BERWICK-UPON-TWEED TOWN CENTRE HEALTH CHECK REPORT

Prepared by: Lauren Widdrington & Alyson Forster
Tel: 01670 534757, 01670 534755
E-mail: alyson.forster@northumberland.gov.uk / lauren.widdrington@northumberland.gov.uk
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EXECUTIVE SUMMARY

- 51% of the floorspace in Berwick-upon-Tweed was for retail.
- Shopper’s perceptions of the range of retail provision was somewhat negative - 40% did not think Berwick-upon-Tweed offered a wide choice of shops.
- Shopper’s felt that the range and choice of shops needed to be improved.
- There were more comparison retail (clothing, household goods, furniture, DIY and electrical goods) than convenience or retail service.
- There was 5% of vacant floorspace in Berwick-upon-Tweed.
- The amount of vacant floorspace had reduced when looking at property flows. This was a result of more buildings changing from being vacant to occupied from 2007 to 2008, than occupied to vacant.
- 78% of shoppers interviewed found it easy to travel into the town centre by car.
- 49% of these shoppers felt that the parking in the town centre was either poor or very poor.
- 29 shoppers commented on the lack of parking and a further 9 said parking in general was a problem.
- Berwick-upon-Tweed also has good bus connectivity by the frequency and number of destinations reached from Berwick-upon-Tweed.
- 79% of shoppers interviewed found it easy to travel into the town centre by bus.
- Approximately one quarter of respondents rating the quality, regularity and destinations served by public transport negatively.
- 51% of Berwick-upon-Tweed residents shopped in Berwick-upon-Tweed. 12% of expenditure was lost to Newcastle and a further 7% to the Metro Centre.

Recommendations

- The town centre should be monitored over a number of years to track changes.
- Comparisons can also be made with towns which have similar functions.
• Use class data will take all floors (from which businesses operate) within town centre buildings into consideration, as opposed to solely the ground floor.

• Investigate the location and quantity residential properties within the town centre.

• Work in partnership with local estate agents to gain further insight on property enquiries received.

• Align footfall counts across all town centres to enable fair comparisons. Additionally, footfalls to take place on Sunday to enable a weekly footfall to be estimated.

• A map to show all bus and train routes would prove useful in the analysis process.

• Investigate impact of crime initiatives on shopper’s perception of crime and safety within the town centre.

• Investigate impact of future proposals for Berwick-upon-Tweed on shopper’s overall perception of the town centre.
1.0 INTRODUCTION

1.1 Why Measure Town Centre Performance?

Through Planning Policy Statement 6 (PPS6), the Government sets out its key objectives for town centers. Overall, PPS6 describes the need to promote town centre vitality and viability by planning for the growth and development of existing centres; promoting and enhancing existing centres; by focusing development in such centers; and encouraging a wide range of services in a good environment, accessible to all.

More generally, the UK Government is committed to:

- Enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially-excluded groups.
- Supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity.
- Improving accessibility, ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport.

The importance of town centres and the contribution that they make to the local economy is also highlighted in the Regional Economic Strategy. According to “Leading the Way”, the draft Regional Economic Strategy (2006), thriving town centres are at the heart of our communities and it is essential that they continue to provide a good range of services such as shops, leisure, transport and other services. Town Centres provide employment in many areas and attract new businesses to sustain the local economy. Research has shown the importance of strong Town Centres as the focus for driving wider economic growth and productivity. The Regional Economic Strategy also emphasises the importance of building on the potential of all town centres so that more remote economies and communities of the settlements around them can be supported.

The importance of the role played by town centres is also highlighted in Northumberland Local Area Agreement (LAA). The LAA Economic Development and Enterprise block includes an outcome to improve the impact of public/private sector
intervention on economic performance of Northumberland Town Centres. Whilst stretch targets leading to additional government funding are not proposed for this outcome, it is hoped that improved town centre performance can help achieve other LAA targets.

1.2 What should we measure?

Government policy contained in PPS6 recognises that:
“Comprehensive, relevant and up to date monitoring is essential to the effective planning and management of town centres. It should be used to inform the review of site allocations and town centre policies and enable early signs of change of town centres to be identified and appropriate action taken”.

In order to ensure that monitoring is effective, data collection on the quality, quantity and convenience of retailing in the area and potential capacity for growth or change of shopping centres is essential. In order to measure the vitality and viability and monitor the health of their town centres and how this is changing over time, local authorities should regularly collect information, preferably in co-operation with the private sector, on the following key indicators:

- Diversity of main town centre uses (by number, type and amount of floorspace): the amount of space in use for different functions – such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafes and restaurants; and, hotels.

- The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations.

- The potential capacity for growth or change of centres in the network: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development.

- Retailer representation and intentions to change representation: existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce or close their representation.
• Shopping rents: pattern of movement in Zone A rents within primary shopping areas (i.e. the rental value for the first 6 metres depth of floorspace in retail units from the shop window).

• Proportion of vacant street level property: vacancies can arise even in the strongest town centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators.

• Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental): demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care.

• Pedestrian flows (footfall): a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the center at different times of the day and evening, who are available for businesses to attract into shops, restaurants or other facilities.

• Accessibility: ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions.

• Customer and residents’ views and behaviour: regular surveys will help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. Interviews in the town centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centre. This information could also establish the degree of linked trips.

• Perception of safety and occurrence of crime: should include views and information on safety and security, and where appropriate, information for monitoring the evening and night-time economy.

• State of the town centre environmental quality: should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).
In response to the monitoring requirements set out above, the InfoNet has developed the Northumberland Town Centre Performance System, which is designed to assess the vitality and viability of rural market towns and larger centres within the former coalfield areas. The system uses intelligence from the InfoNet Organisation Database; the Northumberland Property Data Service (NPDS) database; the County Public Transport Team; and from the Community Safety Analysis function maintained for the 6 Crime & Disorder Reduction Partnerships (CDRP’s) in the County. This is complemented by additional primary research designed to capture footfall estimates and shopper perception of town centres. The Service is also designed to complement the Retail Distinctiveness work undertaken for One North East and the Northumberland Strategic Partnership by Millers Consulting; and the Retail Distinctiveness Toolkit that has been developed for use by Town Centre Partnerships and Managers.

The service currently covers the towns of Berwick-upon-Tweed, Amble, Ashington, Bedlington, Belford, Berwick-upon-Tweed upon Tweed, Blyth, Cramlington, Haltwhistle, Hexham, Morpeth, Newbiggin, Ponteland, Prudhoe, Rothbury, Seahouses and Wooler using town centre boundary definitions included in Local Development Frameworks. There will, however, be flexibility to include additional settlements as the system develops.
2.0 DESCRIPTION OF THE TOWN CENTRE

2.1 Berwick-upon-Tweed’s Town Centre Boundary

Throughout this report there are two different boundaries for Berwick-upon-Tweed Town Centre that will be used depending on the section: the town centre boundary as defined by the former Berwick-upon-Tweed Borough Council (Figure 1), and the boundary as defined by Experian (a source of data used in this report) (Figure 2).

The area of Berwick-upon-Tweed Town Centre in relation to the District Council boundary is 435,153.51 m².

**Figure 1: Boundary for Berwick-upon-Tweed Town Centre (District Council)**

Source: Berwick-upon-Tweed Borough Council
Figure 2: Boundary for Berwick-upon-Tweed Town Centre (Experian)
2.2 Berwick-upon-Tweed’s Town Centre – A Definition

The RSS (Regional Spatial Strategies) definition of a town centre is that it “includes a range of different sized centres, including market and country towns, traditional suburban centres, and quite often, the principal centre(s) in a local authority’s area. Town centres contain a Primary Shopping Area, the area where retail development is generally concentrated”.

(From Northumberland County Council): Berwick-upon-Tweed is a key market town set within a distinctive landscape, and benefiting from outstanding buildings and a rich cultural heritage. It is one of only a few walled towns in the UK, and its geographical proximity and connections to both Newcastle and Edinburgh are major economic strengths.

Berwick-upon-Tweed suffers from a declining and ageing population particularly with young people relocating elsewhere to pursue a higher quality of life through better employment, training opportunities and affordable housing. Tourism accounts for most of the economic activity in the area, with food processing, and agriculture-related businesses also important.

The town comprises three parts – the town centre, Tweedmouth and Spittal. It provides an important rural service centre, located on both the A1 and the East Coast Main Railway line. Vacancy rates in the town centre are below the national average, and there is currently only one vacant shop in Marygate, the town’s main street. In the last eighteen months, many new shops and cafes have opened, including a champagne bar, a florists, and a bridal shop. Three major new housing developments have been agreed for the town centre, on the site of the former Playhouse Cinema, the former Youngman’s store, and the former Blackburn and Price car dealer premises, although it is likely that these will now be delayed until the property market improves. A new edge-of-town Tesco Supermarket has been given the go-ahead, and subject to the detailed plans being agreed, construction is likely to begin later this year.
2.3 History and Development of Berwick-upon-Tweed

Berwick-upon-Tweed is the northernmost town in England. It is situated in North Northumberland, 4km from the Scottish Borders, at the lowest crossing point of the river Tweed.

It is unclear as to where the name ‘Berwick-upon-Tweed’ derived from. ‘Ber’ may have come from ‘baer’ (meaning ‘Barley’) or ‘bar’ referring to the headland which cuts across the Tweed estuary. ‘Wick’ may have derived from ‘vik’ (meaning ‘bay’) or ‘wic’ (meaning ‘settlement’). An alternative suggestion is that ‘Berwick-upon-Tweed’ means ‘Corn Farm’.

Berwick-upon-Tweed has had a turbulent history in which it changed hands at least 13 times during over 300 years of Border warfare. It was finally captured by Richard Duke of Gloucester in 1482, and has remained under the administration of England since this time. Walls were built in the 14th century to protect the town. These were replaced in 1558-80, and this is now the only example of an intact Elizabethan town wall in England.

In the 18th Century, Berwick-upon-Tweed was a thriving port and market town. The harbour was improved in the late 18th and 19th centuries, and by the early 19th century it had become the third most improvement grain exporting port in the UK.

In 1846-7, the railway was brought to Berwick-upon-Tweed on the north side of the river Tweed, and Tweedmouth on the south side. A temporary viaduct over the river was built 18 months later, and the more permanent Royal Border Railway Bridge in 1850. The bridge is still in use, and this, together with the Old Bridge (1634) and the Royal Tweed Bridge which carries the old A1 into the town (1928), forms a key feature of the town.

