean scores and centre rankings for these five environmental quality and personal safety factors are set out in Table 12, which shows that:

- Washington achieves the highest satisfaction ratings in relation to the **cleanliness of shopping streets**, with Houghton-le-Spring ranked second and Sunderland ranked the lowest of the three;
- Washington achieves the highest satisfaction ratings in relation to **personal safety/policing,** and the **quality and overall appearance of the centre's buildings and landscaping**, with Houghton-le-Spring ranked second for both factors, and again Sunderland is ranked the lowest of the three;
- Sunderland obtains a higher satisfaction rating than Houghton-le-Spring in relation to **shelter from the weather and pedestrian safety**, however Washington still tops the satisfaction rankings with respect to each of these factors

Table 12: Pedestrian Satisfaction Ratings in Relation to the Centres' Environmental and Personal Safety Factors

	Environmental and Personal Safety Factors									
	Cleanliness of shopping streets		Personal safety / policing		Quality & overall appearance of buildings & landscaping		Shelter from weather		Pedestrian safety	
	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank
Sunderland	3.01	3	3.40	3	2.83	3	3.01	2	3.63	2
Washington	4.65	1	4.56	1	4.38	1	4.41	1	4.45	1
Houghton-le-Spring	3.28	2	3.61	2	3.05	2	2.28	3	3.36	3

1.30 The six factors considered in relation to each centre's accessibility by various modes of transport were:

- amount of car parking;
- cost of car parking;

- accessibility by bus;
- cycle access/cycle parking;
- ease of movement around the centre on foot; and
- access for people with mobility/hearing/site difficulties.

1.31 Thus, the mean scores and centre rankings for these six accessibility factors are set out in Table 13, which shows that:

- Washington tops the satisfaction ratings once again by a significant margin, in relation to each of the six factors;
- Houghton-le-Spring outperforms Sunderland City in each of the six factors, with the biggest difference evident for the **cost of car parking**, **accessibility by bus** and **cycle access/cycle parking**; and
- that there is very little difference between Sunderland and Houghton-le-Spring's satisfaction ratings for **ease of movement around the centre on foot** and **access for people with mobility/hearing/ sight difficulties**.

Table 13: Pedestrian Satisfaction Ratings in Relation to the Centre's Accessibility Factors

	Accessibility Factors											
	Amount of car parking		Cost of car parking		Accessibility by bus		Cycle access / cycle parking		Ease of movement around the centre on foot		Access for people with mobility / hearing / sight difficulties	
	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank
Sunderland	3.48	3	3.05	3	3.92	3	3.27	3	3.90	3	3.54	3
Washington	4.28	1	4.67	1	4.61	1	4.29	1	4.59	1	4.44	1
Houghton-le-Spring	3.69	2	4.27	2	4.42	2	3.93	2	3.92	2	3.56	2

1.32 Table 14 presents an analysis of the mean of means for the five retail, leisure and service offer factors; for the five environmental and personal safety factors; and for the six accessibility factors. Table 14 shows that:

- Washington maintains its top position in the satisfaction rankings in each of the categories;

- Sunderland obtains the second highest satisfaction ranking in the **retail/leisure/service offer** and **environmental and personal safety** categories but is ranked third overall for **accessibility**;
- Houghton-le-Spring obtains the second highest satisfaction ranking in the **accessibility** category but is ranked third overall for **retail/leisure/service offer** and **environmental and personal safety**;

Table 14: Mean of Means for Pedestrian Satisfaction Ratings

	Retail/ Leisure/ Service Offer		Environmental and Personal Safety		Accessibility	
	Mean of Means	Overall Rank	Mean of Means	Overall Rank	Mean of Means	Overall Rank
Sunderland	3.49	2	3.18	2	3.53	3
Washington	4.20	1	4.49	1	4.48	1
Houghton-le-Spring	3.29	3	3.12	3	3.97	2

1.33 Finally, Table 15 sets out the overall mean of means for the sixteen factors considered. Washington is the clear 'winner' in relation to the customer satisfaction 'league table', with Houghton-le-Spring the 'runner-up' and Sunderland in close contention at third.

Table 15: Mean of Means for all Sixteen Customer Satisfaction Factors

	Overall	
	Mean of Means	Overall Rank
Sunderland	3.41	3
Washington	4.40	1
Houghton-le-Spring	3.49	2

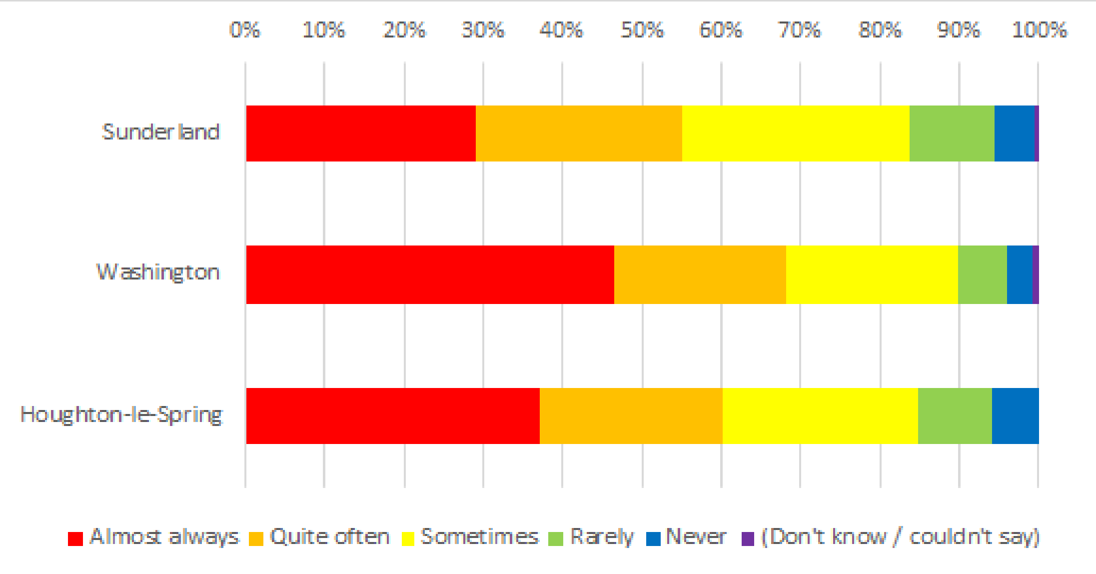
Linked Trips

1.34 The pedestrian survey also asked how often respondents combine shopping with visits to services, or with visits to eating and drinking outlets, or with visits to other leisure facilities. The findings are set out in Figure 1, which shows that:

- the propensity for linked trips combining shopping with visits to services/eating and drinking outlets/leisure facilities is greatest in Washington, followed by Houghton-le-Spring and then Sunderland;

- these results are surprising as with Sunderland being a sub-regional centre, one would assume that it contains a greater provision of services/eating and drinking outlets/leisure facilities than the other two town centres, yet the visitors to Sunderland have a lower propensity to link their trip with visits to services/eating and drinking outlets/leisure facilities, but, this finding may reflect the strong competition that Sunderland faces from Newcastle City Centre in terms of the night time economy and from the Metro Centre in terms of its leisure offer;
- the high propensity for linked trips in Washington along with the other findings of the survey, suggest that Washington is performing quite well and if the cinema and restaurant mixed use development can be delivered, it will further increase the propensity for linked trips, which in turn will increase overall spend and reduce leakage; and that
- Houghton-le-Spring already performs quite well in terms of linked trips and this is likely to be further improved when the Lidl supermarket is completed and if there is an improvement to the commercial leisure offer.

Table 16: Linked Trips Combining Shopping with Visits to Services/Eating and Drinking Outlets/Leisure Facilities



Health and Disability

1.35 Finally, the pedestrian survey asked various questions in relation to health or disability. In response to the question: *'Are your day-to-day activities limited because of a health* *problem or disability which has lasted, or is expected to last, at least 12 months (including problems relating to old age)?'*, 86 per cent of respondents said '*No*', with 4.6 per cent saying '*Yes, limited a little'*, and 7.8 per cent saying '*Yes, limited a lot'*. The majority of the respondents who did report a health/disability problem said that this was related to mobility (71 per cent).

1.36 When asked to describe what problems they experienced, most of those who had cited a health/disability problem said none, but the next most frequent response was that this was related to their inability to walk very well. When these respondents were asked what improvements they would like to see that would help overcome their difficulties, the most frequently cited responses were *'better maintenance of pavements'*, *'more street/shop seating', 'more circulation space in shops', 'reduce amount of pavement clutter such as A-boards or other obstructions' and 'wider pavements/footpaths/walkways'*.

Conclusions

Sunderland City Centre

1.37 Sunderland is a Sub-regional City Centre which appears to be **experiencing some difficulties**. It is noted that the findings of the pedestrian surveys show a division in visitors' opinions, in terms of the City Centre's offer. Whilst 7.6 per cent of respondents cited *'choice/quality of non-food multiples'* as a *'most liked'* aspect of Sunderland City Centre, 11.6 per cent cited this factor as a *'most disliked'* aspect and 16.7 per cent suggested that more non-food multiples/high street chains are required to improve Sunderland's offer. In terms of non-food gaps, 43.6 per cent of respondents stated that there were no gaps, whereas 46.6 per cent of visitors felt that there were gaps.

1.38 In addition, Sunderland City Centre has a weak convenience offer in both the independent and national multiple sectors, with a moderately sized Tesco Metro supermarket being the only 'big four' retailer present in the City Centre. Yet, despite this lack of representation by the 'big four', respondents cited the 'lack of choice/poor quality of independent shops' as one of the 'most disliked' aspects of Sunderland and 26.3 per cent suggested a 'better choice/quality of independent shops' would best improve Sunderland's offer. Moreover, when asked if Sunderland was lacking in a type of food shop, the majority of those who said 'yes' cited Asda, Morrisons or another unnamed supermarket, together with improvements to food markets.

1.39 Furthermore, there is a relatively high level of vacancy within the City Centre, which is above the national average, both in terms of proportion of units and proportion of floorspace. The quantum of vacancies is evident on the ground, especially along High Street West, so that it is not surprising that vacancy featured in the top five most frequently cited 'dislikes' by respondents.

1.40 Sunderland came third overall in the satisfaction ratings, when compared with the scores achieved by Washington and Houghton-le-Spring. Indeed, Sunderland obtained an overall mean of means score of 3.41, which is significantly below the 4.40 mean of means achieved by Washington.

1.41 Sunderland achieved quite a low series of rankings in relation to the '*Environmental and Personal Safety'* category, particularly for the '*cleanliness of shopping streets'* and '*quality and overall appearance of buildings and landscaping'*. We point out, however that during the pedestrian surveys in Sunderland improvement works were being carried out along High Street West; construction works were being carried out within the Holmeside Triangle for Sunderland College's new campus; construction works were ongoing for Sunderland University's new Enterprise and Innovation Hub at the eastern edge of the campus along the A183; and refurbishment works were being carried out to provide new student accommodation along Union Street. These works may have affected the scoring of respondents.

Washington Town Centre

1.42 Washington achieved the highest satisfaction rating in relation to each of the 16 factors identified and achieved an overall mean of means score of 4.40, thereby, demonstrating that most of its customers fall within the satisfied to very satisfied range. It is not surprising, therefore, that when asked what they disliked most about Washington, 58 per cent of respondents had no opinion /stated nothing in particular. Furthermore, almost half of the respondents could not suggest any ways to improve the centre.

1.43 Nevertheless, it is clear that Washington's overall offer as a Town Centre will be much improved if the extant consent for a cinema and food and drink uses come to fruition.

Houghton-le-Spring

1.44 Houghton achieves an overall mean of means satisfaction rating of 3.49, suggesting it is a reasonably healthy Town Centre. Indeed, Houghton-le-Spring outscored Sunderland on a number of factors, including '*range of financial, legal and personal services', 'cleanliness of shopping streets', 'personal safety/policing', 'quality and overall appearance of buildings and landscaping'*, and in relation to all of the accessibility factors, particularly in relation to access by bus and cost of car parking. Furthermore, Houghton-le-spring has a below the national average level of vacancies, both in terms of proportion of units and proportion of floorspace.

1.45 However, there is a distinct under provision in the convenience sector, particularly evident since the closure of the former Co-op store. Analysis of Goad data for Houghton-le-Spring reinforces this finding, as it shows that the centre is below the national average for convenience provision, both in terms of proportion of units and proportion of floorspace. Therefore, it is not surprising that when respondents were asked what they disliked most about Houghton-le-Spring, the lack of a larger supermarket was the second most cited response. In addition, when asked how Houghton-le-Spring could best be improved, the top response was a '*bigger/better supermarket*'.

1.46 Furthermore, when asked if Houghton-le-Spring was lacking in a type of food shop, 58.9 per cent of respondents stated 'yes'. Indeed, it is noted that Lidl has been granted planning permission for a new store, in place of the former Co-op, and when delivered it will have a larger building footprint and sales area than the Co-op.

1.47 It is noted that visitors to the centre are split in opinion when considering Houghton-le-Spring's non-food provision. The '*choice/quality of non-food multiples'* was the fourth most frequent response by visitors in terms of 'most liked' aspect of the centre, whereas the '*lack of choice/poor quality of non-food multiples/high street* chains' was the fifth most cited response for 'most disliked' aspect. In addition, when asked if Houghton-le-Spring was lacking in a type of non-food shop, respondents were again divided in opinion with 47.7 per cent citing yes, and 43 per cent citing no. Out of the 72 people that cited 'yes', the most frequent responses were a shoe shop, a hardware shop, a ladies clothes shops, a mens clothes shop and an electrical shop.

