APPENDIX 5:
VITALITY AND VIABILITY ASSESSMENTS OF EXISTING CENTRES

APPENDIX 5: VITALITY AND VIABILITY OF WEST CUMBRIAN TOWN CENTRES

A5.1 Introduction

WYG have undertaken a town centre 'health check' - an assessment of the vitality and viability - of the town centres within West Cumbria (defined for the purposes of this exercise as the local planning authority areas of Allerdale and Copeland). These centres are:

Allerdale:	Workington Maryport Cockermouth Wigton
Copeland:	Whitehaven Egremont Millom Cleator Moor

This section provides a brief introduction as to the importance of town centres and the purpose of carrying out town centre 'health checks'. This is followed by an assessment of the West Cumbrian town centres' position in the regional hierarchy. Each town centre is then considered separately in further detail.

A5.1.2 The Importance of Town Centres

Town centres have a very important role to play in West Cumbria. They form a focal point for both urban and rural communities, and provide a wide range of services that are accessible to the local population, including retail, employment, leisure, education and transport.

Planning Policy Statement 6 (PPS6) 'Planning for Town Centres', emphasises the need for local authorities to monitor the 'health' of their town centres and how they are changing over time. Indeed, vital and viable town centres help foster civic pride and local identity whilst helping to achieve sustainable development.

In recent years there has been concern nationally about the health of town centres and this is reflected in West Cumbria. Changing patterns in the ownership of and dependence on the private car, working patterns and the resulting shopping patterns have seen changes in town centres in many cases for example large format supermarkets outside defined centres having an impact on the town centres. There has also been a resurgence in development activity within established centres for example as can be seen through the major redevelopment of Workington town centre. More recently however, the impact of the 'credit – crunch' and economic recession is already starting to have a significant effect on the vitality of the high street nationally through closures of well known retailers.

A5.1.3 The Purpose of the Health Check

It is important that the main established centres in West Cumbria remain as competitive as possible and continue to attract shoppers, visitors and businesses. To achieve this, town centres must continually strive to build upon their strengths, alleviate their weaknesses and continually improve the facilities they provide to the community. Successful town centres must respond effectively to the changing needs and demands of their users.

The Town Centre Health Checks in West Cumbria serve a number of important functions:

- they will help assess the success of retail policies in the existing Local Plans and will assist in the formulation of appropriate policies within the Allerdale and Copeland Local Development Frameworks;
- they will provide a starting point for any future retail strategy within West Cumbria;
- they will provide key baseline data to facilitate a process of annual monitoring to assess each town centre's performance;
- they will allow positive and negative aspects of the town centre to be identified and appropriate action to be taken;
- they will provide data that can be used to compare the performance of town centres in the District to other neighbouring centres in the region and to ensure that these centres remain competitive; and
- by understanding retailers' and shoppers' perception of the town it will allow schemes and strategies to be drawn up to help improve the town centre for its users.

WYG's assessment has been informed by a combination of 'desk based' research, 'on the ground' observation and survey work, including:

- a household survey of residents within the defined Study Area to indicate shopping patterns within the District, including modes of transport and reasons for visiting;
- a postal survey of existing businesses in each of the eight town centres

- an on street survey to identify visitors' perceptions of Workington and Whitehaven, the frequency of visits and the main purpose for which each centre is used, particularly with regard to shopping and leisure habits

A5.1.4 Regional Hierarchy

Table A5.1 illustrates the West Cumbria town centres' position within the hierarchy of centres based on the Management Horizons Europe's (MHE) UK Shopping Index (2008). Also listed are other centres within the area for comparison purposes. The Index ranks the top retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlets) based on current retail provision.

Of the 6721 venues included in the Index, Workington is categorised as a 'major district centre' and is ranked 332nd position, placing it within the top 5% of all UK shopping venues. Whilst it is acknowledged that Workington has fell in the rankings since the survey undertaken in 2003/4, it should be noted that this is general characteristic of a wider sub region.

Whitehaven, identified as a 'district centre', is ranked 468th, falling within the top 7% of centres. Cockermouth, defined as a 'local' centre has experienced the most significant fall in rankings since 2003/4, falling 152 places to be 1420th. This ranking still ensures that the town falls within the top 25% of UK shopping venues however.

Wigton, Maryport, Egremont, Cleator Moor and Millom are all identified as 'Minor Local Centres' but were not included in the previous 2003/4 survey. Cleator Moor and Egremont are the lowest ranked settlements.

Table A5.1: The Sub Regional Shopping Hierarchy

Centre	MHE score	Location Grade	Rank 2008	Rank 2003/4	Change in Rank 2004 – 2008
Carlisle	227	Regional	79	68	- 11
Kendal	199	Sub-regional	199	208	+9
Barrow in Furness	115	Major District	261	208	-53
Workington	**96**	**Major District**	**332**	**313**	**-19**
Whitehaven	**73**	**District**	**468**	**404**	**-64**
Penrith	69	District	499	404	-95
Workington – Derwent Drive Retail Park	46	Minor District	779	829	+50
Keswick	33	Minor District	1095	829	-266
Cockermouth	**25**	**Local**	**1420**	**1268**	**-152**
Whitehaven – Bridges Retail Park	18	Local	1866	-	-
Workington – Clay Flatts	15	Local	2133	-	-
Wigton	**14**	**Minor Local**	**2247**	-	-
Millom	**13**	**Minor Local**	**2356**	-	-
Maryport	**11**	**Minor Local**	**2608**	-	-
Whitehaven – Preston Street	9	Minor Local	2988	-	-
Workington – Dunmail Park	9	Minor Local	2988	-	-
Egremont	**8**	**Minor Local**	**3120**	-	-
Cleator Moor	**5**	**Minor Local**	**3870**	-	-
Workington - Seaton	3	Minor Local	4666	-	-
Workington - Distington	3	Minor Local	4666	-	-
Whitehaven - Hensingham	1	Minor Local	5720	-	-

Source: Management Horizons Europe: UK Shopping Index (2008)

A5.2 Workington

A5.2.1 Overview of centre

Workington is the principal shopping centre and largest settlement in Allerdale with a population of 24,254.

In recent years, and since the previous West Cumbria Retail Study[1] was undertaken, Workington Town Centre has undergone a £50 million major redevelopment scheme, with the intention of re-establishing the town as a major shopping destination. Other key objectives of the redevelopment included widening the town's retail catchment area and creating development that co-exists with and improves the town centre, attracts high quality retailers to the town, improves the environment, acts as a catalyst for future growth, creates jobs and improves long term prosperity. Works on the redevelopment commenced in 2004 and saw the demolition and redevelopment of the former Co-op supermarket and parts of the St Johns Shopping Precinct.

RSS 13 (adopted September 2008) recognises Workington/Whitehaven as a location where comparison retailing facilities should be enhanced and encouraged.

The main focus for retailing is in Workington town centre the newly developed and pedestrianised Washington Square, extending to the older properties along Pow Street, Murray Road and Finkle Street.

Photographs of the redeveloped, existing and historic areas of the town centre are provided overleaf. Figure A5.6 provides a ground floor land use plan of Workington town centre as defined by GOAD.

[1] West Cumbria Retail Update, 2003, Roger Tym & Partners

Photographs of Workington Town Centre

Figure A5.1

Figure A5.2

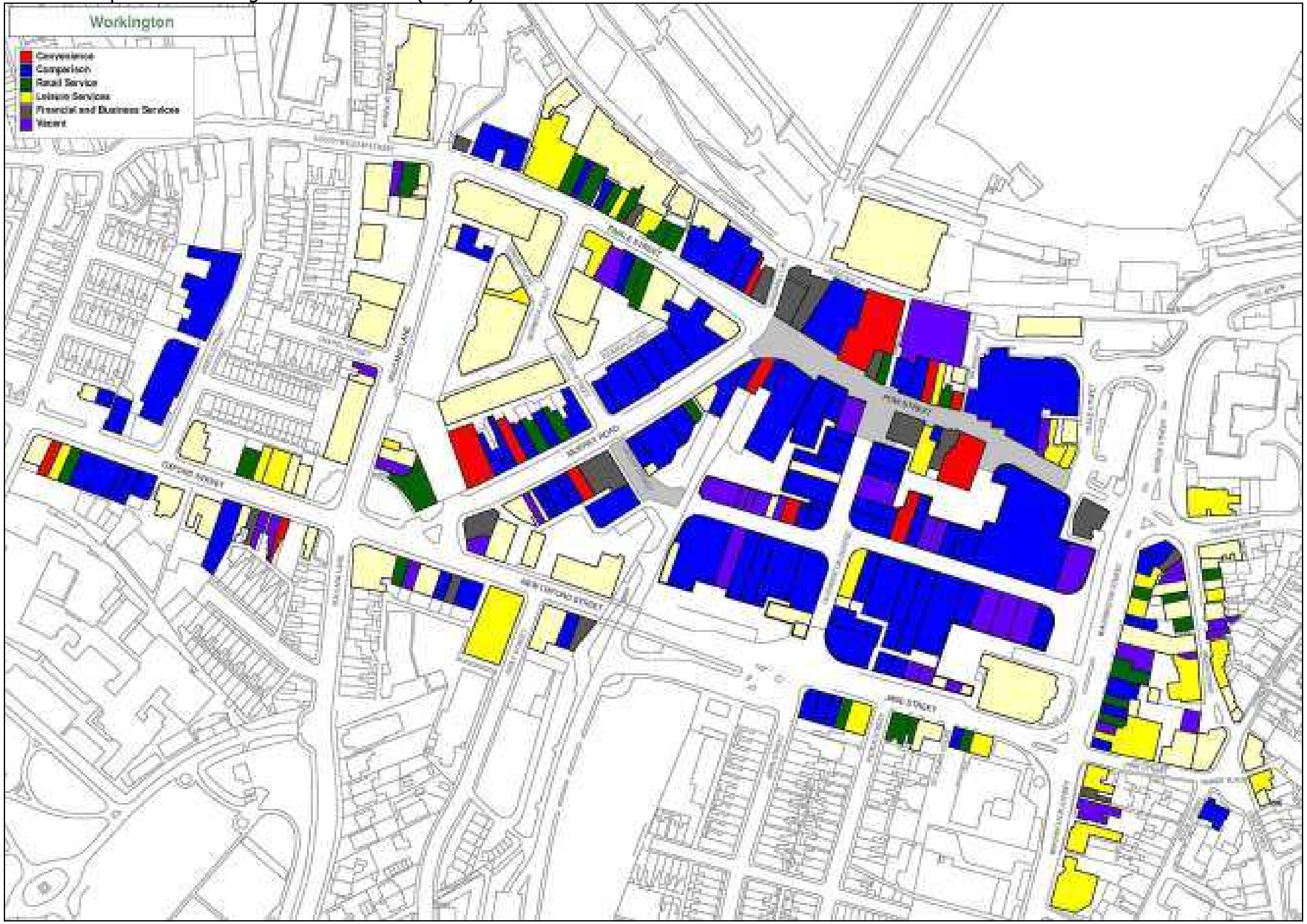
Figure A5.3

Figure A5.4

Figure A5.5

Figure A5.1 : Public art , looking south from Pow Street along Ivison Lane
Figure A5.2:` Debenhams Store within Washington Square development from Washington Street
Figure A5.3: Bus Station from Vulcan's Lane
Figure A5.4: Murray Road
Figure A5.5: Wilson Street

Figure A5.6: Land Use plan for Workington Town Centre (2008)



Source: GOAD base validated by WYG 2008 site visit

A5.2.2 Amount and Diversity of Uses in Workington Town Centre

Tables A5.2 – 3 and Figures A5.7 - 8 set out the diversity and amount of uses within Workington Town centre as assessed by GOAD and verified/updated by a WYG site visit. The data is presented in terms of both number of outlets and floorspace. National average figures are also provided.

A5.2.3 Convenience retailing in Workington

Workington has 15 convenience outlets, representing 6% of the total which is slightly below the national average of 8%. In terms of convenience floorspace, at 2930 sq m, accounting for just 6% of the total town centre floorspace, Workington town centre is 8% below the national average for this type of use. It is noted however that a current planning application to relocate the existing out of centre Tesco store onto the Laundry Field site, adjacent to the town centre, has consent, subject to a S106 agreement.

A5.2.4 Comparison retailing in Workington

There are currently 83 comparison retail outlets in the town centre. This accounts for 34% of all outlets which is generally in line with the national average. In terms of floorspace, at 24,930 sq m, Workington is 9% above the national average for this type of use. Comparison retail currently accounts for just under half (48%) of all floorspace in Workington. In addition, it should be noted that a significant amount of the vacant floorspace in the Washington Square development is also suitable for comparison use.

A5.2.5 Service retailing in Workington

Retail services are slightly above the national average in terms of their representation in Workington. There are 42 retail service outlets including 11 hairdressers, 6 beauty salons, 4 opticians and 4 travel agents. Retail service uses account for 4820 sq m of floorspace which equates to 9% of the total town centre.

There are 40 leisure service outlets in Workington town centre, accounting for 16% of the total outlets which is below the national average (21%). In terms of floorspace, Workington remains below, but closer to the national average for this use type, with several larger units including Opera Bingo (870 sq m) and the Carnegie (780 sq m) making significant contributions to the total.

Financial/ business service provision in Workington is 2% below the national average in terms of both number of outlets and floorspace, although the town is well served by 9 banks and building societies.

Table A5.2: Diversity of Uses in Workington Town Centre - units (2008)

	Number of Units		
	Number	Workington (%)	UK (%)
Convenience	15	6	8
Comparison	83	34	35
Retail Service	42	17	13
Leisure Services	40	16	21
Financial and Business Services	25	10	12
Vacant	39	16	10
Total	**244**	**100**	**100**

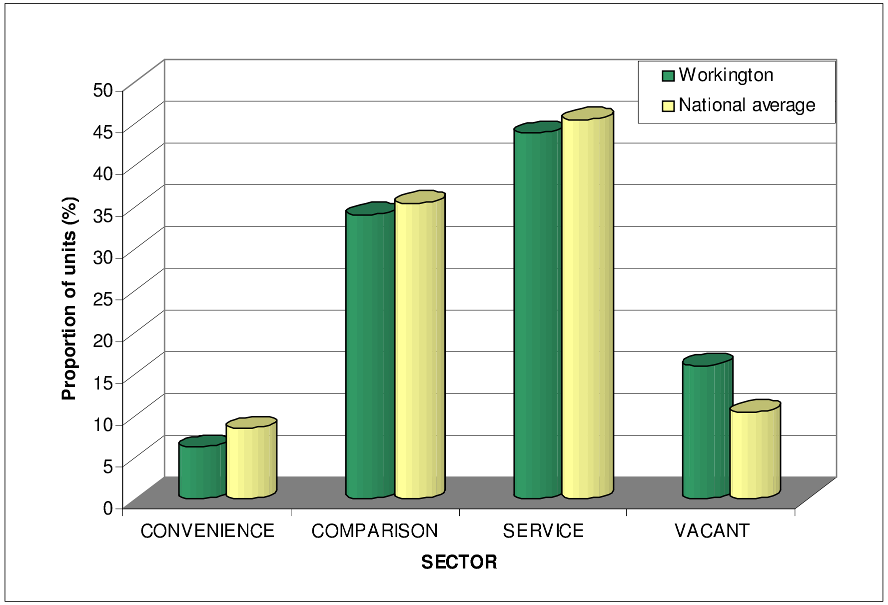
Source: GOAD Report 2008

Table A5.3: Diversity of Uses in Workington Town Centre - floorspace

	Floorspace		
	Sq m 2008	Workington (%) 2008	UK (%)
Convenience	2930	6	14
Comparison	24930	48	39
Retail Service	4820	9	7
Leisure Services	9950	19	22
Financial and Business Services	3630	7	9
Vacant	5750	11	8
Total	**52010**	**100**	**100**

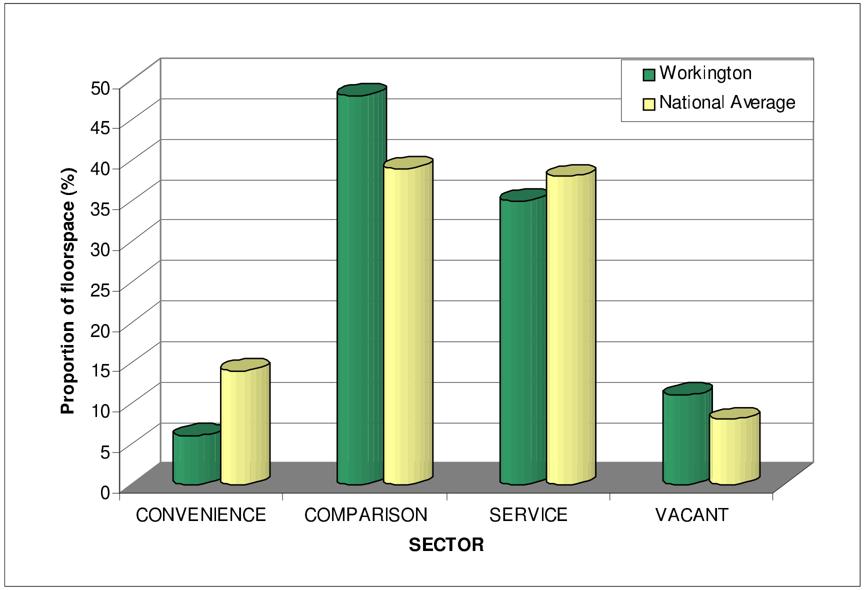
Source: GOAD Report 2008 as updated by WYG

Figure A5.7: Proportion of Units in Workington Town Centre (2008)



Source: GOAD 2008 as updated by WYG

Figure A5.8: Proportion of Floorspace in Whitehaven Town Centre (2008)



Source: GOAD 2008 as updated by WYG

A5.2.6 Vacancies in Workington

As demonstrated in Tables A5.2 – 3 and Figures A5.7 – 8 Workington town centre has a higher than average vacancy rate in terms of both the number of units (39) and floorspace currently available (5750 sq m).

Of the current 39 vacant units, 17 are in the Washington Square development and account for 2600 sq m of floorspace. This is 45% of the vacant floorspace in the town.

Other vacant properties are dispersed fairly evenly throughout the rest of the town centre with larger premises, including the former bingo hall on Tiffen Lane (930 sq m) and former public house off Udale Street (330 sq m) contributing significantly to the total.

The WYG survey of Workington town centre was undertaken in July 2008. In January 2009, Allerdale Borough Council obtained further updated figures. The most significant change revealed in the figures related to the loss of Woolworths from its central Pow Street location, accounting for over 1000 sq m of vacant retail floorspace in this single premises.

Figure A5.9: Vacancies in Workington Town Centre (July 2008)

Source: GOAD base validated by WYG 2008 site visit

A5.2.7 Top 20 Retailer Representation in Workington

Of the 'Top Twenty Retailers' as identified by Focus (2008) 11 were represented in Workington in 2008. Those represented are highlighted in Table A5.4 below. It should be noted that the Woolworths store ceased trading in December 2008.

Table A5.4: Top Twenty Retailers

Rank	Retailer
1	**Boots**
2	**Marks & Spencer**
3	**Argos**
4	**Woolworths**
5	**Debenhams**
6	John Lewis
7	W.H. Smith
8	BHS
9	**Next**
10	Dixons
11	**Superdrug**
12	Lloyds Pharmacy
13	**Wilkinson**
14	CO-OP Department Stores
15	Primark
16	**New Look**
17	**HMV**
18	**Dorothy Perkins**
19	Rosebys
20	Waterstones

Source: Focus Database (2008) /ORC Data Services
These are the top 20 comparison goods multiples ranked by ORC's forecast of average town centre sales for individual retailers with Great Britain.

A5.2.8 Unit sizes in Workington

Table A5.5 below provides a summary of the composition of Workington in terms of the size of town centre outlets. This is taken from an assessment of retailing facilities provided by GOAD for 2008.

It is demonstrated that Workington has a below average number of smaller units (under 1000 sq ft) however, analysis of the vacancy data demonstrates that over ½ of all vacant units fall within this range. Workington is also shown to have an above average supply of units in the size range 1000-2500 sq ft, which accounts for ¼ of the vacancies.

Table A5.5: Size of units in Workington Town Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Workington	UK
Under 93 sq m (1,000 sq ft)	78	32.0	39.1
94-232 sq m (1,000-2,499 sq ft)	108	44.2	39.6
233-464 sq m (2,500-4,999 sq ft)	36	14.8	12.6
465-929 sq m (5,000-9,999 sq ft)	18	7.4	5.1
930-1,393 sq m (10,000-14,999 sq ft)	1	0.4	1.5
1,394-1,858 sq m (15,000-19,999 sq ft)	1	0.4	0.7
1,859-2,787 sq m (20,000-29,999 sq ft)	2	0.8	0.7
Above 2,787 sq m (30,000 sq ft)	0	0	0.8
Total	**244**	**100**	

Source: GOAD 2008

A5.2.9 Retailer Requirements in Workington

Table A5.6 sets out the retailer requirements within Workington town centre as derived from the Focus Database (2008). This list should be treated with some degree of caution however as some retailers may indicate that they have requirements on the Database whilst not having an active desire to locate there. Additionally, the list includes retailers who are already present in the town but are seeking new premises. Furthermore, a single retailer may express more than one requirement in a town centre for different sizes of units.

Table A5.6: Retail Demand: Number of requirements by year

Year (Oct)	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Workington	**14**	**13**	**10**	**17**	**14**	**7**	**10**	**15**	**22**	**21**	**16**
Whitehaven	11	10	6	7	6	8	10	11	8	8	7
Penrith	9	8	4	6	6	9	17	16	20	20	23
Carlisle	52	62	64	61	53	59	62	70	70	51	44
Kendal	16	21	18	23	23	22	27	33	34	46	44

Source: Focus 2008

The table indicates that the number of retailer requirements in Workington has varied since the 1990's, showing a significant rise in requirement during 2004 – 2006, coinciding with the town centre redevelopment, with a decline shown for 2007. When compared to other towns in Cumbria, the Retailer Requirements database indicates that Workington has a higher retail demand than Whitehaven, but less demand than that experienced by Penrith, Carlisle and Kendal.

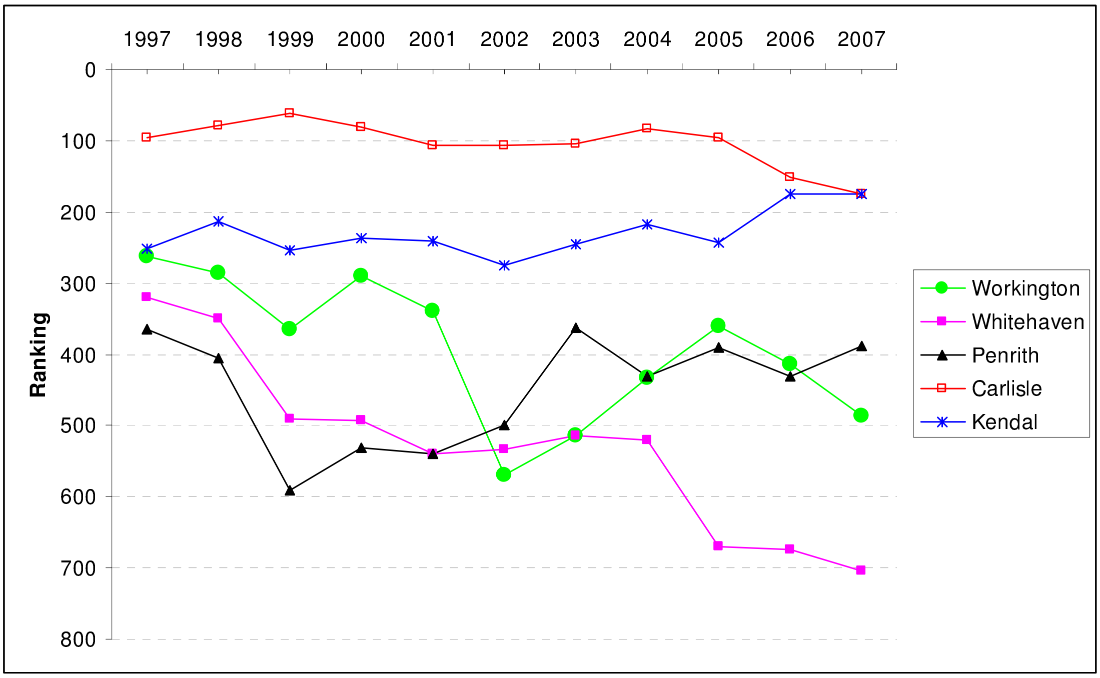
Table A5.7 and Figure A5.10 provide details of retail rankings of town centres from Focus (2008). It indicates that whilst Workington saw a general decline in its ranking through the late 1990's to 2002, after this time, coinciding with the town centre redevelopment, the town's ranking improved before declining once again after 2005. This more recent decline is a trend also experienced by Carlisle and Whitehaven.