The railway caused a decline in the harbour and in the fishing fleet. However, commercial operations from the port have recently been revitalised, and it is now the second largest Northumberland port.
Today, Berwick-upon-Tweed-upon-Tweed is a popular tourist resort, with a population of 11,665. It has a market day twice weekly on Wednesdays and Saturdays, and also has a Farmer’s market on the last Sunday of each month. As well as the town wall walk, there are many things to see and do in and around Berwick-upon-Tweed, including visiting the Berwick-upon-Tweed Barracks Museum (1719) and the spired town hall (1754), and attending the events of the Riding of the Bounds and the Border Marches.

\[1\] 2001 census
3.0  DIVERSITY OF USES

The diversity of uses within a town centre contributes to the attractiveness of the centre to the local community. In this section the use class of buildings within the town centre will be investigated in terms of the percentage of floorspace occupied within the town centre and which areas of the town centre particular uses of buildings are situated. This chapter will also look at the events that take place throughout the year in Berwick-upon-Tweed Town Centre and also the opinions of shoppers surveyed on the range of retail provision in Berwick-upon-Tweed.

The full breakdown of use class analysed in this section can be found in Appendix 1.
3.1 Diversity of Use within Town Centre

Figure 3 shows that just over half (58%) of the floorspace in Berwick-upon-Tweed Town Centre are classed as shops. Financial and professional services account for 9% of the floorspace in Berwick-upon-Tweed, with businesses occupying 8%.

Figure 3: Floorspace by Use Class

Source: Experian
Figure 4: Building Use class for Berwick-upon-Tweed Town Centre

Source: Experian
The map (Figure 4) shows that the majority of shops within the town centre are clustered around Marygate which is the main street. The main cluster of financial and professional services is situated on Hide Hill. Businesses are generally distributed evenly throughout the town centre. Restaurants are also distributed throughout Berwick-upon-Tweed with a particular cluster around Bridge Street and behind Marygate.

It must be noted that the use class information in this section is based on the ground floor of the premises from the data that was provided by Experian, and with the assumption that the majority of the commercial property in the town centre is situated on the ground floor.

3.2 Events

There are a number of events that happen throughout the year. Every Saturday the Market takes place at Marygate. A Traditional Music session is held at ‘The Pilot Inn, Low Greens every Thursday. Family Fun Days every Sunday in July at the Marshall Meadows Hotel, where there is a barbecue, bouncy castle, football and garden games for all the family. The League of Friends Summer Fete is held in the Guildhall, Town Hall, Marygate from 10am-12.30pm this normally takes place in July, also held in July is the Berwick-upon-Tweed Animal Rescue Kennels novelty pet show and fun day at the stanks from 11.30 till 4pm. The Berwick-upon-Tweed Food Festival which takes place on September 12-13th 2009, this is a feast of culture, heritage and food which is centred round Berwick-upon-Tweed’s 18th Century Barracks with venues and events throughout the town. There is a producers market, tasting sessions, demonstrations, gardeners produce, real ale tent, photographic displays, historical re-enactments, music, competitions all organised by Slow Food. A producers market ran by Slow Food is held in the Buttermarket form 9.30am till 1.30pm in August. The Christmas lights switch on takes place on the 23rd November.

3.3 Satisfaction with the range of provision – retail

Question 14 in the Berwick-upon-Tweed Shopper Questionnaire asked:
To what extent do you agree/disagree with the statement “On the whole, Berwick-upon-Tweed offers a wide choice of quality shops”?

The level of disagreement with this statement was considerably higher than the level of agreement (33% vs. 17% of respondents) (Figure 5). The majority of respondents (47%) neither agreed nor disagreed.

Figure 5: How would you rate “On the whole, Berwick-upon-Tweed offers a wide choice of quality shops”?

(Excludes 'don't know' responses unless otherwise specified)

Source: Shopper Surveys

Base: 288 respondents
4.0 RETAIL TRENDS

The range and diversity of the retail offer directly influences the appeal of a town centre to visitors and shoppers. Convenience goods are consumer goods purchased on a regular basis, including food, groceries, toiletries and cleaning materials. Comparison goods are durable goods such as clothing, household goods, furniture, DIY and electrical goods.

In this section, the category of shops will be investigated and analysed in terms of both category and whether they are part of a multiple chain or are an independent business.

Figure 6: Multiple Chain and Independent Businesses by Category - Berwick-upon-Tweed

Figure 6 shows that in Berwick-upon-Tweed town centre, the majority of businesses are comparison retail (58 independent, 37 multiple chain). The category which has the 2nd highest amount of businesses is leisure services: 38 of which are independent.
and 7 multiple chain. There are 22 convenience retail premises and 31 retail service in total.
5.0 RETAILER DEMAND

This section aims to investigate the types of property enquiries that are being made in the town centre and whether the enquirer was of local, regional or national significance. The aim was also to investigate the new occupiers within the town centre over the past year, for which we have referred to section 7.2 (Changes in Town Centre Occupiers 2007 – 2008).

5.1 Interest in Vacant Outlets within the Town Centre 2007 - 2008

Figure 7 shows that the enquiry for vacant properties within Berwick-upon-Tweed Town Centre as recorded on the Northumberland Property Database (April 2007 – March 2008) was local (within Northumberland). The only enquiry recorded was for Berwick-upon-Tweed Workspace which is a business centre consisting of 35 offices situated at the heart of Berwick-upon-Tweed Town Centre on Marygate. The remaining enquiries for the Berwick-upon-Tweed area were all for properties in Ramparts Business Park which is an out of town business park, from both local and national enquirers. However, it must be noted that this data is based solely on one source (Northumberland Property Database) and other sources may provide further insight.
Figure 7: Property Enquiries for Berwick-upon-Tweed Town Centre April 2007 – March 2008

Property Enquiries for Berwick Town Centre April 2007 - March 2008

Source: Northumberland Property Search.com
5.2 A Review of New Town Centre Occupiers

6.0 RETAIL RENTS AND YIELDS

Retail rent and yield are important indicators of viability. This section will investigate the zone A rent for properties within the town centre and also the yield of Berwick-upon-Tweed Town Centre in comparison with the other town centres in Northumberland for which this information was available; the North East; and England.

6.1 Zone A Rental Information

“Zoning is a method of valuation where the highest level of value is attributable to the front part of the shop because that is the part nearest to the pavement, the frontage. It is therefore the part that all shoppers must pass to enter the shop and is also the part where the main display is generally situated in order to entice customers into the shop. The zoning theory is that the level of value within a shop decreases as the shop depth increases. The Valuation Office adopts a zoning pattern of three zones (A, B and C), each measuring 6·10 metres in depth, and then a remainder. The principle is to determine a price for zone A (the highest level of value), use half that price for zone B, half the zone B price for zone C and half the zone C price for the remainder. This is known as "halving back" though in reality the areas are adjusted in the valuation process with each area being expressed "in terms of zone A" (ITZA). The zoning process is restricted to areas of ground floor retail space. Other parts of the property will be measured to NIA and be valued in relation to a fraction of the zone A price.” (Valuation Office, October 2008)

Figure 8 shows the zone A rental information from the Valuation Office. The values relate to the 2005 Rating List, which are based on a valuation date of 1 April 2003. The properties have been banded by intervals of £100, as we cannot publish the exact figure for each building. This will also make it easier to identify trends when analysing the data on the map.

There are some properties which are shown as “unknown” on Figure 8. These premises could be retail in nature but are not valued on a zoned approach. The reason for this is that zoning is generally not used in various circumstances including:
• Larger retail properties (i.e. shops with a NIA (net internal area) greater than 1500m²).

• Where the retail areas are spread over several floors, again resulting in the Zone A being only a small fraction of the total.

• Larger shops may not have ‘traditional’ shop fronts, such that the zoning approach is not appropriate.

• The ‘market’ does not typically zone larger shops when letting and the VOA tries to follow the market in its analysis and valuation.

Figure 8: Valuation Office Zone A rental prices for Berwick-upon-Tweed Town Centre
Valuation Office Zone A rental prices for Berwick upon Tweed Town Centre

Figure 8 shows that the properties on Marygate generally have the highest zone A rent, with a large proportion being £500 - £599 per m², especially in the centre of this particular street. The prices decrease towards the edge of the town centre (including Hide Hill and Castlegate) and either end of Marygate where the majority of properties are £100 - £199 per m², £200 - £299 per m², or unknown. Only on the very outskirts of the town centre do some properties have zone A rents of £0 - £99 per m² namely on the top end of Church Street and the top end of Castlegate.
6.2 Yield

Yield “is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as percentage of the capital value.” ² It “provide a consistent basis for understanding how the property market assesses the comparative attractiveness of shop investments in different locations across the country... low yields indicate that a town is considered to be attractive and as a result be more likely to attract investment than a town with high yields.”³

\[
\text{Yield} = \frac{\text{Annual Rent}}{\text{Capital Value} / \text{Sale Price of Property}}
\]

Source: Valuation Office (www.voa.gov.uk)

In Northumberland, this data is only available for 5 towns: Berwick-upon-Tweed, Ashington, Berwick-upon-Tweed upon Tweed, Blyth and Hexham.

Figure 9: Shopping Centre Yields - Berwick-upon-Tweed

² www.voa.gov.uk
³ www.voa.gov.uk
Figure 9 shows that in 2001 (April and October), the average yield for Berwick-upon-Tweed (8.5 in both months) was just slightly lower than the average for Northumberland (8.6 in both months), but higher than the North East of England (8.22 in both months), and England (8.10 and 8.08 respectively). In 2002 (April and October), the average for Northumberland dropped to 8.25, and below Berwick-upon-Tweed’s constant 8.5. The most significant change to the yield in Berwick-upon-Tweed occurred between January 2005 and July 2005 where the yield dropped from 9 to 7 within the space of 6 months. The reason for this could be the result of significant regeneration in the area at this time.

Berwick-upon-Tweed’s yield continued to drop at a fairly steady rate to 5.75 in both January and July 2007 which was the last time the figures were published. Since July 2005, the yield for Berwick-upon-Tweed has also remained lower than the averages for Northumberland, the North East and England indicates that based on yield, it has been derived that there is less of a “risk” associated with setting up business in Berwick-upon-Tweed.

6.3 Average Rental Rate

The average monthly rental rate for vacant commercial property in Berwick-upon-Tweed town centre between 1\textsuperscript{st} January 2006 and 31\textsuperscript{st} December 2007 was £163.66 per square metre. Figure 10 show this rate in comparison with other town centres. According to Figure 10, in comparison with other Northumberland town centres, Berwick-upon-Tweed has the 4\textsuperscript{th} highest average monthly rental rate in Northumberland for the 11 towns recorded here with only Ponteland, Morpeth and Ashington with higher average rental rates. However, it must be noted that these rental figures are based solely on properties that were vacant between 1\textsuperscript{st} January 2006 and 31\textsuperscript{st} December 2007 and does not take the rental prices of buildings that were occupied throughout this period into consideration.