1.48 The primary care and sports centre facility augments Houghton-le-Spring's service and leisure provision. Thus, in light of the range of facilities and sports provided for by the sports centre and noting Houghton-le-Spring's function and role, it is not surprising that two-thirds of respondents felt that the centre was not lacking in any leisure facilities, and a further 28.5 per cent stated that they did not know. The 17 respondents that cited 'yes' to this question suggested *'swimming pool'* as the main leisure gap, followed by '*children's activities/youth club', 'leisure centre', 'cafes/restaurants'* and '*nicer pubs*'.

TECHNICAL PAPER 2 – CONCENTRATION OF HOT-FOOD TAKEAWAY (A5) USES

Introduction

2.1. In this Technical Paper, we assess whether there are any parts of the centres identified in draft Core Strategy Policy CS5.1 where the concentration of hot-food takeaways is significantly adversely affecting the vitality and viability of those centres, as listed in Table 1.

Table 1 – Hierarchy of Centres within Sunderland City Council's Administrative Boundary

City Centre	Sunderland	
Town Centres	Washington	Houghton-le-Spring
District Centres	Concord Sea Road Hetton	Southwick Green Chester Road Doxford Park
Local Centres	Hylton Road Pallion Grangetown Ryhope Hendon Pennywell Silksworth	Thorndale Road Shiney Row Easington Lane Market Street, Hetton Fencehouses Monkwearmouth Castletown

2.2. In undertaking our assessment of the effects of hot-food takeaways, we have drawn on a number of streams of work, as follows:

- England and Lyle's Health Check findings for Sunderland's Town, District and Local Centres, January 2015;
- the findings of the NEMS survey of pedestrians undertaken in February 2016 in Sunderland City Centre, Washington Town Centre and Houghton-le-Spring Town Centre;
- Experian's Goad report and electronic listings for Sunderland City Centre, dated 30th September 2015;

- Experian's Goad report and electronic listings for Washington Town Centre, dated 11th September 2015;
- Experian's Goad report and electronic listings for Houghton-le-Spring Town Centre, dated 16th September 2015;
- the Council's OS mapping for the identified District and Local Centres, which contain a red line showing the extent of each centre; and
- our own fieldwork observations in each of the identified centres.

2.3. Our survey work has focused primarily on units within Class A5 (hot food takeaways) and fast-food restaurants. However, outlets that fall within Class A1 (shops) or Class A3 (restaurants and cafes), other than fast-food restaurants, have not been assessed in this Technical Paper, and these uses include delis, cafés, sandwich shops, bakeries and tea rooms.

2.4. The Experian Goad maps and Council OS maps, have been annotated with a light purple colour to identify takeaway units, a light blue colour to identify fast-food restaurants and a green colour to identify vacant units that were previously a fast-food takeaway unit (as per fascia evidence).

Existing Policy in Sunderland

2.5. Sunderland's existing policies relating to non-retail uses comprise Policies S11 and S12 of the UDP, and Policy SA74A of UDP Alteration No.2. These policies were designed to help the Council to regulate the concentration of non-retail uses, including takeaways within, and outside of, Sunderland's identified centres. However, Policies S11 and S12 pre-date the creation of the new Use Class A5 for hot-food takeaways and are generalised in their nature. Similarly, Policy SA74A of UDP Alteration No. 2 provides generalised support for the diversification of licensed premises within the City Centre in order to create an evening economy for all groups

2.6. Nevertheless, in January 2008 the Council published the Sunderland City Centre Evening Economy Supplementary Planning Document (SPD), the main purpose of which was to '*…to develop a strategy to improve and manage the evening and night time economy* *within Sunderland's City Centre by regulating the location and type of licensed premises and hot food takeaways, to ensure harm is not caused to the physical and functional character of areas or to nearby residents*'. The SPD identifies licensed premises as being premises which fall within use classes A3, A4, A5 and Sui Generis. It is particularly noteworthy that the Policy Matrix reproduced as Appendix A to the SPD seeks to deter new A5 hot-food takeaway uses throughout the City Centre.

2.7. However, we note that there is no Supplementary Planning Document relating to the evening economy for the other centres in the hierarchy, and hence our instructions to put forward appropriate policy mechanisms for seeking to ensure that hot-food takeaways do not have significantly adverse impacts on the vitality and viability of all centres in the hierarchy.

Survey Count of Hot-Food Takeaways and Fast-Food Restaurants

2.8. In order to set the context for our subsequent discussion, Table 2 first sets out our survey counts of the number and proportion of hot-food takeaways and fast-food restaurants in each of the 23 centres included in the hierarchy set out in draft Policy CS5.1 of the Draft Core Strategy.

2.9. Our surveys have found that hot-food takeaways account for more than 10 per cent of the total number of units in each of the 14 Local Centres. In nine of the centres, the proportion of hot-food takeaways range from 11.0 per cent to 14.9 per cent, in three of the centres the proportion is between 15.0 per cent and 19.9 per cent, and in two centres (Easington Lane and Thorndale Road) the proportion is between 20.0 per cent and 29.9 per cent. In absolute terms 10 of the 14 Local Centres have five or more hot-food takeaways; indeed in Hylton Road there are 15 hot-food takeaways, which is almost as many units as in the City Centre, which has 17 such units.

2.10. For the District Centres, the proportion of hot-food takeaways is generally lower, and it is less than 5 per cent in Sea Road and Hetton. The highest absolute number of hot-food takeaways in the District Centres are within Concord (14 units, or 15.4 per cent of the total) and in Southwick Green (10 units, or 11.6 per cent of the total).

2.11. In Houghton-le-Spring Town Centre, hot-food takeaways account for 8.2 per cent of the total number of units, but there are no hot-food takeaways in Washington Town Centre, although Washington does provide two fast-food restaurants. In the City Centre, there are 17 hot-food takeaways and two fast-food restaurants, so that these uses account for only 2.1 per cent of the units within the City Centres.

Table 2 – Survey Count of Hot-Food Takeaways and Fast-Food Restaurants

Name of Centre	No. of Takeaway Units	No. of Fast-Food Restaurants	Proportion of Total Units (%)
City Centre			
Sunderland City Centre	17	2	4.5
Town Centres			
Washington	0	2	1.5
Houghton-le-Spring	8	0	8.2
District Centres			
Concord	14	0	15.4
Sea Road	5	0	4.7
Hetton	2	0	4.5
Southwick Green	10	0	11.9
Chester Road	6	0	7.1
Doxford Park	3	0	20.0
Local Centres			
Hylton Road	15	0	12.2
Pallion	8	0	12.5
Grangetown	6	0	10.3
Ryhope	6	0	15.3
Hendon	5	0	13.5
Pennywell	2	0	11.7
Silksworth	5	0	13.5
Thorndale Road	3	0	27.3
Shiney Row	4	0	14.8
Easington Lane	6	0	20.5
Market Street, Hetton	5	0	18.5
Fencehouses	5	0	19.2
Monkwearmouth	9	0	11.0
Castletown	2	0	11.8

2.12. Having set out the counts of the hot-food takeaways and fast-food restaurants, we next turn to our assessment of the implications for each of the centres in the hierarchy.

Sunderland City Centre

2.13. Sunderland City Centre contains 17 takeaway units, 2 fast-food restaurant units and 3 vacant units that were previously takeaways, as shown in Figure 1. Therefore, as at September 2015, there were 19 take-away units/fast-food restaurants operating within the Retail Core of the City Centre, which accounts for 2.1 per cent of the 421 categorised units[2] and 13.6 per cent of the 139 service units within, and immediately adjacent to, the City Centre's Retail Core.

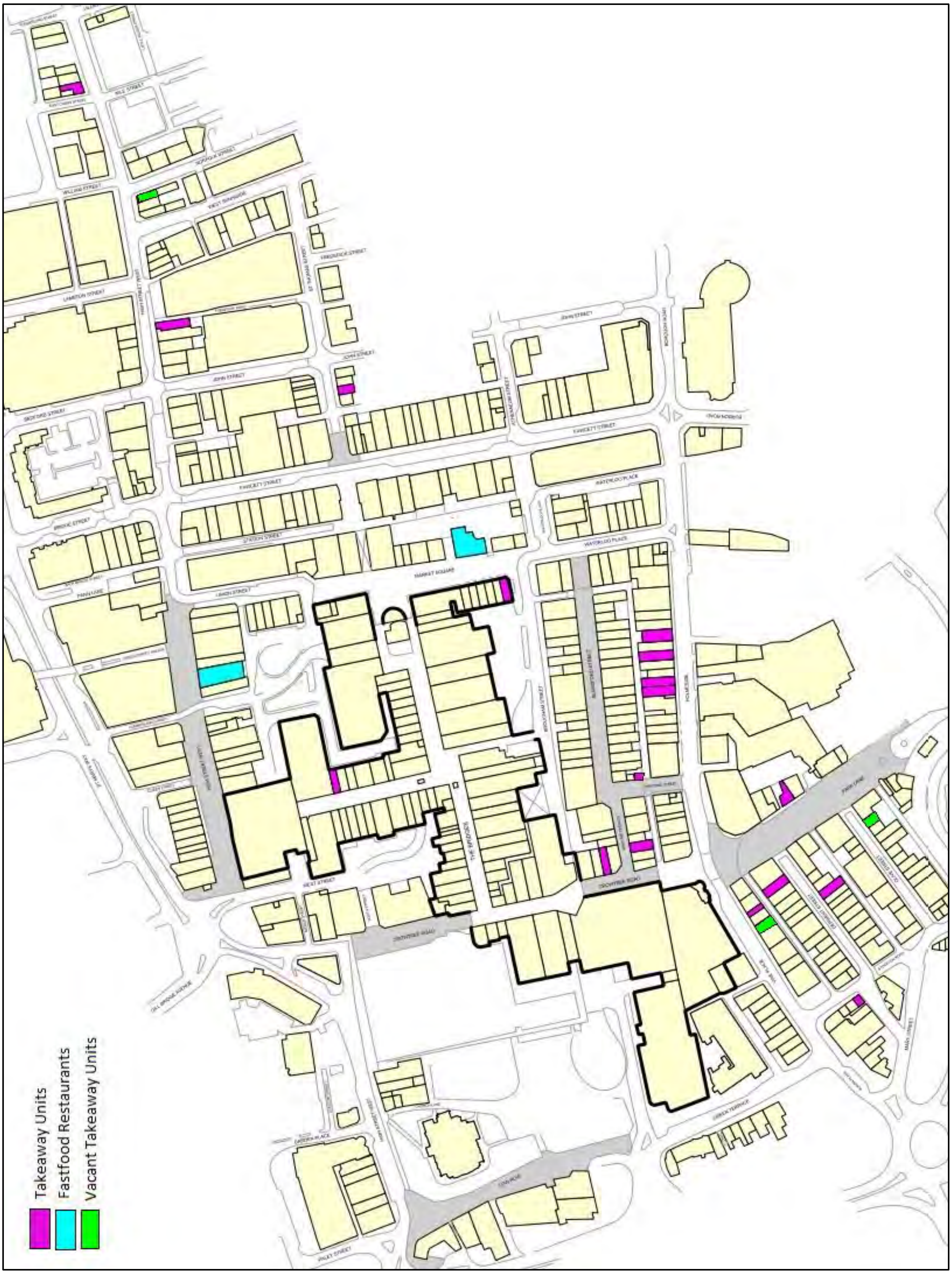
2.14. Thus, the City Centre's Retail Core contains the second lowest proportion of takeaway and fast food restaurant uses when compared with all of the other identified centres within Sunderland's administrative area, with the lowest being in Washington, as shown in Table 2. Therefore, it would seem that the combination of UDP Policies S11 and S12, Alteration No. 2 Policy SA74A and the Evening Economy SPD have led to the successful management of these types of uses within the City Centre.

2.15. There are, however, clusters of takeaways along the northern side of Holmeside and within the Park Lane Shopping Area. Therese clusters are not surprising given the presence of late night entertainment and leisure facilities, a public transport interchange, taxi ranks, and bus stops, and noting that the Sunderland University Campus is only a short walk away. It is noted also that Policy SA74A and Figure 4 of the Unitary Development Plan (the UDP) Alteration No.2 identify the area south of Holmeside as the 'Nightlife Quarter'.

2.16. Furthermore, despite this concentration of takeaway uses, the 'inactive' frontage issue typically associated with takeaways was not overly apparent during our fieldwork visit, as most of these units were operating during the day. Indeed, this positive aspect would appear to stem from the City Council's use of Section 106 agreements for new licensed premises to ensure that they are open throughout the day as well as in the evening.

[2] To be consistent with the approach adopted in the Roger Tym & Partners Retail Needs Assessment Study of 2009, we refer to the total amount of categorised units within each of the centres identified. This enables us to express the amount of takeaways within each centre as a percentage of all retail, service and vacant units within each centre. Goad does not categorise car parks, entrances, offices, schools, religious institutions and so on.

Figure 1: Annotated Goad Plan showing Hot Food Takeaways, Fast Food Restaurants and Vacant Former Takeaway Units in Sunderland City Centre



Source: Experian Goad's Survey, September 2015

2.17. During our consultations with key stakeholders, several consultees made a somewhat obvious observation that the quantum and location of takeaway units reflects the demand for these uses. In light of this, we would anticipate that the existing demand for takeaway uses within this area will be increased when Sunderland College's new City Centre Campus opens at Holmeside later this year. This expectation is based on the anticipated influx of up to 2,000 students to this area each day and the propensity of students to patronise hot-food takeaways because of perceived low levels of prices and their limited incomes. We note also that the new City Campus of Sunderland College will not be provided with a refectory.