Table A5.7: Retail demand - rankings

Year (Oct)	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Workington	**263**	**285**	**364**	**290**	**340**	**569**	**514**	**432**	**360**	**413**	**487**
Whitehaven	321	350	490	493	539	534	514	520	670	674	704
Penrith	364	405	590	531	539	499	362	431	391	431	388
Carlisle	97	78	62	80	106	107	105	83	96	151	174
Kendal	252	214	254	237	242	275	245	218	244	174	174

Source: Focus 2008

Figure A5.10 : Retail demand - Rankings



Source: Focus 2008

A5.2.10 Commercial rents in Workington

Zone A rents (i.e. the rental value of the first six meters depth of floorspace in retail units from the shop window) reflects retailers' perception of the town centres. As retailers consider rent to reflect the margin between turnover and operational costs (plus profit), the better the trading prospects, the higher the rent that the operator will be willing to pay.

Table A5.8 identifies the changes in prime pitch Zone A in rents in Workington Town Centre between 2000 and 2007 relative to other town centres in the sub region. It indicates that

Workington rents have increased by 20% since 2000. The table indicates that Zone A rents in Workington are higher than those in Whitehaven and Penrith, but cheaper than those in Carlisle and Kendal.

Table A5.8: Zone A Rents (£ per square m)

Centre	2000	2001	2002	2003	2004	2005	2006	2007	% change
Carlisle	1237	1237	1291	1345	1399	1453	1453	1507	+22
Kendal	699	699	699	699	699	699	699	699	0
Penrith		430	430	430	430	430	430	484	+13
Workington	**538**	**538**	**538**	**538**	**538**	**538**	**538**	**646**	**+20**
Whitehaven	484	484	484	538	538	538	538	538	+11

A5.2.11 Yield

Commercial yield demonstrates the confidence of investors in the long term profitability of the centre for retail, office and other commercial developments. A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage. Yields provide a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. Many considerations determine the yield for a particular property, including: the physical condition of the building; the potential for rental growth; the certainty of income; lease arrangements; and the range of potential uses of the building. Whilst there are therefore many complex factors which can determine yield, generally speaking, those towns with lower yield are considered to be more attractive and hence are more likely to attract more new investment than those with higher yields.

Table A5.9 sets out the findings of the Valuation Property Market Report (January 2008) in relation to towns in Cumbria. It indicates that yields in Workington have fallen from 2000 in line with a similar trend for comparable centres within the County, although they are showing an increase between 2007 and 2008, taking the Workington yield above that of Whitehaven.

Table A5.9: Commercial yields in Cumbrian town centres – 2000 to 2008

Shopping Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008
Workington	**10**	**10**	**>=10**	**>=10**	**>=10**	**>=10**	**>=10**	**6.75**	**7.75**
Whitehaven	9.5	10	>=10	>=10	>=10	10	7.5	7.5	7.5
Carlisle	6	6	6	6	5	5.5	5	4.75	5
Penrith	8	8	8	8	8	8	8	6.75	7.75
Kendal	7.5	7.5	7.5	6.5	7	7	6	8	8
Barrow-in-Furness	8	8.75	8.75	8	9	9	7.5	7.5	7.5

Source: VOA Property Market Report January 2008 www.voa.gov.uk

A5.2.12 Local Business Views in Workington

In order to gain a better understanding of the views of businesses operating within Workington, WYG undertook a survey of town centre businesses. The survey was undertaken in August 2008. 240 surveys were distributed and 58 returned resulting in a response rate of 24%. In addition to the survey, a Workington Town Centre Business Forum was held at Allerdale House, Workington. All recipients of the business survey were invited to attend this meeting however turnout was exceptionally low. The survey results are set out in full in Appendix 4. The key findings are summarised below:

- Over 55% of respondents had traded in Workington Town Centre for over 10 years. ¼ had operated in the town centre 3 years or less.
- Just under 60% of respondents were independent businesses whilst the remainder were part of a national/regional group or chain.
- 90% of respondents had always operated from Workington town centre.
- 59% of businesses indicated that trade has grown during their time in the town centre with 20% stating that business had declined. The remainder stated that their business had remained largely static.
- 43% of businesses consider themselves to be trading well with 45% stating trade to be moderate. Just 12% advise that trade is poor.
- Over two thirds of respondents lease their premises. Lack of commercial property for owner occupation was identified as an issue by local agents in the area.
- Just under half (47%) of respondents believe that there is a good balance of uses in the town centre. 22% believe that there are too many non retail uses whilst 31% believe that there are not enough non retail uses.
- 74% of respondents indicated that they have no intention to alter their business in any way over the next 5 years whilst only 1 respondent indicated that they intend to close their

business. 19% of respondents intend to refurbish their current premises during this time period.

- Notably only 31% of business survey respondents considered that the Washington Square development has had a positive impact. Positive impacts identified included a better shopping environment, greater choice of shops and increased footfall. Of the 60% of respondents identifying a negative impact, the reasons given included high rents and rates, limited local involvement, problems regarding car parking, a lack of diversity in shops and too many vacant units.
- In terms of competition from other centres, Carlisle was considered to be the biggest competitor by over 2/3 of the respondents. The internet is also considered significant, with 40% of respondents identifying it as a significant competitor.

As part of the business survey, respondents were also asked to rate various aspects of the town centre as either 'good', 'average' or 'poor'. Table A5.10 summarises the response of the Workington businesses. Overall, the majority of respondents rated the majority of aspects as 'average'. No aspects were rated as 'good' by the majority of respondents, but the most frequent positive responses related to the pedestrian environment (34% rated 'good') and location and quality of car parks (28%) and access by foot/cycle (28%). Those issues ranked by the majority as 'poor' included foodstore provision (69%) and entertainment and leisure (67%).

Table A5.10: Business respondents perception of Workington Town Centre

	Good (%)	Average (%)	Poor (%)	Don't Know (%)
Range of Shops and services	16	57	28	0
Location and quality of car parks	28	47	26	0
Foodstore Provision	9	22	69	0
Car parking	12	40	48	0
Shopping Environment	22	62	14	2
Pedestrian environment	34	47	14	5
Security (e.g. CCTV)	24	45	17	14
Personal Safety	24	60	10	5
Access by public transport	26	48	12	14
Access by foot/cycle	28	48	14	10
Signage	10	60	22	7
Cleanliness	12	41	47	0
Entertainment/leisure	3	24	67	5
Events	5	40	47	9
Public toilets	5	40	33	22
Leisure/tourism	0	22	57	21

Survey respondents were also asked to consider what they perceived to be the main barriers to their trading performance. Table A5.11 summarises the results. The most frequently raised concerns were inadequate customer car parking (47%), followed by high rents/overheads

(45%). A lack of passing trade outside their premises was identified as a problem by 29% of respondents.

Table A.5.11: Barriers to trading performance in Workington Town Centre

Barrier to trading performance	% respondent
High Rents/Overheads	45
Lack of passing trade outside your premises	29
Poor location of your premises	17
Inadequate customer car parking	47
Competition from other traders in Town Centre	16
Competition from other Town Centres nearby	22
Competition from elsewhere	16
Lack of day visitors/tourists to the town	29
Anti-social behaviour	12
Poor security	7
Inadequacy of your current premises	7
Poor quality of shopping environment	16
Don't Know	2
None	7

Following on from rating aspects of the town centre and barriers to performance, the survey asked respondents to consider what improvement measures they would like to see implemented in the town centre. Table A5.12 summarises the findings. The most frequent response was to have an increase in the choice / range of shops within the town centre (81%). This was closely followed by having a foodstore in the town centre, improved street paving and more street cleaning (78%). Over 2/3 also identified improved public transport and more cultural facilities as measure that would improve the town centre.

Table A5.12: Potential measures to improve Workington Town Centre

Improvement measure	% respondents
Increased choice/range of shops	81
More national multiples	38
Foodstore in the Town Centre	78
Improved street paving	78
Improved street furniture	12
Improved built environment	16
Lower parking charges	17
Flexible parking	10
More street cleaning	78
Improved public transport	69
Improved access by foot and cycle	55
More entertainment/leisure facilities	24
More quality restaurants/pavement cafes	16
More specialist markets	64
More cultural facilities (i.e. Theatre)	69
Improved security/CCTV	52
Greater promotion/marketing of the centre	43
Improved signposting	24
Public toilets	59

When asked what specific support would help their business, half of all respondents identified marketing assistance. 41% indicated that Shopfront improvement grants would help their business. 8 % identified a town centre management as a useful support measure whilst only 2% suggested training support would be helpful.

Additional issues raised by respondents and not covered elsewhere in the business survey included the lack of lack of leisure facilities, the need to integrate old and new Workington and the potential impact of new Tesco store on the Laundry Fields site.

In addition to the town centre business survey, a Town Centre Business Forum was also held at Allerdale House on 26th August 2008. All recipients of the business survey were invited to attend the Forum. However, attendance at the event was poor with only one town centre trader attending the event.

A5.2.13 Customer views and behaviour – on street survey results

An on street visitor survey was also undertaken in Workington. The full results of the survey are included in Appendix 3. The survey identified that the majority of visitors travel by car (60%), although there is also a strong walk-in catchment (18%). The vast majority of respondents (93%) indicated that they had no problem parking. Over 1/5 of those respondents who travelled by car had parked in the multi storey car park. Over 2/3 of respondents had travelled within a 15 minute journey time.

The main reasons for choosing Workington over other centres were proximity to home (51%) and the choice of High Street Retailers (19%).

Respondents were asked for their main reason for being in Workington on that day. 29% identified their main reason as being clothes/shoes shopping whilst 13% identified food and grocery shopping as the main reason for their visit.

Almost a quarter (24%) of respondents stated that they now visit Workington more often than five years ago whilst only 10% stated that they visit less. Significantly, more than three-quarters of respondents (77%) don't visit Workington in the evening.

When asked to compare Workington to other town centres a significant number of respondents rated Workington as either better or much better for the following:

- choice of shops (48%)
- high street names (49%)
- cleanliness (42%)
- layout (50%)
- general environment (40%)

Whilst Workington performs quite well when compared against other centres, the least favourable (rated worse or much worse) aspects identified by visitors emerged as being:

- choice of independent / specialist shops (32%)
- leisure facilities (17.5%)
- car parking prices (21%)

When asked what type of shops/services respondents would like to see more of, the most popular responses were:

- large supermarkets (11%)
- specialist foodstores (11%)
- clothing stores (21%)

When asked what could improve Workington, making it more attractive, the most frequent suggestions were:

- increased choice and range of shops
- better foodstore provision
- cheaper parking
- more restaurants/cafes
- covered shopping areas / more shelter

The biggest weaknesses were identified as:

- foodstore provision
- choice/range of non food shops
- car parking
- rents/rates too high
- Council support

75% of the respondents to the on street visitor survey felt that the Washington Square development has had a positive impact on the town centre (14% felt that it had not had a positive impact, whilst 11% expressed that they 'didn't know'). Of those identifying a positive impact, 72% stated that the shopping environment had been improved and 47% identified the increased range and choice of shops.

A5.2.14 Accessibility

Workington bus station is currently located on Murray Road/Vulcans Lane, although there are bus stops at numerous locations within and around the town centre. Workington railway station is located approximately 400m to the west of the town centre. There are current proposals for a public transport interchange, to incorporate a bus terminal, to be located at the site of the existing railway station.

The Workington visitor survey revealed that 60% of those interviewed had travelled to the town centre by car, 19% had travelled by bus/coach whilst 18% had walked. 3% had travelled by taxi. 48% of respondents had a journey time to the town centre of 10minutes or less and 30% had a journey time of 10 – 20 minutes. 21% had a journey time of over 20minutes.

Just over ¼ of business survey respondents considered accessibility by public transport to Workington town centre to be 'good', and just under ½ considered it to be 'average'. 12%

considered it to be ‘poor’. Visitors to the town centre also viewed public transport provision in a similar way. 15% of the visitors surveyed stated that accessibility to Workington by public transport was better or much better than in other towns. 43% considered that it was ‘about the same’, whilst only 4% considered it to be worse than elsewhere. 24% of business survey respondents identified that they would like to see improved access by public transport to the town centre.

76% of the business survey respondents considered access to the town centre by foot or cycle to be ‘good’ or ‘average’. 16% suggested improved access by foot/cycle would be beneficial to the town centre. Improved signposting was also identified by 26% of respondents as a potential improvement measure.

In addition to on street parking, there are 13 car parks with over 1100 spaces serving Workington town centre. The largest car parks are Brow Top (231 spaces), Central Station (303 spaces) and the Multi Storey which forms part of the Washington Square development (427 spaces). The visitor survey revealed that of those visitors’ who had travelled by car, 21% had parked in the multi storey car park, 16% had used on street parking, 8% had used Central Station whilst a further 8% used the Udale Street car park. Whilst 48% of business survey respondents rated car parking in the town centre as ‘poor’, 93% of the visitors to the town centre who had travelled by car stated that they had no problem parking.

When visitors to the town centre were asked to compare Workington against other centres on the issue of car parking, 32% stated that Workington is better or much better than elsewhere, whilst 27% considered it to be about the same as other towns. Only 16% considered Workington to be worse than elsewhere for car parking.

On the issue of parking costs, whilst 78% of business survey respondents indicated that cheaper parking would improve the town centre, when asked to compare Workington against other centres on the issue of car parking prices, 46% of respondents replied that Workington is either better or the same as elsewhere and with 21% describing it as being worse (a 1/3 stated that they ‘did not know’).

A5.2.15 Perception of safety and crime

12% of respondents to the Workington business survey identified anti-social behaviour as a barrier to their trading performance. 24% of respondents considered security in Workington to be ‘good’, 45% consider it ‘average’ and 17% ‘poor’. The majority of business survey respondents (60%) viewed personal safety in Workington as ‘average’. This echoed by the visitor survey which demonstrated that 61% of respondents considered day time safety to be 'about the same' as elsewhere. 24% of all business survey respondents indicated that they would like to see improved security/CCTV in Workington town centre.

A5.2.16 Quality of environment

The Washington Square redevelopment has obviously brought about significant changes in the general environment of Workington town centre in terms of the built form, layout and linkages to other parts of the town. It has also incorporated a significant amount of public realm improvements and new public art installations.

75% of the visitor survey respondents to the town centre believe that the Washington Square redevelopment has had a positive impact on Workington. Of these respondents, 72% expressed that it had improved the shopping environment. When asked the same question however, only 31% of the business survey respondents suggested that the redevelopment has had a positive impact.

Less than a ¼ of the business survey respondents consider the shopping environment of Workington to be 'good', with the majority (62%) rating it as 'average'. The pedestrian environment is viewed more favourably however with 34% of business respondents rating this as 'good' and further 47% describing this aspect as 'average'.

The visitors' perception of the town centre environment appears more favourable than the business operators. When asked to compare Workington against other centres on the issue of the general environment, 40% of respondents replied that Workington is 'better or much better' than other centres whilst 53% consider it to be 'about the same' as elsewhere.

A5.3 Maryport

A5.3.1 Overview of centre

Maryport is a key service centre with a population of 12,080.

The retail focus of the town centre is along the length of Senhouse Street, extending from Curzon Street to the harbour area. There have been several regeneration initiatives targeted at making improvements to Maryport and the town centre. A Townscape Heritage Scheme is currently underway, targeting some of the most significant and prominent vacant properties as well as environmental enhancements in key locations including Shipping Brow, which links the town centre to the historic harbour and recently development 'Wave' visitor centre.

Photographs of Maryport town centre are provided overleaf. Figure A5.16 provides a ground floor land use plan of Maryport town centre as defined by GOAD.

Photographs of Maryport Town Centre

Figure A5.11

Figure A5.12

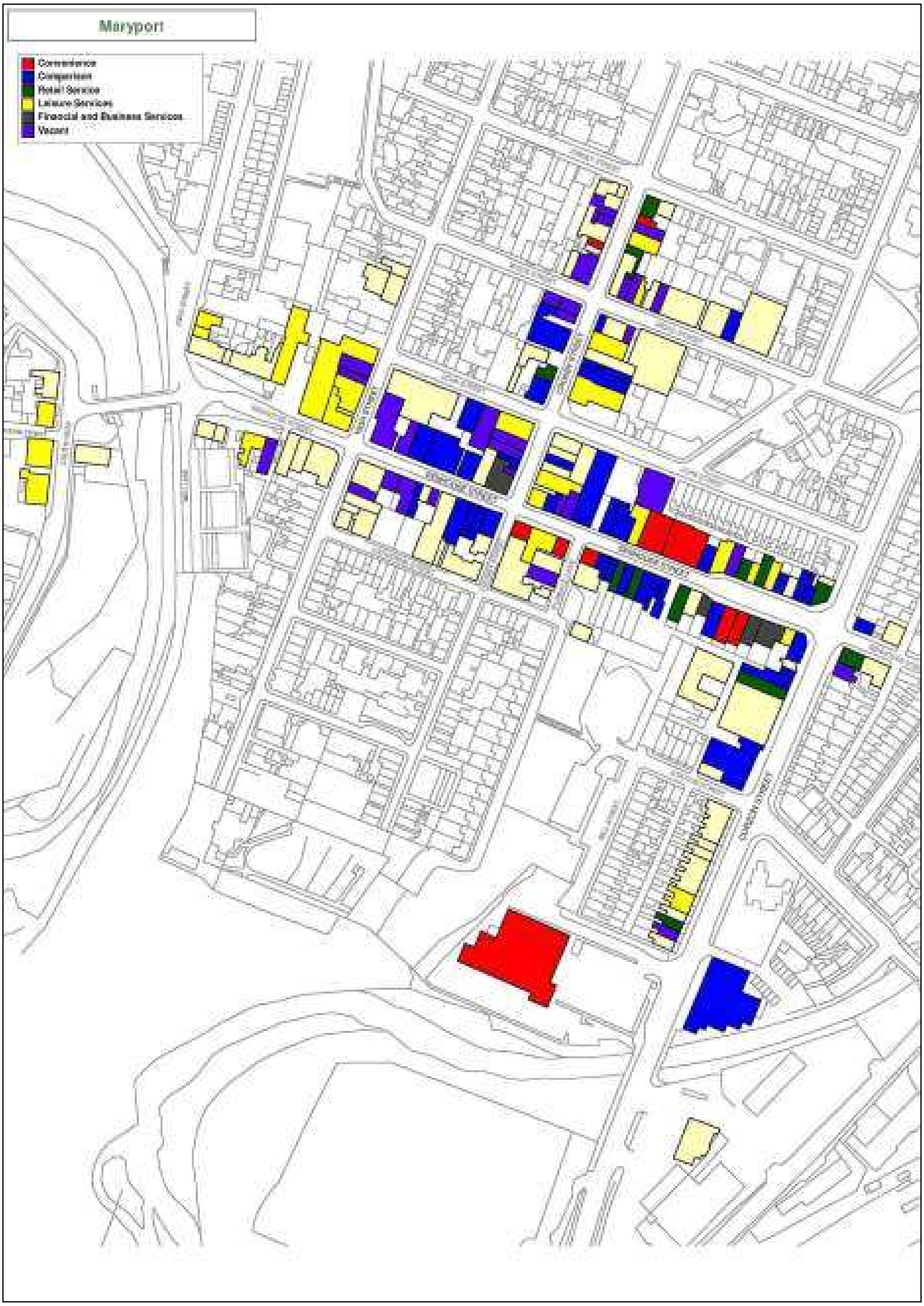
Figure A5.13

Figure A5.14

Figure A5.15

Figure A5.11: Looking west along Senhouse Street
Figure A5.12: Looking north along Curzon Street
Figure A5.13: Former Golden Lion Hotel
Figure A5.14: Public realm along harbourside
Figure A5.15: Looking south along Curzon Street

Figure 5.16: Land Use map for Maryport Town Centre (2008)



A5.3.2 Amount and Diversity of Uses in Maryport Town Centre

Tables A5.13 – 14 and Figures A5.17 – 18 set out the diversity and amount of uses within Maryport Town centre as assessed by GOAD and verified/updated by a WYG site visit in July 2008. The data is presented in terms of both number of outlets and floorspace. National average figures are also provided.

A5.3.3 Convenience retailing in Maryport

There are currently 13 convenience outlets in Maryport which represents 10% of the total number of outlets, slightly above the national average (8%). This equates to 3380 sq m of floorspace (18% of all total floorspace) which is again slightly above the national average (14%). Other than the Co-op the remainder of the convenience outlets are all of 380 sq m or less in size and other then Heron Foods, Spar and Greggs, they are independent retailers or part of a small local chain.

A5.3.4 Comparison retailing in Maryport

There are currently 33 comparison retail outlets in Maryport town centre, accounting for 25% of all outlets, which is 10% below the national average. In terms of floorspace, at 4560 sq m and 24% of the total Maryport floorspace, it is 15% below the national average. At the time of the survey with the exception of Woolworths and 2 charity shops, the comparison retailers are independent or part of a small local chain. Woolworths has since closed.

A5.3.5 Service retailing in Maryport

In terms of the number of outlets, Maryport is fairly consistent with national averages for retail and leisure services. However with just 6 financial/business outlets, it falls below the average for this type of use. This pattern is also reflected in terms of floorspace, although the town centre does host 3 of the 'high street' banks – the NatWest, HSBC and Lloyds TSB.

Table A5.13: Diversity of Uses in Maryport Town Centre - units (2008)

	Number of Units		
	Number	Maryport (%)	UK (%)
Convenience	13	10	8
Comparison	33	25	35
Retail Service	18	14	13
Leisure Services	30	23	21
Financial and Business Services	6	5	12
Vacant	32	24	10
Total	**132**	**100**	**100**

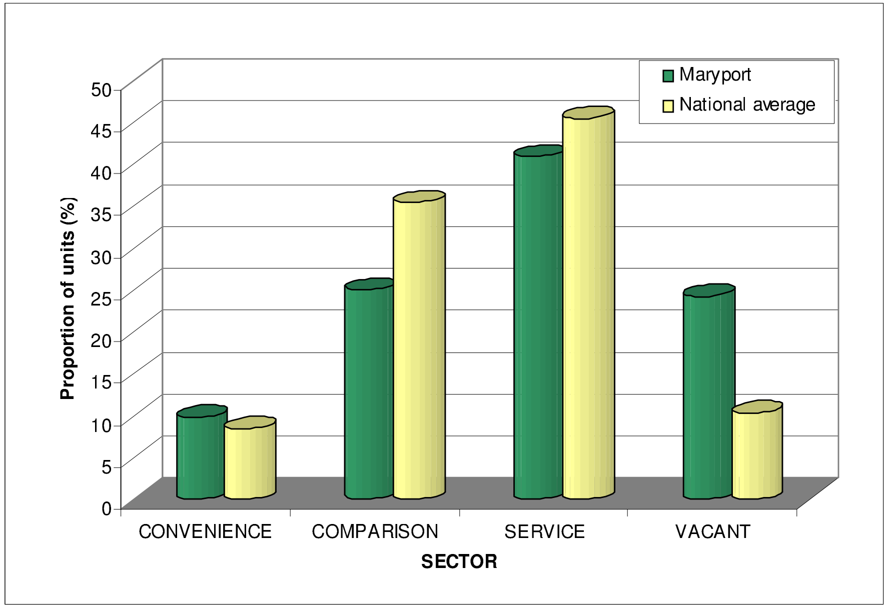
Source: GOAD Report 2008

Table A5.14: Diversity of Uses in Maryport Town Centre - floorspace(2008)

	Floorspace		
	Sq m 2008	Maryport (%) 2008	UK (%)
Convenience	3380	18	14
Comparison	4560	24	39
Retail Service	2500	13	7
Leisure Services	4410	23	22
Financial and Business Services	640	3	9
Vacant	3700	19	8
Total	**19190**	**100**	**100**

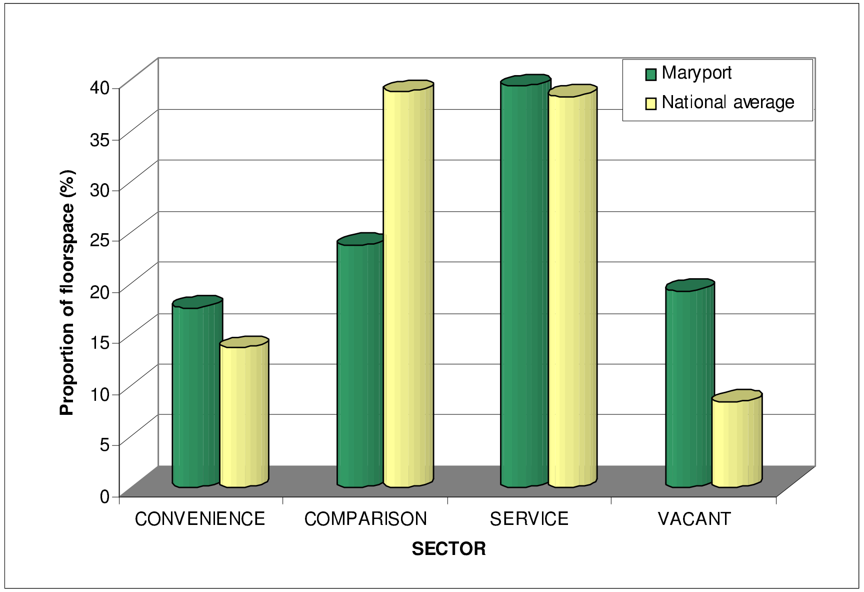
Source: GOAD Report 2008 as updated by WYG

Figure 5.17: Proportion of Units in Maryport Town Centre (2008)



Source: GOAD 2008 as updated by WYG

Figure 5.18: Proportion of Floorspace in Maryport Town Centre (2008)