Figure 10: A comparison on average rental prices for commercial property between Berwick-upon-Tweed and other Northumberland Towns
A comparison on average rental prices for commercial property between Berwick and other Northumberland Towns

Source: Northumberland Property Database
7.0 VACANCY RATES

All town centres experience a baseline level of vacancy rates and this should not always be interpreted as a sign of weakness. A large number of vacant units within centres may indicate decline related to poor performance of the town or that shop premises are inadequate to meet the demands of modern retailers. Furthermore, units may be located in parts of the centre unsuited to retailers' requirements. This section will investigate the vacancy rates of premises within the town centre by road and overall vacancy rates within the town. Additionally, this section will look at property flows within Berwick-upon-Tweed town centre between 2007 and 2008 in terms of both primary activity type and type of change (i.e. change in occupier, occupied to vacant, vacant to occupied).

It must be noted that the vacancy information in this section is based on the ground floor of the premises from the data that was provided by Experian the majority of the commercial property in the town centre is situated on the ground floor.

7.1 Vacancy Rates of Premises

Figure 11 shows that the streets within Berwick-upon-Tweed Town Centre with the most vacant premises are Chapel Street and Foul Ford each with 100% of premises vacant.

Silver Street was ranked 3rd when looking at number of vacant buildings with 67%. However, when looking at vacancy rates in terms of floorspace, Silver Street was ranked 5th with 35% of its total floorspace vacant. The street with the 3rd most vacant floorspace in Berwick-upon-Tweed was Walkergate with 73% of premises vacant.

Figure 12 shows that in Berwick-upon-Tweed Town Centre, there were 91% of occupied premises and 9% of vacant premises overall.
Figure 11: Vacancy Rates of Premises

<table>
<thead>
<tr>
<th>Road</th>
<th>Vacant (number of buildings)?</th>
<th>Rank - vacancy</th>
<th>Vacant (floorspace sqm)?</th>
<th>Rank - vacancy</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHAPEL STREET</td>
<td>100%</td>
<td>1</td>
<td>100%</td>
<td>1</td>
</tr>
<tr>
<td>FOUL FORD</td>
<td>100%</td>
<td>1</td>
<td>100%</td>
<td>1</td>
</tr>
<tr>
<td>SILVER STREET</td>
<td>67%</td>
<td>3</td>
<td>35%</td>
<td>5</td>
</tr>
<tr>
<td>WALKERGATE</td>
<td>30%</td>
<td>4</td>
<td>73%</td>
<td>3</td>
</tr>
<tr>
<td>WOOLMARKET</td>
<td>29%</td>
<td>5</td>
<td>25%</td>
<td>6</td>
</tr>
<tr>
<td>SANDGATE</td>
<td>14%</td>
<td>6</td>
<td>36%</td>
<td>4</td>
</tr>
<tr>
<td>GOLDEN SQUARE</td>
<td>10%</td>
<td>7</td>
<td>3%</td>
<td>11</td>
</tr>
<tr>
<td>WEST STREET</td>
<td>9%</td>
<td>8</td>
<td>7%</td>
<td>7</td>
</tr>
<tr>
<td>CHURCH STREET</td>
<td>6%</td>
<td>9</td>
<td>3%</td>
<td>11</td>
</tr>
<tr>
<td>BRIDGE STREET</td>
<td>6%</td>
<td>10</td>
<td>7%</td>
<td>7</td>
</tr>
<tr>
<td>CASTLE GATE</td>
<td>6%</td>
<td>11</td>
<td>4%</td>
<td>10</td>
</tr>
<tr>
<td>MARYGATE</td>
<td>5%</td>
<td>12</td>
<td>5%</td>
<td>9</td>
</tr>
<tr>
<td>HIDE HILL</td>
<td>3%</td>
<td>13</td>
<td>2%</td>
<td>13</td>
</tr>
<tr>
<td>BORDER COURT</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>BRIDGE END</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>CRAWFORDS ALLEY</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>DEWAR LANE</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>EASTERN LANE</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>QUAY WALLS</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>SCOTTS PLACE</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>SIDEY COURT</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>ST MARYS PLACE</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>TWEED STREET</td>
<td>0%</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Experian
Figure 12: Is a Property Vacant

![Pie chart showing 91% of properties are occupied and 9% are vacant.]

Source: Experian

7.2 Changes in Town Centre Occupiers 2007 – 2008 (Property Flows)

Figure 13 shows changes in Town Centre Occupiers in 2007 and 2008 within Berwick-upon-Tweed Town Centre. The graph shows the number of vacant outlets have decreased in from 21 in 2007 to 18 in 2008. There has also been a decrease in the number of Video Rental and Printing and Photocopying from 2 in 2007 to 0 in 2008 showing that these types of businesses have disappeared altogether from Berwick-upon-Tweed town centre within this time.

However, there has been a number of increases, with the most significant being and increase of Beauty Salons – there were just 2 in 2007 but 6 by 2008. There were no Coffee Shops, Delicatessens or Grocers in 2007, but 2 of each in 2008. Estate Agents increased from 6 in 2007 to 8 in 2008.
Figure 13: Changes in Primary Activity Type 2007-2008

Source: Experian

Figure 14 shows the type of changes in premises in Berwick-upon-Tweed Town Centre between 2007 and 2008. Over half (53%) of the changes were a change in occupier. Almost a third (31%) of these changes were premises that were vacant in 2007 but were occupied in 2008. Only 16% of premises were occupied in 2007 but vacant in 2008, therefore a reduction of vacant premises is evident.
Figure 14: Type of Changes in Premises 2007-2008

Source: Experian
8.0 PEDESTRIAN FLOWS

Pedestrian counts are a useful measure of vitality, in relation to the number and movement of people in different parts of the town centre and at different times of the day. The counts provide a clear picture of footfall patterns across the centre and of the number of people in the town. Over time trends can be identified and the success or decline of locations monitored. This section will analyse the results of the footfall counts that took place in Berwick-upon-Tweed Town Centre in November 2008 and estimate a weekly footfall total.

8.1 Footfall methodology

Footfall counts were taken for 10 minutes of each hour between 9am and 5pm on Thursday 13\textsuperscript{th} November, Friday 14\textsuperscript{th} November and Saturday 15\textsuperscript{th} November 2008. They were carried out by interviewers at four “access points” within the town centre (see Figure 15). These counts were used to give estimates of hourly and daily pedestrian rates.

8.2 Estimates of footfall

It is estimated that the footfall for a typical Saturday in Berwick-upon-Tweed town centre is around 21,300, although this will obviously vary depending on the time of year. The data suggests that the footfall on a Thursday is slightly lower than this (around 20,400) and substantially lower on a Friday.

\begin{table}[h]
\centering
\begin{tabular}{|l|c|c|c|}
\hline
Location & Thursday & Friday & Saturday \\
\hline
Co-op Travel, 124 Marygate & 3,228 & 2,316 & 4,884 \\
Somerfield, 2 Castlegate & 4,776 & 4,758 & 5,622 \\
WHSmiths, 69-75 Marygate & 5,142 & 5,628 & 6,324 \\
Boots, 60-68 Marygate & 7,284 & 4,824 & 4,506 \\
Total & 20,430 & 17,526 & 21,336 \\
\hline
\end{tabular}
\caption{Estimated daily footfall in Berwick-upon-Tweed Town Centre}
\end{table}

Source: Northumberland Footfall Counts

\footnote{Daily footfall has been estimated by summing the footfall counts for each location, then multiplying the totals by 6 to account for the footfall count being carried out for 10 minutes in each hour.}
On this occasion, footfalls were calculated for the individual days that they were carried out to give an indication of daily footfall totals on particular “types” of day of the week. In the future, it is the intention to calculate average weekly footfalls for each town.
9.0 ACCESSIBILITY

The availability of different access modes to a town centre is important if shoppers are to be attracted to a centre for frequent visits. This section will investigate various aspects of accessibility into Berwick-upon-Tweed town centre including the different methods of transport used to access the town centre by shoppers that were surveyed, their origin and their perceptions on accessibility and transport, availability of parking within the town centre and bus connectivity.

9.1 Shoppers travelling to town by car

39% of respondents travelled into Berwick-upon-Tweed by car on the day of the interview (Figure 16). 65% of these said that they go into Berwick-upon-Tweed at least once a week during the daytime (although it cannot be deduced how often they use a car for these trips). This figure dropped to 14% in the evenings.

Figure 16: Frequency of visit to the town centre by those respondents travelling in by car

(Excludes 'don't know' responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires

Base: 115 for daytime; 115 for evening
Over half (54%) of the respondents that travelled by car found it fairly easy or very easy to travel into Berwick-upon-Tweed town centre. 14% found it fairly or very difficult (Figure 17).

**Figure 17: How easy/difficult do you feel it is to travel into Berwick-upon-Tweed town centre (those respondents that travelled by car)**

(Excludes 'don't know' responses unless otherwise specified)

```
<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>14%</td>
</tr>
<tr>
<td>Fairly easy</td>
<td>13%</td>
</tr>
<tr>
<td>Neither easy nor difficult</td>
<td>1%</td>
</tr>
<tr>
<td>Fairly difficult</td>
<td>40%</td>
</tr>
<tr>
<td>Very difficult</td>
<td>32%</td>
</tr>
</tbody>
</table>
```

Source: Northumberland InforNet Shopper Questionnaires

Base: 115

**9.2 Access to car parking**

Parking in Berwick-upon-Tweed town centre was not rated very highly (Figure 18). Only 21% of respondents rated the availability of public parking spaces as good or very good, whereas nearly half (45%) gave a poor or very poor rating. Similarly, the safety/security of parking facilities and the availability of disabled spaces were given a positive rating by only 18% of respondents, whereas over one third gave a negative rating in each case.
Parking was mentioned by a number of people when asked what the main problems were with the shopping experience in Berwick-upon-Tweed town centre:

- “Parking” (2 responses).
- “Parking in general”.
- “Poor parking overall”.
- “Parking is a nightmare!”
- “Parking spaces” (2 responses).
- “Not many places to park”.
- “Need more disabled parking”.
- “Parking limited”.

Source: Northumberland Infonet Shopper Questionnaires

Base: 164 to 211 respondents depending on question (note: this excludes those respondents that gave a ‘don’t know’ response)
When asked how they would make the town centre better, 29% gave the response ‘improved parking’. Two verbatim responses were also noted:

- “Better disabled parking”.
- “More spaces to park”.

9.3 Cost of parking

Respondents did not rate the cost of parking particularly highly. Nearly one half (46%) gave a poor or very poor rating, and only 16% gave a positive rating (Figure 19).