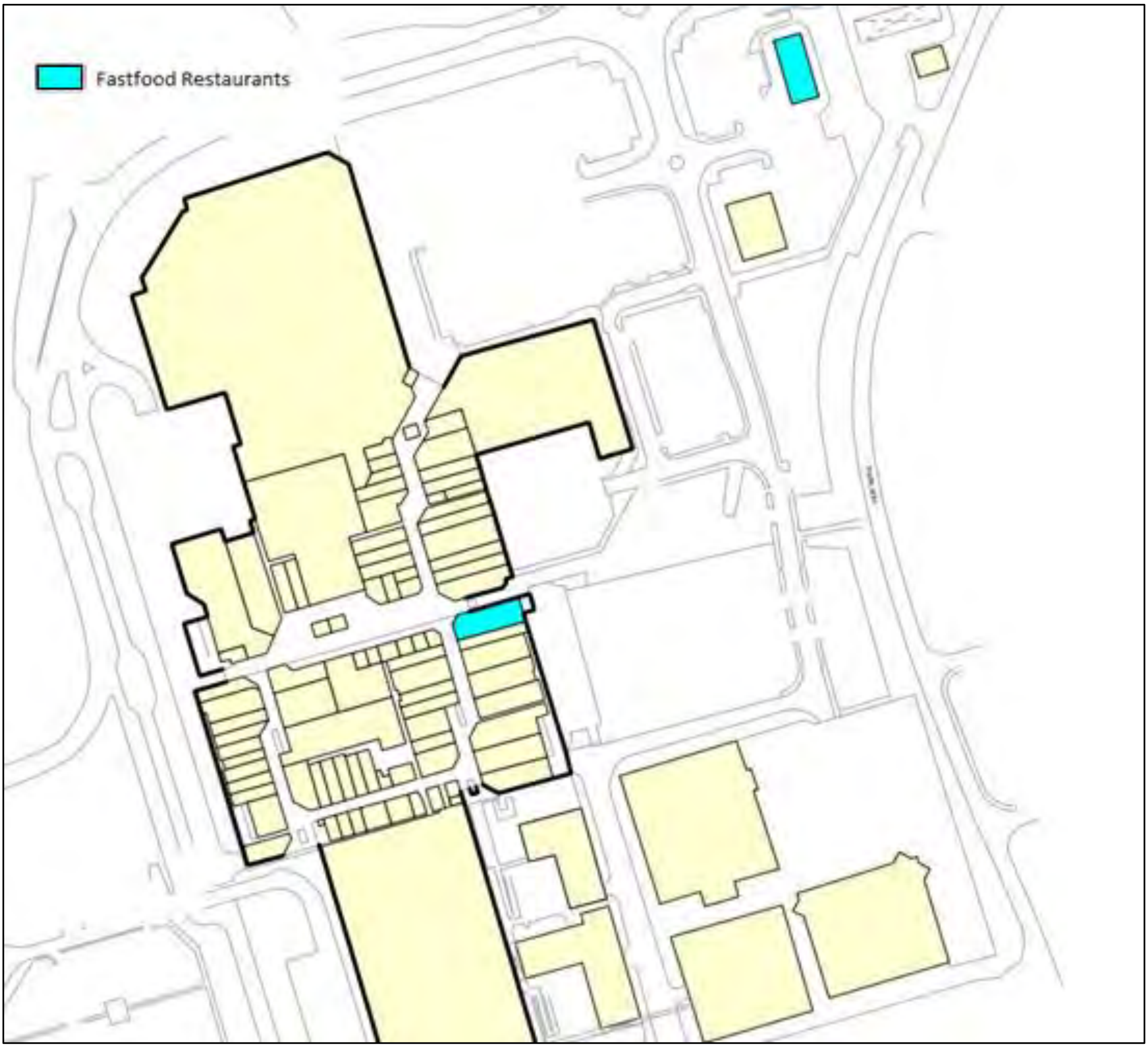
2.18. In light of this anticipated demand, there may be some merit in relaxing future policy mechanisms for controlling A5 uses within certain parts of the City Centre, including the Nightlife Quarter. Indeed, we note that during the NEMS survey of pedestrians in Sunderland City Centre, 'takeaways/ fast food units' were the third most cited gap by respondents when asked if the City Centre was lacking in any food stores. In addition, it may even be argued that takeaway uses could provide some assistance in reducing the high number of vacancies within the City Centre. However, a careful balance will need to be achieved between limiting the negative consequences arising from concentrations of takeaway uses (as discussed in the conclusion section of this Technical Paper).

Washington Town Centre

2.19. Washington Town Centre is unique in terms of having virtually one owner, and this unique ownership position enables the Management Team of the Galleries Shopping Centre and Galleries Retail Park to regulate the diversity of non-retail uses within the centre. During our consultations with key stakeholders, we were informed that the overall strategy for the Galleries Shopping Centre and Retail Park, is to maximise the attractiveness of the centre as a whole. As such, over concentrations of uses, including non-retail uses such as takeaways/fast-food restaurants, which can adversely affect the vitality and viability of the centre, are avoided.

2.20. This approach appears to be working well, as Figure 2 shows that there are only two fast-food restaurants located within Washington Town Centre, and that there are no takeaway units within the centre. As such, Washington has the lowest proportion of takeaway and fast food restaurant uses when compared with all of the other identified centres within Sunderland's administrative area, as shown in Table 2.

Figure 2: Annotated Goad Plan showing the Fast-Food Restaurants in Washington Town Centre



Source: Experian Goad's Survey, September 2015

2.21. As per Experian Goad's data, the two fast-food restaurants units represent just 1.5 per cent of the 131 categorised units within Washington, and 5.2 per cent of the 38 service units, which is a negligible proportion. Other non-retail uses within Washington Town

Centre, such as charity shops, pay-day loan shops and bookmakers have been mapped previously in Figure 5.1 and Figure 5.2 of Section 5 of our main report.

2.22. During our consultations with representatives of the Galleries Shopping Centre, it was suggested that the day time opening hours of the centre would ensure that the 'inactive' frontage issue associated with takeaways would not be an issue within Washington, if any of these uses were to be permitted within the centre.

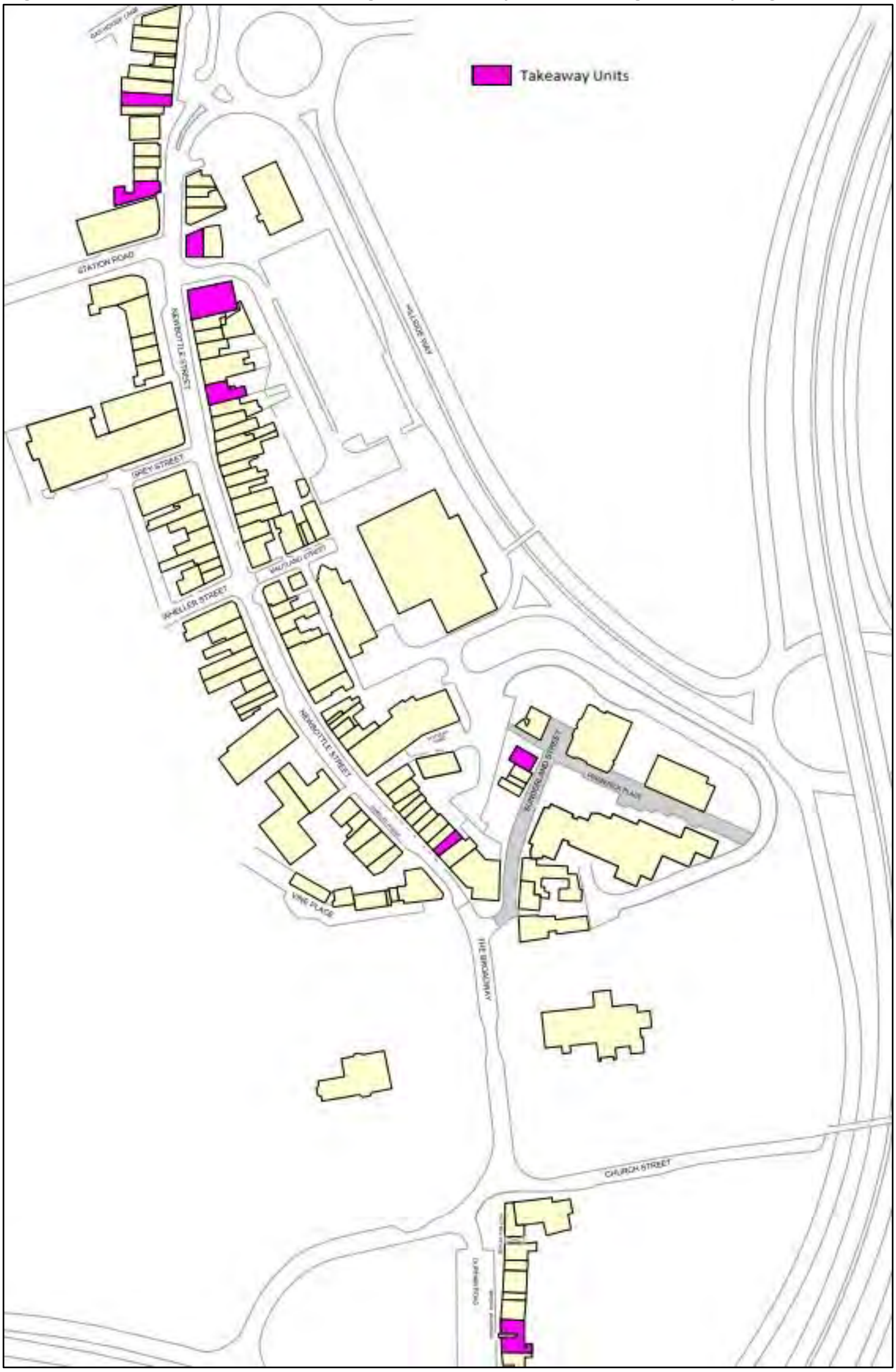
2.23. Having carried out an analysis of Washington Town Centre, we do not consider that the Town Centre's vitality or viability is being significantly adversely affected by the existing concentration of fast-food restaurants. Therefore, it would appear that Policies S11 and S12 of the UDP, along with the management practices adopted by the owners of the Galleries Shopping Centre, have together, prevented the occurrence of a detrimental concentration of takeaway uses within the Town Centre.

Houghton-le-Spring Town Centre

2.24. Houghton-le-Spring Town Centre contains eight takeaway units, but no fast-food restaurants, as per Experian's Goad survey data (Figure 3). The existing takeaway units account for 8.2 per cent of the 98 categorised units in Houghton-le-Spring, and 20 per cent of the 40 service units identified by Experian Goad's survey data. Other non-retail uses within Houghton-le-Spring Town Centre, such as charity shops, pay-day loan shops and bookmakers have been mapped in Figure 5.3 of Section 5 of our main report.

2.25. Therefore, it is clear that Houghton-le-Spring Town Centre has a higher proportion of takeaways compared with Sunderland City Centre and Washington Town Centre. Indeed, we consider that the higher number of takeaways within Houghton-le-Spring is reflective of its role as the administrative centre of the Coalfield and for local services generally.

Figure 3: Annotated Goad Plan showing the Takeaway Units in Houghton-le-Spring Town Centre



Source: Experian Goad's Survey, September 2015

2.26. Nevertheless, we consider that the quantum of takeaway units in Houghton-le-Spring is as likely to be expected given the size of the centre and we note that the takeaways generally occupy small units. In addition, the takeaway units are well distributed throughout the centre, which helps to prevent the creation of any potential negative clustering impacts associated with these uses, such as 'inactive' frontages, and undesirable odours and littering. As a consequence, we do not consider that the existence of the hot-food takeaways is having a significant adverse impact on Houghton-le-Spring town Centre's overall vitality or viability

Concord District Centre

2.27. Concord District Centre contains 12 takeaway units within the red line boundary (supplied by Council) and 2 takeaway units just outside the red line boundary (along Heworth Road), as illustrated in Figure 4. Whilst undertaking a review of E&L's Health Check findings (in Section 5 of the main report), we adopted E&L's survey area, which included the units along Heworth Lane, noting that they contain town centre uses that service the needs of visitors to, and residents of, Concord.

Figure 4: Annotated OS Map showing the Takeaway Units in Concord District Centre

Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

2.28. Therefore, if we include the 2 takeaway units outside the red line boundary in Figure 4, the District Centre contains a total of 14 takeaway units, which represents 15.4% of the 91 categorised units within Concord District Centre. Noting the amount and location of takeaways, we consider that Concord has a negative concentration of these units. We also consider that the negative 'inactive' frontage appearance associated with these units is exacerbated by the presence of 5 vacant units within the centre.

2.29. However, despite this concentration of takeaways and vacant units, we consider that Concord District Centre can be described as being reasonably healthy, and it would not appear that this concentration of takeaways within the centre is significantly adversely affecting its overall vitality and viability. Nevertheless, we would advise the Council to carefully assess any new proposal that would result in the loss of a retail unit and the creation of a new takeaway unit within the centre. In addition, we consider that where practicable, the clustering of these units should be resisted so that the negative 'inactive' frontage issue, apparent along Speculation Place in the eastern part of the centre, is not repeated elsewhere within the centre, as illustrated in Photo 1.

Photo 1 – Two Takeaway units and a vacant unit clustered together along Speculation Place

Sea Road District Centre

2.30. Sea Road District Centre contains 5 takeaway units and 7 vacant units, with the takeaways equating to 4.7 per cent of the 106 categorised units within the centre. Thus, Sea Road has a very low proportion of takeaway units which are not having an adverse effect on the centre's overall vitality and viability. Although, there is a possibility for an increase in the amount of takeaway uses within the centre, due to the existence of 7 vacant units, the existing takeaways are not clustered.