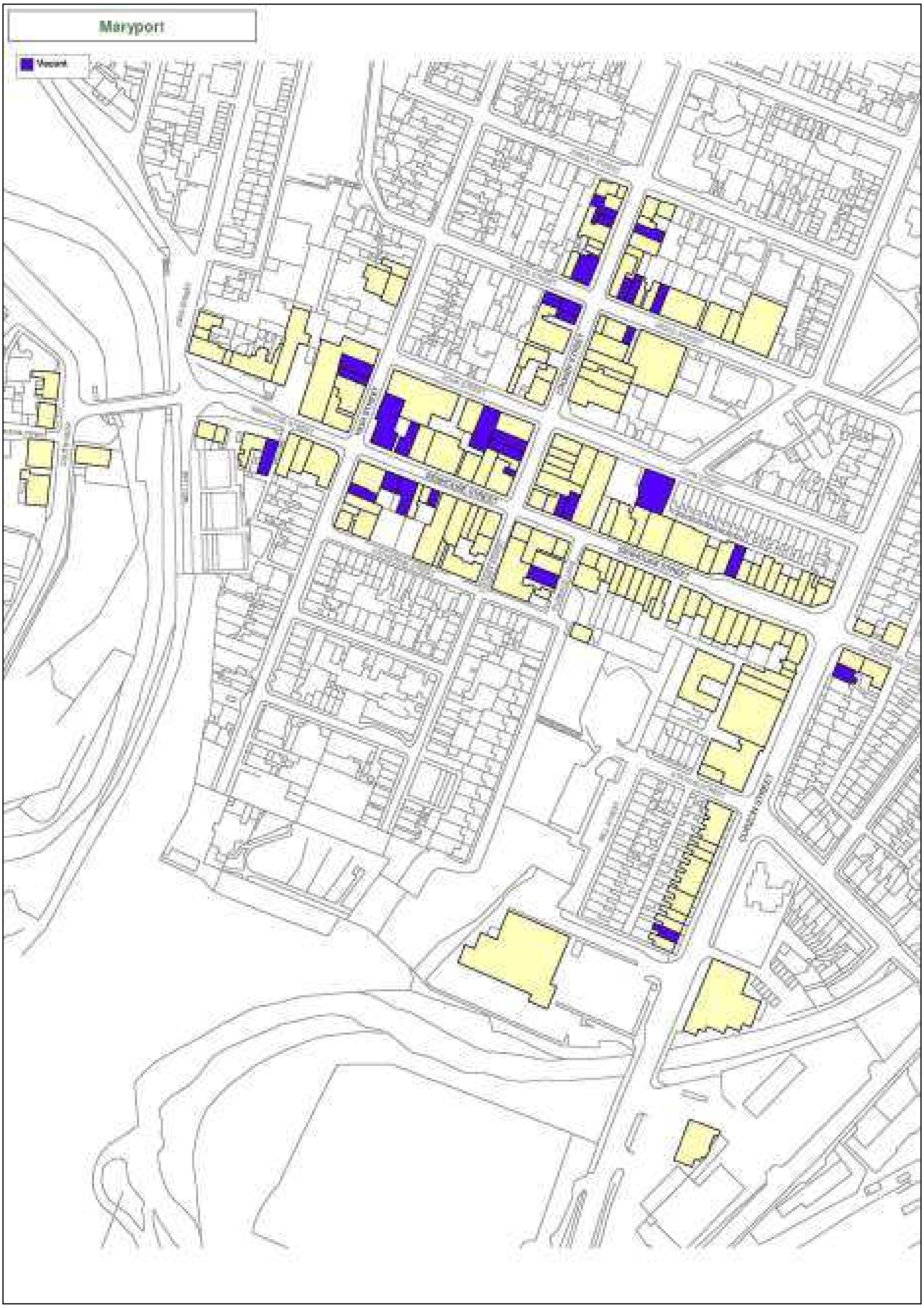
Source: GOAD 2008 as updated by WYG

A5.3.6 Vacancies in Maryport

Vacant floorspace and premises in Maryport town centre are both significantly above the national average. There are 32 vacant premises which account for almost a ¼ of the total outlets, with a particular concentration in the north east part of the town centre. This accounts for 3700 sq m of floorspace, which is 19% of the total town centre floorspace.

This survey was undertaken in July 2008. A further significant addition to vacant floorspace since this time is the town centre Woolworths store which ceased operation in December 2008.

Figure 5.18: Vacancies in Maryport Town Centre (2008)



A5.3.7 Top 20 Retailer Representation in Maryport

At the time of the WYG survey (July 2008), of the 'Top Twenty Retailers' identified by Focus (2008), Maryport accommodated only one of these businesses within the town centre – Woolworths. Woolworths has since closed.

Table A5.15: Top Twenty Retailers

Rank	Retailer
1	Boots
2	Marks & Spencer
3	Argos
4	**Woolworths**
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Database (2008) /ORC Data Services
These are the top 20 comparison goods multiples ranked by ORC's forecast of average town centre sales for individual retailers with Great Britain.

A5.3.8 Unit sizes

Table A5.16 below provides a summary of the composition of Maryport in terms of the size of town centre outlets. This is taken from an assessment of retailing facilities provided by GOAD for 2008.

It is demonstrated that Maryport has a significant overrepresentation of smaller units (51% are under 1000 sq ft) when compared to the national average (39%). The Co-op is the only unit over 15,000 sq feet.

Table A5.16: Size of units in Maryport Town Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Maryport	UK
Under 93 sq m (1,000 sq ft)	67	50.8	39.1
94-232 sq m (1,000-2,499 sq ft)	47	35.6	39.6
233-464 sq m (2,500-4,999 sq ft)	14	10.6	12.6
465-929 sq m (5,000-9,999 sq ft)	2	1.5	5.1
930-1,393 sq m (10,000-14,999 sq ft)	1	0.75	1.5
1,394-1,858 sq m (15,000-19,999 sq ft)	1	0.75	0.7
1,859-2,787 sq m (20,000-29,999 sq ft)	0	0	0.7
Above 2,787 sq m (30,000 sq ft)	0	0	0.8
Total	**132**	**100**	

Source: GOAD 2008

A5.3.9 Business Survey Results

A questionnaire was distributed to all local businesses in Maryport Town Centre in order to gain an understanding of the opinions, views and perceptions of retailers. A total of 110 questionnaires were distributed and 38 were returned, representing response rate of 35%. The results are contained in Appendix 4. The key findings are set out below:

- 63% of respondents have traded in Maryport for over 10 years. 13% have traded for under 3 years, whilst 24% have traded for between 3 and 10 years.
- 90% of respondents operated independent businesses
- During time trading in Maryport 55% of respondents state that their business has grown. 11% advise that their business has been largely static whilst 33% identify that trade has declined
- Over ½ of respondents (52%) advise that their business is performing well and 26% moderately. 21% advise that their current business performance is poor or very poor.
- Just under ½ of respondents (47%) consider that there are too many non retail uses in Maryport town centre. 32% consider there to be a good balance of uses whilst 21% consider there to be not enough non retail uses.
- 62% of respondents indicate that they have no intention to alter their business in any way in the next 5 years. 4 respondents indicate that they intend to close. 11% intend to refurbish their existing floorspace.
- 61% of respondents identify Workington as their biggest, or one of their biggest, competitors. Cockermouth and Carlisle were also both identified by 21% of respondents. 18% identified the internet.

As part of the business survey, respondents were also asked to rate various aspects of the town centre as either 'good', 'average' or 'poor'. Table A5.17 summarises the response of the Maryport businesses. Overall the majority of respondents rate all the identified aspects as either poor or average. The aspects receiving the most positive response was access to the town centre by foot/cycle (37%). The aspects most frequently rated 'poor' were public toilets (71%), entertainment/leisure (66%), security (58%) and car parking (58%).

Table A5.17: Business respondents perception of Maryport Town Centre

	Good (%)	Average (%)	Poor (%)	Don't Know (%)
Range of Shops and services	5	45	50	0
Location and quality of car parks	11	39	50	0
Foodstore Provision	8	45	47	0
Car parking	0	37	58	5
Shopping Environment	3	39	50	8
Pedestrian environment	11	61	24	5
Security (e.g. CCTV)	8	26	58	8
Personal Safety	21	66	8	5
Access by public transport	21	63	11	5
Access by foot/cycle	37	47	5	11
Signage	26	55	18	0
Cleanliness	16	61	24	0
Entertainment/leisure	0	32	66	3
Events	5	34	53	8
Public toilets	5	13	71	11
Leisure/tourism	13	47	34	5

Survey respondents were also asked to consider what they perceived to be the main barriers to their trading performance. Table A5.18 summarises the results. Responses to this were quite widely spread with high rents and overheads, inadequate customer parking and competition from other town centres being the most frequent responses (39% each). Lack of passing trade, poor quality of the shopping environment and anti social behaviour were also significant concerns.

Table A5.18 Barriers to trading performance in Maryport Town Centre

Barrier to trading performance	% respondents
High Rents/Overheads	39
Lack of passing trade outside your premises	34
Poor location of your premises	24
Inadequate customer car parking	39
Competition from other traders in Town Centre	13
Competition from other Town Centres nearby	39
Competition from elsewhere	18
Lack of day visitors/tourists to the town	21
Anti-social behaviour	32
Poor security	11
Inadequacy of your current premises	8
Poor quality of shopping environment	34
Don't Know	5
None	11

Following on from rating aspects of the town centre and barriers to performance, the survey asked respondents to consider what improvement measures they would like to see implemented in the town centre. Table A5.19 summarises the findings. An increased choice/range of shops was the most frequently identified improvement measure (74%) followed by improved security/CCTV (53%), flexible parking (58%) and lower parking charges (45%).

Table A5.19: Potential measures to improve Maryport Town Centre

Improvement measure	% respondents
Increased choice/range of shops	74
More national multiples	18
Foodstore in the Town Centre	42
Improved street paving	13
Improved street furniture	26
Improved built environment	29
Lower parking charges	45
Flexible parking	58
More street cleaning	26
Improved public transport	26
Improved access by foot and cycle	16
More entertainment/leisure facilities	39
More quality restaurants/pavement cafes	32
More specialist markets	42
More cultural facilities (i.e. Theatre)	42
Improved security/CCTV	53
Greater promotion/marketing of the centre	42
Improved signposting	32
Public toilets	42

When asked what specific support would help their business, the most popular response was shop front improvement grants (59%) followed by marketing assistance (28%). 9% identified a town centre manager as a measure to help their business whilst only 3% identified training.

A5.3.10 Accessibility

The main town centre bus stops are located on Curzon Street and Senhouse Street. Maryport railway station, which is on the West Cumbria Coast line is located approximately 250m from the main shopping area along Senhouse Street. 21% of the business survey respondents considered accessibility by public transport to Maryport town centre to be good, whilst 63% considered it to be 'average' and just 11% 'poor'. Access by foot and cycle is also rated slightly better with 37% of considering it to be 'good', 47% 'average' and 5% 'poor'. 26% of respondents identified that they would like to see improved access by public transport to the town centre, whilst 16% suggested improved access by foot/cycle as being beneficial. Improved signposting was also identified by 32% of respondents as a potential improvement measure.

In addition to on street parking, there are five public car parks serving the town centre providing over 270 spaces. None of the business survey respondents considered the town centre car parks to be 'good' and the majority (58%) consider them to be 'poor'. 39% of respondents viewed inadequate customer car parking as a barrier to their trading performance. When considering what improvements they would like to see in the town centre, 45% identified lower car parking charges and 58% more flexible parking.

A5.3.11 Perception of safety and crime

32% of respondents to the Maryport business survey identified anti-social behaviour as a barrier to their trading performance. Only 8% of respondents considered security in Maryport to be 'good' and the majority (58%) considered it to be 'poor'. However 1/5 of respondents rated personal safety in Maryport to be 'good', with only 8% considering this aspect of the town centre to be poor. Over half of all respondents (53%) would like to see improved security/CCTV in Maryport town centre.

A5.3.12 Quality of environment

Whilst it is recognised that there has been significant and ongoing investment in seeking to improve the quality of the physical environment of Maryport in recent years there remains a significant number of vacant properties throughout the town centre.

Significantly, only 3% of the business survey respondents rate the shopping environment in Maryport to be ‘good’, with the majority (50%) considering it to be ‘poor’. The pedestrian environment is viewed more favourably with 11% of respondents considering this aspect to be ‘good’ and the majority (61%), average, although 24% consider it ‘poor’. When considering improvement measures for the town centre, 29% of respondents suggested improvements to the built environment whilst 13% identified improvements to street paving and 26% improvements to street furniture. 34% of respondents identified the poor quality of the shopping environment as a barrier to their trading performance. Almost 60% of respondents feel that their business would benefit from Shopfront improvement grants.

A5.4 Cockermouth

A5.4.1 Overview of centre

Cockermouth is a historic market town and key service centre in Allerdale with a population 7,948.

The retail focus of the town centre is along Main Street and Station Street, extending to Market Place which had undergone recent improvements as part of the Cockermouth Masterplan. A Sainsbury's superstore, located off South Street at the site of the former auction mart, opened in the town centre in 2003.

Photographs of Cockermouth town centre are provided overleaf. Figure A5.24 provides a ground floor land use plan of Cockermouth town centre as defined by GOAD.

Photographs of Cockermouth Town Centre

Figure A5.19

Figure A5.20

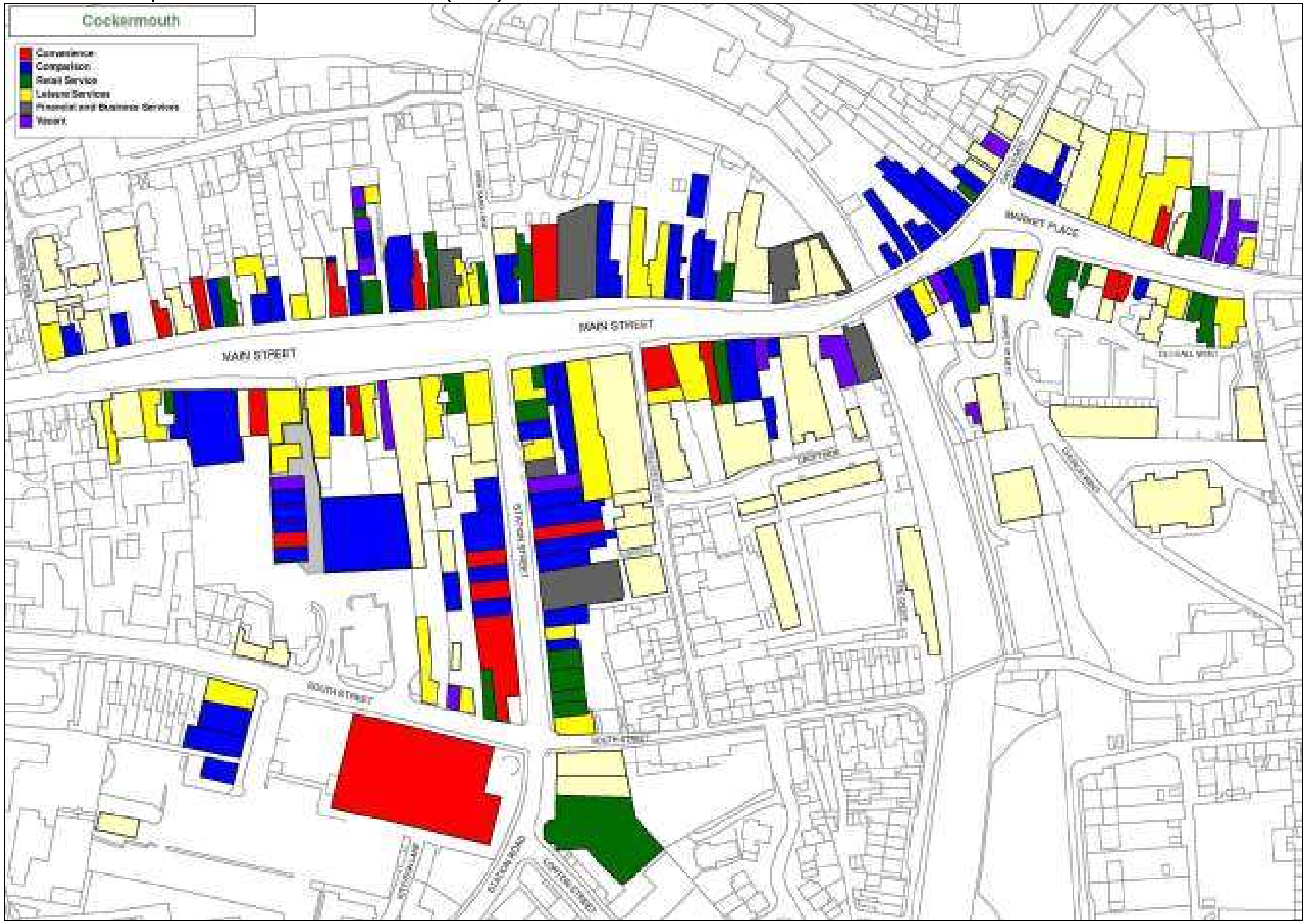
Figure A5.21

Figure A5.22

Figure A5.23

Figure A5.21 : Market Place, looking towards Main Street
Figure A5.20: Looking towards Lowther Went from South Street
Figure A5.21: Sainsbury's supermarket, South Street
Figure A5.22: Looking south along Station Street
Figure A5.23: Looking west along Main Street

Figure A5.24: Land Use map for Cockermouth Town Centre (2008)



Source: GOAD base validated by WYG 2008 site visit

A5.4.2 Amount and Diversity of Uses in Cockermouth Town Centre

Tables A5.20-21 and Figures A5.25-26 set out the diversity and amount of uses within Cockermouth Town centre as assessed by GOAD and verified/updated by a WYG site visit. The data is presented in terms of both number of outlets and floorspace. National average figures are also provided.

A5.4.3 Convenience retailing in Cockermouth

There are currently 22 convenience outlets in Cockermouth town centre, which accounts for 13% of the total outlets which is slightly above the national average. At 5090 sq m, convenience floorspace in Cockermouth accounts for 17% of all floorspace, which is again slightly above the national average (14%). Just under half of this floorspace is accounted for by the Sainsbury's store.

A5.4.4 Comparison retailing in Cockermouth

Comparison shopping is under-represented in Cockermouth town centre when compared to the national average. There are currently 52 comparison outlets which accounts for 30% of the total, 5% below the national average. More significantly, in terms of floorspace, Cockermouth falls 14% below the national average for comparison shopping. The underrepresentation is therefore accentuated by the relatively small size of the comparison outlets – 90% of units are 250 sq m or below.

A5.4.5 Service retailing in Cockermouth

The number of service outlets are broadly in line with the national average. In terms of floorspace both leisure and financial/business services are above average. In terms of leisure, both the Globe and Wordsworth Hotels contribute significantly to the floorspace figure. In terms of financial/business services Cockermouth has a good representation of banks and building societies including four 'high street' banks. There are also currently 11 estate/letting agencies.

Table A5.20: Diversity of Uses in Cockermouth Town Centre - units (2008)

	Number of units Number	Cockermouth (%)	UK (%)
Convenience	22	13	8
Comparison	52	30	35
Retail Service	22	13	13
Leisure Services	41	23	21
Financial and Business Services	22	13	12
Vacant	16	9	10
Total	**175**	**100**	100

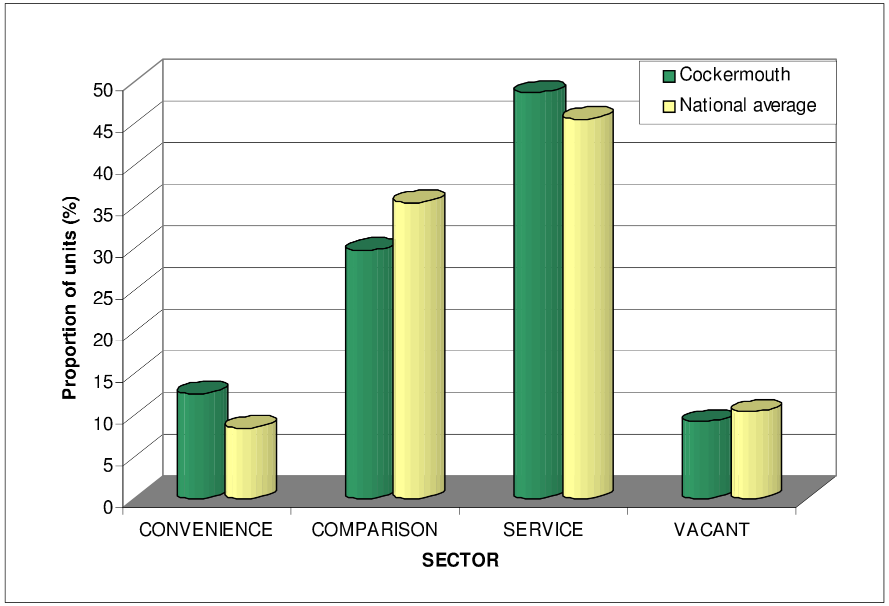
Source: GOAD Report 2008

Table A5.21: Diversity of Uses in Cockermouth Town Centre - floorspace

	Floorspace Sq m 2008	Cockermouth (%) 2008	UK (%)
Convenience	5090	17	14
Comparison	7520	25	39
Retail Service	2460	8	7
Leisure Services	8520	28	22
Financial and Business Services	4480	15	9
Vacant	1840	6	8
Total	**29910**	**100**	100

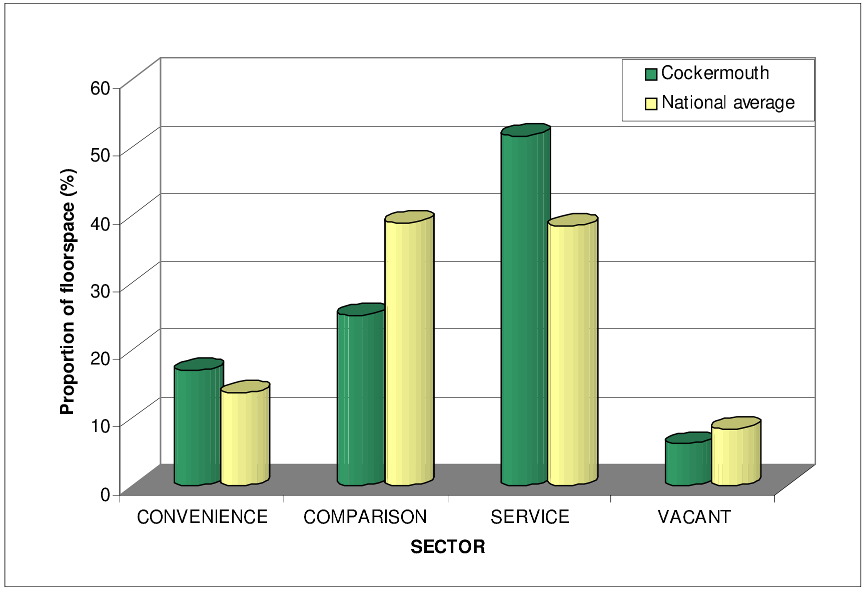
Source: GOAD Report 2008 as updated by WYG

Figure A5.25: Proportion of Units in Cockermouth Town Centre (2008)



Source: GOAD 2008 as updated by WYG

Figure A5.26: Proportion of Floorspace in Cockermouth Town Centre (2008)



Source: GOAD 2008 as updated by WYG

A5.4.6 Vacancies in Cockermouth

There are currently 16 vacant units distributed across Cockermouth town centre. This accounts for 9% of the total number of units which is below the national average of 10%. Vacant units account for 6% of all the town centre floorspace which is again, just below the national average.

The distribution of those properties currently vacant in Cockermouth is shown in Figure A5.27.

Figure A5.27: Vacancies in Cockermouth Town Centre (2008)

Source: GOAD base validated by WYG 2008 site visit

A5.4.7 Top 20 Retailer Representation in Cockermouth

Of the 'Top Twenty Retailers' identified by Focus (2008), Cockermouth currently accommodates two these businesses within the town centre – Boots and Wilkinson's.

Table A5.22: Top Twenty Retailers

Rank	Retailer
1	**Boots**
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	**Wilkinson**
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Database (2008) /ORC Data Services
These are the top 20 comparison goods multiples ranked by ORC's forecast of average town centre sales for individual retailers with Great Britain.

A5.4.8 Unit sizes

Table A5.23 below provides a summary of the composition of Cockermouth in terms of the size of town centre outlets. This is taken from an assessment of retailing facilities provided by GOAD for 2008.

It is demonstrated that Cockermouth has quite a wide variety of unit sizes. The town has an average supply of units under 1000 sq ft, but a higher representation of units in the 1000 to 2500 sq ft range.

The larger units indentified in the 10,000 to 15,000 sq feet category are the Wilkinson's store and the Mitchell Estate Agency/auction room. The only unit over 20,000 sq ft is the Sainsbury's supermarket.