Figure 19: Percentage of respondents giving each rating for the cost of parking

(Excludes ‘don’t know’ responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires
Base: 202 respondents (note: this excludes those respondents that gave a ‘don’t know’ response)

9.4 Berwick-upon-Tweed’s Car parks

Figures 20 and 21 show the location of car parks within and surrounding Berwick-upon-Tweed Town Centre.
## Figure 20: Location of Car Parks

<table>
<thead>
<tr>
<th>Location</th>
<th>Car Park</th>
<th>Cost of Parking</th>
<th>Type of Car Park</th>
<th>Spaces</th>
<th>Long/Sh short Stay</th>
<th>Disabled Spaces</th>
<th>Coach Parking</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Error! Hyperlink reference not valid.</td>
<td>Up to 1 hour £1, up to 2 hours £1.50</td>
<td>Surface Car Park</td>
<td>short stay</td>
<td></td>
<td></td>
<td></td>
<td>The Parking Partnership - Joint permit with Berwick-upon-Tweed District Council and Castle Morpeth Borough Council, permits are valid in the Berwick-upon-Tweed-upon-Tweed.</td>
</tr>
<tr>
<td>2</td>
<td>Error! Hyperlink reference not valid.</td>
<td>1 hr £1, 1-3 hrs £1.80, All day £2.50</td>
<td>Surface Car Park</td>
<td>long stay</td>
<td></td>
<td></td>
<td></td>
<td>Permits are valid in the Berwick-upon-Tweed-upon-Tweed Borough and also in Berwick-upon-Tweed and in Castle Morpeth. Annual permit £85.00, half yearly £50.00. Weekly permit £9.00.</td>
</tr>
<tr>
<td>3</td>
<td>Error! Hyperlink reference not valid.</td>
<td>1 hr £1, 1-3 hrs £1.80, All day £2.50</td>
<td>Surface Car Park</td>
<td>long stay</td>
<td></td>
<td></td>
<td></td>
<td>The Parking Partnership -</td>
</tr>
<tr>
<td>4</td>
<td>Error! Hyperlink reference not valid.</td>
<td>Up to 1 hr £1.00, up to 2 hrs £1.50</td>
<td>Surface Car Park</td>
<td>short stay</td>
<td></td>
<td></td>
<td></td>
<td>The Parking Partnership - Joint</td>
</tr>
<tr>
<td>5</td>
<td>Error! Hyperlink reference not valid.</td>
<td>Up to 1 hour £1.00, 1-3 hrs £1.80</td>
<td>Surface Car Park</td>
<td>Max stay 3 hrs</td>
<td></td>
<td></td>
<td></td>
<td>In short/medium stay areas, permit holders must also display a parking disk showing their arrival time. Permits are valid in the Berwick-upon-Tweed-upon-Tweed Borough and also in Berwick-upon-Tweed and in Castle Morpeth.</td>
</tr>
<tr>
<td>6</td>
<td>Error! Hyperlink reference not valid.</td>
<td>1 hr £1, 1-3 hrs £1.80, All day £2.50</td>
<td>Surface Car Park</td>
<td>150</td>
<td></td>
<td></td>
<td></td>
<td>The Parking Partnership - Joint permit with Berwick-upon-Tweed District Council and Castle Morpeth Borough Council, permits are valid in the Berwick-upon-Tweed-upon-Tweed Borough and also in Berwick-upon-Tweed and in Castle Morpeth.</td>
</tr>
<tr>
<td>7</td>
<td>Error! Hyperlink reference not valid.</td>
<td>£0.60</td>
<td>Surface Car Park</td>
<td>max stay 2 hrs</td>
<td></td>
<td></td>
<td></td>
<td>In short/medium stay areas, permit holders must also display a parking disk showing their arrival time. Permits are valid in the Berwick-upon-Tweed-upon-Tweed Borough and also in Berwick-upon-Tweed and in Castle Morpeth.</td>
</tr>
<tr>
<td>8</td>
<td>Error! Hyperlink reference not valid.</td>
<td>Minimum Cost of Parking: £0.50</td>
<td>Surface Car Park</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>The Parking Partnership - Joint permit with Berwick-upon-Tweed District Council and Castle Morpeth Borough Council, permits are valid in the Berwick-upon-Tweed-upon-Tweed Borough and also in Berwick-upon-Tweed and in Castle Morpeth.</td>
</tr>
<tr>
<td>9</td>
<td>Error! Hyperlink reference not valid.</td>
<td>1 hr £1, 1-3 hrs £1.80, All day £2.50</td>
<td>Surface Car Park</td>
<td>long stay</td>
<td></td>
<td></td>
<td></td>
<td>The Parking Partnership - Joint permit with Berwick-upon-Tweed District Council and Castle Morpeth Borough Council, permits are valid in the Berwick-upon-Tweed-upon-Tweed Borough and also in Berwick-</td>
</tr>
</tbody>
</table>
### BERWICK-UPON-TWEED TOWN CENTRE HEALTH CHECK REPORT

<table>
<thead>
<tr>
<th>10</th>
<th>Error! Hyperlink reference not valid.</th>
<th>Surface Car Park</th>
<th>long stay</th>
<th>upon-Tweed and in Castle Morpeth.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2 hr £1, 1-3 hrs £1.80, All day £2.50</td>
<td></td>
<td></td>
<td>The Parking Partnership - Joint permit with Berwick-upon-Tweed District Council and Castle Morpeth Borough Council, permits are valid in the Berwick-upon-Tweed-upon-Tweed Borough and also in Berwick-upon-Tweed and in Castle Morpeth.</td>
</tr>
</tbody>
</table>

Source: Berwick-upon-Tweed B.C and Transport Direct
9.5 Bus Connectivity

The direct connections linking Berwick-upon-Tweed to surrounding towns and villages are listed below.

**Figure 22: Destination and Frequency of Buses from Berwick-upon-Tweed**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Mon - Fri</th>
<th>Sat</th>
<th>Sun</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eyemouth</td>
<td>At least one per hour</td>
<td>At least one per hour</td>
<td>At least one per hour</td>
</tr>
<tr>
<td>Tweedmouth</td>
<td>Approx 4 per hour</td>
<td>Approx 4 per hour</td>
<td>At least one per hour</td>
</tr>
<tr>
<td>Cornhill on Tweed</td>
<td>1 per day</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Chirnside</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>4 per day</td>
</tr>
<tr>
<td>Wooler</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>None</td>
</tr>
<tr>
<td>Scremerston</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>1 every 2 hours</td>
</tr>
<tr>
<td>Haggerston</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>1 every 2 hours</td>
</tr>
<tr>
<td>Belford</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>1 every 2 hours</td>
</tr>
<tr>
<td>Berwick-upon-Tweed</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>1 every 2 hours</td>
</tr>
<tr>
<td>Morpeth</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>1 every 2 hours</td>
</tr>
<tr>
<td>Location</td>
<td>Via Berwick-upon-Tweed</td>
<td>Via Berwick-upon-Tweed</td>
<td>Via Berwick-upon-Tweed</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------</td>
<td>-------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Amble</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seahouses</td>
<td>Via Belford</td>
<td>Via Belford</td>
<td>Via Belford</td>
</tr>
<tr>
<td>Ashington</td>
<td>Via Berwick-upon-Tweed</td>
<td>Via Berwick-upon-Tweed</td>
<td>Via Berwick-upon-Tweed</td>
</tr>
<tr>
<td>Allanton</td>
<td>4 per day</td>
<td>4 per day</td>
<td>None</td>
</tr>
<tr>
<td>Ancroft</td>
<td>8 per day</td>
<td>5 per day</td>
<td>None</td>
</tr>
<tr>
<td>Bamburgh</td>
<td>6 per day</td>
<td>7 per day</td>
<td>None</td>
</tr>
<tr>
<td>Beadnel</td>
<td>6 per day</td>
<td>7 per day</td>
<td>None</td>
</tr>
<tr>
<td>Beal</td>
<td>None</td>
<td>1 or 2 per day</td>
<td>None</td>
</tr>
<tr>
<td>Birgahm</td>
<td>7 per day</td>
<td>7 per day</td>
<td>4 per day</td>
</tr>
<tr>
<td>Bowsden</td>
<td>6 per day</td>
<td>6 per day</td>
<td>None</td>
</tr>
<tr>
<td>Branxton</td>
<td>4 per day</td>
<td>6 per day</td>
<td>None</td>
</tr>
<tr>
<td>Burnmouth</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Churnside</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>4 per day</td>
</tr>
<tr>
<td>Clintmains</td>
<td>6 per day</td>
<td>6 per day</td>
<td>4 per day</td>
</tr>
<tr>
<td>Cockburnspath</td>
<td>6 per day</td>
<td>6 per day</td>
<td>3 per day</td>
</tr>
<tr>
<td>Coldstream</td>
<td>7 per day</td>
<td>7 per day</td>
<td>4 per day</td>
</tr>
<tr>
<td>Cornhill on Tweed</td>
<td>1 per day</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Doddington</td>
<td>6 per day</td>
<td>6 per day</td>
<td>None</td>
</tr>
<tr>
<td>Dunbar</td>
<td>6 per day</td>
<td>6 per day</td>
<td>3 per day</td>
</tr>
<tr>
<td>Duns</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>7 per day</td>
</tr>
<tr>
<td>Earliston</td>
<td>9 per day</td>
<td>7 per day</td>
<td>7 per day</td>
</tr>
<tr>
<td>East Linton</td>
<td>6 per day</td>
<td>6 per day</td>
<td>3 per day</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>6 per day</td>
<td>6 per day</td>
<td>3 per day</td>
</tr>
<tr>
<td>Foulden</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>4 per day</td>
</tr>
<tr>
<td>Felton</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>5 per day</td>
</tr>
<tr>
<td>Fishwick</td>
<td>3 per day</td>
<td>5 per day</td>
<td>None</td>
</tr>
<tr>
<td>Galashiels</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Grantshouse</td>
<td>6 per day</td>
<td>6 per day</td>
<td>3 per day</td>
</tr>
<tr>
<td>Greenlaw</td>
<td>8 per day</td>
<td>7 per day</td>
<td>7 per day</td>
</tr>
<tr>
<td>Haddington</td>
<td>6 per day</td>
<td>6 per day</td>
<td>3 per day</td>
</tr>
<tr>
<td>Highcliffe</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>At least 1 per hour</td>
</tr>
<tr>
<td>Horncliffe</td>
<td>1 per day</td>
<td>1 per day</td>
<td>None</td>
</tr>
<tr>
<td>Hutton</td>
<td>4 per day</td>
<td>4 per day</td>
<td>None</td>
</tr>
</tbody>
</table>
9.6 Shoppers travelling to town by bus

35% of respondents travelled into Berwick-upon-Tweed town centre by bus on the day of the interview. Nearly all of these (96%) said that they visit the town centre at least once a week during the daytime (although it cannot be deduced how often they use a bus for these trips). This figure dropped to 27% in the evenings (Figure 23).