Figure 5: Annotated OS Map showing the Takeaway Units in Sea Road District Centre

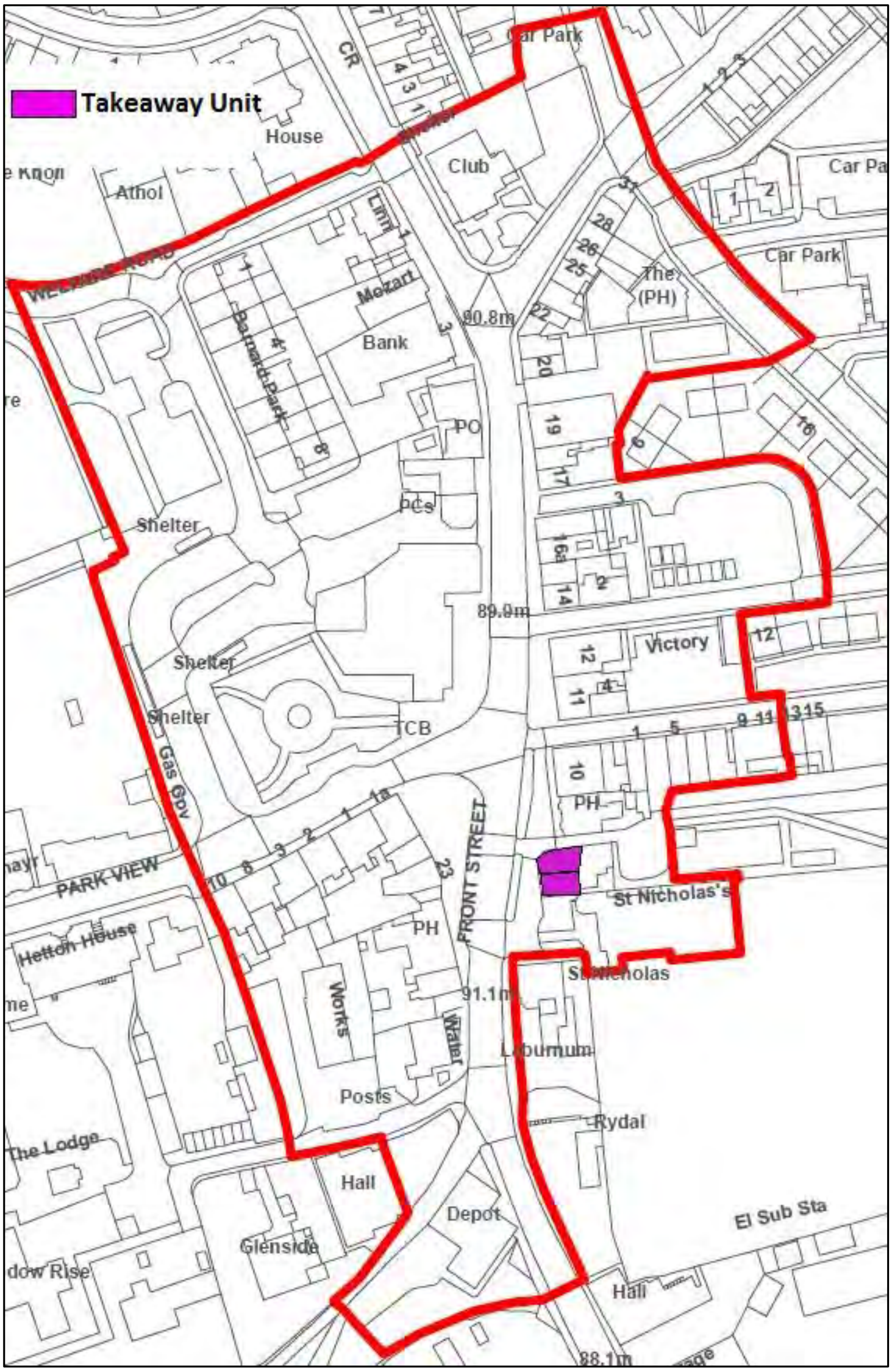
Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Hetton District Centre

2.31. Hetton District Centre contains just two takeaway units out of a total of 44 categorised units (Figure 6), so that it has the lowest proportion of such units in any of the six District Centres. It is perhaps unfortunate that these two takeaway units are located side-by-side. Nevertheless, the centre is moderately healthy (as set out in Section 5 of our main report) and the pair of existing units is not causing any significantly adverse impacts on the vitality and viability of Hetton. However, we note that there are 9 vacancies within the centre, some of which are centrally located, prominent premises, which may provide opportunities for the amount of takeaway units to increase.

However, we anticipate that the Council would be likely to promote these units for retail use.

Figure 6: Annotated OS Map showing the Takeaway Units in Hetton District Centre

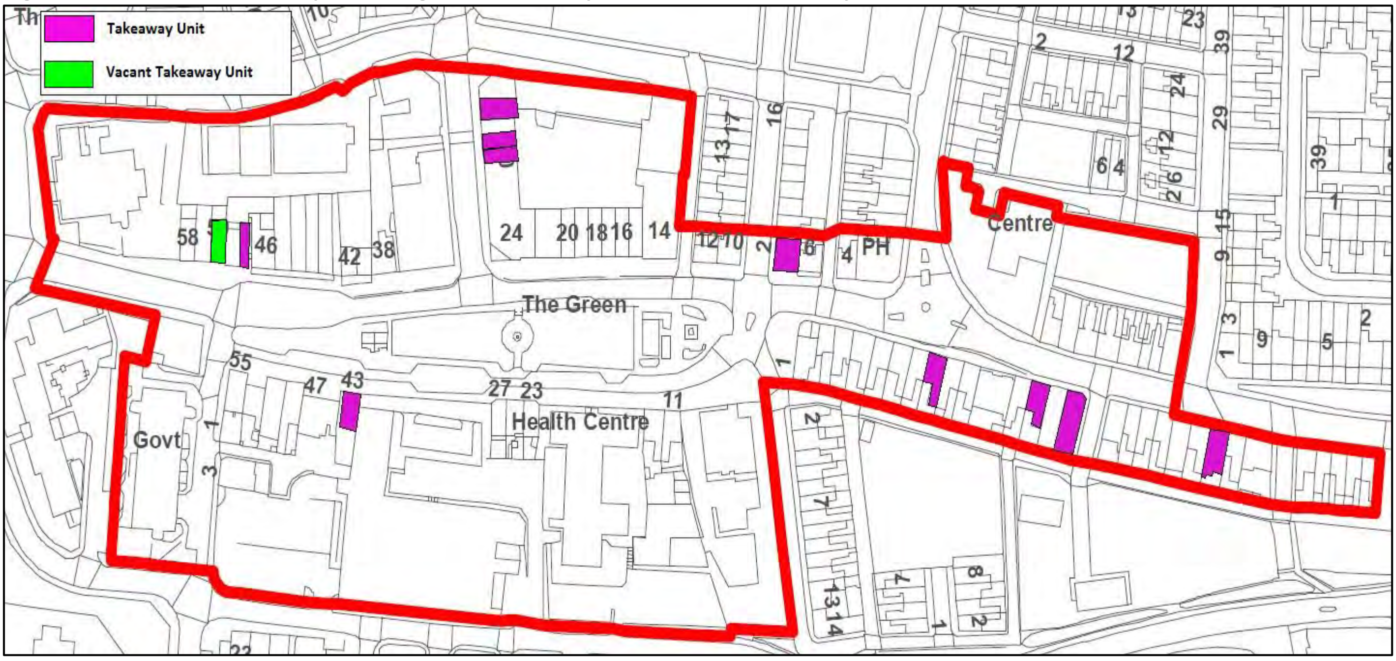


Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Southwick Green District Centre

2.32. Southwick Green District Centre contains a total of 10 takeaway units, as illustrated in Figure 7, which equates to 11.9 per cent of the 84 categorised units within the District Centre. We note that the District Centre also contains one vacant unit that was previously a takeaway. Whilst the proportion of takeaways within Southwick Green is lower than Concord, their negative impacts (such as the 'inactive' frontage appearance) are more pronounced due to the high vacancy level (12 units) within the centre and by the fact that there are a number of independent retailers in Southwick Green that appear to operate on the basis of shorter trading hours. The negative 'inactive' frontage appearance was highly apparent during our fieldwork centre visit, particularly at fringe locations (Photo 2).

Figure 7: Annotated OS Map showing the Takeaway and Vacant Takeaway Units in Southwick Green District Centre



Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Photo 2 – Shows three takeaway units and a vacant unit clustered together along Beaumont Street

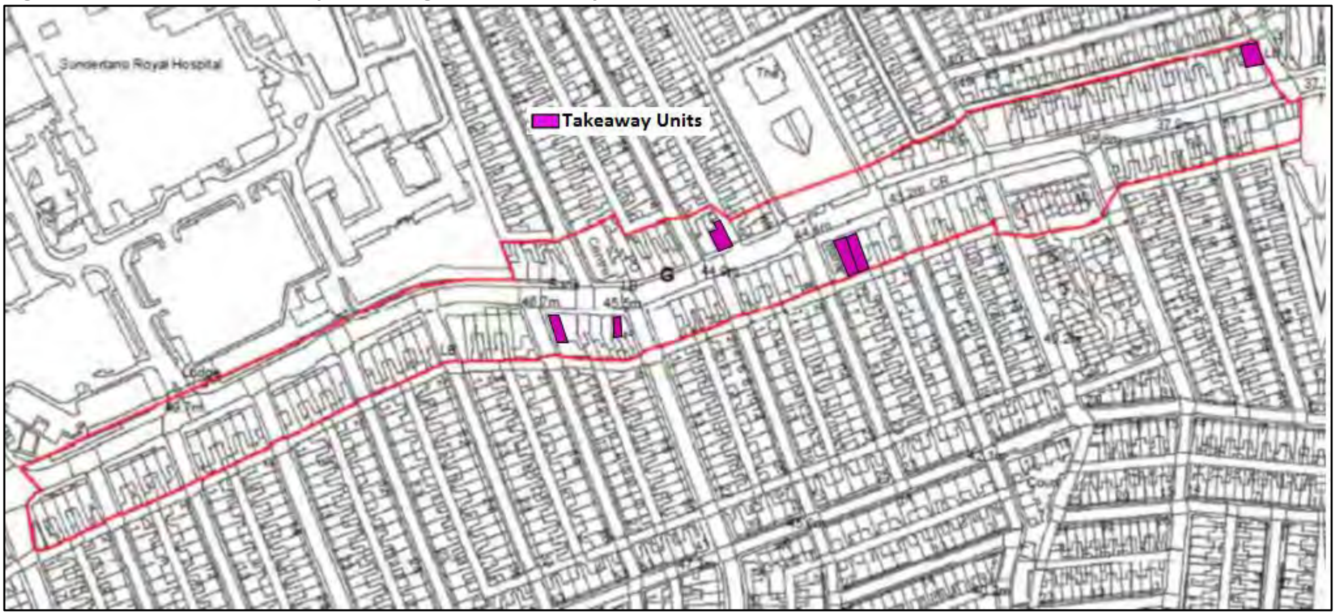
2.33. Whilst the majority of takeaways are located outside of the District Centre's central area (located around the Green), we note that the existing vacancies provide opportunities for more central locations to be converted to takeaway use. This outcome should be resisted by the Council as the retention of Southwick Green's existing retail provision, particularly within the central area, is vital to maintaining the District Centre's overall health.

2.34. Thus, given the combination of a high level of vacancies, a high level of takeaways and a high level of service units within Southwick Green, it is a Centre for which the Council's policies on takeaways should be restrictive.

Chester Road District Centre

2.35. Chester Road District Centre contains 6 takeaway units, which account for 7.1 per cent of the Centre's 86 categorised units, as illustrated in Figure 8. This would appear to be quite a low level of takeaways given the density of the residential areas surrounding the District Centre. Thus, although the District Centre contains 10 vacant units, we do not feel that the takeaway units are creating any significantly adverse impacts on its vitality and viability. Indeed, we consider that Chester Road District Centre can reasonably be described as a vital and viable centre relative to its role and function.