Table A5.23: Size of units in Cockermouth Town Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Cockermouth	UK
Under 93 sq m (1,000 sq ft)	68	38.8	39.1
94-232 sq m (1,000-2,499 sq ft)	81	46.3	39.6
233-464 sq m (2,500-4,999 sq ft)	15	8.6	12.6
465-929 sq m (5,000-9,999 sq ft)	8	4.6	5.1
930-1,393 sq m (10,000-14,999 sq ft)	2	0.6	1.5
1,394-1,858 sq m (15,000-19,999 sq ft)	0	0	0.7
1,859-2,787 sq m (20,000-29,999 sq ft)	1	0.6	0.7
Above 2,787 sq m (30,000 sq ft)	0	0	0.8
Total	**175**	**100**	

Source: GOAD 2008

A5.4.9 Cockermouth Business Survey Results

A questionnaire was distributed to all local businesses in Cockermouth Town Centre in order to gain an understanding of the opinions, views and perceptions of retailers. A total of 188 questionnaires were distributed and 64 were returned, representing response rate of 34%. The results are contained in Appendix 4. The key findings are set out below:

- Over ½ of respondents have traded in Cockermouth for over 10 years. 1/5 have operated in the town centre for less than 3 years.
- The vast majority of respondents (92%) operate independent businesses
- 89% of respondents have always operated the business from Cockermouth town centre
- Over 2/3 of respondents expressed that their business had grown during their time trading in Cockermouth. 17.5% expressed business had declined with remainder identifying business as static.
- In terms of current business performance, 51% of respondents advised that they are performing well or very well, 32% moderately and 17% poorly or very poorly.
- 52% of respondents rely on local trade, whilst 23% identified they rely on customers from the wider Cockermouth area. 23% also advise that their business relies on tourist/leisure customers.
- 51% of respondents believe that there is a good mix of uses within the town centre whilst 42% believe that there are too many non retail uses. Only 7% believe that there are not enough non retail uses.
- 46% of respondents have no plans to alter their business in any way over the next 5 years. 8% intend to close, whilst a further 8% intend to extend their premises. 7% intend to relocate. 1/3 of all respondents intend to refurbish their premises in the next 5 years.

- 38% of respondents indentified Workington to be their biggest, or one of their biggest competitors. 27% identified other retailers in Cockermouth, 23% the internet, 20% Keswick and 19% Carlisle.

As part of the business survey, respondents were also asked to rate various aspects of the town centre as either 'good', 'average' or 'poor'. Table A5.24 summarises the response of the Cockermouth businesses. Overall the majority of respondents rated the majority of aspects as 'average'. The majority of respondents (64%) felt that foodstore provision in the town centre is good. Other aspects of the town centre which rated quite highly were accessibility by foot/cycle and personal safety, which 48% of respondents rated 'good'. The aspects which rated most negatively were related to the issues of car parking.

Table A5.24: Business respondents perception of Cockermouth Town Centre

	Good (%)	Average (%)	Poor (%)	Don't Know (%)
Range of Shops and services	38	50	17	0
Location and quality of car parks	19	38	42	0
Foodstore Provision	64	23	6	0
Car parking	16	38	48	0
Shopping Environment	38	45	14	0
Pedestrian environment	45	44	11	0
Security (e.g. CCTV)	14	31	27	27
Personal Safety	48	41	3	5
Access by public transport	25	39	25	9
Access by foot/cycle	48	39	6	5
Signage	28	44	20	2
Cleanliness	36	47	19	0
Entertainment/leisure	13	50	28	9
Events	42	31	23	5
Public toilets	8	48	23	16
Leisure/tourism	28	42	25	5

Survey respondents were also asked to consider what were the main barriers to their trading performance. Table A5.25 summarises the results. The most prevalent response was inadequate customer parking (55%) followed by high rents and overheads (50%). 30% of respondents had concerns over the lack of passing trade and lack of day visitors/tourists.

Table A5.25: Barriers to trading performance in Cockermouth Town Centre

Barrier to trading performance	% respondent
High Rents/Overheads	50
Lack of passing trade outside your premises	30
Poor location of your premises	16
Inadequate customer car parking	55
Competition from other traders in Town Centre	28
Competition from other Town Centres nearby	16
Competition from elsewhere	11
Lack of day visitors/tourists to the town	30
Anti-social behaviour	8
Poor security	8
Inadequacy of your current premises	13
Poor quality of shopping environment	19
Don't Know	0
None	8

Following on from rating aspects of the town centre and barriers to performance, the survey asked respondents to consider what improvement measures they would like to see implemented in the town centre. Table A5.26 summarises the findings. The most frequently identified measure was an increase in the choice and range of shops (67%). Second to this, were measures to address parking issues, with 2/3 of respondents identifying flexible parking and 64% suggesting lower parking charges as a way of improving the town centre. Over half of respondents also feel that greater promotion and marketing of Cockermouth would be of benefit. Approximately 1/3 of respondents identified improved public transport, more specialist markets, improved security/CCTV and improved signposting as measures that would improve the town.

Table A5.26: Potential measures to improve Cockermouth Town Centre

Improvement measure	% respondents
Increased choice/range of shops	67
More national multiples	6
Foodstore in the Town Centre	5
Improved street paving	23
Improved street furniture	25
Improved built environment	9
Lower parking charges	64
Flexible parking	66
More street cleaning	30
Improved public transport	34
Improved access by foot and cycle	9
More entertainment/leisure facilities	27
More quality restaurants/pavement cafes	6
More specialist markets	34
More cultural facilities (i.e. Theatre)	22
Improved security/CCTV	34
Greater promotion/marketing of the centre	53
Improved signposting	33
Public toilets	20

When asked what specific support would help their business, the most popular response was marketing assistance (50%) followed by shop front improvement grants (33%). Less than 10% identified a town centre manager as a measure to help their business and even fewer (7%) identified training.

A5.4.10 Accessibility

The main town centre bus stops are in a central location on Main Street. Cockermouth is not served by the rail network. 25% of the business survey respondents considered accessibility by public transport to Cockermouth town centre to be good, whilst 39% considered it to be 'average' and 25% 'poor'. Access by foot and cycle was considered more positively than public transport with 48% of considering it to be 'good'. 39% considered this aspect to be 'average' and only 6% 'poor'. 9% of respondents identified that they would like to see improved access by foot/cycle to the town centre, whilst 34% suggested improved public transport. Improved signposting was also identified by 1/3 of respondents as a potential improvement measure.

In addition to on street parking, there are six public car parks serving the town centre, providing over 500 spaces. 54% of business survey respondents considered the town centre car parks to be 'good' or 'average', whilst the remainder considered them to be 'poor'. 55% of respondents viewed car parking as a barrier to their trading performance. When considering what improvements they would like to see in the town centre, 64% identified lower car parking charges and 66% more flexible parking.

A5.4.11 Perception of safety and crime

8% of respondents to the Cockermouth business survey identified anti-social behaviour as a barrier to their trading performance. Whilst 48% of respondents rated personal safety in Cockermouth as 'good' and just 3% as poor, only 14% regarded security as 'good' with 31% regarding this as 'average' and 27% as 'poor'. 34% of respondents would like to see improved security and CCTV in the town centre.

A5.4.12 Quality of environment

Whilst it is recognised that there has been significant investment in seeking to improve the quality of the physical environment of Cockermouth in recent years, with a particular focus on properties in and around the Market Place, there remains a number of vacant properties throughout the town centre.

38% of the business survey respondents rate the shopping environment of Cockermouth as 'good' with a further 45% considering it to be 'average'. Only 14% consider the shopping environment of Cockermouth to be poor. The pedestrian environment rates more favourably with 45% considering this aspect to be 'good', 44% 'average' and 11% 'poor'. In terms of improvement measures for the town centre, only 9% of respondents suggested improvements to the built environment were needed whilst approximately ¼ suggested improved street paving and street furniture. Just under 1/5 of businesses identified the poor quality of the shopping environment as a barrier to their trading performance. 1/3 of respondents feel that their business would benefit from Shopfront improvement grants.

A5.5 Wigton

A5.5.1 Overview of centre

Wigton is market town and key service centre in Allerdale with a population 5,758.

The retail focus of the town centre is along High Street and King Street. A Masterplan has recently been prepared for Wigton which, if implemented, would see significant changes to the layout and traffic movements around and through the town centre.

Photographs of Wigton town centre are provided overleaf. Figure A5.33 provides a ground floor land use plan of Wigton town centre as defined by GOAD.

Photographs of Wigton Town Centre

Figure A5.28

Figure A5.29

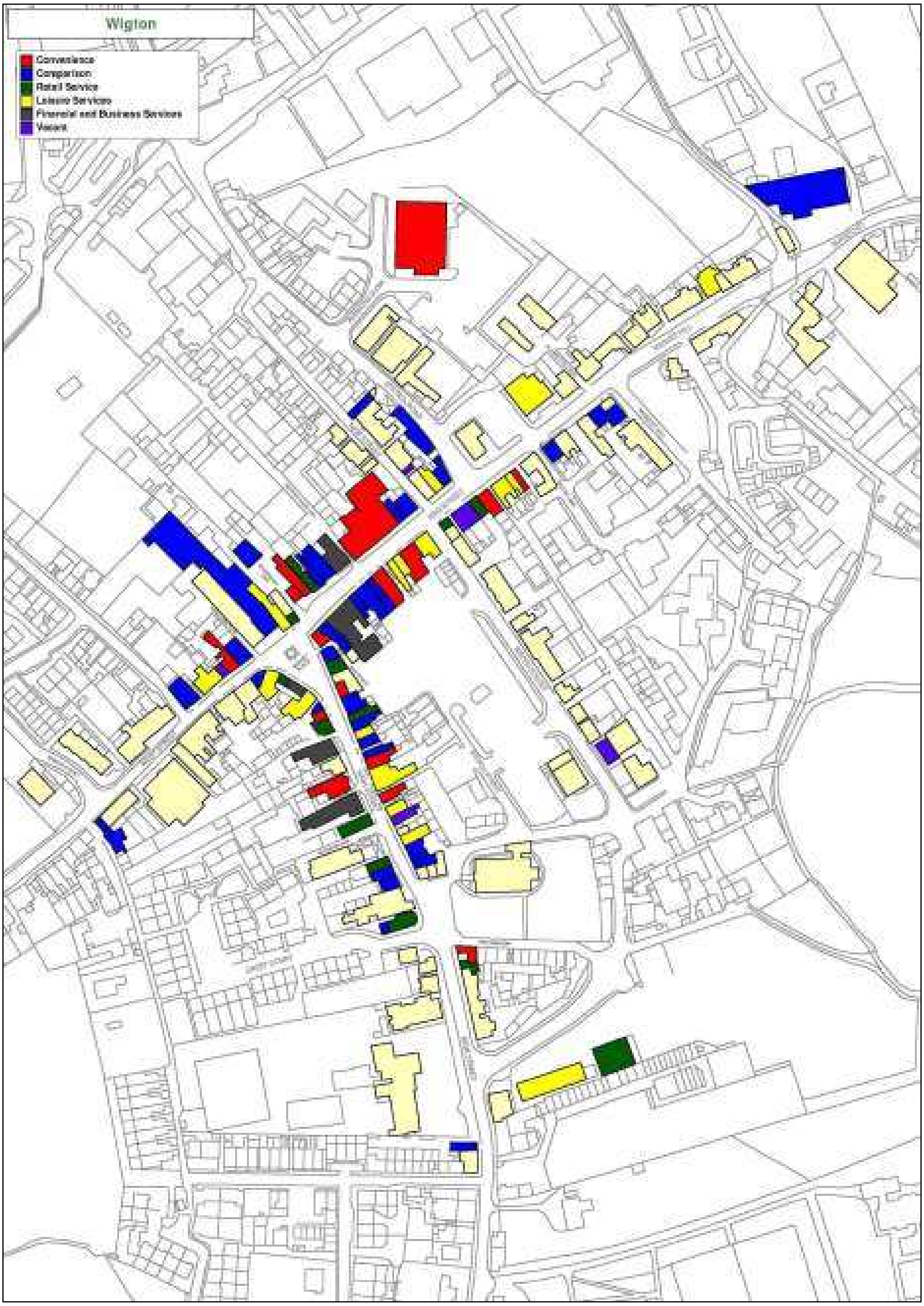
Figure A5.30

Figure A5.31

Figure A5.32

Figure A5.28: High Street, frontage of St Marys Church
Figure A5.29: High Street, looking north
Figure A5.30: Looking north to Market Place
Figure A5.31: High Street, looking south
Figure A5.32: Community Centre

Figure A5.33 : Land Use map for Wigton Town Centre (2008)



Source: GOAD base validated by WYG 2008 site visit

A5.5.2 Amount and Diversity of Uses in Wigton Town Centre

Tables A5.27-28 and Figures A5.34-5 set out the diversity and amount of uses within Wigton Town centre as assessed by GOAD and verified/updated by a WYG site visit. The data is presented in terms of both number of outlets and floorspace. National average figures are also provided.

A5.5.3 Convenience retailing in Wigton

At 16% of the total number of outlets, comparison outlets in Wigton are double the national average for this type of use. This represents 2890 sq m of floorspace or 20% of the total floorspace (6% above the national average).

9 of the units are independent whilst the remainder are national or regional retailers. The independents account for 27% of the convenience floorspace. The town has two supermarkets, Somerfield (930 sq m) and the Co-op (750 sq m). The remainder of the units are 160 sq m or less.

A5.5.4 Comparison retailing in Wigton

Wigton is underrepresented in comparison retailing with only 28% of units currently in use for this purpose compared to the national average of 35%. This is a similar situation for floorspace as the 4470 sq m equates to 31% of the town centre total which is 8% less than the national average. 1000 sq m of comparison floorspace is accounted for by the Factory Shop located in the town centre.

A5.5.5 Service retailing in Wigton

The provision of service retailing in Wigton is more closely aligned to the national averages for these uses, and incorporates a broad range of uses across all sectors.

Table A5.27: Diversity of Uses in Wigton Town Centre - units (2008)

	Number of Units		
	Number	Wigton (%)	UK (%)
Convenience	16	16	8
Comparison	29	28	35
Retail Service	15	15	13
Leisure Services	23	22	21
Financial and Business Services	12	12	12
Vacant	7	7	10
Total	**102**	**100**	100

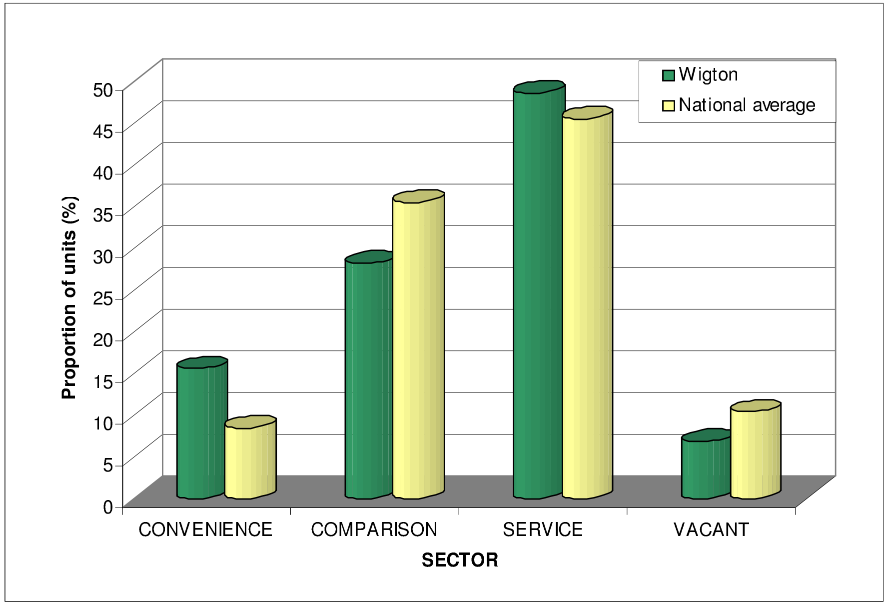
Source: GOAD Report 2008

Table A5.28: Diversity of Uses in Wigton Town Centre - floorspace(2008)

	[1]Floorspace		
	Sq m 2008	Wigton (%) 2008	UK (%)
Convenience	2890	20	14
Comparison	4470	31	39
Retail Service	1150	8	7
Leisure Services	3220	22	22
Financial and Business Services	1480	10	9
Vacant	1110	8	8
Total	**14320**	**100**	100

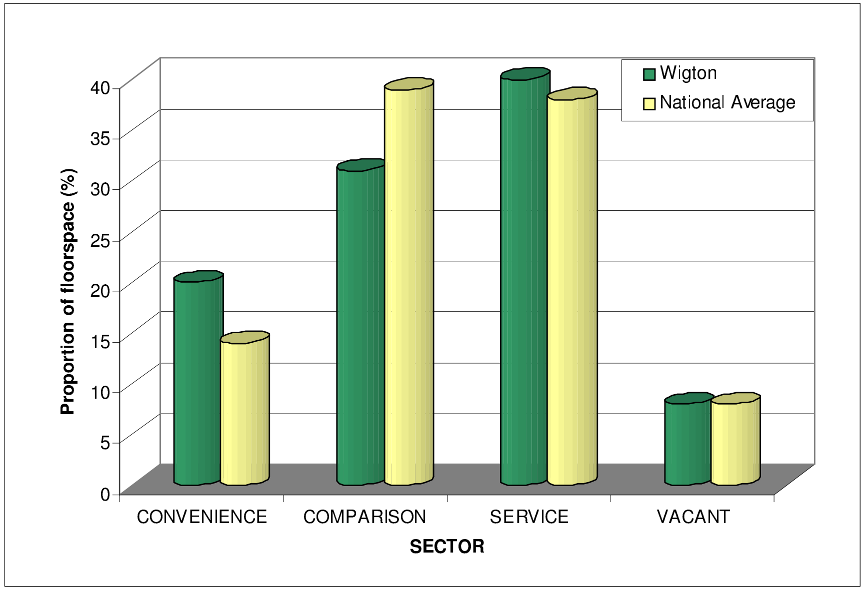
Source: GOAD Report 2008 as updated by WYG

Figure A5.34: Proportion of Units in Wigton Town Centre (2008)



Source: GOAD 2008 as updated by WYG

Figure A5.35: Proportion of Floorspace in Wigton Town Centre (2008)



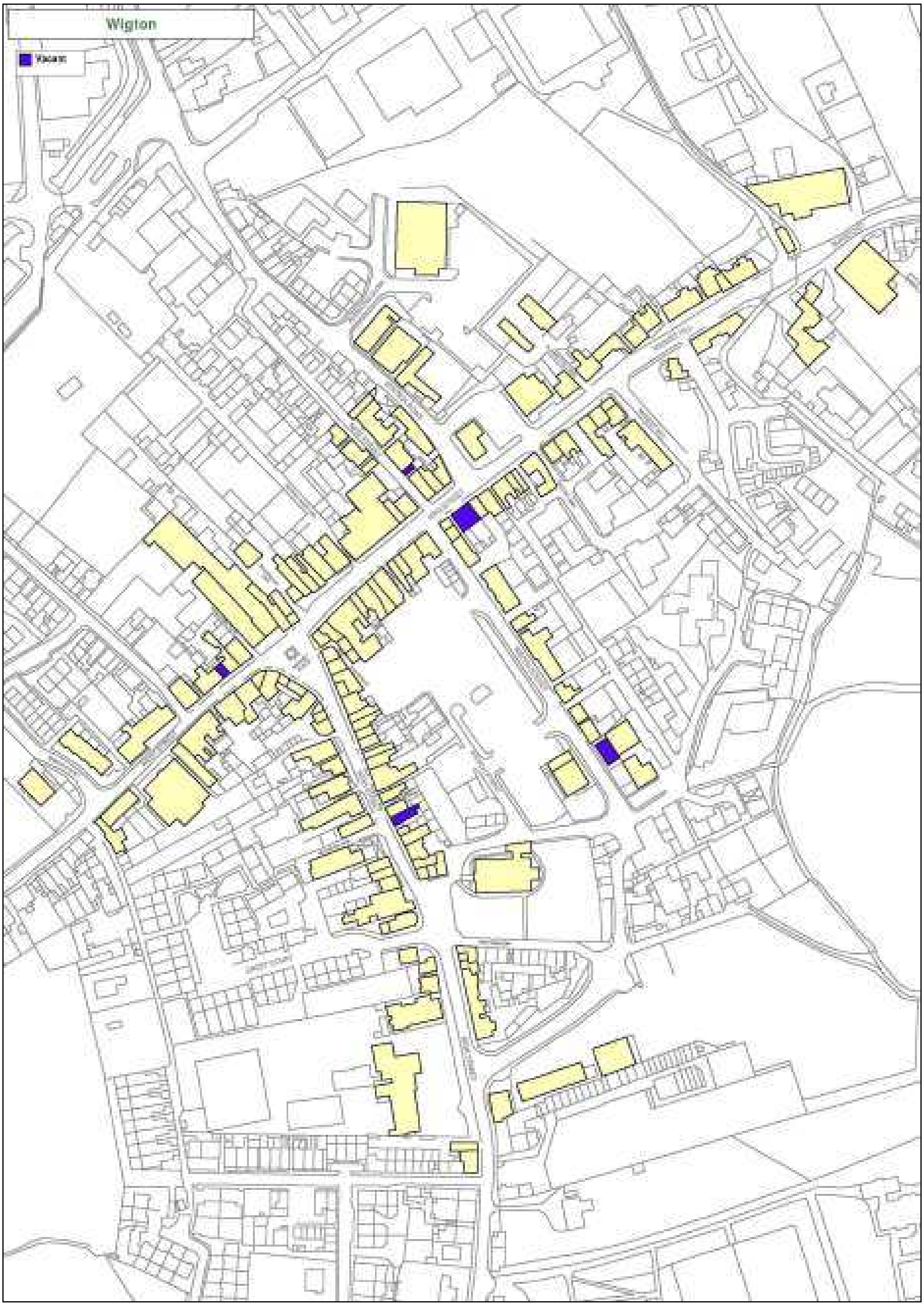
Source: GOAD 2008 as updated by WYG

A5.5.6 Vacancies in Wigton

The number of vacant units in Wigton (7) is below the national average and the floorspace to which this equates (1110 sq m) is in line with the national average. The vacancies are distributed evenly throughout the town centre.

The distribution of those properties currently vacant in Cockermouth is shown in Figure A5.36.

Figure A5.36: Vacancies in Wigton Town Centre (2008)



Source: GOAD base validated by WYG 2008 site visit

A5.5.7 Top 20 Retailer Representation in Wigton

None of the 'Top Twenty Retailers' as identified by Focus (2008) are currently represented in Wigton.

Table A5.29: Top Twenty Retailers

Rank	Retailer
1	Boots
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Database (2008) /ORC Data Services
These are the top 20 comparison goods multiples ranked by ORC's forecast of average town centre sales for individual retailers with Great Britain.

A5.5.8 Unit sizes

Table A5.30 below provides a summary of the composition of Wigton in terms of the size of town centre outlets. This is taken from an assessment of retailing facilities provided by GOAD for 2008.

It is demonstrated that Wigton has an higher than average representation of smaller units (57% of total units are under 1000 sq ft), with most other size of units under represented when compared to the national average. The exception to this is for unit size 10,000-15,000 sq ft where there are 2 units present in Wigton. These are the Somerfield and Factory Shop outlets.

Table A5.30: Size of units in Wigton Town Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Wigton	UK
Under 93 sq m (1,000 sq ft)	58	56.8	39.1
94-232 sq m (1,000-2,499 sq ft)	31	30.4	39.6
233-464 sq m (2,500-4,999 sq ft)	7	6.9	12.6
465-929 sq m (5,000-9,999 sq ft)	4	3.9	5.1
930-1,393 sq m (10,000-14,999 sq ft)	2	2.0	1.5
1,394-1,858 sq m (15,000-19,999 sq ft)	0	0	0.7
1,859-2,787 sq m (20,000-29,999 sq ft)	0	0	0.7
Above 2,787 sq m (30,000 sq ft)	0	0	0.8
Total	**102**	**100**	

Source: GOAD 2008

A5.5.9 Wigton Business Survey

A questionnaire was distributed to all local businesses in Wigton Town Centre in order to gain an understanding of the opinions, views and perceptions of retailers. WYG undertook a survey of town centre businesses in Wigton in February/March 2008 as part of a WYG separate commission which focussed on the both the general health of the town centre and the potential impact of the loss of the auction mart from it's current edge of centre location. Given that the survey resulted in a very high response rate (51%), and that the questionnaire was of very similar design, it was agreed that the results of this earlier survey would be incorporated into this study.

A total of 87 questionnaires were distributed and 44 were returned, representing response rate of 51%. The results are contained in Appendix 4. The key findings are set out below:

- Over half (52%) of respondents have traded in Wigton for over 20 years and a further 18 % for between 10 – 20 years. 25% have traded in the town for 5 years or less.
- 70% of respondents were independent businesses
- 61% of respondents advised that that their business is performing well , 34% moderately and just 4% poorly.
- The majority of businesses (75%) identified that they relied primarily of Wigton residents

- 49% of respondent identified that the auction mart had a positive impact on their businesses, whilst 41% felt it had no impact
- 61% of respondents considered that the outdoor Friday market had a positive impact on their business, whilst 7% identified it as having a negative impact and 32% no impact.
- 84% of respondent started that the outdoor market should be retained in the town centre
- 41% of business survey respondents considered that there are too many non retail uses within the town centre whilst 43% considered there was a good balance of shops and non retail services. 11% of respondents considered that there was not enough non retail uses.
- 43% of respondents advised that they have no intention to alter their business in any way in the next 5 years. 23 % intend to refurbish their exiting floorspace
- 91% of respondents identified Carlisle as a significant competitor. 14% identified Workington and 14% the internet in this category

As part of the business survey, respondents were also asked to rate various aspects of the town centre as either 'good', 'average' or 'poor'. Table A5.31 summarises the response of the Wigton businesses.