<table>
<thead>
<tr>
<th>Innerwick</th>
<th>6 per day</th>
<th>6 per day</th>
<th>3 per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kelso</td>
<td>7 per day</td>
<td>7 per day</td>
<td>4 per day</td>
</tr>
<tr>
<td>Lamberton</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Lowick</td>
<td>6 per day</td>
<td>6 per day</td>
<td>None</td>
</tr>
<tr>
<td>Melrose</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Milfield</td>
<td>5 per day</td>
<td>6 per day</td>
<td>None</td>
</tr>
<tr>
<td>Norham</td>
<td>7 per day</td>
<td>7 per day</td>
<td>4 per day</td>
</tr>
<tr>
<td>Paxton</td>
<td>6 per day</td>
<td>6 per day</td>
<td>None</td>
</tr>
<tr>
<td>Prior Park</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Reston</td>
<td>9 per day</td>
<td>10 per day</td>
<td>3 per day</td>
</tr>
<tr>
<td>Roberts Lodge</td>
<td>3-4 per hour</td>
<td>3-4 per hour</td>
<td>2 per hour</td>
</tr>
<tr>
<td>Shilbottle</td>
<td>6 per day</td>
<td>8 per day</td>
<td>5 per day</td>
</tr>
<tr>
<td>Spittal</td>
<td>3-4 per hour</td>
<td>3-4 per hour</td>
<td>2 per hour</td>
</tr>
<tr>
<td>St Abbs</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>St Boswells</td>
<td>6 per day</td>
<td>6 per day</td>
<td>4 per day</td>
</tr>
<tr>
<td>Waren Mill</td>
<td>6 per day</td>
<td>7 per day</td>
<td>None</td>
</tr>
</tbody>
</table>

Source: Travel Search ([http://www.carlberry.co.uk/index.htm](http://www.carlberry.co.uk/index.htm)), North East Travel Line ([http://jplanner.travelinenortheast.info](http://jplanner.travelinenortheast.info))
Figure 23: Frequency of visit to the town centre by those respondents travelling in by bus
(Excludes 'don't know' responses unless otherwise specified)

![Frequency of visit to the town centre by those respondents travelling in by bus](image_url)

Source: Northumberland Infonet Shopper Questionnaires

*Base: 103 for daytime; 103 for evening*

Over two thirds (68%) of the respondents that travelled by bus found it easy or very easy to travel into Berwick-upon-Tweed town centre. 6% found it fairly or very difficult (Figure 24).
Figure 24: How easy/difficult do you feel it is to travel into Berwick-upon-Tweed town centre (those respondents that travelled by bus)
(Excludes ‘don't know’ responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires
Base: 103 respondents

9.7 Train Connectivity
Berwick-upon-Tweed has a major railway station, managed by National Express East Coast, covering the following local destinations. Trains from Newcastle and Edinburgh link to railway lines covering a wider part of the UK.

Figure 25: Destination and Frequency of Trains from Berwick-upon-Tweed

<table>
<thead>
<tr>
<th>Destination</th>
<th>M-Fri</th>
<th>Sat</th>
<th>Sun</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Newcastle upon Tyne</em></td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td><em>Morpeth</em></td>
<td>Early morning and evening service only – 3 trains per day</td>
<td>Early morning and evening service only – 2 trains per day</td>
<td>2 trains in the afternoon</td>
</tr>
<tr>
<td><em>Alnmouth</em></td>
<td>Early morning and evening service only – 7 trains per day</td>
<td>Early morning and evening service only – 7 trains per day</td>
<td>4 trains in the afternoon/evening</td>
</tr>
<tr>
<td><em>Dunbar</em></td>
<td>Approx 1 per hour</td>
<td>Approx 1 every 2 hours</td>
<td>7 trains in the afternoon/evening</td>
</tr>
<tr>
<td><em>Edinburgh</em></td>
<td>Approx 2 per hour</td>
<td>1-2 per hour</td>
<td>Approx 1 per hour in afternoon/evening</td>
</tr>
</tbody>
</table>
9.8 Shoppers travelling to town by train

6 respondents (2%) travelled into Berwick-upon-Tweed town centre by train. All of these found it very easy to travel into the centre.

Half of these respondents said that they visit the town centre once a month during the daytime (although it cannot be deduced how often they use a train for these trips). The other respondents said that they visit every day, less than once a month, or for a one-off visit. In terms of the evenings, 3 respondents said they never visit the town centre, 2 said they visit once a month, and one said that they go there for a one-off visit.

9.9 Perception of Public Transport Services

Less than half of the respondents gave a positive rating for the quality of bus/rail services, the regularity of bus/rail services and the destinations served by public transport. However, less than 12% gave a negative rating for each aspect.

Figure 26: Percentage of respondents giving each rating for public transport related attributes

(Excludes 'don't know' responses unless otherwise specified)

Base : 236 to 242 respondents depending on attribute (note: this excludes those respondents that gave a 'don't know' response)
9.10 Perception of Accessibility

When asked how they would make the town centre better, 12% of respondents gave the response ‘improved accessibility’. 2 people also said that the quality of footpaths was one of the main problems with the shopping experience in Berwick-upon-Tweed town centre.

21% of respondents expressed concern about road safety, and numerous comments were made about difficulty in crossing the roads in Berwick-upon-Tweed town centre:

Main problems with the shopping experience:

- “Bad crossings”.
- “Place to cross. Hundreds of traffic”.
- “Nowhere to cross the road - traffic is really bad”.
- “A lot of pedestrians around and nowhere to cross roads – unsafe”.

How to make the town centre better:

- “Better crossing” (2 responses).
- “Better crossings”.
- “Better crossings for people e.g. zebra”.
- “Make pedestrian crossing…”.
- “Pedestrian crossings - make it look a bit nicer”.
- “Pedestrianised - the roads are bad to cross”.
- “Safer for crossing roads”.
- “Road crossings”.
- “…a new pedestrian crossing”.

9.11 Origin and method of travel of Shoppers Interviewed

As Figure 27 shows, most of the respondents from the Berwick-upon-Tweed Shopper Survey live in the Berwick-upon-Tweed District, with a large proportion living in or around Berwick-upon-Tweed itself. In addition, some respondents came from the Alnwick area, and most of the others came from elsewhere in Northumberland or Tyne & Wear.
A large proportion of the respondents that live in or around Berwick-upon-Tweed travelled in by bus. The majority remainder of these respondents along with those that lived further away travelled by car.

The remaining few respondents were from just outside the Northumberland and Tyne and Wear Region in the Scottish Borders and County Durham. Most of these travelled into Berwick-upon-Tweed by car.

Figure 27: Visitors to Berwick-upon-Tweed within Northumberland and Tyne and Wear

(Excludes 'don't know' responses unless otherwise specified)
Source: Northumberland Infornt Shopper Questionnaires

**Figure 28: Visitors to Berwick-upon-Tweed outside Northumberland**

(Excludes 'don't know' responses unless otherwise specified)
Visitors to Berwick outside of Northumberland and Tyne & Wear (Shopper's Survey) - Home Towns

Source: Northumberland Infonet Shopper Questionnaires
10.0 ENVIRONMENTAL QUALITY OF TOWN

This section will consider various aspects relating to the environmental quality of the town centre. This includes any improvements made within the past 12 months mainly by the District Council and Town Council (where applicable) and shopper’s perceptions of the environmental quality and appearance of the town centre as a whole.

10.1 Review of Recent Improvements

The following improvements have happened over the past 12 months in Berwick-upon-Tweed:

- Planting throughout the town centre, which won a bronze award at the Northumbria in Bloom Awards 2008.

- The town centre planting in Berwick-upon-Tweed was capital funding in 2007/8 of nearly £10K and the rest was Town Committee and Chamber of Trade monies of around £7K for 2008/9. All of the schemes rely heavily on local people volunteering to do the planting and then look after the displays.

- Street furniture has been refurbished through Town Partnership.

10.2 Shopper perception of the town

10.2.1 Pedestrianisation

Views on pedestrianisation were not specifically asked about in the survey. However, a few comments were made relating to this subject:

Main problems with the shopping experience:
- “Should be pedestrianised - main road too busy”.
- “Should be pedestrianised” (2 responses).
- “Congestion, should be pedestrianised”.

How to make the town centre better:

- “Pedestrianised - the roads are bad to cross”.
- “Pedestrianise it” (3 responses).
- “…traffic free zone”.

10.2.2 Signage, Street furniture and Open Spaces

Signage

None of the respondents made any comments about signage.

Street Furniture

Respondents were asked to rate street furniture as part of two different questions (Figure 29). The first question asked for a street furniture rating, and the second asked about the general state of the town centre with regards to street furniture.

The responses to the two questions were quite different. 56% of respondents gave a positive rating for the ‘street furniture’ question versus 77% for the ‘general state’ question.

Figure 29: Street furniture ratings

(Excludes ‘don’t know’ responses unless otherwise specified)
One respondent also gave the suggestion, “make the main street better with a fountain with seats…”.

Open Spaces
Nearly two thirds (64%) of the respondents gave a positive rating for the parks and open spaces in Berwick-upon-Tweed. Only 4% gave a negative rating.

Figure 30: Ratings given for parks and open spaces
(Excludes ‘don’t know’ responses unless otherwise specified)

Two respondents said that they wanted “more parks” or a “better park”.

10.2.3 Litter and Cleanliness
The overall level of cleanliness in Berwick-upon-Tweed town centre was perceived to be good, with 80% of respondents giving a good or very good rating, and only 1%
giving a poor or very poor rating. Litter within the town centre received a slightly lower rating (78% positive and 4% negative) (Figure 31).