Figure 8: Annotated OS Map showing the Takeaway Units in Chester Road District Centre



Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

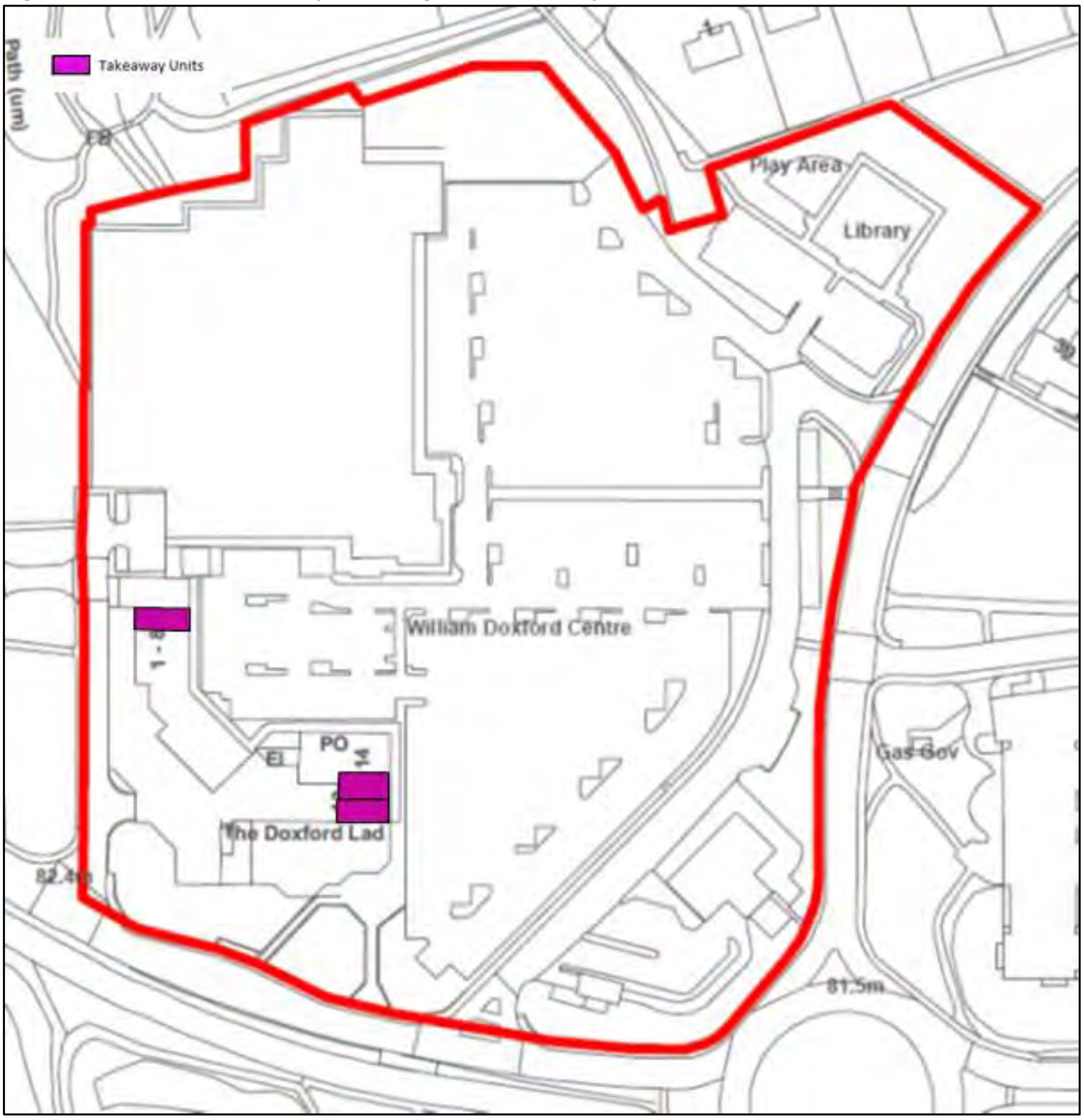
Doxford Park District Centre

2.36. Doxford Park District Centre contains 3 takeaway units, which account for 20 per cent of the centre's 15 categorised units (Figure 9). Whilst the proportion of takeaways appear to be significant, it is not a true reflection of the quantum of these uses within the centre, given that Doxford Park contains a large Morrison's supermarket, which dominates the overall quantum of floorspace within the centre.

2.37. As such, the District Centre has a 'main' shopping role, and a subsidiary service role, with the existing takeaways providing additional eating options for nearby residents and which help to promote linked trips among those who visit the centre to shop at Morrisons. We note also that the District Centre does not contain any vacancies, and that it does not have a negative 'inactive' frontage appearance, as observed during our fieldwork visit.

2.38. Therefore, we do not consider that the concentration of takeaways are creating any significantly adverse impacts on the centre's vitality and viability. This is reflected by the fact that our review of England and Lyle's Health Check Assessment (Section 5 of our main report) found that Doxford is a vital and viable centre relative to its role and function, and as such it can reasonably be described as healthy.

Figure 9: Annotated OS Map showing the Takeaway Units in Doxford Park District Centre



Source: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Hylton Road Local Centre

2.39. Hylton Road Local Centre contains 15 takeaway units, which equate to 12.2 per cent of the 123 categorised units within the centre (Figure 10). Hylton Road also contains 22 vacant units, of which one was previously a takeaway. Despite the elongated nature of the centre, and the fact that the takeaways are evenly distributed throughout the centre, the combination of takeaways and vacant units creates a proliferation of negative 'inactive' frontages during the day (Photo 3). Therefore, the Council is likely to take a cautious approach to change of use applications within the centre, given the signs of weakness that already exist within Hylton Road.

Figure 10: Annotated OS Map showing the Takeaway Units in Hylton Road Local Centre

Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

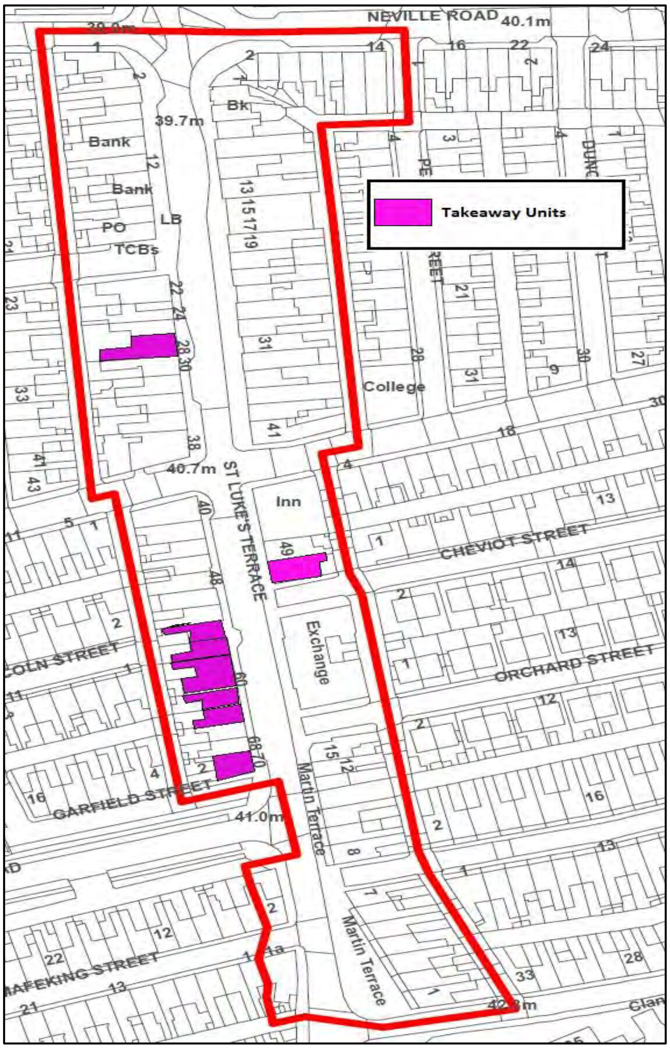
Photo 3: Shows an example of the negative 'inactive' frontage appearance within Hylton Road Local Centre

Pallion Local Centre

2.40. Pallion Local Centre contains 8 takeaway units, which equate to 12.5 per cent of the 64 categorised units within the centre (Figure 11). The Local Centre also contains 7 vacant units. During our fieldwork centre visit, we observed a cluster of 5 takeaways, which we would have anticipated to be negatively impacting on the centre's vitality and viability.

However, the centre was relatively busy at the time of our visit (Photo 4), and the majority of the takeaways were open.

Figure 11: Annotated OS Map showing the Takeaway Units in Pallion Local Centre



Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

2.41. Therefore, we could not see any signs at the time of our visit that these takeaways were causing any harm to the overall health of the Local Centre. However, we acknowledge that if the takeaways were closed at the time of our visit, our observations may have been different. Therefore, we would consider that this centre currently contains an ample supply of takeaways, and we would encourage Council to resist any proposals for new takeaways, unless the proposal would help to enhance the choice of takeaways within the centre, for example a Thai food takeaway.

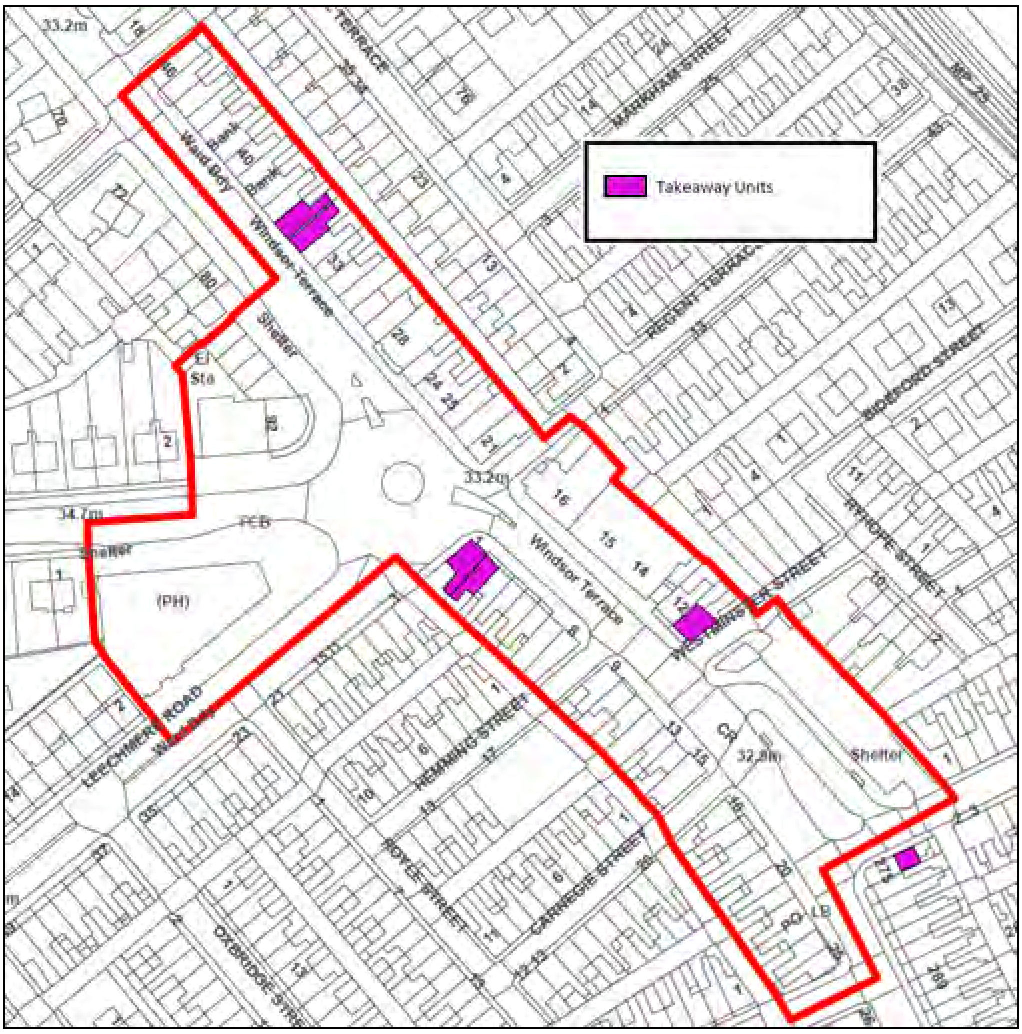
Photo 4: Shows that Pallion Local Centre was relatively busy during the time of our centre visit

Grangetown Local Centre

2.42. Grangetown Local Centre contains 6 takeaway units, which equate to 10.3 per cent of the 58 categorised units within the centre (Figure 12). Grangetown also contains 9 vacant units. We noted during our visit that the takeaways were distributed quite evenly within the centre. However, there are two sets of two adjoining units, with the most prominent set located to the south east of the central roundabout junction (Photo 5). Whilst the 'inactive' frontage appearance associated with this set of takeaways is harmful during the day, we consider that these takeaways would provide opportunities for street level animation, activity and surveillance in the evening/at night, when the majority of retail uses are closed.

2.43. Therefore, whilst we do not consider that the centre's vitality and viability is being significantly adversely affected by the existing concentration of takeaways, we note, that the existing vacancies within the centre may provide opportunities for the number of takeaways to increase, so that the Council will need to find a balance between bringing vacant units back into use whilst, limiting the concentration of non-retail uses.

Figure 12: Annotated OS Map showing the Takeaway Units in Grangetown Local Centre



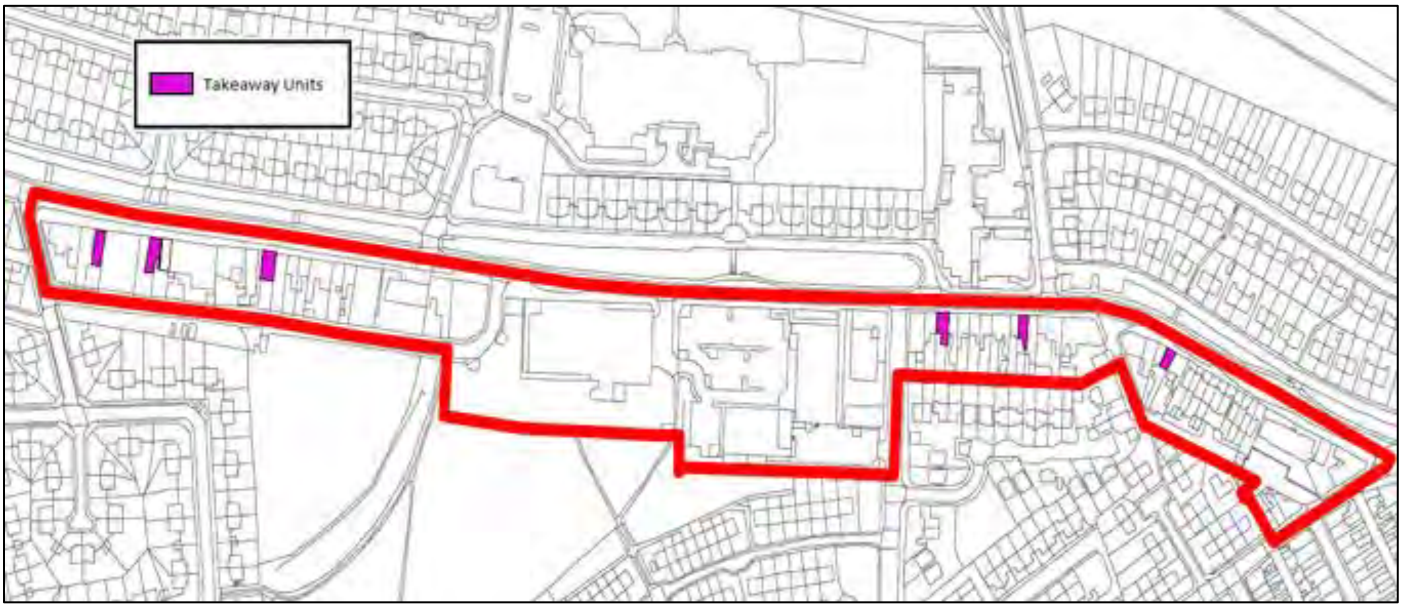
Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Photo 5: Shows the set of two adjoining takeaway units within Grangetown Local Centre

Ryhope Local Centre

2.44. Ryhope Local Centre contains 6 takeaway units, which equates to 15.3 per cent of the 39 categorised units within the centre (Figure 13) and it contains 6 vacant units. Whilst the centre is very long, and the takeaways are spread relatively well throughout it, the 'inactive' frontages are quite noticeable during the day, even though the takeaway units are quite small, particularly when compared to the reasonably sized Asda and Tecaz stores which dominate the centre. We note also that if the existing vacancies within the centre are converted into takeaways, this could lead to the creation of a negative clustering effect. However, we acknowledge that the takeaways provide positive surveillance, activity and animation contributions in the evening/at night, when most retail uses are closed, and this was apparent during our visit to the Local Centre (Photo 6). Nevertheless, we consider that the current concentration of takeaways is not significantly adversely affecting the centre's vitality and viability.