The most positive aspects of the town centre were identified as the foodstore provision and access by public transport (identified as being 'good' by 64% and 52% of respondents respectively). The biggest weakness of the town centre appears to be the provision of entertainment, leisure and cultural facilities which were ranked as 'poor' by approximately ¾ of respondents. Over 2/3 of respondents also ranked events (such as Christmas and specialist markets) as being poor. There are also key issues relating to the pedestrian environment and security with 89% of respondents reporting that these aspects of the town centre are average or poor.

Survey respondents were also asked to consider what were the main barriers to their trading performance. Table A5.32 summarises the results. The most significant factor in constraining performance appeared to be the lack of day visitors/ tourists to the town (48%) and poor quality of the town centre shopping environment (32%)

Table A5.31: Business respondents' perception of Wigton Town Centre (%)

	Good	Average	Poor	Don't know	No response
Range of shops and services	41	48	11	0	0
Location and quality of car parks	48	48	4	0	0
Pricing of car parks	18	39	41	0	2
Access by public transport	52	27	7	11	2
Foodstore provision	64	30	4	2	0
The outdoor market (Friday)	45	30	11	14	0
The indoor market (Tuesday)	18	34	36	11	0
Appearance of the town centre	23	48	27	2	0
Pedestrian environment	11	64	25	0	0
Security (CCTV)	7	39	50	4	0
Personal safety	25	61	11	2	0
Signage	18	66	9	7	0
Cleanliness	20	54	27	0	0
Entertainment / leisure	2	16	77	4	0
Cultural Facilities	0	20	70	7	2
Events (e.g. Christmas, Specialist Markets)	7	27	64	2	0
Public toilets	7	25	59	7	2
Condition of town centre properties	11	70	16	2	0

Table A5.32: Barriers to trading performance in Wigton Town Centre

Barrier to trading performance	% respondents
High Rents /Overheads	22
Lack of footfall outside your premises	20
Poor location of your premises (e.g. not prime pitch)	11
Inadequate customer car parking	25
Competition from other traders in the town centre	18
Competition from other town centres nearby	23
Competition from elsewhere (e.g. retail parks)	23
Lack of day visitors/tourists to the town	48
Poor security	9
The inadequacy of current premises (e.g. size of configuration)	14

Poor quality of town centre shopping environment	32
Don't know	2
Nothing is constraining performance of the business	16

Following on from rating aspects of the town centre and barriers to performance, the survey asked respondents to consider what impact identified measures would have on the town centre. Table A5.33 summarises the findings. It was felt that the biggest improvements to the town centre would result from an increased choice and range of shops being provided (91%), more independent and specialist traders (89%), more flexible parking (84%), more entertainment and leisure facilities (86%) and organised events (82%) and more security/CCTV (80%).

Table A5.33: Potential impact of improvement measures on Wigton Town Centre (% respondents)

	Improve	No effect	Harm	Don't know	No response
Increased choice/range of shops	91	7	2	0	0
More national retailers	41	9	41	9	0
More Independent/Specialist traders	89	11	0	0	0
Investment in public realm	59	23	0	11	7
Cheaper parking	77	23	0	0	0
Flexible parking	84	11	2	0	2
Improved street cleaning	75	23	2	0	0
Improved public transport	64	32	0	4	0
More entertainment/leisure facilities	86	9	2	2	0
More quality restaurants/pavement cafes	61	27	7	2	1
More organised events (e.g.xmas events)	82	16	0	2	0
More cultural facilities (e.g. theatre)	70	27	0	2	0
More security/CCTV	80	16	0	0	4
Greater promotion/marketing of Wigton	75	18	0	0	2
Improved Public toilets	70	30	0	0	0
A town centre manager	50	34	2	14	0
Expansion of the town centre	61	27	7	4	0
Improvements to town centre properties	84	16	0	0	0

A5.5.10 Accessibility

The main town centre bus stops are located on King Street, towards the edge of the town centre. Wigton railway station, which is on the West Cumbria Coast line, is approximately 400m from the town centre. The majority (52%) of the business survey respondents considered accessibility by public transport to Wigton town centre to be 'good', with only 7% describing it as 'poor'. 64% of respondents identified that the town centre would benefit from improved public transport.

In addition to on street parking, there are three public car parks serving the town centre (Market Hill, Water Street and Council Offices) providing over 250 spaces. Whilst the location and quality of car parks do not fare badly with the business survey respondents (48% describe these aspects as 'good' and 48% as 'average') the pricing of car parks does appear to be more of an issue with 41% of respondents describing car park pricing as 'poor'. 25% of respondents viewed inadequate customer car parking as a barrier to their trading performance. When considering the impact of potential improvement measures in the town centre, 77% of respondents believed that cheaper parking would have a positive effect whilst 84% were supportive of more flexible parking.

A5.5.11 Perception of safety and crime

Only 9% of respondents to the Wigton business survey identified poor security as a barrier to their trading performance. However 50% of respondents consider security in the town centre to be 'poor'. The majority of respondents (61%) consider personal safety in Wigton to be 'average'. 80% of all respondents believe that more security/CCTV would improve Wigton town centre.

A5.5.12 Quality of environment

23% of the business survey respondents in Wigton consider the appearance of the town centre to be 'good'. The majority (48%) rate it as 'average', whilst 27% consider it to be 'poor'. The majority of respondents (64%) also rate the pedestrian environment as 'average'. When considering improvement measures for the town centre, 84% of respondents believe that improvements to town centre properties would be beneficial. 32% of respondents identified the poor quality of the shopping environment as a barrier to their trading performance.

A5.6 Whitehaven

A5.6.1 Overview of centre

Whitehaven is the largest settlement in Copeland with a population of 25,382. The town centre is characterised by its Georgian architecture and 'grid iron' street pattern and proximity to the harbour which has undergone significant investment in recent years. The town centre has a significant number of 'opportunity sites' which are being promoted for redevelopment as part of wider regeneration initiatives.

RSS 13 (adopted September 2008) recognises Workington/Whitehaven as a location where comparison retailing facilities should be enhanced and encouraged.

The main focus for retailing in Whitehaven is King Street and Lowther Street. Two supermarkets (Tesco and Morrison's) are located just beyond the town centre boundary.

Photographs of Whitehaven town centre are provided overleaf. Figure A5.41 provides a ground floor land use plan of Whitehaven town centre as defined by GOAD

Photographs of Whitehaven Town Centre

Figure A5.37

Figure A5.38

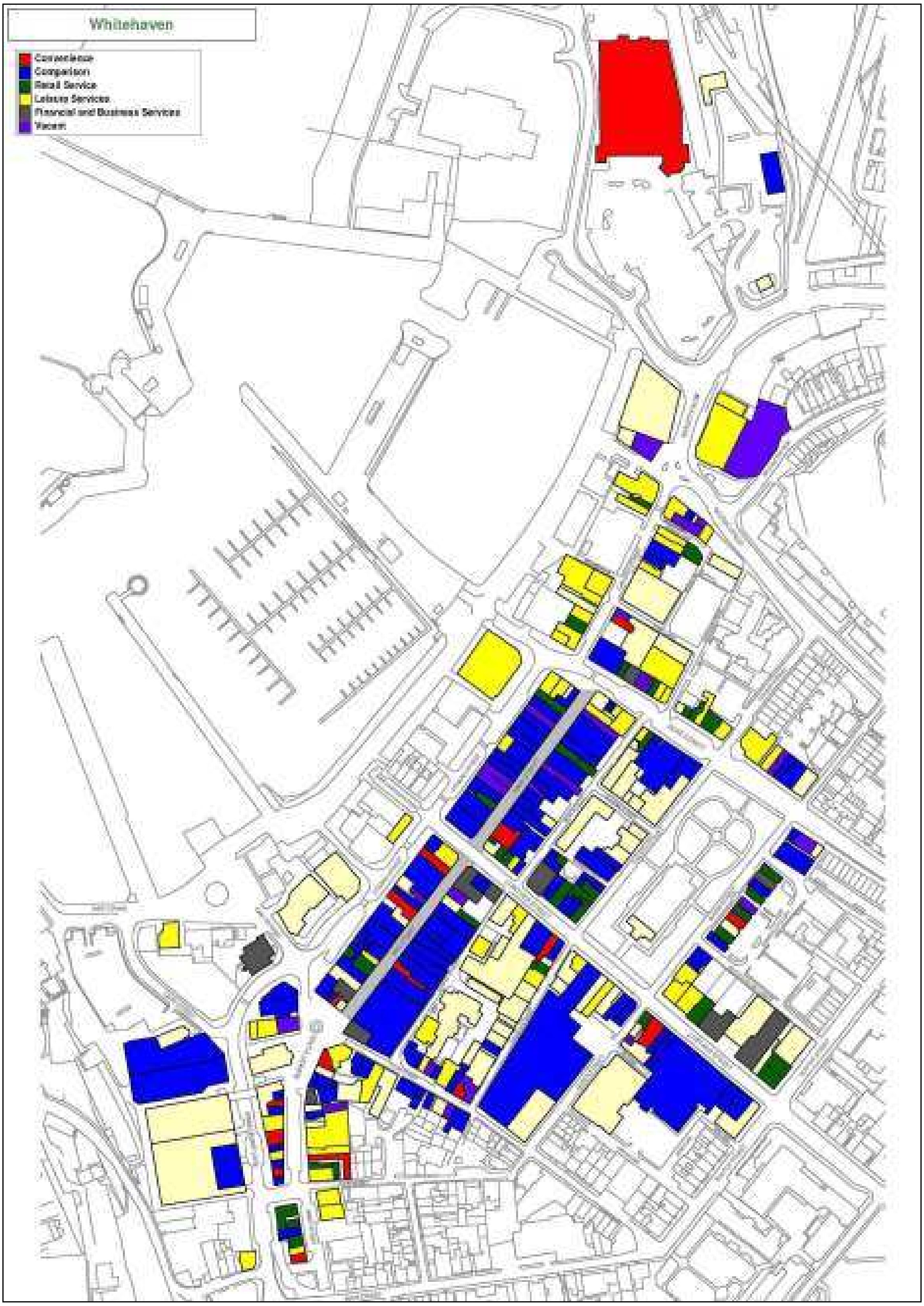
Figure A5.39

Figure A5.40

Figure A5.41

Figure A5.37: Multi-storey car park, Swingpump Lane
Figure A5.38: Market Place
Figure A5.39: King Street
Figure A5.40: Rear of King Street properties along Strand Street
Figure A5.41: Former bus depot, Bransty Row

Figure A5.41: Land Use map for Whitehaven Town Centre (2008)



Breakdown by retail, leisure and financial

A5.6.2 Amount and Diversity of Uses in Whitehaven Town Centre

Tables A4.34-5 and Figures A5.42-3 set out the diversity and amount of uses within Whitehaven Town centre as assessed by GOAD and verified/updated by a WYG site visit in July 2008. The data is presented in terms of both number of outlets and floorspace. National average figures are also provided.

A5.6.3 Convenience retailing in Whitehaven

There are 18 convenience retail units in Whitehaven, representing 6% of the total number of town centre outlets, which is slightly below the national average of 8%. It terms of floorspace, the table indicated that Whitehaven is underrepresented in terms of convenience floorspace at just 4%, and 10% less than the national average. When considering this however it must be taken in account that the Tesco and Morrison supermarket lies just beyond the town centre boundary, with additional convenience retail (Aldi, Lidl, Iceland) beyond. All of the convenience units with the town centre are 180 sq m or less.

A5.6.4 Comparison retailing in Whitehaven

In terms of comparison retailing, Whitehaven's 91 units means that it is fairly consistent with the national average for this type of outlet, although the fact that it accounts for 48% of all floorspace puts it above the national average on this indicator. This floorspace figure is influenced by a small number of large outlets including Dixons Department Store (2010 sq m), Wilkinson's (3300 sq m), Woolworths (1220sq m)[2] and B&M (1140sq m).

A5.6.5 Service retailing in Whitehaven

The retail service sector in Whitehaven has slightly higher representation when compared to the national average. This sector accounts for 18% of all outlets in Whitehaven, compared to 13% nationally. In terms of floorspace, retail services account for 9% of floorspace (4130 sq m) compared to 7% nationally.

Leisure services also have higher representation than the national average in terms of number of outlets. However the floorspace given to this use in Whitehaven is less than the national

[2] Since the survey was undertaken, Woolworths has now closed.

average, probably best explained by the number of smaller public houses and cafes found in the town centres historic businesses.

7% of both Whitehaven's outlets and floorspace are financial and business services compared to the national averages of 12% and 9% respectively. Again this difference with outlet and floorspace provision in best explained by the average smaller unit size in Whitehaven.

Table A5.34: Diversity of Uses in Whitehaven Town Centre - units (2008)

	Number of Units		
	Number	Whitehaven (%)	UK (%)
Convenience	18	6	8
Comparison	91	33	35
Retail Service	49	18	13
Leisure Services	70	25	21
Financial and Business Services	19	7	12
Vacant	33	12	10
Total	**280**	**100**	**100**

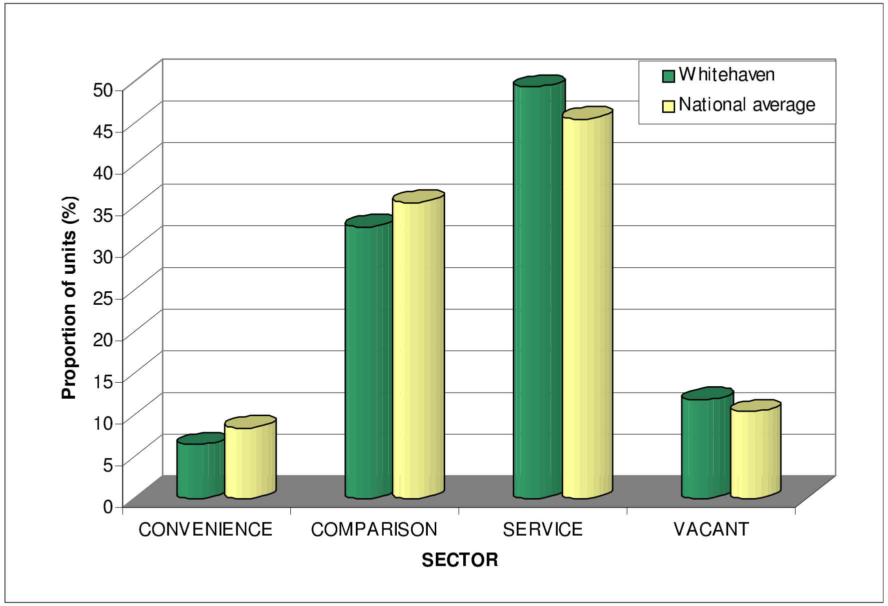
Source: GOAD Report 2008 (excluding Tesco)

Table A5.35: Diversity of Uses in Whitehaven Town Centre - floorspace

	Floorspace		
	Sq m 2008	Whitehaven (%) 2008	UK (%)
Convenience	1790	4	14
Comparison	21510	48	39
Retail Service	4130	9	7
Leisure Services	8200	18	22
Financial and Business Services	3180	7	9
Vacant	5730	13	8
Total	**44540**	**100**	**100**

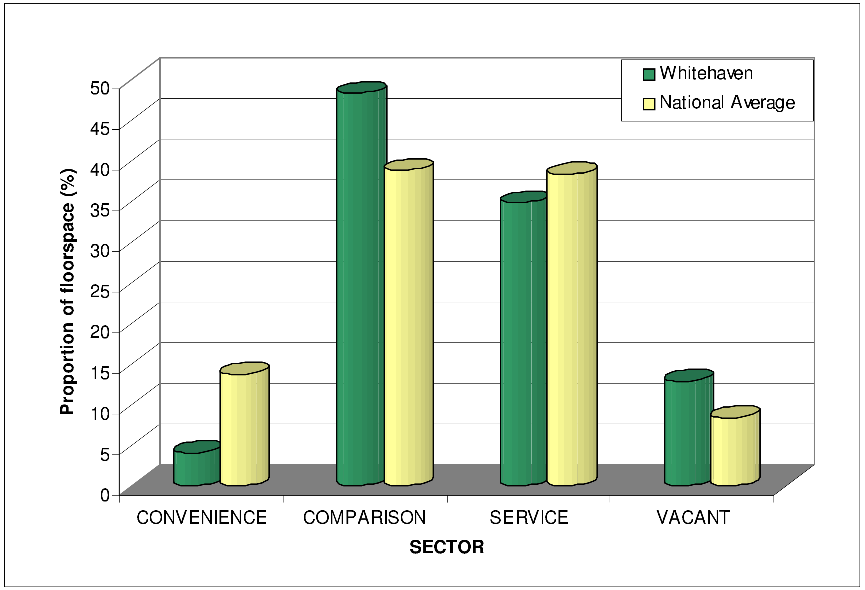
Source: GOAD Report 2008 as updated by WYG (excluding Tesco)

Figure A5.42: Proportion of Units in Whitehaven Town Centre (2008)



Source: GOAD 2008 as updated by WYG

Figure A5.43: Proportion of Floorspace in Whitehaven Town Centre (2008)



Source: GOAD 2008 as updated by WYG

A5.6.6 Vacancies in Whitehaven

There are currently 33 vacant units in Whitehaven equating to 12% of all units, slightly above the national average of 10%. The vacant floorspace is 5730 sq m accounting for 13% of all floorspace.

Key vacant buildings are those on the entrance to the town centre at the site of the former bus works. There are also a number of vacancies along King Street, the main pedestrians shopping area.

Figure A5.44: Vacancies in Whitehaven Town Centre (2008)

A5.6.7 Top 20 Retailer Representation in Whitehaven

Of the 'Top Twenty Retailers' identified by Focus (2008), Whitehaven currently accommodates nine of these businesses within the town centre – Boots, Woolworths, Argos, WH Smith, Dixons, Superdrug, Wilkinson's, New Look and Dorothy Perkins (Woolworths closed December 2008).

Table A5.36: Top Twenty Retailers

Rank	Retailer
1	**Boots**
2	Marks & Spencer
3	**Argos**
4	**Woolworths**
5	Debenhams
6	John Lewis
7	**W.H. Smith**
8	BHS
9	Next
10	**Dixons**
11	**Superdrug**
12	Lloyds Pharmacy
13	**Wilkinson**
14	CO-OP Department Stores
15	Primark
16	**New Look**
17	HMV
18	**Dorothy Perkins**
19	Rosebys
20	Waterstones

Source: Focus Database (2008) /ORC Data Services
These are the top 20 comparison goods multiples ranked by ORC's forecast of average town centre sales for individual retailers with Great Britain.

A5.6.8 Unit sizes

Table A5.37 below provides a summary of the composition of Whitehaven in terms of the size of town centre outlets. This is taken from an assessment of retailing facilities provided by GOAD for 2008.

84% of Whitehaven's units are below 2500 sq ft, which is just 5% above the national average. It is below the national average for all other size of units. There is only one unit in the 20,000 – 30,000 sq ft range (Dixons) and one in the 30,000+sq ft range (Wilkinson's).

Table A5.37: Size of units in Whitehaven Town Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Whitehaven	UK
Under 93 sq m (1,000 sq ft)	117	41.8	39.1
94-232 sq m (1,000-2,499 sq ft)	119	42.5	39.6
233-464 sq m (2,500-4,999 sq ft)	28	10	12.6
465-929 sq m (5,000-9,999 sq ft)	7	2.5	5.1
930-1,393 sq m (10,000-14,999 sq ft)	7	2.5	1.5
1,394-1,858 sq m (15,000-19,999 sq ft)	0	0	0.7
1,859-2,787 sq m (20,000-29,999 sq ft)	1	0.4	0.7
Above 2,787 sq m (30,000 sq ft)	1	0.4	0.8
Total	**280**	**100**	

Source: GOAD 2008

A5.6.9 Retailer Requirements in Whitehaven

Table A5.38 sets out the retailer requirements within Whitehaven town centre as derived from the Focus Database (2008). This list should be treated with some degree of caution however as some retailers may indicate that they have requirements on the Database whilst not having an active desire to locate there. Additionally, the list includes retailers who are already present in the town but are seeking new premises. Furthermore, a single retailer may express more than one requirement in a town centre for different sizes of units.

Table A5.38: Retail Demand: Number of requirements by year

Year (Oct)	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Workington	14	13	10	17	14	7	10	15	22	21	16
Whitehaven	**11**	**10**	**6**	**7**	**6**	**8**	**10**	**11**	**8**	**8**	**7**
Penrith	9	8	4	6	6	9	17	16	20	20	23
Carlisle	52	62	64	61	53	59	62	70	70	51	44
Kendal	16	21	18	23	23	22	27	33	34	46	44

Source: Focus 2008

The table indicates that the number of retailer requirements Whitehaven has reduced in recent years, but this is also repeating the trend from the late 1990's. Other key service centres have also been included within the table for comparison purposes and this indicates that Whitehaven is experiencing less demand than other towns in the county.

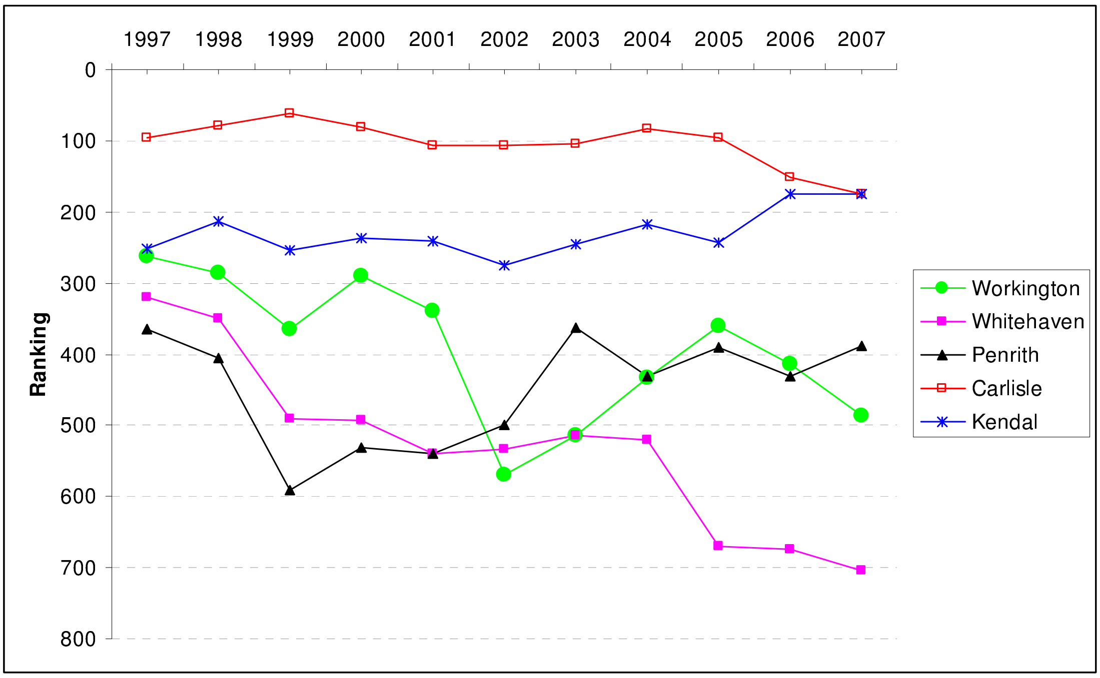
Table A5.39 and Figure A5.55 provide details of retail rankings of centres from Focus. It indicates that Whitehaven has fallen significantly in the rankings since the 1990's, with a significant fall in 2004, at a time when Workington saw a rise in its ranking.

Table A5.39: Retail demand - rankings

Year (Oct)	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Workington	263	285	364	290	340	569	514	432	360	413	487
Whitehaven	**321**	**350**	**490**	**493**	**539**	**534**	**514**	**520**	**670**	**674**	**704**
Penrith	364	405	590	531	539	499	362	431	391	431	388
Carlisle	97	78	62	80	106	107	105	83	96	151	174
Kendal	252	214	254	237	242	275	245	218	244	174	174

Source: Focus 2008

Figure A5.55: Retail Demand - Rankings



Source: Focus 2008

A5.6.10 Commercial rents

Zone A rents (i.e. the rental value of the first six meters depth of floorspace in retail units from the shop window) reflects retailers' perception of the town centres. As retailers consider rent to reflect the margin between turnover and operational costs (plus profit), the better the trading prospects the higher the rent that the operator will be willing to pay.

Table A5.40 identifies the changes in prime pitch Zone A in rents in Whitehaven Town Centre between 2000 and 2007 relative to other town centres in the sub region. It indicates that rents have increased by 11% since 2000, although this is a smaller proportionate increase than experienced elsewhere.