**Figure 31: Ratings given for litter and overall cleanliness**
(Excludes 'don't know' responses unless otherwise specified)

![Graph showing ratings for litter and overall cleanliness](image)

Source: Northumberland Infonet Shopper Questionnaires
Base: 295 respondents (litter); 295 responses (cleanliness); (note: this excludes those respondents that gave a ‘don’t know’ response)

**10.2.4 General Appearance of the Town**
Respondents were reasonably positive about the general appearance of the town. The general state of the buildings received the highest rating (73% good or very good). Shop frontage and graffiti/fly posting were rated slightly lower (72% and 65% positive ratings respectively) (Figure 32).
Figure 32: Ratings given for the appearance of the town

(Excludes ‘don’t know’ responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires

Base: 267 to 295 respondents; (note: this excludes those respondents that gave a ‘don’t know’ response)
11.0 PERCEPTION OF SAFETY AND OCCURRENCE OF CRIME

High levels of crime in a centre will impact on the way people use it and may deter traders from locating there. This section will include an analysis of reported crimes which will be supplemented with information on perception or fear of crime from the Shopper Surveys. Consideration will also be given to any initiatives designed to address town centre-related crime.
11.1 Analysis of Reported Crimes

Figure 33: Analysis of Reported Crimes

Source: Northumbria Police
Figure 34: Crime and Anti Social Behaviour

Looking at Figures 33 and 34, it is clear to see that the majority of crime in Berwick-upon-Tweed in 2005 – 2007 occurred on Marygate and Church Street and Hide Hill (which are perpendicular to Marygate and parallel to Ravensdowne), and the main type of crime here was “rowdy and/ or nuisance”. There were also a significant number of cases of other types of crime distributed fairly evenly throughout the rest of the town centre, with the exception of Ravensdowne and surrounding streets where crimes were not so frequently occurring.

Source: Northumbria Police
Looking at the chart (Figure 34), the types of crime have been broken down further. The most frequent type of crime or anti social behaviour occurring in Berwick-upon-Tweed Town Centre between 2005 and 2007 was rowdy and/or nuisance of which there were 1116 occurrences. The most frequent type of crime was “violence/offences against the person” of which there were 292 occurrences.

11.2 Perception or Fear of Crime

Two respondents thought that safety/security was a main problem with the shopping experience in the town centre, and 16 respondents thought that the safety/security needed to be improved in order to make the town centre better (Figure 34).

Three related comments were also made in response to this question:

- “…too many rough people”.
- “…it’s full of smack heads and druggies”.
- “More police/security - can be quite frightening at night”.

Respondents were also asked to rate safety/security during the daytime and the night-time. Nearly three quarters of respondents (71%) gave a good or very good rating for the daytime, and only 3% a poor or very poor rating. For the night-time, the ratings were not as good, with 35% giving a positive rating and 17% a negative rating.

As can be seen in Figure 35, only 18% of respondents felt that the safety/security of the parking facilities was good/very good, whereas 38% thought they were poor or very poor.
11.3 Initiatives to Address Town Centre-Related Crime

According to the Berwick-upon-Tweed Crime and Disorder Reduction Partnership (CRDP) the following initiatives exist in the Berwick-upon-Tweed District (September 2008):

- Berwick-upon-Tweed Borough CDRP has developed a labelling scheme to tackle the sale of alcohol to persons under the age of 18. Can identify offending premises through use of special barcodes on the labels. The Project is called “Bar None”, currently in the pilot phase and is trialling with Off License premises.

- Headteachers from: Berwick-upon-Tweed High School; Berwick-upon-Tweed Middle; Tweedmouth Middle; Belford Middle; Glendale Middle, Wooler; and Seahouses Middle have been invited to a series of meetings in order to explore:
  - Engaging in local community issues
o Exploring the options to create safer and greener communities
o Developing a preventative approach that includes support, effective communication and publicity in order to address community issues in a pro-social manner
o Encouraging local individual and collective responsibility and accountability in the communities we serve and live in.
12.0 CUSTOMER VIEWS

Shopper surveys will help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. In this section the shoppers’ surveys carried out in Berwick-upon-Tweed Town Centre will be analysed to find out their regularity of visits, type of purchases made, opinions on and use of leisure and entertainment; and what improvements they think will improve the town centre in the future. Additionally, data purchased from Experian will enable investigation of Berwick-upon-Tweed catchment area; spending patterns and retaining shopper spend within the town centre.

12.1 Regularity of visits

82% of respondents go to Berwick-upon-Tweed town centre during the daytime at least once a week, with the most common frequency of visit being twice a week (33%).

Respondents visit the town centre far less often during the evenings, with only 25% visiting at least once a week. 33% said that they never visit the town centre during the evening (Figure 36).

Figure 36: Approximately how often are you in Berwick-upon-Tweed Town Centre?

(Excludes 'don't know' responses unless otherwise specified)
12.2 Expenditure/ Type of Purchases

Figure 37 shows the proportion of respondents that shop for different items solely in Berwick-upon-Tweed town centre, and how many go further afield. Figure 38 gives more details about which shopping centres the respondents use.

As can be seen from the tables, the most common place for respondents to shop for all types of items, particularly food and other domestic items, is in Berwick-upon-Tweed town centre. Newcastle and the Metro Centre are also used to a lesser extent, particularly for clothes and shoes.
## Figure 37: Proportion of respondents shopping in Berwick-upon-Tweed and other areas

| Source: Northumberland Infonet Shopper Questionnaires |

<table>
<thead>
<tr>
<th></th>
<th>Main food shopping</th>
<th>Top-up food shopping</th>
<th>Other domestic (eg. Chemist, cosmetics, etc)</th>
<th>Clothes</th>
<th>Shoes</th>
<th>Electrical goods</th>
<th>Furniture/carpets</th>
<th>DIY goods</th>
<th>CDs/DVDs etc</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Berwick-upon-Tweed</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Berwick-upon-Tweed only</td>
<td>73%</td>
<td>71%</td>
<td>73%</td>
<td>42%</td>
<td>46%</td>
<td>57%</td>
<td>53%</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Berwick-upon-Tweed + local area⁵</td>
<td>3%</td>
<td>4%</td>
<td>8%</td>
<td>21%</td>
<td>17%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>Berwick-upon-Tweed + non-local/local mix</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Non-Berwick-upon-Tweed</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local area (not Berwick-upon-Tweed)</td>
<td>13%</td>
<td>16%</td>
<td>15%</td>
<td>32%</td>
<td>33%</td>
<td>24%</td>
<td>20%</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Mixture of places (not Berwick-upon-Tweed)</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Don't buy</td>
<td>8%</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>14%</td>
<td>22%</td>
<td>23%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Base</strong></td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
</tr>
</tbody>
</table>

⁵ ‘Local area’ is defined as being one of the following: Alnwick, Wooler, Newcastle, Metro Centre, Edinburgh, Galashiels, Kelso, Morpeth, Other Scotland, Other Northumberland
Figure 38: Shopping centres used by respondents to purchase different items

<table>
<thead>
<tr>
<th></th>
<th>Main food shopping</th>
<th>Top-up food shopping</th>
<th>Other domestic (eg. Chemist, cosmetics, etc)</th>
<th>Clothes</th>
<th>Shoes</th>
<th>Electrical goods</th>
<th>Furniture/ carpets</th>
<th>DIY goods</th>
<th>CDs/ DVDs etc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berwick-upon-Tweed</td>
<td>77%</td>
<td>75%</td>
<td>81%</td>
<td>63%</td>
<td>63%</td>
<td>59%</td>
<td>56%</td>
<td>57%</td>
<td>62%</td>
</tr>
<tr>
<td>Alnwick</td>
<td>5%</td>
<td>7%</td>
<td>7%</td>
<td>10%</td>
<td>9%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Wooler</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Newcastle</td>
<td>6%</td>
<td>6%</td>
<td>11%</td>
<td>35%</td>
<td>32%</td>
<td>17%</td>
<td>14%</td>
<td>10%</td>
<td>19%</td>
</tr>
<tr>
<td>Metro Centre</td>
<td>2%</td>
<td>1%</td>
<td>4%</td>
<td>24%</td>
<td>23%</td>
<td>7%</td>
<td>5%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>5%</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Galashiels</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Kelso</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Morpeth</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>6%</td>
<td>5%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Other Scotland</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
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</tr>
<tr>
<td>Northumberland Other</td>
<td>1%</td>
<td>6%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>Don't buy</td>
<td>8%</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>14%</td>
<td>22%</td>
<td>23%</td>
<td>12%</td>
</tr>
<tr>
<td>Base</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
<td>293</td>
</tr>
</tbody>
</table>

Source: Northumberland Infonet Shopper Questionnaires

44% of respondents planned to spend less than £25 in Berwick-upon-Tweed on the day they were interviewed, with a further 23% expecting to spend between £25 and £100. 23% did not know how much they would spend (Figure 38).
Figure 39: How much do you plan to spend in Berwick-upon-Tweed today?
(Excludes ‘don’t know’ responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires
Base: 295 respondents

12.3 The Catchment

According to the North East RSS, the region exhibits a polycentric settlement pattern based on two city-regions centered round Tyne & Wear and Tees Valley. A polycentric settlement pattern is one with many centres or nodes, albeit with different characteristics and scales, rather than one key centre dominating everywhere, where their functions are interconnected. Berwick-upon-Tweed upon Tweed is the main town in the Berwick-upon-Tweed upon Tweed Borough and is described in the RSS as a Rural Service Centre: a settlement that provides jobs, services and facilities for a wider rural hinterland. The district contains a number of other local or secondary centres, including Belford, Seahouses and Wooler. These settlements act as key service centres for the rural areas but are smaller in scale or function than Berwick-upon-Tweed upon Tweed.
The map above shows the catchment area for the town of Berwick-upon-Tweed upon Tweed, as defined by Experian. The catchment, which measures the extent of the local consumer base, is based on the Where Britain Shops survey carried out by Experian. Where Britain Shops is an ongoing survey that generates responses from around 1.6 million households per annum. The survey provides detailed knowledge of consumers preferred shopping destinations, covering in-town and out of down locations. The retail catchment area is based on the following theory.
“Where Britain Shops utilises a gravity model called the Shopper Flow Model that calculates the probability of someone living in a specific postal sector shopping in a particular retail area. This probability is determined by the relative travel times to each centre and a retail areas relative pulling power.

The Shopper Flow Model is the key building block used to determine the shopper catchments of a retail centre and includes a measure of the quality, quantity and mix of the shops within a centre using a combination of several variables that include:

- The rank of retail centres based on shopper (weighted) population
- A rank of centres based on likely annual expenditure on comparison goods
- A retail centre's primary, secondary and tertiary catchments
- Presence of anchor, premier and key retailers plus others
- A tourism score
- Workforce importance

The Shopper Flow Model allocates demand from where people live to where they shop; describing both the comparison goods spend by each retail centre and the ranking of that shopping centre. This allows leakage statistics to be calculated and the impacts of new or re-developed shopping centres to be measured including the larger retail parks, shopping malls and out of town retail centres that are important to multiple retailers and comparison shopping in general.