Figure 13: Annotated OS Map showing the Takeaway Units in Ryhope Local Centre



Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Photo 6: Shows the positive evening contribution that a takeaway unit is making in Ryhope Local Centre

Hendon Local Centre

2.45. Hendon Local Centre contains 5 takeaway units, which equate to 13.5 per cent of the 36 categorised units within the centre (Figure 14), and it contains 11 vacant units. Thus, the combination of takeaways and a high vacancy level within this centre creates a proliferation of 'inactive' frontages during the day. However, we note that the takeaways are generally well distributed throughout the centre, and that the centre only contains one set of adjoining takeaways (Photo 7).

2.46. Whilst there are no obvious negative clustering effects within the centre, the existing vacant units may provide opportunities for clusters to form. Therefore, whilst we do not consider that the current concentration of takeaways is adversely affecting the centre's vitality and viability, we would encourage also that Council adopts a cautious approach when assessing any new takeaway change of use proposals.

Figure 14: Annotated OS Map showing the Takeaway Units in Hendon Local Centre

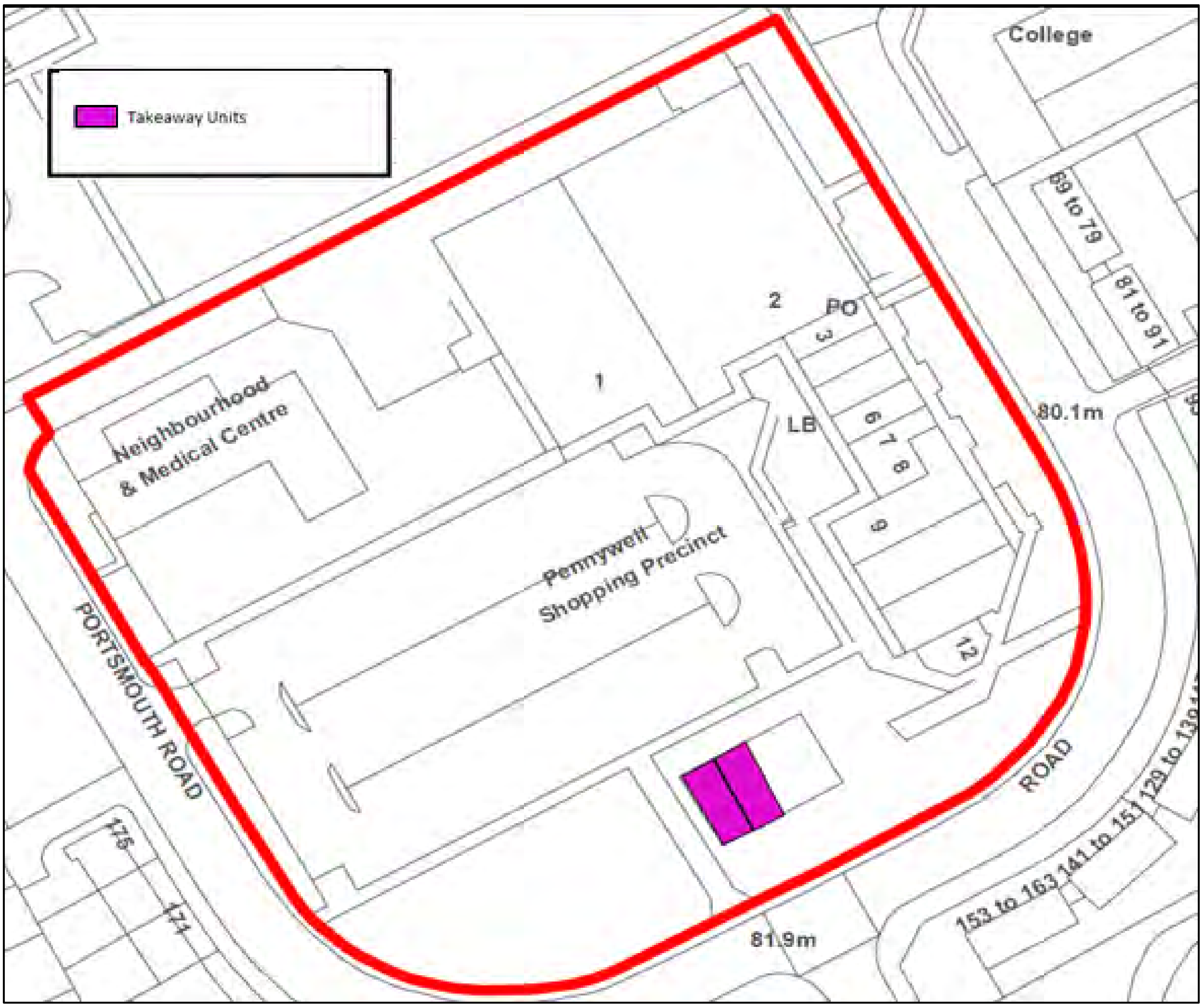
Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Photo 7: Shows the two adjoining takeaway units within Hendon Local Centre

Pennywell Local Centre

2.47. Pennywell Local Centre contains 2 takeaway units, which equate to 11.7 per cent of the 17 categorised units within the centre (Figure 15). We note that these two takeaway units are located adjacent to each other (Photo 8). However, Pennywell does not contain any vacant units. Indeed, we acknowledge that out of all the Local Centres in Sunderland, Pennywell was the only centre that England and Lyle considered to be vital and viable relative to its role and function. Therefore, despite the adjoining relationship of the takeaways, we consider that this concentration is not causing any significantly adverse impacts on the Local Centre's vitality and viability.

Figure 15: Annotated OS Map showing the Takeaway Units in Pennywell Local Centre



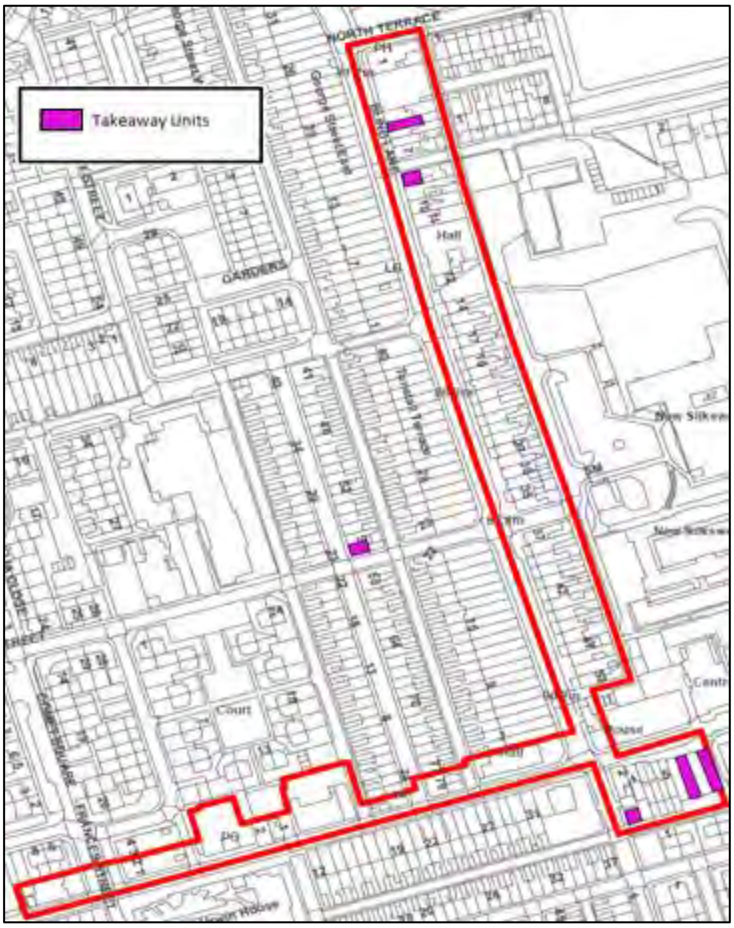
Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Photo 8: Shows the two adjoining takeaway units within Pennywell Local Centre

Silksworth Local Centre

2.48. Silksworth Local Centre contains 5 takeaway units (Figure 16) and 6 vacant units, with the takeaways equating to 13.5 per cent of the 35 categorised units within the centre. It was noted also that an additional takeaway unit is located just outside the centre, to the west as annotated in Figure 16. Similar to Ryhope and Hendon Local Centres, the takeaway units are generally well distributed throughout Silksworth, which reduces the potential for any negative clustering impacts. In addition, whilst visiting Silksworth, we observed the positive surveillance, activity and animation contributions that takeaways make to local centres in the evening/at night, when the majority of retail uses are closed (Photo 9). Overall, we consider that the existing concentration of takeaways is not causing any significantly adverse impacts on the Local Centre’s vitality and viability.

Figure 16: Annotated OS Map showing the Takeaway Units in Silksworth Local Centre



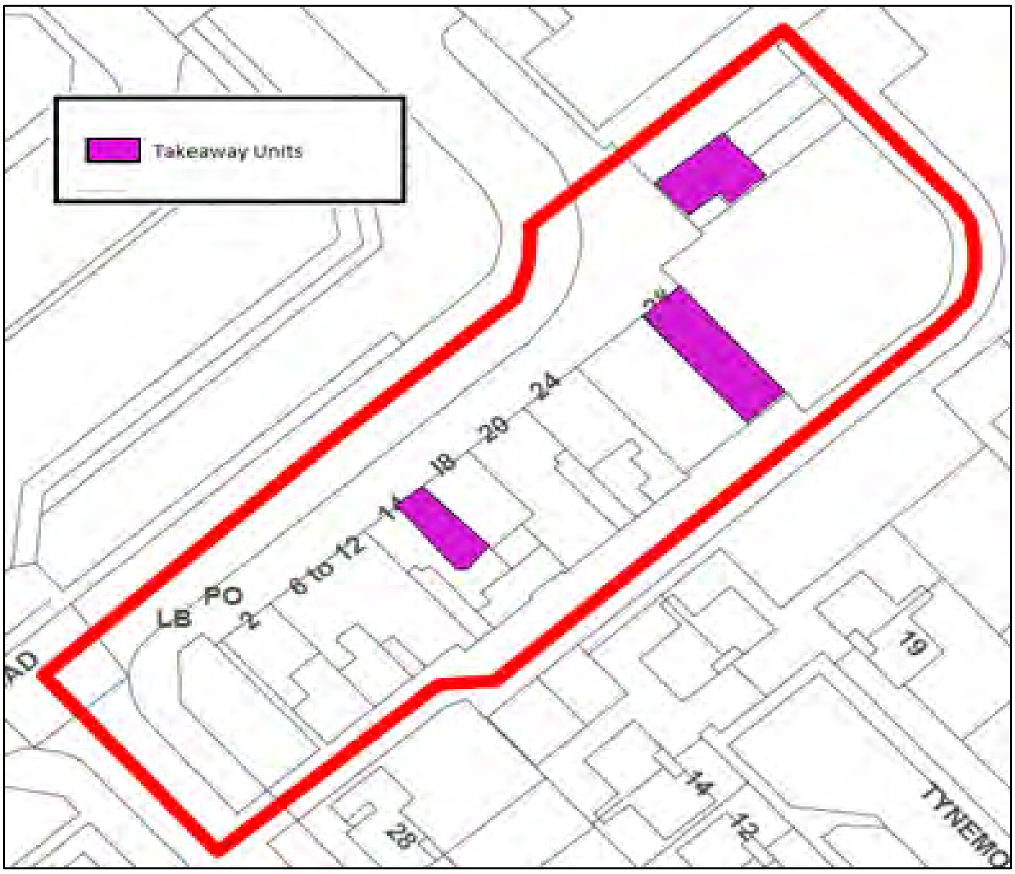
Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Photo 9: Shows the positive evening contribution that a takeaway unit is making in Silksworth Local Centre

Thorndale Road Local Centre

2.49. Thorndale Road is the smallest of the Local Centres in Sunderland, containing just 11 units, three of which are takeaways (Figure 17), and two of which are vacant units. We note that E&L found this Local Centre to be moderately healthy, but showing signs of weakness. However, we do not consider that the existing amount of takeaways is the sole, or even the main, cause of the signs of weakness. Indeed, at night time, they provide the centre with positive animation, street level activity and surveillance opportunities when the other units are closed (Photo 10). We consider that the limited size, role and function of this centre, along with the proximity of Doxford Park District Centre, Pennywell Local Centre and Silksworth Local Centre, are the main factors restricting Thorndale Road's overall vitality and viability. Nevertheless, the centre does contain an ample amount of takeaways, and any future takeaway proposals should be carefully assessed so that its overall health does not deteriorate any further.