Table A5.40: Zone A Rents (£ per square m)

Centre	2000	2001	2002	2003	2004	2005	2006	2007	% change
Carlisle	1237	1237	1291	1345	1399	1453	1453	1507	+22
Kendal	699	699	699	699	699	699	699	699	0
Penrith		430	430	430	430	430	430	484	+13
Workington	538	538	538	538	538	538	538	646	+20
Whitehaven	**484**	**484**	**484**	**538**	**538**	**538**	**538**	**538**	**+11**

A5.6.11 Yield

Commercial yield demonstrates the confidence of investors in the long term profitability of the centre for retail, office and other commercial developments. A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage. Yields provide a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. Many considerations determine the yield for a particular property, including: the physical condition of the building; the potential for rental growth; the certainty of income; lease arrangements; and the range of potential uses of the building. Whilst there are therefore many complex factors which can determine yield, generally speaking, those towns with lower yield are considered to be more attractive and hence are more likely to attract more new investment than those with higher yields.

Table A5.41 sets out the findings of the Valuation Property Market Report (January 2008) in relation to towns in Cumbria. It indicates that yields in Whitehaven have fallen from 2000 in line with a similar trend for comparable centres within the County.

Table A5.41: Commercial yields in Cumbrian town centres – 2000 to 2008

Shopping Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008
Workington	**10**	**10**	**>=10**	**>=10**	**>=10**	**>=10**	**>=10**	**6.75**	**7.75**
Whitehaven	**9.5**	**10**	**>=10**	**>=10**	**>=10**	**10**	**7.5**	**7.5**	**7.5**
Carlisle	**6**	**6**	**6**	**6**	**5**	**5.5**	**5**	**4.75**	**5**
Penrith	**8**	**8**	**8**	**8**	**8**	**8**	**8**	**6.75**	**7.75**
Kendal	**7.5**	**7.5**	**7.5**	**6.5**	**7**	**7**	**6**	**8**	**8**
Barrow-in-Furness	**8**	**8.75**	**8.75**	**8**	**9**	**9**	**7.5**	**7.5**	**7.5**

Source: VOA Property Market Report January 2008 www.voa.gov.uk

A5.6.12 Local Business Views

In order to gain a better understanding of the views of businesses operating within Whitehaven, WYG undertook a survey of town centre businesses in August 2008. 366 surveys were distributed and 108 returned meaning a response rate of 30%. In addition to the survey, a Whitehaven Town Centre Business Forum was held at the Whitehaven Civic Hall. All recipients of the business survey were invited to attend this meeting. Eight town centre business representative attended the meeting. The following summarises the views from both the survey and the business forum.

- Of those businesses that responded to the survey, 62% had traded in Whitehaven for over 10 years. ¾ of respondents were independent businesses and 90% had always operated from Whitehaven Town Centre.
- During their time trading in Whitehaven 49% of respondents indicated that their business had grown whilst 28% stated that trade had declined. The remainder indicated that trade had remained largely static.
- In terms of business performance, 37% of respondents considered that their businesses were trading well, with 46% stating trade to be moderate, and 17% poor.
- 44% of respondents indicated that their business premises were owner occupied whilst 48% stated that they leased their premises.
- Just under 1/5 of respondents identified their premises relies primarily on tourist and leisure visitors.
- In terms of competitors to Whitehaven town centre, 62% of respondents viewed Workington as a significant competitor and 44% also viewed Carlisle in this way. 30% of respondents felt that the internet was also a significant competitor to their business.
- Respondents were evenly split as to whether the harbour improvements had improved performance of their business.
- In terms of the mix of uses in the town centre, ½ of respondents felt that there were too many retail units within the town centre.
- When considering the future of their business, almost ½ of the respondents (44%) indicated that they had no plans to alter their business over the next five years. 8% indicated that they intended to close their business whilst just under 1/3 intended to relocate, alter or refurbish their existing floorspace.

As part of the business survey, respondents were also asked to rate various aspects of the town centre as either 'good', 'average' or 'poor'. Table A5.42 summarises the response of the Whitehaven businesses surveyed. From these results, public toilet provision, the range of shops and services and car parking are clearly issues for the town centre businesses. The most positive aspects of the town centre emerged to be foodstore provision, personal safety and access by foot and cycle.

Table A5.42: Business respondents perception of Whitehaven Town Centre

	Good (%)	Average (%)	Poor (%)	Don't Know (%)
Range of Shops and services	9	26	60	0
Location and quality of car parks	6	35	53	0
Foodstore Provision	54	31	11	1
Car parking	6	26	63	0
Shopping Environment	6	41	47	1
Pedestrian environment	15	44	36	0
Security (e.g. CCTV)	18	39	26	12
Personal Safety	34	46	12	2
Access by public transport	21	43	21	9
Access by foot/cycle	32	46	10	6
Signage	16	46	30	2
Cleanliness	9	32	48	0
Entertainment/leisure	5	36	53	2
Events	12	36	45	2
Public toilets	1	6	82	6
Leisure/tourism	11	55	27	2

Survey respondents were also asked to consider what they perceived to be the main barriers to their trading performance. Table A5.43 summarises the results. The most frequently observed response was the inadequate customer car parking (53%) followed by the poor quality shopping environment (42%).

Table A5.43: Barriers to trading performance in Whitehaven Town Centre

Barrier to trading performance	% respondents
High Rents/Overheads	37
Lack of passing trade outside your premises	31
Poor location of your premises	13
Inadequate customer car parking	53
Competition from other traders in Town Centre	10
Competition from other Town Centres nearby	32
Competition from elsewhere	17
Lack of day visitors/tourists to the town	21
Anti-social behaviour	12
Poor security	6
Inadequacy of your current premises	11
Poor quality of shopping environment	42
Don't Know	0
None	5

Following on from rating aspects of the town centre and barriers to performance, the survey asked respondents to consider what improvement measures they would like to see implemented in the town centre. The most popular response (84%) was an increase in the choice / range of shops. More street cleaning (77%), improved public transport (71%), improved street paving (66%) and public toilet provision (60%) were also identified as measures to improve the town centre by significant numbers of respondents.

Table A5.44: Potential measures to improve Whitehaven Town Centre

Improvement measure	% respondents
Increased choice/range of shops	84
More national multiples	40
Foodstore in the Town Centre	25
Improved street paving	66
Improved street furniture	42
Improved built environment	55
Lower parking charges	37
Flexible parking	38
More street cleaning	77
Improved public transport	71
Improved access by foot and cycle	46
More entertainment/leisure facilities	34
More quality restaurants/pavement cafes	16
More specialist markets	52
More cultural facilities (i.e. Theatre)	37
Improved security/CCTV	49
Greater promotion/marketing of the centre	47
Improved signposting	37
Public toilets	60

When asked what specific support would help their business, the most popular response was marketing assistance (33%), followed by Shopfront improvement grants (30%). 21% of respondents indicated that a town centre manager would be beneficial whilst only 6% identified training as a support measure that would help their business.

A5.6.13 Customer views and behaviour

An on street visitor survey was also undertaken in Whitehaven. The results of this survey are included in Appendix 3. The survey for Whitehaven identified that the majority of respondents travelled by car (60%), although there is also a strong walk-in catchment (17%). The majority of respondents (85%) indicated that they had no problem parking and over 2/3 of respondents had travelled from within 15 minutes of Whitehaven.

The most popular reasons identified by respondents for choosing Whitehaven to shop in/ visit were the proximity of the town to their home (60%) and proximity to work (12%). The main reasons for visiting were identified as food and grocery shopping (28%) followed by social / leisure activities (13%) and café/restaurant/pubs (12%).

Just under a 1/5 of respondents (19%) indicated that they now visit Whitehaven more often than five years ago with only 10% stating they visit less frequently. Just under 60% of respondents advised that they do not visit Whitehaven town centre in the evening.

When asked to compare Whitehaven to other town centres, the majority of respondents felt many aspects were 'about the same as elsewhere'. Whitehaven was considered to rate better than other towns in terms of day time safety (39% expressing that this is better in Whitehaven than other towns). Over half (52%) of respondents rated Whitehaven as 'worse' or 'much worse' for both it's choice of high street names and its choice of independent / specialist shops.

When asked what type of shops/service they would like to see more of, the most frequent responses were:

- more clothing stores (31%)
- more department stores (18%)
- more footwear stores (10%)
- more household goods stores (10%)

In addition, nearly 1/3 of respondents indicated that they would like to see a cinema in Whitehaven.

When asked what measures could improve Whitehaven, making it more attractive, the most frequent suggestions were:

- an increased choice / range of shops (15%)
- more speciality shops (10%)
- improved cleanliness (7%)
- better foodstore provision (6%)

Significantly, 87% of respondents to the Whitehaven visitor survey felt that the harbour improvements have had a positive impact on the town. They key positive impacts identified were that it had attracted more visitors and tourists (46%) and improved the town centre environment (33%).

A5.6.14 Accessibility

Since the closure of the former facility on Bransty Row, Whitehaven no longer has a dedicated bus station. Instead, the main location for town centre bus stops is on Lowther Street, although there are of course numerous additional bus stops in and around the town centre. Whitehaven railways station is located to the north of the town centre, adjacent to the Tesco supermarket. There are ongoing proposals to develop a public transport interchange for Whitehaven at the site of the existing railway station.

The Whitehaven visitor survey revealed that 61% of those interviewed had travelled to the town centre by car, 21% had travelled by bus/coach whilst 17% had walked. 1% had travelled by train. 48% of respondents had a journey time to the town centre of 10 minutes or less and 38% had a journey time of 11 – 20 minutes. 14% had a journey time of over 20minutes.

Just over 1/5 of business survey respondents considered accessibility by public transport to Whitehaven town centre to be 'good', with an equal amount considering it 'poor'. 43% considered public transport to be 'average'. 8% of the visitors surveyed stated that accessibility to Whitehaven by public transport was 'better' or 'much better' than in other towns. 54% considered that it was 'about the same', whilst only 6% considered it to be worse than elsewhere. 34% of business survey respondents identified that they would like to see improved access by public transport to the town centre.

85% of the business survey respondents considered access to the town centre by foot or cycle to be either 'good' or 'average'. 16% suggested improved access by foot/cycle would be beneficial to the town centre. Improved signposting was also identified by 1/3 of respondents as a potential improvement measure.

The visitor survey revealed that of those visitors' who had travelled by car, 14% had parked in the North Shore car park, 12% had parked in either the Beacon, multi storey or at Tesco. Whilst 63% of business survey respondents rated car parking in the town centre as 'poor', 86% of the visitors to the town centre who had travelled by car stated that they had no problem parking.

When visitors to the town centre were asked to compare Whitehaven against other centres on the issue of car parking provision, 19% stated that Workington is better or much better than elsewhere, whilst 34% considered it to be about the same as other towns. 23% considered Whitehaven to be worse than elsewhere for car parking provision.

On the issue of parking costs, 77% of business survey respondents indicated that cheaper parking would improve the town centre. When asked to compare Whitehaven against other centres on the issue of car parking prices, 19% of respondents replied that Workington is either better or the same as elsewhere and with only 16% describing it as being worse.

A5.6.15 Perception of safety and crime

12% of respondents to the Whitehaven business survey identified anti-social behaviour as a barrier to their trading performance. 18% of respondents considered security in Whitehaven to be 'good', 39% consider it average and 26% 'poor'. 34% of the business survey respondents viewed personal safety in Whitehaven as 'good' with a further 46% describing it as 'average'. This echoed by the visitor survey which demonstrated that 39% of respondents considered day time safety to be better and 54% about the same as elsewhere. 37% of all business survey respondents indicated that would like to see improved security/CCTV in Whitehaven town centre.

A5.6.16 Quality of environment

87% of the visitor survey respondents to the town centre believe that the investment in Whitehaven harbour has had a positive impact on the town centre. Of these respondents, 1/3 expressed that it had improved the town centre environment. On the same issue, only 50% of the business survey respondents suggested that the investment had improved business performance.

Only 6% of the business survey respondents consider the shopping environment of Whitehaven to be 'good', with 47% rating it as 'poor'. The pedestrian environment is viewed more favourably however with 15% of business respondents rating this as 'good' and further 44% describing this aspect as 'average, but with a 1/3 also describing it as poor.

The visitors' perception of the town centre environment appears more favourable than the business operators. When asked to compare Whitehaven against other centres on the issue of the general environment, 26% of respondents replied that Whitehaven is 'better or much better' than other centres whilst 56% consider it to be 'about the same' as elsewhere. 15% consider Whitehaven to be worse or much worse than elsewhere.

A5.7 Egremont

A5.7.1 Overview of centre

Egremont is a historic market town and key service centre as identified in the Copeland Local Plan. Egremont has a population of 7,891.

The retail focus of the town is along Main Street, extending into Market Place. There have been several regeneration initiatives targeted at making improvements to Egremont and the town centre, most recently through the Market Town Initiative. Improvements included the availability of shop front improvement grants and investment in the key 'gateways' to the town.

Photographs of Egremont town centre are provided overleaf. Figure A5.61 provides a ground floor land use plan of Egremont town centre as defined by GOAD.

Photographs of Egremont Town Centre

Figure A5.56

Figure A5.57

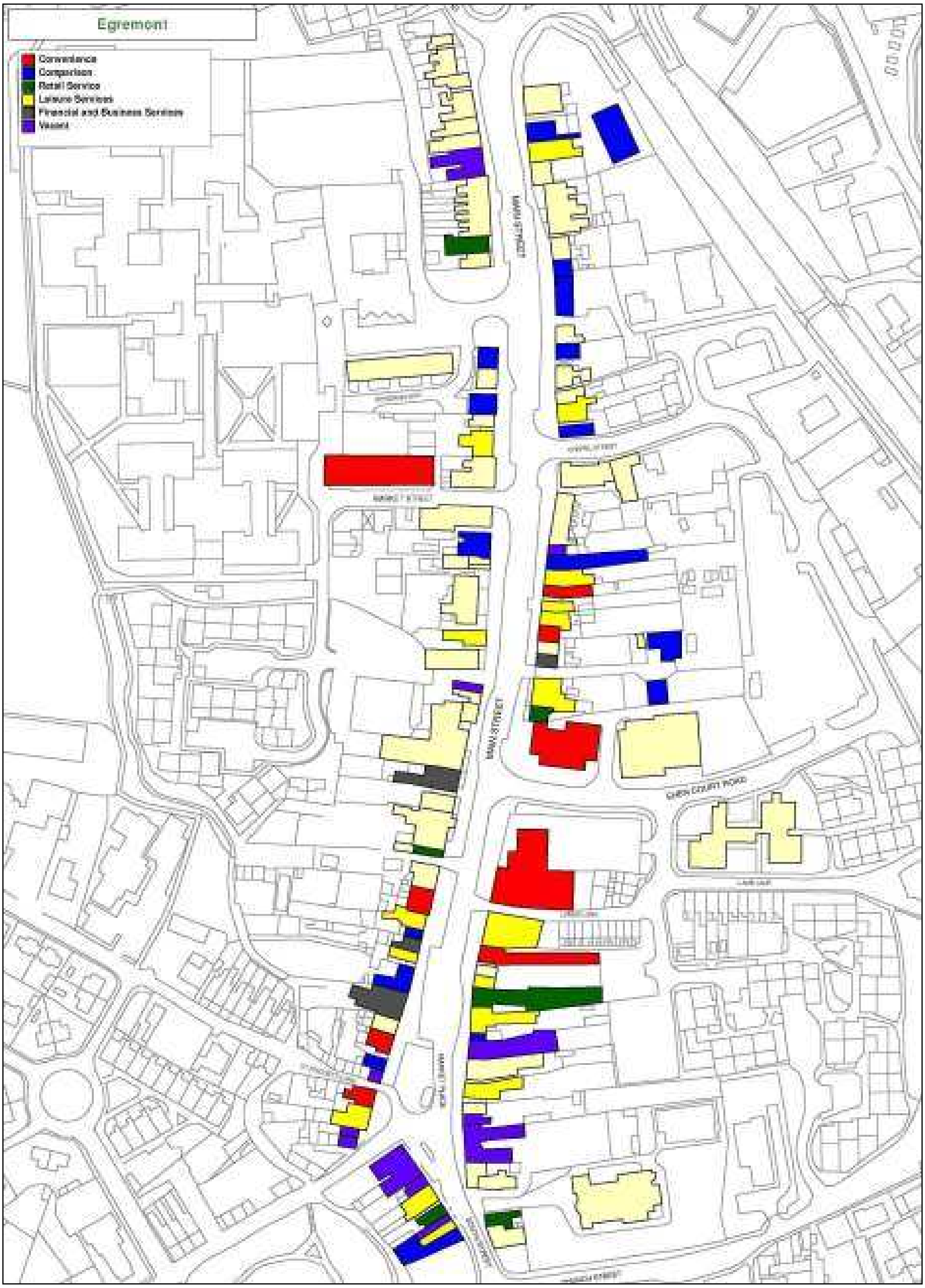
Figure A5.58

Figure A5.59

Figure A5.60

Figure A5.56: Main Street
Figure A5.57: Main Street
Figure A5.58: Main Street at junction with Ehen Court Road
Figure A5.59: Car park
Figure A5.60: Market Place

Figure A5.61: Land Use map for Egremont Town Centre (2008)



A5.7.2 Amount and Diversity of Uses in Egremont Town Centre

Tables A5.44-45 and Figures A5.62-3 set out the diversity and amount of uses within Egremont Town centre as assessed by GOAD and verified/updated by a WYG site visit. The data is presented in terms of both number of outlets and floorspace. National average figure are also provided.

A5.7.3 Convenience retailing in Egremont

In terms of convenience retailing, Egremont is slightly above the national average in terms of number of outlets, but below average in terms of floorspace. Since the closure of Kwik Save on Main Street (470 sq m) in 2007 the town just has one remaining supermarket (the Co-op, Main Street, 790 sq m). The remainder of the convenience outlets in Egremont are smaller units. There are no significant out of centre supermarkets within Egremont.

A5.7.4 Comparison retailing in Egremont

Comparison retailing in Egremont is significantly below the national average. Just 17% of the total number of units sell comparison goods compared to 35% nationally. This accounts for just 10% of the floorspace in Egremont, compared the national average of 39%. All of the comparison retailers in Egremont are independent businesses or part of a local chain. It should be noted however that the GOAD definition of the town centre does not include the Factory Shop, located off Main Street.

A5.7.5 Service retailing in Egremont

The provision of service sector uses in Egremont town centre is much higher than the national average for this type of use. The number of retail servicing outlets is broadly in keeping with the national average, although a number of larger units (e.g. Lakeland Self Drive, Wilson's Car Repairs) see that this use type over double the national average in terms of floorspace for this use type.

In terms of Leisure services, Egremont is significantly above the national average in terms of number of outlets and floorspace. This use type is largely accounted for by 9 public houses/social clubs and 8 take aways.

Financial and business uses are slightly below the national average in Egremont. Two high street banks are represented (HSBC and NatWest, along with the Cumberland Building Society).

Table A5.44: Diversity of Uses in Egremont Town Centre - units (2008)

	Number of units		
	Number	Egremont (%)	UK (%)
Convenience	7	10	8
Comparison	12	17	35
Retail Service	10	14	13
Leisure Services	23	33	21
Financial and Business Services	5	7	12
Vacant	13	19	10
Total	**70**	**100**	100

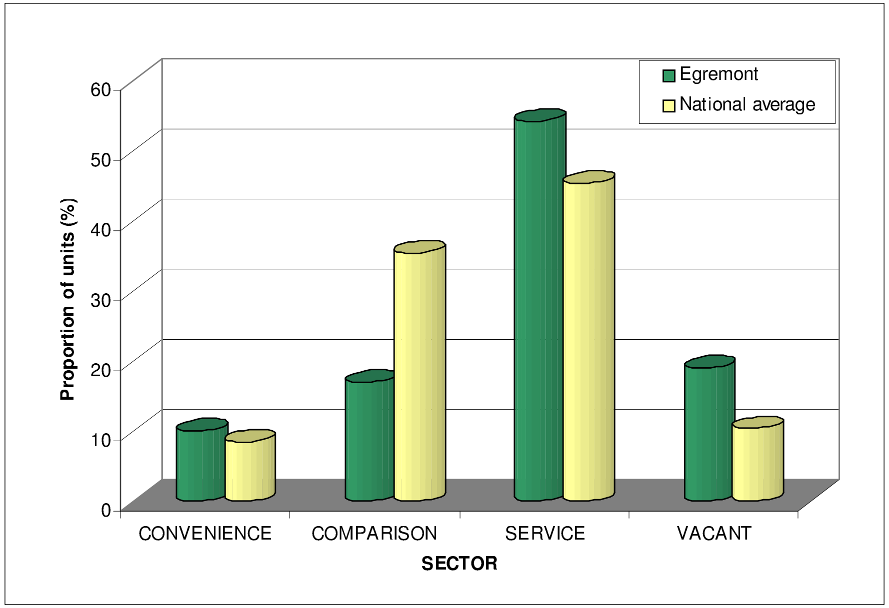
Source: GOAD Report 2008

Table A5.45: Diversity of Uses in Egremont Town Centre - floorspace

	Floorspace		
	Sq m 2008	Egremont (%) 2008	UK (%)
Convenience	1510	14	14
Comparison	1070	10	39
Retail Service	1620	15	7
Leisure Services	3950	37	22
Financial and Business Services	600	6	9
Vacant	2070	19	8
Total	**10820**	**100**	100

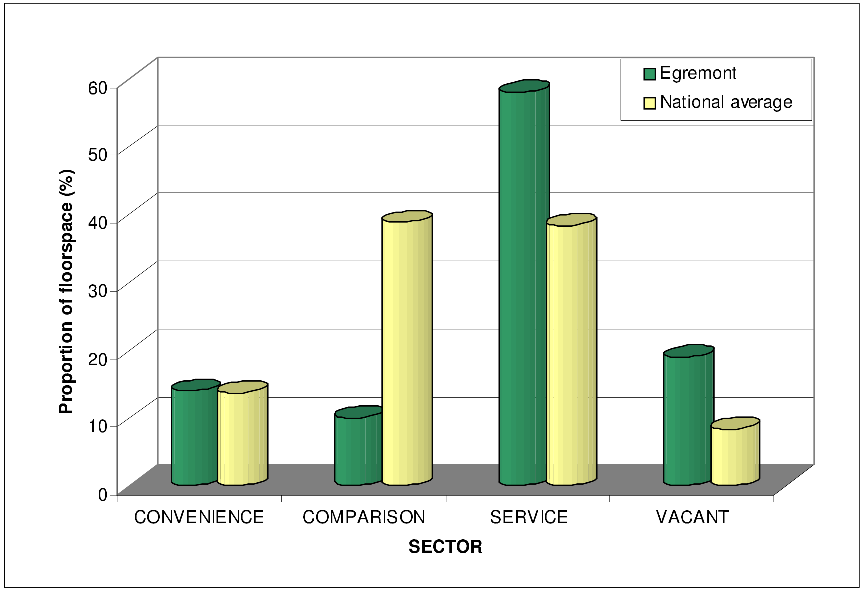
Source: GOAD Report 2008 as updated by WYG

Figure A5.62: Proportion of Units in Egremont Town Centre (2008)



Source: GOAD 2008 as updated by WYG

Figure A5.63: Proportion of Floorspace in Egremont Town Centre (2008)

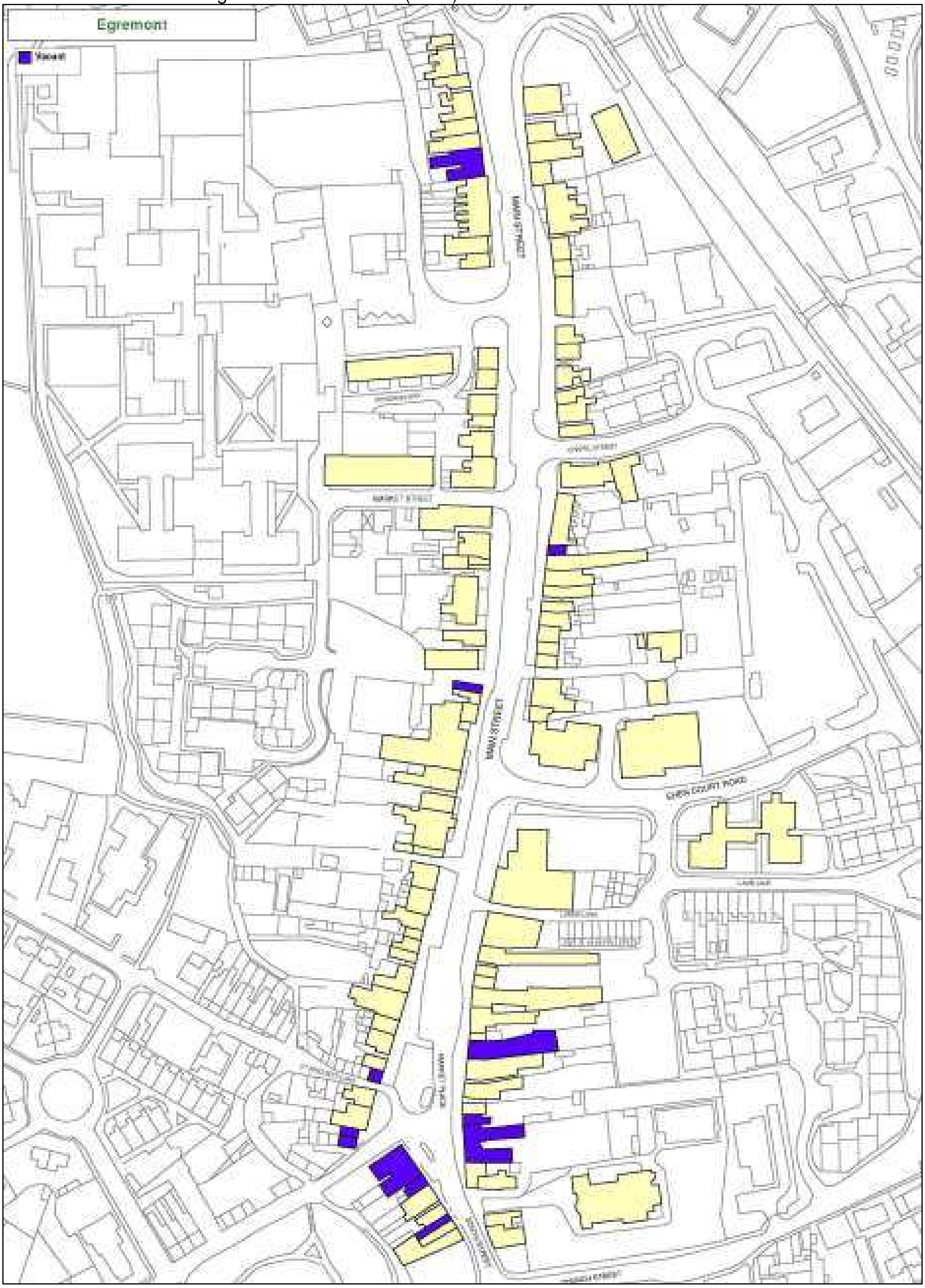


Source: GOAD 2008 as updated by WYG

A5.7.6 Vacancies in Egremont

There is a significant amount of vacant units and floorspace in Egremont town centre. Just under 1/5 of all units and floorspace are currently vacant which is significantly above the national average. A significant contributor to the vacant floorspace figure is the former Kwiksave store although at the time of the site visit, some renovation works appeared to be underway at this key location. In addition, significant works are ongoing to the vacant properties in the Market Place.