The Shopper Flow Model is regulated by millions of shopper responses from Lifestyle surveys which ask people where they shop for different types of goods. The model is re-evaluated each year in the light of retail supply and demand changes and is tuned to improve and more accurately represent the picture of British shopping year on year. Use of the model over the years has identified how successfully it works.⁶

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⁶ “Goad Town Centre Shopper Report - Interpretation and Methodology 2008” Experian
12.4 Spending Patterns

In addition to Berwick-upon-Tweed upon Tweed town, the catchment embraces a
number of other smaller settlements in the North East part of the Borough and into
the Scottish Borders. These include Fenwick, Lowick and Ford to the South of the
catchment area, Horncliffe and Norham to the East and Eyemouth and St Abbs in the
Borders. Altogether, the catchment covers an area of 1194.99 sq km, is home to
almost 23,500 people and 10,700 households. Collectively, these households and
residents spend an estimated £107.2 million per annum on retail goods and services,
with 37.2% of expenditure on convenience retail goods (£39.9 million) and 62.8% on
comparison retail (£67.3 million). This balance differs slightly from the national (UK)
average, which reports 36.6% of expenditure on convenience retail and 63.4% on
comparison. The difference between the national and local position is illustrated
through the index which relates the proportion of each spend type in the Berwick-
upon-Tweed upon Tweed catchment to the proportion in the UK. An index of more
than 100% indicates higher than average local spend and an index of less than 100
represents lower than average local spend.

Figure 41: Berwick-upon-Tweed Catchment Summary Profile

<table>
<thead>
<tr>
<th></th>
<th>Berwick-upon-Tweed Catchment</th>
<th>%</th>
<th>UK</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007 Population</td>
<td>23,453.00</td>
<td>60,796,178.00</td>
<td>2007 Households</td>
<td>10,734.00</td>
<td>26,018,847.00</td>
</tr>
<tr>
<td>Total Comparison</td>
<td>67,303,101.00</td>
<td>62.8%</td>
<td>171,926,829,196.00</td>
<td>63.4%</td>
<td>99.14</td>
</tr>
<tr>
<td>Total Convenience</td>
<td>39,856,954.00</td>
<td>37.2%</td>
<td>99,464,696,627.00</td>
<td>36.6%</td>
<td>101.48</td>
</tr>
<tr>
<td>Total Retail</td>
<td>107,160,054.00</td>
<td>100.0%</td>
<td>271,391,525,823.00</td>
<td>100.0%</td>
<td>100.00</td>
</tr>
</tbody>
</table>

Source: Experian

Total retail expenditure per household per annum within the catchment stands at
£9,983, with average comparison retail spend at £6,270 per annum and convenience
spend at £3,713 per annum (Figure 41). Total comparison spend per household and
total convenience spend per household in the catchment are both below the UK
average, with indices of 94.9 and 97.1, respectively.
Figure 42 below provides a breakdown of Comparison retail expenditure within the Berwick-upon-Tweed upon Tweed catchment and in the UK. Clearly the largest expenditure type within comparison retail is Clothing Material & Garments, accounting for £14.9 million or 22.1% of total Comparison Expenditure within the catchment. Clothing is followed by Audio-visual, photographic and information processing equipment (£7.5 million or 11.1%) and Furniture and furnishings; carpets and other floor coverings (£7.1 million or 10.5%). The pattern of expenditure nationally is similar, but with some notable differences. Referring to the index, households in Berwick-upon-Tweed upon Tweed spend substantially more on Small electrical household appliances, Major Household Appliances, Audio-visual, photographic and information processing equipment and Recording Media as a proportion of total spend than the UK average. In contrast, they spend substantially less on Bicycles, Small tools and miscellaneous accessories and Major tools and equipment.
### Figure 42: Total Expenditure (in 2006 prices) Comparison

#### 2007 Total Expenditure (in 2006 prices) Comparison

<table>
<thead>
<tr>
<th>Totals</th>
<th>Berwick-upon-Tweed upon Tweed Catchment</th>
<th>%</th>
<th>UK</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>10% of Non-Durable household goods</strong></td>
<td>133,991.00</td>
<td>0.20%</td>
<td>357,185,476.00</td>
<td>0.21%</td>
<td>95.00</td>
</tr>
<tr>
<td>Appliances for personal care</td>
<td>5,606,178.00</td>
<td>8.33%</td>
<td>15,298,262,865.00</td>
<td>8.90%</td>
<td>93.61</td>
</tr>
<tr>
<td>Audio-visual, photographic and information processing equipment</td>
<td>7,456,473.00</td>
<td>11.08%</td>
<td>14,926,597,385.00</td>
<td>8.68%</td>
<td>127.61</td>
</tr>
<tr>
<td>Bicycles</td>
<td>168,083.00</td>
<td>0.25%</td>
<td>1,345,908,674.00</td>
<td>0.78%</td>
<td>31.90</td>
</tr>
<tr>
<td>Books and stationery</td>
<td>2,464,404.00</td>
<td>3.66%</td>
<td>6,968,169,166.00</td>
<td>4.05%</td>
<td>90.34</td>
</tr>
<tr>
<td>Clothing materials and garments</td>
<td>14,874,327.00</td>
<td>22.10%</td>
<td>37,197,970,202.00</td>
<td>21.64%</td>
<td>102.15</td>
</tr>
<tr>
<td>Furniture and furnishings; carpets and other floor coverings</td>
<td>7,056,002.00</td>
<td>10.48%</td>
<td>18,218,052,893.00</td>
<td>10.60%</td>
<td>98.94</td>
</tr>
<tr>
<td>Games, toys and hobbies; sport and camping; musical instruments</td>
<td>6,778,201.00</td>
<td>10.07%</td>
<td>18,951,364,780.00</td>
<td>11.02%</td>
<td>91.37</td>
</tr>
<tr>
<td>Gardens, plants and flowers</td>
<td>1,148,133.00</td>
<td>1.71%</td>
<td>3,402,000,385.00</td>
<td>1.98%</td>
<td>86.21</td>
</tr>
<tr>
<td>Glassware, tableware and household utensils</td>
<td>1,654,853.00</td>
<td>2.46%</td>
<td>4,753,009,610.00</td>
<td>2.76%</td>
<td>88.94</td>
</tr>
<tr>
<td>Household textiles</td>
<td>2,208,621.00</td>
<td>3.28%</td>
<td>5,378,572,610.00</td>
<td>3.13%</td>
<td>104.90</td>
</tr>
<tr>
<td>Jewellery, clocks and watches</td>
<td>1,742,704.00</td>
<td>2.59%</td>
<td>4,533,353,900.00</td>
<td>2.64%</td>
<td>98.20</td>
</tr>
<tr>
<td>Major household appliances (electric or not)</td>
<td>2,498,391.00</td>
<td>3.71%</td>
<td>4,457,482,024.00</td>
<td>2.59%</td>
<td>143.18</td>
</tr>
<tr>
<td>Major tools and equipment</td>
<td>115,159.00</td>
<td>0.17%</td>
<td>370,528,409.00</td>
<td>0.22%</td>
<td>79.39</td>
</tr>
<tr>
<td>Materials for maintenance and repair of the dwelling</td>
<td>2,147,554.00</td>
<td>3.19%</td>
<td>6,826,571,834.00</td>
<td>3.97%</td>
<td>80.36</td>
</tr>
<tr>
<td>Medical goods and other pharmaceutical products</td>
<td>1,271,983.00</td>
<td>1.89%</td>
<td>3,904,354,994.00</td>
<td>2.27%</td>
<td>83.22</td>
</tr>
<tr>
<td>Other personal effects</td>
<td>774,741.00</td>
<td>1.15%</td>
<td>2,276,336,174.00</td>
<td>1.32%</td>
<td>86.94</td>
</tr>
<tr>
<td>Pets and related products</td>
<td>1,004,428.00</td>
<td>1.49%</td>
<td>2,747,999,981.00</td>
<td>1.60%</td>
<td>93.37</td>
</tr>
<tr>
<td>Recording media</td>
<td>3,790,922.00</td>
<td>5.63%</td>
<td>7,513,288,250.00</td>
<td>4.37%</td>
<td>128.89</td>
</tr>
<tr>
<td>Shoes and other footwear</td>
<td>1,994,704.00</td>
<td>2.96%</td>
<td>5,348,647,704.00</td>
<td>3.11%</td>
<td>95.27</td>
</tr>
<tr>
<td>Small electrical household appliances</td>
<td>442,327.00</td>
<td>0.66%</td>
<td>748,364,529.00</td>
<td>0.44%</td>
<td>150.99</td>
</tr>
<tr>
<td>Small tools and miscellaneous accessories</td>
<td>954,533.00</td>
<td>1.42%</td>
<td>3,301,806,678.00</td>
<td>1.92%</td>
<td>73.85</td>
</tr>
<tr>
<td>Therapeutic appliances and equipment</td>
<td>1,016,389.00</td>
<td>1.51%</td>
<td>3,101,000,673.00</td>
<td>1.80%</td>
<td>83.73</td>
</tr>
<tr>
<td><strong>Total Comparison</strong></td>
<td>67,303,101.00</td>
<td>100.00%</td>
<td>171,926,829,196.00</td>
<td>100.00%</td>
<td>100.00</td>
</tr>
</tbody>
</table>

*Source: Experian*
Figure 43: Expenditure on Comparison Retail

Expenditure on Comparison Retail: Items with an Index Less than the UK Average

- Clothing materials and garments
- Furniture and furnishings; carpets and other floor coverings
- Appliances for personal care
- Glassware, tableware and household utensils
- Shoes and other footwear
- 10% of Non-Durable household goods
- Books and stationery
- Jewellery, clocks and watches
- Games, toys and hobbies; sport and camping; musical
- Gardens, plants and flowers
- Therapeutic appliances and equipment
- Medical goods and other pharmaceutical products
- Other personal effects
- Major tools and equipment
- Small tools and miscellaneous accessories
- Materials for maintenance and repair of the dwelling
- Bicycles

Index (UK=100)

Source: Experian

Figure 44: Expenditure on Comparison Retail

Expenditure on Comparison Retail: Items with an Index Greater than the UK Average

- Small electrical household appliances
- Major household appliances (electric or not)
- Recording media
- Audio-visual, photographic and information processing equipment
- Household textiles
- Clothing materials and garments

Index (UK=100)

Source: Experian

Figure 45 provides a breakdown of Convenience retail expenditure within the Berwick-upon-Tweed upon Tweed catchment and in the UK. Clearly the largest expenditure type within comparison retail in Berwick-upon-Tweed upon Tweed is Food and non-alcoholic beverages, accounting for £27.4 million or 68.9% of total Comparison Expenditure within the area. Food and non-alcoholic beverages is
followed by Alcohol (£5.1 million or 12.8%) and Tobacco (£4.1 million or 10.2%). The pattern of expenditure nationally differs a little. Referring to the index, households in Berwick-upon-Tweed upon Tweed spend proportionately more on Newspapers and Periodicals, Alcohol and Tobacco and less on Food and non-alcoholic beverages.