Figure 17: Annotated OS Map showing the Takeaway Units in Thorndale Road Local Centre



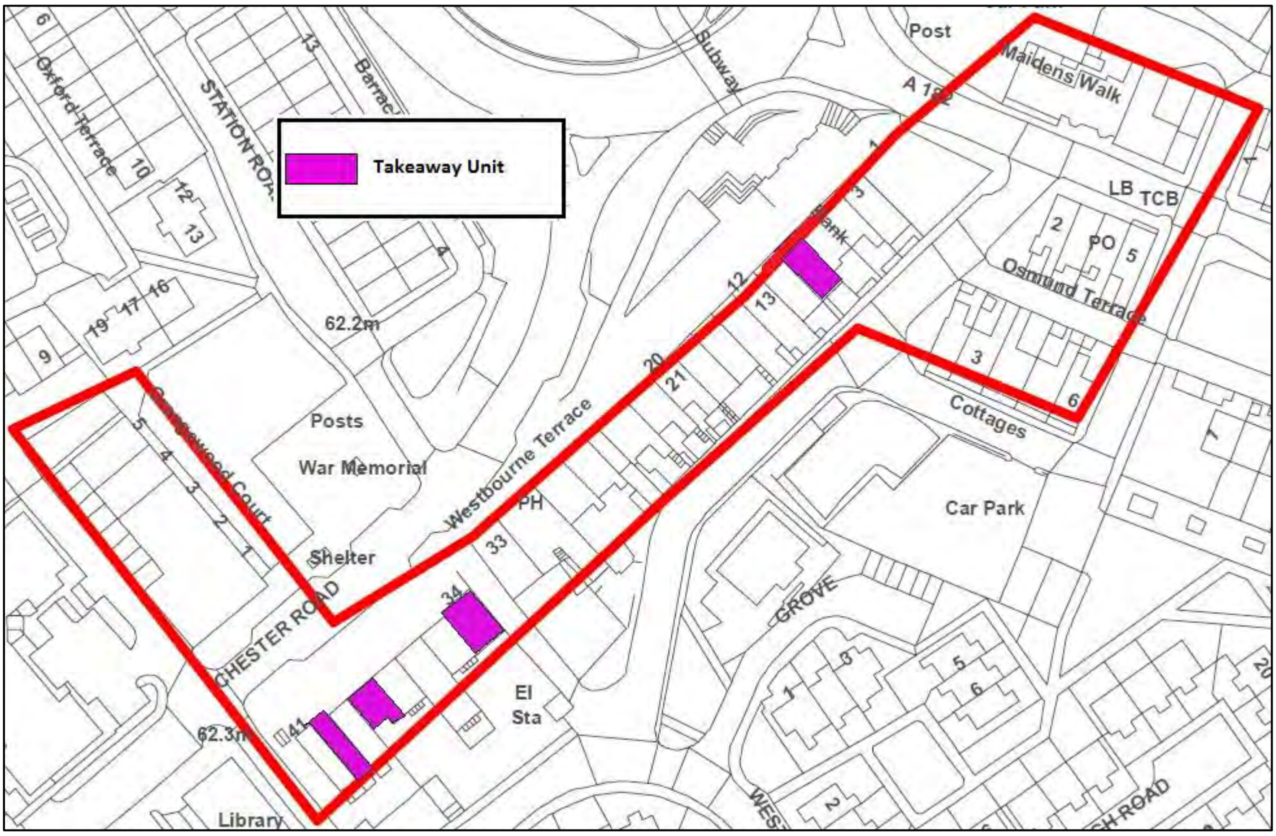
Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Photo 10: Shows the evening contribution that a takeaway unit is making in Thorndale Road Local Centre

Shiney Row Local Centre

2.50. Shiney Row Local Centre contains 4 takeaway units (Figure 18) and 3 vacant units, with the takeaways equating to 14.8 per cent of the 27 categorised units within the centre. The Local Centre appears to be moderately healthy, and we did not observe any signs during our visit that would indicate that the centre is being adversely impacted upon by the existing concentration of non-retail uses. Indeed, Photo 11 demonstrates the positive animation, street level activity and surveillance opportunities that takeaways provide at night when other retail and service units are closed.

Figure 18: Annotated OS Map showing the Takeaway Units in Shiney Row Local Centre



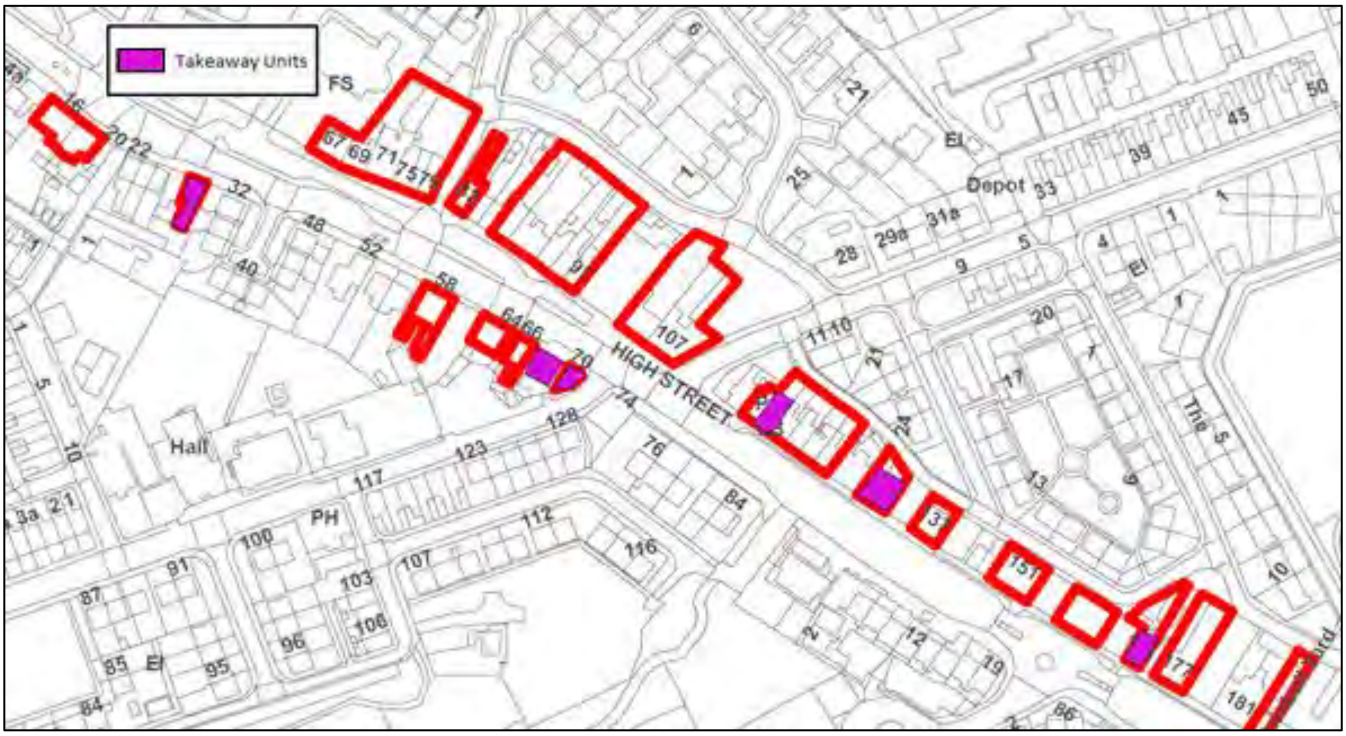
Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Photo 11: Shows the takeaway units located either side of a veterinary centre in Shiney Row Local Centre

Easington Lane Local Centre

2.51. Easington Lane Local Centre contains 6 takeaway units (Figure 19) and 8 vacant units, with the takeaways equating to 20.5 per cent of the 34 categorised units within the centre. We also noted that there was an additional takeaway unit to the east of the centre, at No. 239 High Street. The centre contains centrally located residential units, which has an effect of stretching out its overall retail and service provision. As such, the takeaways are spread relatively well throughout the centre, which ensures that no negative clustering effects occur. However, the combination of takeaways and vacant units creates a proliferation of negative 'inactive' frontages during the day (Photo 12), and we note that if the existing vacancies are converted into takeaways, then there is potential for these uses to be clustered together. Therefore, Council will need to find a balance between bringing vacant units back into use and limiting the clustering of non-retail uses, particularly takeaways.

Figure 19: Annotated OS Map showing the Takeaway Units in Easington Lane Road Local Centre



Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

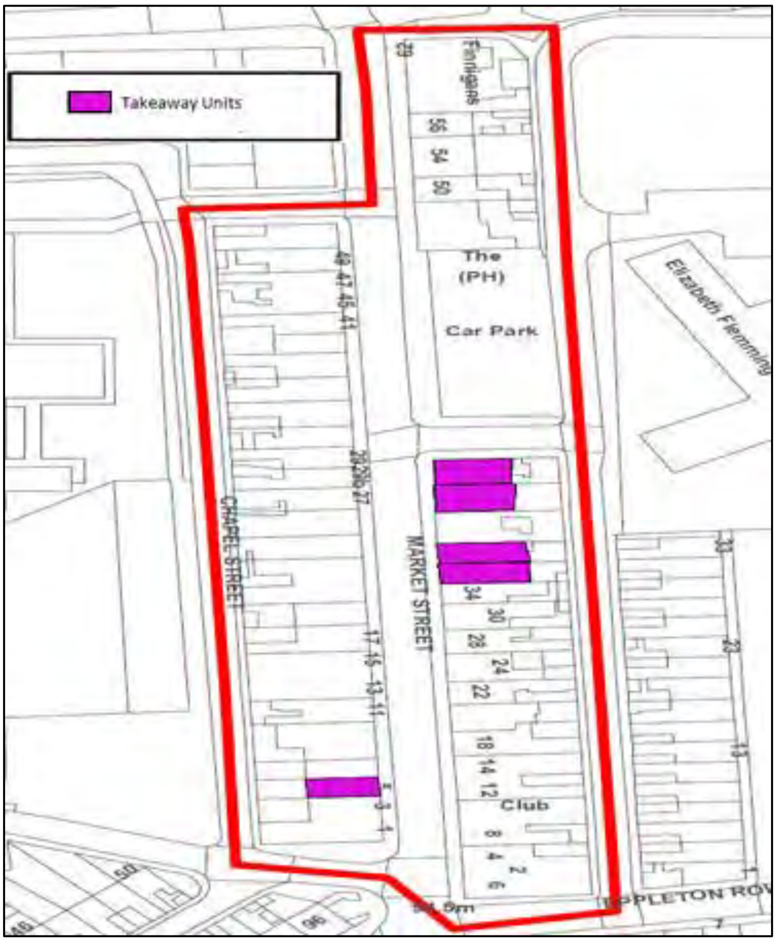
Photo 12: Shows the two adjoining takeaway units within Easington Lane Local Centre

Market Street (Hetton) Local Centre

2.52. Market Street (Hetton) Local Centre contains 5 takeaway units (Figure 20) and 6 vacant units, with the takeaways equating to 18.5 per cent of the 27 categorised units within the centre. Similar to Easington Lane, the centre is interspersed with centrally located residential units, which has an effect of stretching out its overall retail and service provision. The centre was relatively quiet at the time of our visit, and the majority of the takeaways were closed. Thus, a proliferation of 'inactive' frontages was apparent within the centre, which was caused by the combination of closed takeaways and vacant units.

2.53. However, we acknowledge that the centre contains examples of how takeaway frontages can be designed to reduce the 'inactive' frontage appearance associated with them when they are closed (Photo 13). We agree with E&L that the centre offers a poor diversity of uses and would benefit from a stronger representation of retail. Therefore, whilst the centre contains two sets of two adjoining takeaways located in close proximity to each other, it is not clear if the existing takeaways alone are significantly adversely affecting the centres vitality and viability. Nevertheless, we would encourage Council to resist any new proposals for additional takeaway units within this centre.