Figure A5.64: Vacancies in Egremont Town Centre (2008)



Source: GOAD base validated by WYG 2008 site visit

A5.7.7 Top 20 Retailer Representation in Egremont

Of the 'Top Twenty Retailers' identified by Focus (2008), Egremont currently accommodates only one of these businesses within the town centre – Boots.

Table A5.46: Top Twenty Retailers

Rank	Retailer
1	**Boots**
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Database (2008) /ORC Data Services
These are the top 20 comparison goods multiples ranked by ORC's forecast of average town centre sales for individual retailers with Great Britain.

A5.7.8 Unit sizes

Table A5.47 below provides a summary of the composition of Egremont in terms of the size of town centre outlets. This is taken from an assessment of retailing facilities provided by GOAD for 2008. Egremont is shown to be fairly consistent with national average in terms of the distribution of unit sizes in the town centre, although it is noted that there are no larger format outlets. The largest unit is the Co-op store at 790 sq m / 8500 sq ft.

Table A5.47: Size of units in Egremont Town Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Egremont	UK
Under 93 sq m (1,000 sq ft)	30	42.2	39.1
94-232 sq m (1,000-2,499 sq ft)	27	38	39.6
233-464 sq m (2,500-4,999 sq ft)	9	12.6	12.6
465-929 sq m (5,000-9,999 sq ft)	5	7.1	5.1
930-1,393 sq m (10,000-14,999 sq ft)	0	0	1.5
1,394-1,858 sq m (15,000-19,999 sq ft)	0	0	0.7
1,859-2,787 sq m (20,000-29,999 sq ft)	0	0	0.7
Above 2,787 sq m (30,000 sq ft)	0	0	0.8
Total	**71**	**100**	

Source: GOAD 2008

A5.7.9 Business Survey Results

A questionnaire was distributed to all local businesses in Egremont Town Centre in order to gain an understanding of the opinions, views and perceptions of retailers. A total of 83 questionnaires were distributed and 22 were returned, representing response rate of 27%. The results are contained in Appendix 4. The key findings are set out below:

- Over 2/3 of respondents have traded in Egremont for over 10 years. 23% have traded for between 3 and 10 years and the remaining 9% for less than three years.
- 82% of respondents operated independent businesses
- 45% of respondents indicate that during their time trading in Egremont their business had grown. 27% indicated that business had remained static, whilst a further 27% indicated that business had declined.
- ½ of respondents indicate that their business is performing well or very well, whilst 40% indicate that it is performing moderately. Only 9% of respondents indicated that their business was performing poorly or very poorly.
- Over 68% of the business respondents' premises in Egremont were owner occupied.
- The majority of respondents (81%) indicated that they relied primarily on local residents for their business. 15% indicated that they relied on those from the wider Egremont area. Just 1 respondent indicated that their business relied primarily on tourist and leisure visitors.
- When considering the appropriate mix of uses within the town centre, respondents were fairly evenly divided. 36% feel that there is a good balance of uses, 27% feel that there are too many non retail uses and 36% feel that there are not enough non retail uses.

- 62% of respondents indicated that they had no plans to alter their business within the next 5 years. 33% of respondents stated that they intended to refurbish their existing floorspace. Only one respondent indicated that they intended to close.
- ½ of all respondents identified Whitehaven as their biggest, or one of their biggest, competitors. 32% of respondents identified Workington in this category and 27% identified other centres in this category and 18% the internet.

As part of the business survey, respondents were asked to rate various aspects of the town centre as either 'good', 'average' or 'poor'. Table A5.48 summarises the response of the Egremont businesses. The majority of respondents rated the majority of the identified town centre aspects as 'poor.' There appears to be significant concerns regarding the range of shops and services, entertainment, leisure and tourism within the town centre. Foodstore provision and the shopping environment was also identified by 64% of respondents as being poor. From a more positive perspective, all respondents identified signage in the town as being either 'good' or 'average' whilst 91% of respondents rated personal safety in this way.

Table A5.48: Business respondents perception of Egremont Town Centre

Perception	Good (%)	Average (%)	Poor (%)	Don't Know (%)
Range of Shops and services	5	18	77	0
Location and quality of car parks	9	41	45	5
Foodstore Provision	9	27	64	0
Car parking	9	36	55	0
Shopping Environment	0	36	64	0
Pedestrian environment	18	68	14	0
Security (e.g. CCTV)	0	41	45	14
Personal Safety	18	73	5	5
Access by public transport	41	45	5	9
Access by foot/cycle	32	55	5	9
Signage	18	82	0	0
Cleanliness	5	50	45	0
Entertainment/leisure	5	18	77	0
Events	9	50	36	5
Public toilets	0	23	59	18
Leisure/tourism	0	23	73	5

Survey respondents were also asked to consider their main barriers to trading performance. The results are set out in Table A5.49 below. The biggest concern emerged as inadequate customer parking (50%) followed by the poor quality of the shopping environment (45%). High rents/overheads and lack of day visitors/tourists to the town also rated highly (41%) as key barriers to performance.

Table A5.49: Barriers to trading performance in Egremont Town Centre

Barrier to trading performance	% respondent
High Rents/Overheads	41
Lack of passing trade outside your premises	36
Poor location of your premises	0
Inadequate customer car parking	50
Competition from other traders in Town Centre	18
Competition from other Town Centres nearby	27
Competition from elsewhere	14
Lack of day visitors/tourists to the town	41
Anti-social behaviour	18
Poor security	14
Inadequacy of your current premises	14
Poor quality of shopping environment	45
Don't Know	0
None	9

Following on from rating aspects of the town centre and barriers to performance, the survey asked respondents to consider what improvement measures they would like to see implemented in the town centre. Table A5.50 summarises the findings. All respondents agreed that the town centres need an increase in the choice and range of shops in order to improve. Just under 60% believed that additional foodstore provision, flexible parking, more street cleaning, more entertainment and leisure facilities and greater promotion and marketing of the centre would lead to improvements in the town centre.

Table A5.50: Potential measures to improve Egremont Town Centre

Improvement measure	% respondents
Increased choice/range of shops	100
More national multiples	45
Foodstore in the Town Centre	59
Improved street paving	27
Improved street furniture	27
Improved built environment	27
Lower parking charges	55
Flexible parking	59
More street cleaning	59
Improved public transport	9
Improved access by foot and cycle	14
More entertainment/leisure facilities	59
More quality restaurants/pavement cafes	45
More specialist markets	45
More cultural facilities (i.e. Theatre)	50
Improved security/CCTV	55
Greater promotion/marketing of the centre	59
Improved signposting	27
Public toilets	45

When asked what specific support would help their business, the most popular response was shop front improvement grants (41%) followed by marketing assistance (35%). 18% identified a town centre manager as a measure to help their business whilst only 6% identified training.

A5.7.10 Accessibility

The main town centre bus stops are located on Main Street. Egremont is not served by the rail network. 41% of the business survey respondents considered accessibility by public transport to Egremont town centre to be 'good', whilst 45% considered it to be 'average' and just 5% 'poor'. Access by foot and cycle is also rated quite highly with 32% of considering it to be 'good', 55% 'average' and 5% 'poor'. 9% of respondents identified that they would like to see improved access by public transport to the town centre, whilst 14% suggested improved access by foot/cycle as being beneficial. Improved signposting was also identified by 27% of respondents as a potential improvement measure.

In addition to on street parking, there are two public car parks serving the town centre – Chapel Street (122 spaces) and Back Green (30 spaces). Only 9% of business survey respondents considered the town centre car parks to be 'good' and the majority (55%) consider them to be 'poor'. 50% of respondents viewed inadequate customer car parking as a barrier to their trading performance. When considering what improvements they would like to see in the town centre, 55% identified lower car parking charges and 59% more flexible parking.

A5.7.11 Perception of safety and crime

18% of respondents to the Egremont business survey identified anti-social behaviour as a barrier to their trading performance. No respondents considered security in Egremont to be 'good'. 41% considered it to be average whilst 45% stated it was 'poor' the majority of respondents (73%) rated personal safety in Egremont as 'average'. 55% of respondents would like to see improved security and CCTV in Egremont town centre.

A5.7.12 Quality of environment

Whilst it is recognised that there has been significant investment in seeking to improve the quality of the physical environment of Egremont in recent years there remains a significant number of vacant properties throughout the town centre.

Significantly, none of the business survey respondents rate the shopping environment to be 'good', with the majority (65%) considering it to be 'poor'. The pedestrian environment is viewed more favourably with 18% of respondents considering this aspect to be 'good' and the majority (68%), average. When considering improvement measures for the town centre, 27% of respondents suggested improvements to the built environment, street paving and street furniture. 45% of respondents identified the poor quality of the shopping environment as a barrier to their trading performance. 42% of respondents feel that their business would benefit from Shopfront improvement grants.

A5.8 Cleator Moor

A5.8.1 Overview of centre

Cleator Moor is identified as a Key Service Centre by the Copeland Local Plan and has a population of 6,990.

The town centre is very compact and focussed on the Market Square, extending in both directions along High Street. The Market Square itself is dominated by public building (council offices and library) and community/ leisure space (former Civic Hall).

The town centre has benefitted from significant public investment in recent years which has seen the redevelopment of the former Co-op building and Shopfront improvement schemes.

Photographs of Cleator Moor town centre are provided overleaf. Figure A5.70 provides a ground floor land use plan of Cleator Moor town centre as defined by GOAD

Photographs of Cleator Moor Town Centre

Figure A5.65

Figure A5.66

Figure A5.67

Figure A5.68

Figure A5.69

Figure A5.65: Former co-op building, now redeveloped for office and business space, Jacktrees Road
Figure A5.66: Looking north west along High Street
Figure A5.67: Vacant plot, corner of Cragg Road / Market Street
Figure A5.68: 13-20 High Street
Figure A5.69: Looking south across Market Square towards the Civic Hall and Columba Club

Figure A5.70: Land Use map for Cleator Moor Town Centre (2008)

Source: GOAD base validated by WYG 2008 site visit

A5.8.2 Amount and Diversity of Uses in Cleator Moor Town Centre

Tables A5.51-2 and Figure A5.71-2 set out the diversity and amount of uses within Cleator Moor Town centre as assessed by GOAD and verified/updated by a WYG site visit in July 2008. The data is presented in terms of both number of outlets and floorspace. National average figure are also provided.

A5.8.3 Convenience retailing in Cleator Moor

13% of outlets in Cleator Moor are in use for the sale of convenience goods which slightly above the national average (8%) for this type of use in town centres. The current convenience floorspace (610 sq m) accounts for only 9% of the total town centre floorspace which is well below the national average of 14%. The Cleator Moor Co-op and post office are now located on an out of centre site within the settlement of Cleator Moor.

A5.8.4 Comparison retailing in Cleator Moor

The 12 comparison outlets in Cleator Moor account for just 23% of the total number of outlets which is significantly below the national average of 35%. Since 1999 the amount of comparison floorspace has increased, but only accounts for 24% of the total floorspace, which is again well below the national average of 39%. With the exception of the Age Concern charity shop, all of the outlets in this category are independent retailers or part of a small local chain.

A5.8.5 Service retailing in Cleator Moor

Whilst retail and financial/business services are underrepresented in terms of the number of outlets in Cleator Moor, leisure services are over represented when compared to the national average.

There are 18 leisure related outlets in the town centre, 9 of which are fast food/take aways. There are only 3 retail service outlets and 4 financial/business outlets, with only one national 'high street bank', the NatWest, represented.

The over representation of leisure floorspace in the town centre is more apparent when considering the floorspace figures with 44% (2910 sq m) of the total floorspace currently being used for this purpose. This is double the national average for this type of use. In addition to the take aways and 3 public houses, this high figure reflects the number of social clubs within the town centre. In terms of floorspace, Cleator Moor is in line with the national average (9%) for financial and business floorspace.

Table A5.51: Diversity of Uses in Cleator Moor Town Centre - units (2008)

	Number of units		
	Number	Cleator Moor (%)	UK (%)
Convenience	7	13	8
Comparison	12	23	35
Retail Service	3	6	13
Leisure Services	18	35	21
Financial and Business Services	4	8	12
Vacant	8	15	10
Total	**52**	**100**	100

Source: GOAD Report 2008

Table A5.52: Diversity of Uses in Cleator Moor Town Centre - floorspace

	Floorspace		
	Sq m 2008	Cleator Moor (%) 2008	UK (%)
Convenience	610	9	14
Comparison	1560	24	39
Retail Service	270	4	7
Leisure Services	2910	44	22
Financial and Business Services	570	9	9
Vacant	670	10	8
Total	**6590**	**100**	**100**

Source: GOAD Report 2008 as updated by WYG

Figure A5.71: Proportion of Units in Cleator Moor Town Centre (2008)

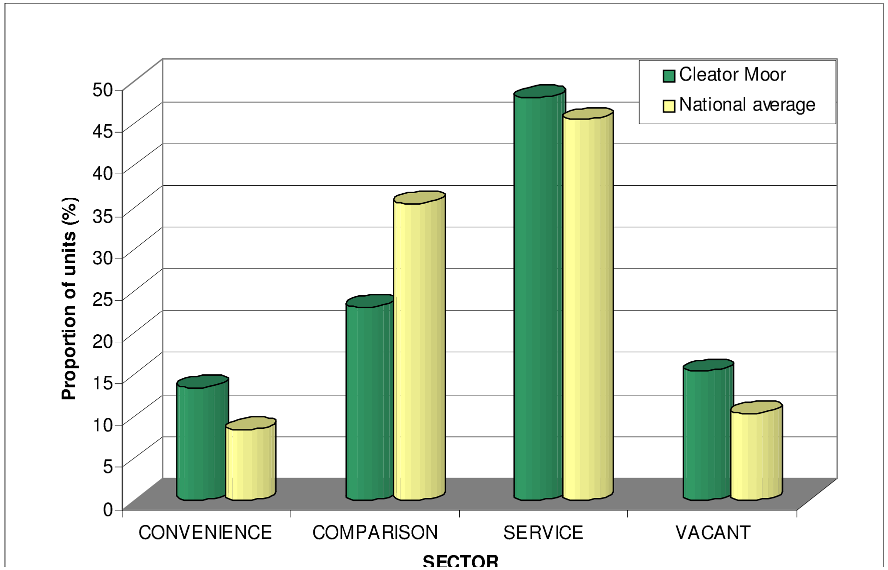
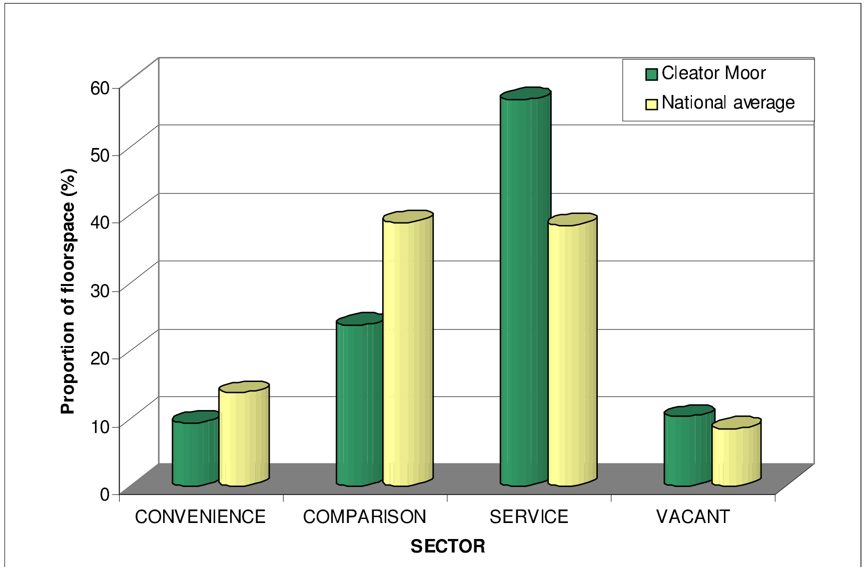


Figure A5.72: Proportion of Floorspace in Cleator Moor Town Centre (2008)



A5.8.6 Vacancies in Cleator Moor

Cleator Moor currently has 8 vacant units accounting for 15% of the total which puts it higher than the national average (10%). It is also higher than the national average (8%) in terms of vacant floorspace with 670 sq m (10%), currently being unoccupied. It should be noted however that this is a significant reduction since 1999, when 1279 sq m of vacant floorspace was recorded in the town centre. It can be assumed that a key factor in this reduction is the redevelopment of the former Co-op building on Jacktrees Road, which in 1999 stood vacant but has since been redeveloped as office/work space.

The distribution of those properties currently vacant in Cleator Moor is shown in Figure A5.73. The properties are in prominent and highly visible locations along High Street. Of particular prominence is the vacant premises at the western entrance to the town centre.

Figure A5.73: Vacancies in Cleator Moor Town Centre (2008)

Source: GOAD base validated by WYG 2008 site visit

A5.8.7 Top 20 Retailer Representation in Cleator Moor

Cleator Moor currently does not accommodate any of the 'Top Twenty Retailers' identified by Focus (2008).

Table A5.53: Top Twenty Retailers

Rank	Retailer
1	Boots
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

A5.8.8 Unit sizes

Table A5.54 below provides a summary of the composition of Cleator Moor in terms of the size of town centre outlets. This is taken from an assessment of retailing facilities provided by GOAD for 2008. It is demonstrated that at 52% of all units, Cleator Moor has a higher proportion of smaller units (under 1000 sq ft) than the national average, but is broadly in line with the average for units in the 1000-2500 sq ft range. Cleator Moor town centre is below average in terms of the number of larger outlets which is sustains.

Table A5.54: Size of units in Cleator Moor Town Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Cleator Moor	UK
Under 93 sq m (1,000 sq ft)	27	52	39.1
94-232 sq m (1,000-2,499 sq ft)	20	38	39.6
233-464 sq m (2,500-4,999 sq ft)	4	8	12.6
465-929 sq m (5,000-9,999 sq ft)	1	2	5.1
930-1,393 sq m (10,000-14,999 sq ft)	0	0	1.5
1,394-1,858 sq m (15,000-19,999 sq ft)	0	0	0.7
1,859-2,787 sq m (20,000-29,999 sq ft)	0	0	0.7
Above 2,787 sq m (30,000 sq ft)	0	0	0.8
Total	**52**	**100**	

Source: GOAD 2008

A5.8.9 Business Survey Results

A questionnaire was distributed to all local businesses in Cleator Moor Town Centre in order to gain an understanding of the opinions, views and perceptions of retailers. A total of 74 questionnaires were distributed and 11 were returned, representing response rate of 15%. The results are contained in Appendix 4. The key findings are set out below:

- Over half of respondents had traded in Cleator Moor for over 10 years. 27% had traded in the town centre for 3 years or less.
- 90% of respondents were operating an independent business and 80% had always operated from Cleator Moor
- During time trading in Cleator Moor just over 2/3 of respondents expressed that their business had grown, whilst the remainder state that business had declined
- 64% advised that their business is currently performing well or very well, whilst 27% stated that performance is poor or very poor.
- 2/3 of respondents stated that their business relies primarily on local residents.
- 60% of respondents expressed that there are too many non retail uses in the town centre. 20% feel that there are not enough non retail uses, whilst the remaining 20% feel that there is a good balance between uses.
- 55% of respondents advised that they have no plans to alter their business any way in the next 5 years. 2 respondents (18%) advised that it is their intention to close. The majority of respondents (82%) expressed that they intend to refurbish their existing floorspace.
- 36% of Cleator Moor town centre respondents see Whitehaven as a significant competitor. Workington, Egremont and out of centre facilities were each identified by 27% of respondents as being significant competitors.

As part of the business survey, respondents were asked to rate various aspects of the town centre as either 'good', 'average' or 'poor'. Table A5.55 summarises the response of the Cleator Moor businesses. Car parking was rated to be one of the best aspects of the town centre, rated good by 45% of respondents. It should be noted that at the time of the survey, car parking in both The Square and Jacktrees Road car parks was free of charge. Entertainment/leisure/tourism, events and public toilet provision were all rated as poor by the vast majority of respondents.

Table A5.55: Business respondents perception of Cleator Moor Town Centre

Perception	Good (%)	Average (%)	Poor (%)	Don't Know (%)
Range of Shops and services	0	27	73	0
Location and quality of car parks	36	36	27	0
Foodstore Provision	9	45	45	0
Car parking	45	45	9	0
Shopping Environment	9	27	64	0
Pedestrian environment	27	64	9	0
Security (e.g. CCTV)	9	45	36	9
Personal Safety	18	36	36	9
Access by public transport	27	27	36	9
Access by foot/cycle	18	64	9	9
Signage	9	45	27	18
Cleanliness	0	55	45	0
Entertainment/leisure	0	9	91	0
Events	0	0	82	18
Public toilets	0	0	82	18
Leisure/tourism	0	9	91	0

Survey respondents were also asked to consider what were the main barriers to their trading performance. Table A5.56 summarises the results. The most frequently identified barrier was the poor quality of the shopping environment with over half of all respondents identifying this as an issue. Anti social behaviour is also perceived 45% of respondents to be a barrier to their trading performance. Competition form other towns and lack of visitors to the town were also rated as a problem by over a 1/3 of respondents. From a positive perspective no respondents had concerns regarding their location or security of their premises.

Table A5.56: Barriers to trading performance in Cleator Moor Town Centre

Barrier to trading performance	% respondent
High Rents/Overheads	27
Lack of passing trade outside your premises	9
Poor location of your premises	0
Inadequate customer car parking	9
Competition from other traders in Town Centre	27
Competition from other Town Centres nearby	36
Competition from elsewhere	18
Lack of day visitors/tourists to the town	36

Anti-social behaviour	45
Poor security	0
Inadequacy of your current premises	18
Poor quality of shopping environment	55
Don't Know	0
None	0

Following on from rating aspects of the town centre and barriers to performance, the survey asked respondents to consider what improvement measures they would like to see implemented in the town centre. Table A5.57 summarises the findings. The most frequently identified measure was to increase the choice and range of shops (82%). Provision of a town centre foodstore and greater promotion/marketing of the town were also viewed as measures which would improve the town centre by approximately 2/3 of respondents. Over half of respondents identified more street cleaning, improved public transport, more entertainment leisure facilities and improved security/CCTV as factors which would improve Cleator Moor.

Table A5.57: Potential measures to improve Cleator Town Centre

Improvement measure	% respondents
Increased choice/range of shops	82
More national multiples	18
Foodstore in the Town Centre	64
Improved street paving	18
Improved street furniture	18
Improved built environment	27
Lower parking charges	9
Flexible parking	9
More street cleaning	55
Improved public transport	55
Improved access by foot and cycle	0
More entertainment/leisure facilities	55
More quality restaurants/pavement cafes	18
More specialist markets	36
More cultural facilities (i.e. Theatre)	27
Improved security/CCTV	55
Greater promotion/marketing of the centre	64
Improved signposting	36
Public toilets	36

When asked what specific support would help their business, 37.5% identified a town centre manager, whilst the same amount identified shop front improvement grants. A ¼ of respondents suggested marketing assistance would be beneficial.

A5.8.10 Accessibility

The main town centre bus stops are in a central location on High Street, adjacent to the Market Square. Cleator Moor is not served by the rail network. 27% of the business survey respondents considered accessibility by public transport to Cleator Moor town centre to be good, whilst 27% considered it to be 'average' and 36% 'poor'. When considering access by foot and cycle, the majority of respondents (64%) considered this to be 'average' in Cleator Moor. 18% considered this aspect to be 'good' whilst only 9% considered it 'poor'.
In addition to on street parking, there are two public car parks serving the town centre, The Square (59 spaces) and Jacktrees Road (28 spaces). At the time of the WYG survey, both of these Council owned car parks were free of charge for use by the public. 72% of business survey respondents considered the town centre car parks to be 'good' or 'average'. Only 9% of respondents viewed car parking as a barrier to their trading performance.

When considering what improvements they would like to see in the town centre, no respondents identified improved access by foot/cycle, but 55% suggested improved public transport. Improved signposting was also identified by over 1/3 of respondents as a potential improvement measure.

A5.8.11 Perception of safety and crime

Security and crime does appear to be an issue within Cleator Moor town centre with 45% of the business survey respondents viewing anti-social behaviour as a barrier to their trading performance. In addition over 1/3 of business survey respondents rated security and personal safety in Cleator Moor as 'poor'. 55% of respondents identified that better security and CCTV would improve the town centre.

A5.8.12 Quality of environment

Whilst it is recognised that there has been significant investment in seeking to improve the quality of the physical environment of Cleator Moor in recent years, with a particular focus on properties in and around the Market Square, there remains a significant number of vacant buildings in prominent locations which detract from the environmental quality of the town centre.

64% of the business survey respondents rate the shopping environment of Cleator Moor as 'poor'. In terms of improvement measures for the town centre, 27% of respondents suggested improvements to the built environment were needed whilst 18% suggested improved street paving and street furniture. 55% of businesses identified that the poor quality of the shopping environment is a barrier to their trading performance.

38% of respondents feel that the town would benefit from further Shopfront improvement grants.

A5.9 Millom

A5.9.1 Millom Overview

Millom is defined as a Key Service Centre by the Copeland Local Plan 2001-2016. The town has a population of 6,076. Given the relative peripheral location of Millom in terms of other key service centres, the town has an important role to play on serving the wider south Copeland community.

The main focus of retailing in Millom is on St Georges Terrace, Market Square, Wellington Street and Lapstone Road, although in the latter two areas in particular this is characterised by a significant mix with terraced residential property.

Photographs of Millom town centre are provided overleaf. Figure A5.79 provides a ground floor land use plan of Millom town centre as defined by GOAD.

Photographs of Millom Town Centre

Figure A5.74

Figure A5.75

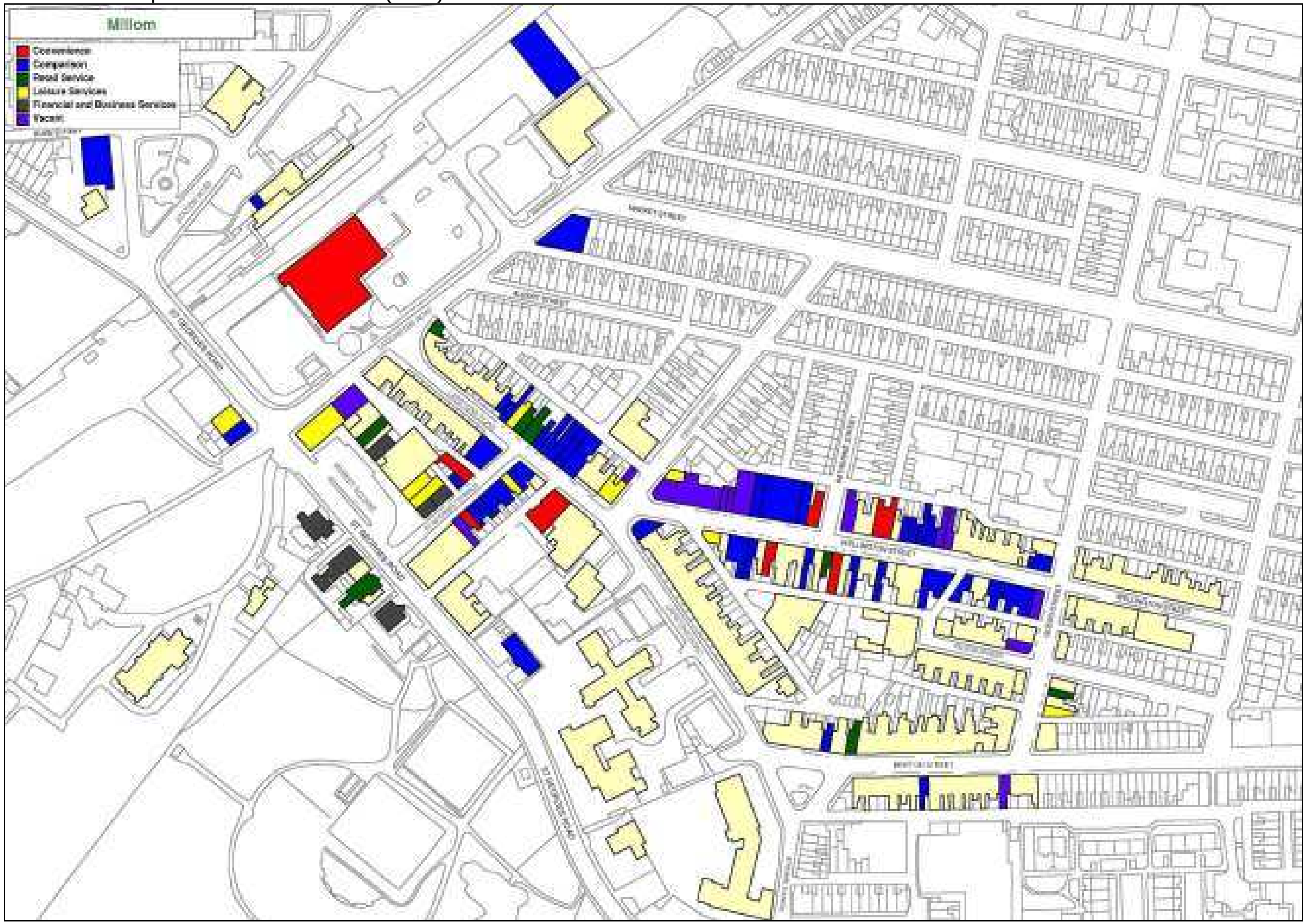
Figure A5.76

Figure A5.77

Figure A5.78

Figure A5.74: Looking north west along St Georges Road
Figure A5.75: Market Square
Figure A5.76: Petrol Station on A5093 at entrance to town centre
Figure A5.77: Park, off St Georges Road, Millom
Figure A5.78: Former Millom Co-op building, Wellington Street

Figure A5.79: Land Use map for Millom Town Centre (2008)



Source: GOAD base validated by WYG 2008 site visit

A5.9.2 Amount and Diversity of Uses in Millom Town Centre

Tables A5.58-9 and Figures A5.80-1 set out the diversity and amount of uses within Millom Town centre as assessed by GOAD and verified/updated by a WYG site visit. The data is presented in terms of both number of outlets and floorspace. National average figure are also provided.

A5.9.3 Convenience retailing in Millom

8% of retail outlets in Millom are in use for the sale of convenience goods which is in line with the national average. The proportion of floorspace in use for this purpose in Millom is only slightly above the national average (16% and 14 % being the totals respectively). The convenience floorspace is dominated by the Somerfield store which accounts for 2/3 of all the convenience floorspace in the town centre. Of the other 7 remaining convenience outlets, 5 are independent units and all are below 230 sq m in size.

A5.9.4 Comparison retailing in Millom

There are at present 37 comparison goods outlets in Millom, accounting for 38% of all outlets in the town which is slightly above the national average for this type of outlet (35%). However, in terms of floorspace, at 4850 sq m which equates to 33% of total town centre floorspace, Millom is below the national average of 39%. This indicates that whilst there is a fairly average number of comparison outlets, these tend to be smaller in size. This reflects the fact that the vast majority of comparison retailers are smaller independent businesses or local chains (89%) as opposed to national retailers (11%). Almost 2/3 of all comparison retailers in Millom town centre occupy outlets of 100 sq m or less.

A5.9.5 Service retailing in Millom

In terms of the number of service retail outlets, Millom is under-represented in this type of use (39%) when compared to the national average (46%). There is a higher proportion of leisure floorspace (28%) when compared to the national average which is includes the Millom Sports Centre, the Conservative Club and Millom Workers Social club, all of which are 500 sq or over, as well as smaller café's, take aways and betting shops.

In terms of number of outlets, at 9% Millom is 4% below the national average for retail service outlets and 2% below the average in terms of floorspace.

There are 11 outlets in Millom which fall into the category of financial and business services which only slightly below the national average. This sector accounts for 1070 sq m of floorspace or 7% of the total town centre floorspace. The national average for financial and business services in town services is 9%. Three 'high street' banks are represented in Millom – NatWest, HSBC, Barclays.

Table A5.58: Diversity of Uses in Millom Town Centre - outlets (2008)

	Number of Units		
	Number	Millom (%)	UK (%)
Convenience	8	8	8
Comparison	37	38	35
Retail Service	9	9	13
Leisure Services	18	19	21
Financial and Business Services	11	11	12
Vacant	14	14	10
Total	**97**	**100**	100

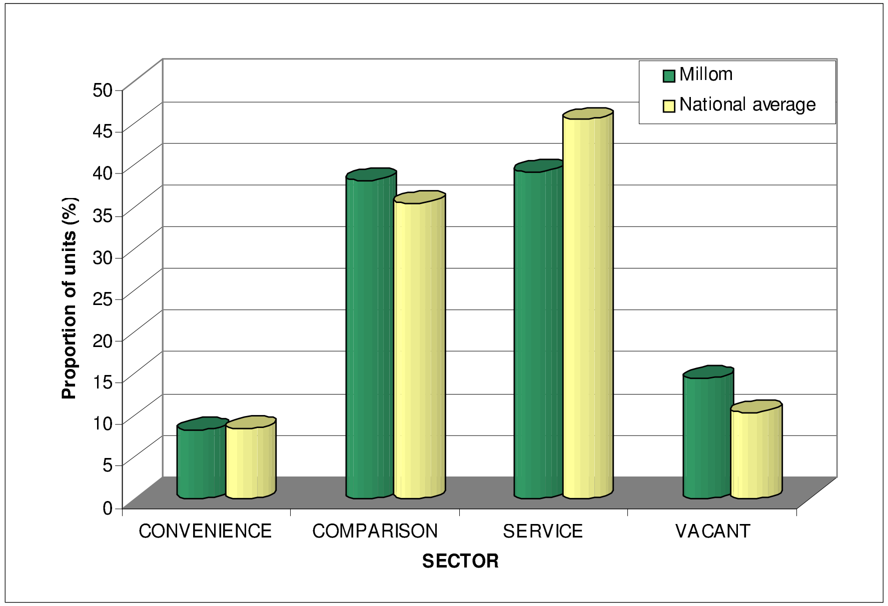
Source: GOAD Report 2008

Table A5.59: Diversity of Uses in Millom Town Centre - floorspace(2008)

	Floorspace		
	Sq m	Millom (%)	UK (%)
Convenience	2340	16	14
Comparison	4850	33	39
Retail Service	670	5	7
Leisure Services	4020	28	22
Financial and Business Services	1070	7	9
Vacant	1580	11	8
Total	**14530**	**100**	100

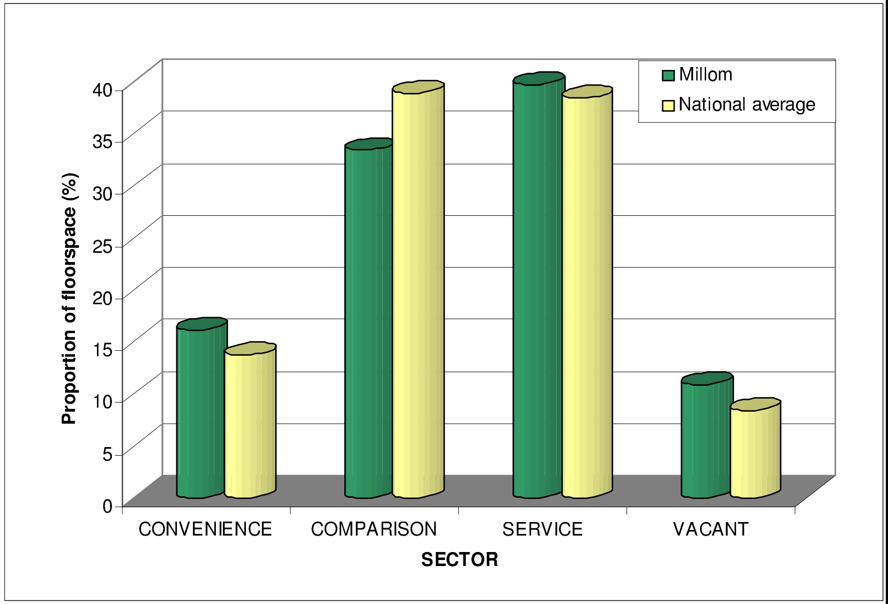
Source: GOAD 2008 as updated by WYG

Figure A5.80: Proportion of Units in Millom Town Centre (2008)



Source: GOAD 2008 as updated by WYG

Figure A5.81: Proportion of Floorspace in Millom Town Centre (2008)



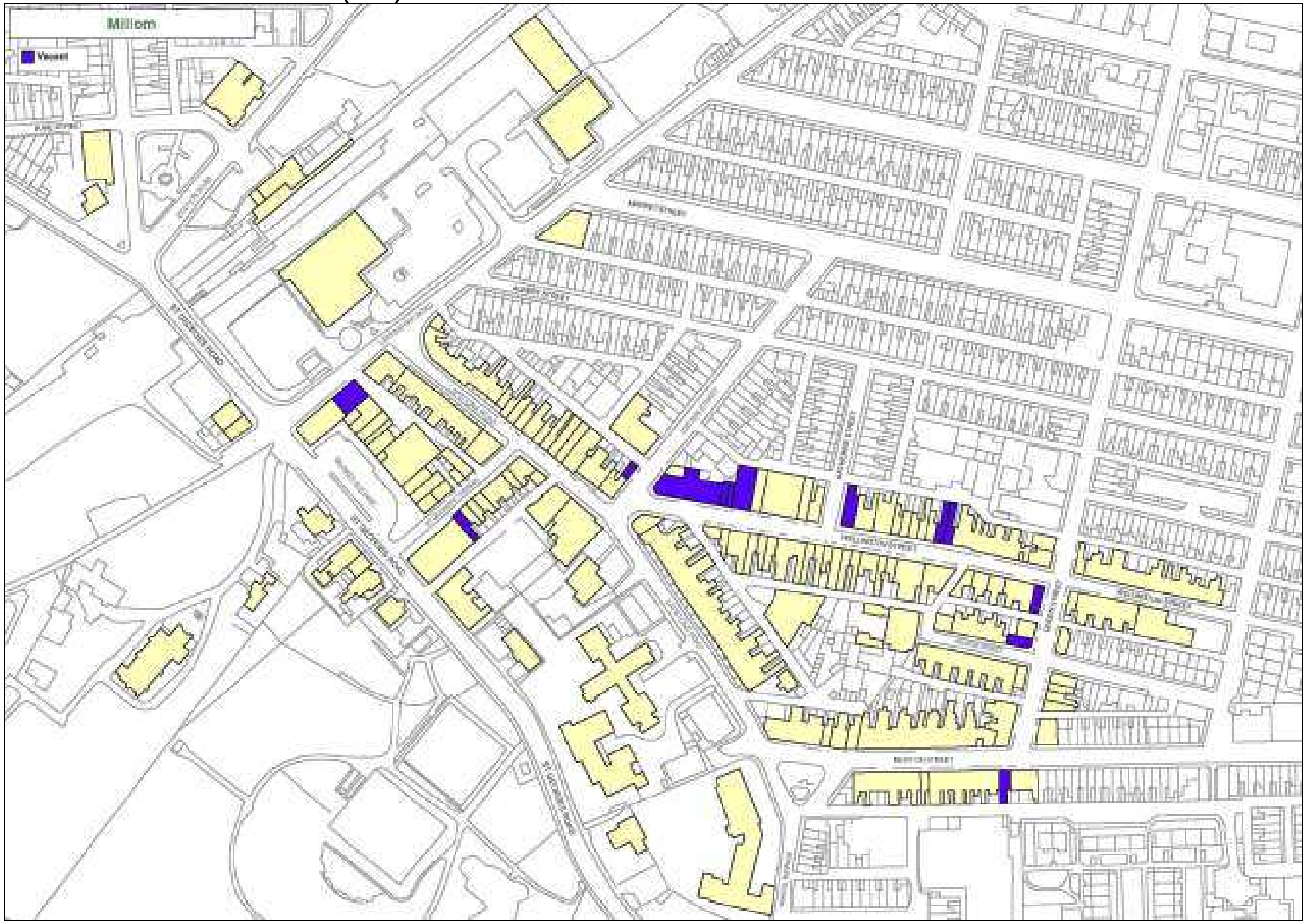
Source: GOAD 2008 as updated by WYG

A5.9.6 Vacancies

There are currently 14 vacant outlets within Millom town centre which is above the national average. Vacant outlets account for 11% of the floorspace in the town centre which is again above the national average (8%). 9 of the vacant units are under 1000 sq ft in size. Figure A5.82 highlights the distribution of the vacant premises and shows that whilst these are distributed throughout the town centre, there is a concentration on Wellington Street, dominated by the former Millom Co-op premises.

The distribution of those properties currently vacant in Millom is shown in Figure A5.82.

Figure A5.82: Vacancies in Millom Town Centre (2008)



Source: GOAD base validated by WYG 2008 site visit

A5.9.7 Top 20 Retailer Representation in Millom

Of the 'Top Twenty Retailers' identified by Focus (2008), Millom currently accommodates only one of these businesses town centre - Boots.

Table A5.60: Top twenty Retailer Representation in Millom

Rank	Retailer
1	**Boots**
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Database (2008) /ORC Data Services
These are the top 20 comparison goods multiples ranked by ORC's forecast of average town centre sales for individual retailers with Great Britain.

A5.9.8 Unit sizes

Table A5.61 below provides a summary of the composition of Millom in terms of the size of town centre outlets. This is taken from an assessment of retailing facilities provided by GOAD for 2008. It is demonstrated that Millom town centre has a significantly higher than average number of smaller outlets, with 55% of all outlets being under 1000 sq ft compared to the national average of 40%, and only one unit (Somerfield) exceeding 15,000 sq ft.

Table A5.61: Size of units in Millom Town Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Millom	UK
Under 93 sq m (1,000 sq ft)	53	55	39.1
93-232 sq m (1,000-2,499 sq ft)	32	33	39.6
232-464 sq m (2,500-4,999 sq ft)	6	6	12.6
465-929 sq m (5,000-9,999 sq ft)	5	5	5.1
929-1,393 sq m (10,000-14,999 sq ft)	0	0	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	1	1	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	0	0	0.7
Above 2,787 sq m (30,000 sq ft)	0	0	0.8
Total	**97**	**100**	

Source: GOAD 2008

A5.9.10 Business Survey Results

A questionnaire was distributed to all local businesses in Millom Town Centre in order to gain an understanding of the opinions, views and perceptions of retailers. A total of 100 questionnaires were distributed and 40 were returned, representing response rate of 40%. The results are contained in Appendix 4. The key findings are set out below:

- Over 55% of respondents have operated from Millom town centre for over 20 years
- 80% of respondents were independent businesses
- Just under 2/3 of respondents stated that during their time operating in Millom, their trade has grown. 17% stated that trade had declined.
- Over half of respondents advised that their business is performing well and less than 1/5 advised that performance is poor
- ¼ of respondents believe that there are not enough retail uses in the town centre whilst 1/3 believe that there are too many
- When asked if they had plans to alter their businesses in any way over the next five years, the majority of respondents (56%) said no. Only one respondent advised that it was their intention to close. Over 1/5 of respondents advised that it was their intention to refurbish their existing floorspace.
- 2/3 of respondents view Barrow as a main competitor with only 5% identifying Whitehaven in this category. 35% view the internet as a significant competitor.

As part of the business survey, respondents were asked to rate various aspects of the town centre as either 'good', 'average' or 'poor'. Table A5.62 summarises the response of the Millom businesses. Overall, none of the identified aspects fared particularly well. Over 82% of respondents considered that entertainment and leisure provision in the town centre to be poor. 65% considered the events and public toilets to be poor.

Table A5.62: Business respondents' perception of Millom Town Centre

	Good (%)	Average (%)	Poor (%)	Don't Know (%)
Range of Shops and services	2.5	52.5	45	0
Location and quality of car parks	10	50	40	0
Foodstore Provision	15	52.5	30	2.5
Car parking	10	42.5	47.5	0
Shopping Environment	2.5	37.5	57.5	2.5
Pedestrian environment	5	55	40	0
Security (e.g. CCTV)	7.5	40	52.5	0
Personal Safety	7.5	70	22.5	0
Access by public transport	2.5	27.5	62.5	7.5
Access by foot/cycle	15	70	7.5	7.5
Signage	2.5	47.5	50	0
Cleanliness	2.5	32.5	65	0
Entertainment/leisure	0	17.5	82.5	0
Events	0	35	65	0
Public toilets	0	30	65	5
Leisure/tourism	0	35	62.5	2.5

Survey respondents were also asked to consider what were the main barriers to their trading performance. Table A5.63 summarises the results. The most frequently identified barrier was the poor quality of the shopping environment with half of all respondents identifying this as an issue. 45% of respondents also identified lack of tourists/ day visitors to the town as an issue. 43% found high rents and overheads to be problematic. From a positive perspective the majority of respondents do not appear to have concerns over the adequacy, location or security of their current premises.

Table A5.63: Barriers to trading performance in Millom Town Centre

Barrier to trading performance	% respondent
High Rents/Overheads	43
Lack of passing trade outside your premises	33
Poor location of your premises	15
Inadequate customer car parking	38
Competition from other traders in Town Centre	15
Competition from other Town Centres nearby	28
Competition from elsewhere	28
Lack of day visitors/tourists to the town	45
Anti-social behaviour	35
Poor security	15
Inadequacy of your current premises	3
Poor quality of shopping environment	50
Don't Know	3
None	5

Following on from rating aspects of the town centre and barriers to performance, the survey asked respondents to consider what improvement measures they would like to see implemented in the town centre. Table A5.64 summarises the findings. The most frequently identified measure was to increase the choice and range of shops (78%). Other frequently identified, but perhaps simpler measures to implement from a public sector perspective included improved street paving (65%), more street cleaning (68%), improved signposting (68%). The provision of more entertainment/leisure facilities and greater promotion of the town centre were also identified as improvement measures by 65% of respondents.

Table A5.64: Potential measures to improve Millom Town Centre

Improvement measure	% respondents
Increased choice/range of shops	78
More national multiples	20
Foodstore in the Town Centre	18
Improved street paving	65
Improved street furniture	58
Improved built environment	35
Lower parking charges	18
Flexible parking	38
More street cleaning	68
Improved public transport	58
Improved access by foot and cycle	25
More entertainment/leisure facilities	65
More quality restaurants/pavement cafes	48
More specialist markets	55
More cultural facilities (i.e. Theatre)	53
Improved security/CCTV	63
Greater promotion/marketing of the centre	65
Improved signposting	68
Public toilets	55

When asked what specific support would help their business, over half of respondents (54%) identified shop front improvement grants. Just under 1/5 identified that they would benefit from marketing assistance, whilst a town centre manager and training were identified by 16% and 11% of respondents respectively.

A5.9.11 Accessibility

The main town centre bus stops are located centrally in the town centre at the Market Square. Millom railway station, which is on the West Cumbria Coast line, is also located in close proximity to the town centre. The majority (63%) of the business survey respondents considered accessibility by public transport to Millom town centre to be 'poor'. Access by foot and cycle was viewed more positively with 70% of respondents rating this as 'average'. 58% of respondents identified that they would like to see improved access by public transport to the town centre, whilst 25% suggested improved access by foot/cycle as being beneficial. Improved signposting was also identified by a significant 68% of respondents as a potential improvement measure.

In addition to on street parking, there are two public car parks serving the town centre providing over 71 spaces. Just 10% of the business survey respondents considered the town centre car parks to be 'good', whilst 43% consider them 'average' and 47% 'poor'. 38% of respondents viewed inadequate customer car parking as a barrier to their trading performance. When considering what improvements they would like to see in the town centre, 18% identified lower car parking charges and 38% more flexible parking.

A5.9.12 Perception of safety and crime

35% of respondents to the Millom business survey identified anti-social behaviour as a barrier to their trading performance. Only 8% of respondents considered security in Millom to be 'good' and the majority (53%) considered it to be 'poor'. 70% of respondents rated personal safety in Millom to be 'average', with 22% considering this aspect of the town centre to be 'poor'. 63% of all respondents would like to see improved security/CCTV in Millom town centre.

A5.9.13 Quality of environment

Significantly, only 3% of the business survey respondents rate the shopping environment in Millom to be 'good', with the majority (58%) considering it to be 'poor'. The pedestrian environment is viewed more favourably with the majority of respondents (55%) rating it as 'average', although 40% also consider this aspect to be 'poor'. When considering improvement measures for the town centre, 35% of respondents suggested improvements to the built environment. Significantly, 65% wish to see improvements to street paving and 58% improvements to street furniture. 50% of respondents identified the poor quality of the shopping environment as a barrier to their trading performance. 54% of respondents feel that their business would benefit from Shopfront improvement grants.