Figure 20: Annotated OS Map showing the Takeaway Units in Market Street (Hetton) Local Centre



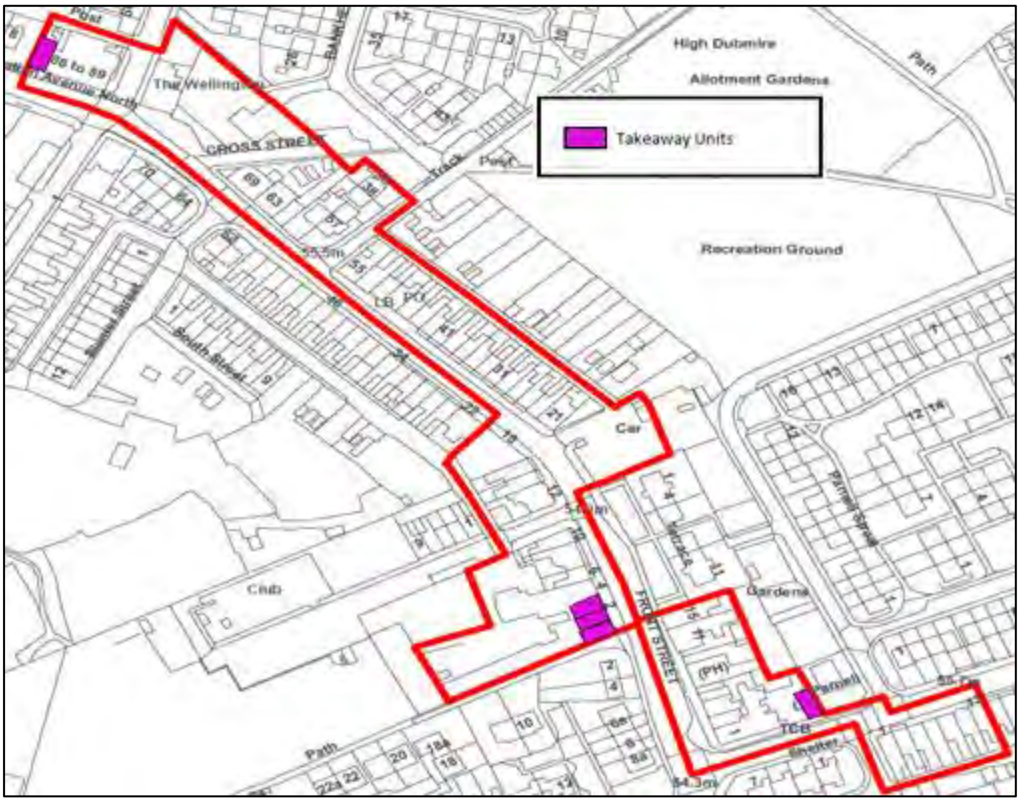
Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Photo 13: Shows an example of how some takeaway uses can have a less negative visual impact than others during the day, depending on the design of the frontage

Fencehouses Local Centre

2.54. Fencehouses Local Centre contains 5 takeaway units (Figure 21) and 2 vacant units, with the takeaways equating to 19.2 per cent of the 26 categorised units within the centre. Similar to Easington Lane and Market Street, the centre is interspersed with centrally located residential units, which has an effect of stretching out its overall retail and service provision. We note that the low number of vacancies within the centre will help to restrict the potential for new takeaways. However, we acknowledge that the cluster of 3 takeaways at 2, 2a and 2b Front Street is not very attractive, (Photo 14) and that this should be avoided in other parts of the centre. Despite this, we note that this cluster of takeaways is well separated from the other two takeaway units within the centre. Indeed, we consider that the existing concentration of takeaways reflects the centre's localised service role and we did not witness any signs that the existing concentration of takeaways is significantly adversely affecting its vitality and viability.

Figure 21: Annotated OS Map showing the Takeaway Units in Fencehouses Local Centre



Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

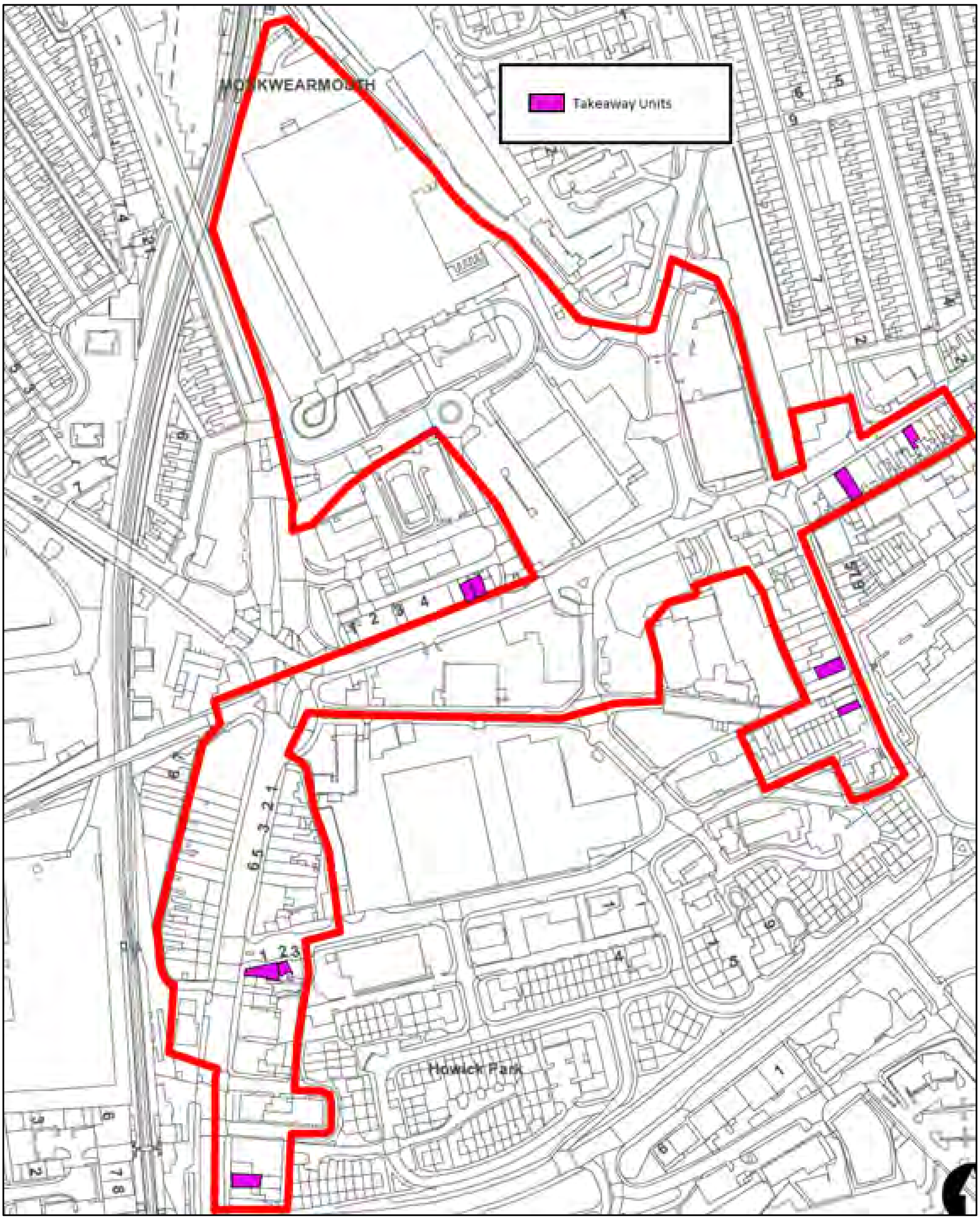
Photo 14: Shows the three adjoining takeaway units within Fencehouses Local Centre

Monkwearmouth Local Centre

2.55. Monkwearmouth Local Centre (Figure 22) is a large Local Centre that contains 9 takeaway units and 25 vacant units, with the takeaways equating to 11 per cent of the 82 categorised units within the centre. The significant size of this Local Centre ensures that the existing takeaway uses are well spread out, which reduces the potential for negative clustering effects. Therefore, we consider that the concentration of takeaways within Monkwearmouth is not significantly adversely affecting its overall vitality and viability.

2.56. However, the 25 vacancies within the Local Centre, and the presence of students in this area (attending the University of Sunderland, Sir Tom Cowie Campus) creates potential for the number of takeaways within the centre to increase. Indeed, noting the large quantum of vacancies within the centre, the Council will need to find a balance between bringing vacant units back into use and limiting the clustering of non-retail uses, particularly takeaways. However, given Monkwearmouth Local Centre's large size, we consider that it would be able to absorb some new takeaway units without experiencing any adverse impacts on its vitality and viability.

Figure 22: Annotated OS Map showing the Takeaway Units in Monkwearmouth Local Centre



Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent's fieldwork survey data, February 2015

Castletown Local Centre

2.57. Castletown Local Centre (Figure 23) contains 2 takeaway units and 4 vacant units, with the takeaways equating to 11.8 per cent of the 17 categorised units within the centre.

The centre was relatively quiet at the time of our fieldwork visit, and the existing takeaways were closed. We note that the central takeaway unit is located adjacent to an Indian restaurant to the east that also has a takeaway option, and a double vacant unit to the west being the former Lifestyle Express convenience store. During our centre visit, the ‘inactive’ frontage appearance along this section of the centre was highly apparent. If the double vacant unit was to be converted to one takeaway or two takeaways, the negative ‘inactive’ frontage appearance would not be alleviated during the day. However, we accept that in the evening/at night time, this would not be an issue. Nevertheless, noting the prominent central location of this double vacant unit, it would be encouraging to see a use that would attract day time visits so as to improve the level of footfall within the centre. Overall, and noting England & Lyle’s finding that the centre is of a moderate health with a reasonable convenience offer, we consider that the centre’s vitality and viability is not currently experiencing any significantly adverse impacts as a result of the existing concentration of takeaways.

Figure 23: Annotated OS Map showing the Takeaway Units in Castletown Local Centre

Sources: Sunderland City Council OS mapping (Licence No. 100018385) and hollissvincent’s fieldwork survey data, February 2015

Photo 15: Shows the vacant Lifestyle Express store, being a prominently located double unit that is located adjacent the Mr. Chips takeaway unit in Castletown Local Centre

Conclusions in Relation to the Concentration of Hot-Food Takeaway (A5) Uses

2.58. It is clear from our analysis that the absolute number and overall proportion of takeaway units within each of Sunderland's identified centres varies dramatically, as illustrated in Table 2.

2.59. The main negative effects associated with **concentrations** (percentage of overall frontage) and **clustering** (number of adjoining frontages) are considered to be:

- issues with 'inactive' frontages during the day time due to the evening only trading of many hot-food takeaways, which in turn reduces footfall potential;
- amenity issues for nearby residents and other visitors to the centres arising from odours, littering, noise and parking issues;
- disturbances in the evening particularly at closing time for pubs and other entertainment venues, which can lead to occurrences of alcohol related violence;
- the low and harmful food value associated with many hot-food takeaway products which tend to be high in fat and salt, and low in fibre, fruit and vegetables so that they are particularly popular with young people, leading to concerns about potential links (not yet proven) with obesity; and

- the potential cumulative impact on vitality and viability where concentrations of hot-food takeaways are combined with high levels of vacancy and other non-retail uses.

2.60. In light of these negative aspects, the proliferation of takeaway units within centres is being increasingly scrutinised, and there is a growing shift towards the adoption of planning policies that enable Councils to appropriately regulate the proportion and location of these uses, as well as recognising the negative health impacts associated with these uses.

2.61. Given the negative effects that we have identified, we can understand the concern of Members and Council's officers, but it is important in reaching balanced judgements to take account also of the potential positive effects of hot-food takeaways, particularly in Local Centres where such uses are more concentrated. For example, takeaways and fast-food restaurants can contribute to the evening economy through the creation of street level activity and animation when the majority of retail and service uses are closed, particularly in the Local Centres, some of which would be 'lifeless' at night without the presence of hot-food takeaways. In addition, the design and layout of takeaway units can also provide useful opportunities for street level surveillance which can help to improve the perception of safety within a centre, and possibly act as a deterrent against crime.

2.62. Thus, Paragraph 6.45 of the explanatory text to Policy S12 of the UDP recognises that hot-food takeaways, along with cafes, restaurants, public houses and wine bars '…*can be an important element of town and suburban centres, adding to their diversity and providing refreshment and leisure facilities in their own right and as an ancillary activity to shopping*'. Indeed, several consultees made a somewhat obvious observation that there would be any takeaways if there wasn't the demand for them from the customer.

2.63. Another important finding, however, that it is the combination of takeaways and a high level of vacancies that cause the adverse effects to be most pronounced, with Hylton Road Local Centre being a good example of a centre that is suffering from the combination of a high level of vacancies and a high absolute number of takeaway units.

2.64. There are a variety of aspects that must be considered when assessing if a certain use is creating significantly adverse impacts on a centre's health, such as: the centre's role and function; local conditions; the proximity to, and competition from, other centres; the quantum of vacancies within the centre; the location of the uses, i.e. are they clustered together, do they occupy prominent/central units; and the design of the units. Indeed, the variety of factors to be considered when determining a centre's overall health is reflected by the National Planning Policy Guidance's (the NPPG's) 10 'health check' indicators.

2.65. Thus, a Centre's health may be declining as a result of a number of factors, and it is very difficult to attribute blame to only one particular use type. Indeed, having carried out our analysis of Sunderland's hierarchy of centres, we have found none where the existence of a concentration of takeaways has been the sole cause of a centre's decline. Nevertheless, of the centres surveyed, we consider that the negative impacts associated with takeaways are most pronounced in Concord District Centre, Southwick Green District Centre and Hylton Road Local Centre. In addition, we would have concerns with respect to the concentration of takeaways in Easington Lane Local Centre and Market Street (Hetton) Local Centre. As such, new takeaway proposals within these centres should be carefully assessed.

2.66. We also found that the negative visual effects associated with takeaway uses in Sunderland's centres' were more pronounced in centres containing high vacancy levels. Indeed, this is a double edged knife scenario, as on top of creating a negative 'inactive' frontage appearance within the centre, these vacancies provide further opportunities for the number of takeaways in the centres to increase. Unfortunately, the conversion of vacant units to takeaway units does not tend to solve the 'inactive' frontage problem, noting that the majority of takeaways trade only in the evening, and are closed during the day. Whilst the overall vacancy level would decrease, which can be viewed as a positive in its own right, the evening only takeaway uses would not attract additional footfall to the centre during the day. Indeed, Council must try to find a balance between regulating the amount of takeaway units in a centre, and ensuring that the centre's vacancy level is not too high, as both aspects can adversely affect a centre's vitality and viability.

2.67. We note also that the proliferation of takeaway uses can often reflect the role and function of the centre, such as the localised service role of the District and Local Centres. Therefore, the presence of takeaways within these centres is often due to a level of local demand, and this can make it difficult for Council to control. However, as a general principle, we would advise that where practicable, the clustering together of takeaways, is resisted by Council, particularly in: the centres mentioned above; the centres that already contain clusters; the centres that are showing signs of weakness; and the centres that contain a large proportion of vacancies.

2.68. Section 9 of our report, therefore, puts forward what we consider to be appropriate policy mechanisms for regulating the amount of non-retail uses within Sunderland's hierarchy of centres.