Figure 45: 2007 Total Expenditure Convenience Retail

<table>
<thead>
<tr>
<th>Totals</th>
<th>Berwick-upon-Tweed upon Tweed Catchment</th>
<th>%</th>
<th>UK</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>90% of Non-Durable household goods</td>
<td>1,205,927.00</td>
<td>3.03%</td>
<td>3,214,575,062.00</td>
<td>3.23%</td>
<td>93.62</td>
</tr>
<tr>
<td>Alcohol (off-trade)</td>
<td>5,114,153.00</td>
<td>12.83%</td>
<td>12,313,767,021.00</td>
<td>12.38%</td>
<td>103.64</td>
</tr>
<tr>
<td>Food and non-alcoholic beverages</td>
<td>27,447,775.00</td>
<td>68.87%</td>
<td>70,035,886,128.00</td>
<td>70.41%</td>
<td>97.80</td>
</tr>
<tr>
<td>Newspapers and periodicals</td>
<td>2,008,601.00</td>
<td>5.04%</td>
<td>4,451,576,478.00</td>
<td>4.48%</td>
<td>112.60</td>
</tr>
<tr>
<td>Tobacco</td>
<td>4,080,498.00</td>
<td>10.24%</td>
<td>9,448,891,938.00</td>
<td>9.50%</td>
<td>107.77</td>
</tr>
<tr>
<td>Total Convenience</td>
<td>39,856,954.00</td>
<td>100.00%</td>
<td>99,464,896,627.00</td>
<td>100.00%</td>
<td>100.00</td>
</tr>
</tbody>
</table>

Source: Experian

12.5 Retaining Shopper Spend

The information outlined in the previous section describes the extent and pattern of expenditure per annum of households living within the Experian-defined catchment area for Berwick-upon-Tweed upon Tweed. What the information does not indicate, however, is how much of the expenditure is spent purchasing goods and services in Berwick-upon-Tweed upon Tweed and how much leaks to neighbouring retail destinations. Based on the Where Britain Shops Survey, Experian have calculated:

- The proportion of the population within the Berwick-upon-Tweed upon Tweed catchment that shops in Berwick-upon-Tweed upon Tweed and the proportion that shop at other centres.
- The percentage of expenditure spent on goods and services in Berwick-upon-Tweed upon Tweed and the extent to which spending leaks to other centres.

The figures in figures 46 and 47 provide a baseline assessment against which future reports will measure changes in performance. The figures do not currently provide a
breakdown of leakage for comparison and convenience retail, although it is anticipated that retention will be substantially higher for the latter compared with the former.

With regards to population (Figure 46), Experian estimates that more than 90% of the resident population shop in Berwick-upon-Tweed upon Tweed (21,250 or 90.6%). Other shopping destinations for households in the catchment area include Edinburgh (553 or 2.4%) and Alnwick (379 or 1.6%).

**Figure 46: Population Leakage**

<table>
<thead>
<tr>
<th>Plan Name</th>
<th>Percentage (%)</th>
<th>Population (no.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berwick-upon-Tweed- upon-Tweed</td>
<td>90.61</td>
<td>21,250</td>
</tr>
<tr>
<td>Edinburgh - Princes Street</td>
<td>2.36</td>
<td>553</td>
</tr>
<tr>
<td>Alnwick</td>
<td>1.62</td>
<td>379</td>
</tr>
<tr>
<td>Galashiels</td>
<td>1.16</td>
<td>273</td>
</tr>
<tr>
<td>Kelso</td>
<td>0.87</td>
<td>205</td>
</tr>
<tr>
<td>Edinburgh - Kinnaird Park</td>
<td>0.78</td>
<td>182</td>
</tr>
<tr>
<td>Belford</td>
<td>0.69</td>
<td>161</td>
</tr>
<tr>
<td>Wooler</td>
<td>0.60</td>
<td>141</td>
</tr>
<tr>
<td>Newcastle upon Tyne - Central</td>
<td>0.48</td>
<td>112</td>
</tr>
<tr>
<td>Jedburgh</td>
<td>0.32</td>
<td>76</td>
</tr>
<tr>
<td>Metro Centre</td>
<td>0.19</td>
<td>45</td>
</tr>
<tr>
<td>Hawick</td>
<td>0.15</td>
<td>36</td>
</tr>
<tr>
<td>Seahouses</td>
<td>0.09</td>
<td>21</td>
</tr>
<tr>
<td>Morpeth</td>
<td>0.05</td>
<td>12</td>
</tr>
<tr>
<td>Ashington</td>
<td>0.03</td>
<td>7</td>
</tr>
</tbody>
</table>

Source: Experian

The pattern with regards to spend is relatively similar (Figure 46). Experian estimates that in excess of 90% of retail spend by residents and households domiciled within the Berwick-upon-Tweed upon Tweed catchment, representing £97.1 million per annum, is spent in the town.

More than £2.5 million of expenditure is lost to Edinburgh - Princes Street (2.4%), with other notable leakage to Alnwick (£1.7 million or 1.6%) and Galashiels (£1.3 million or 1.2%). What is not clear from the figures, however, is the retail types that
outlying centres are able to attract from the catchment area. This is something that InfoNet will be investigating further with Experian over the coming 12 months.

**Figure 47: Spend Leakage**

<table>
<thead>
<tr>
<th>Plan Name</th>
<th>Percentage (%)</th>
<th>Spend (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berwick-upon-Tweed upon Tweed</td>
<td>90.64</td>
<td>97,130,275</td>
</tr>
<tr>
<td>Edinburgh - Princes Street</td>
<td>2.40</td>
<td>2,571,914</td>
</tr>
<tr>
<td>Alnwick</td>
<td>1.55</td>
<td>1,657,233</td>
</tr>
<tr>
<td>Galashiels</td>
<td>1.18</td>
<td>1,268,450</td>
</tr>
<tr>
<td>Kelso</td>
<td>0.89</td>
<td>954,397</td>
</tr>
<tr>
<td>Edinburgh - Kinnaird Park</td>
<td>0.79</td>
<td>845,684</td>
</tr>
<tr>
<td>Berford</td>
<td>0.65</td>
<td>700,713</td>
</tr>
<tr>
<td>Wooler</td>
<td>0.60</td>
<td>645,722</td>
</tr>
<tr>
<td>Newcastle upon Tyne - Central</td>
<td>0.46</td>
<td>497,185</td>
</tr>
<tr>
<td>Jedburgh</td>
<td>0.33</td>
<td>352,297</td>
</tr>
<tr>
<td>Metro Centre</td>
<td>0.18</td>
<td>195,891</td>
</tr>
<tr>
<td>Hawick</td>
<td>0.16</td>
<td>168,350</td>
</tr>
<tr>
<td>Seahouses</td>
<td>0.08</td>
<td>90,749</td>
</tr>
<tr>
<td>Morpeth</td>
<td>0.05</td>
<td>52,766</td>
</tr>
<tr>
<td>Ashington</td>
<td>0.03</td>
<td>28,428</td>
</tr>
</tbody>
</table>

Source: Experian

The map below shows the Berwick-upon-Tweed upon Tweed catchment area and is colour coded to indicate the proportion of retail expenditure that is spent by the resident population in Berwick-upon-Tweed upon Tweed. From the map, it can be seen that households located within Berwick-upon-Tweed upon Tweed and in the adjacent hinterland spend over 50% of their total retail expenditure in Berwick-upon-Tweed upon Tweed. Propensity to shop in Berwick-upon-Tweed upon Tweed dips slightly to 40-50% of expenditure in the south east part of the catchment covering the settlements of Fenwick, Buckton, Elwick and Ross.
12.6 Opinions on and use of Leisure and Entertainment

9% of respondents said that they were in Berwick-upon-Tweed town centre for leisure on the day of the interview.

Events attended

Just over half of the respondents had attended at least one of the events asked about in the questionnaire. The most well attended events were the continental market (37%) and the Christmas lights switch on (30%) (Figure 49).
Figure 49: Have you ever attended any of these events?
(Excludes ‘don't know’ responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires

Base: 294 respondents

Eating and drinking
Most of the eating and drinking venue types in Berwick-upon-Tweed were rated quite well. The best ratings were given for the coffee shops for which 78% of respondents gave a positive rating and only 1% gave a negative rating. The poorest rating was given for pubs and clubs (46% positive ratings and 11% negative ratings) (Figure 50).
Figure 50: How would you rate the following venues for eating and drinking in Berwick-upon-Tweed?
(Excludes ‘don’t know’ responses unless otherwise specified)

![Graph showing the percentage of respondents' ratings for different types of venues.]

Source: Northumberland InFonet Shopper Questionnaires

Base: 171 to 275 respondents depending on type of venue (note: this excludes those respondents that gave a ‘don’t know’ response)

**Arts and leisure facilities**

All of the arts and leisure facilities in Berwick-upon-Tweed were given a good/very good rating by over half of the respondents and a poor/very poor rating by less than 4% of the respondents (Figure 51).
Figure 51: How would you rate the following arts and leisure facilities in Berwick-upon-Tweed?

(Excludes ‘don’t know’ responses unless otherwise specified)

When asked how they would rate Berwick-upon-Tweed as a place to enjoy themselves, two thirds of respondents gave a good or very good rating (Figure 52).
**Figure 52: How do you rate Berwick-upon-Tweed as a place to enjoy yourself?**
(Excludes ‘don't know’ responses unless otherwise specified)

![Pie chart showing the distribution of responses.]

- **25%** Very Poor
- **59%** Poor
- **8%** OK
- **7%** Good
- **1%** Very Good

*Source: Northumberland Infonet Shopper Questionnaires*

*Base: 284 (note: this excludes those respondents that gave a ‘don’t know’ response)*

**General**

When respondents were asked how they would make the town centre better, 15% gave an answer relating to improving the leisure facilities. A few comments were also made on this subject:

- “Not much things to do”.
- “More for kids to do - leisure activites maybe”.
- “Things for kids to play”.
- “More parks”.
- “Better park”.
- “Better sports events”.
- “Better pubs”.
- “More pubs/clubs”.
- “…ice rink”.
- “…better lesuire facilities”.

9% of respondents said that they were in Berwick-upon-Tweed town centre for leisure on the day of the interview.
12.7 The Future: what will improve the town as a place to shop or visit?

Figures 53 and 54, together with the rest of the analysis of the Berwick-upon-Tweed shopper survey, suggest that in order to improve the town as a place to shop or visit, three key issues need to be addressed:

- **The retail offer**
  This is covered in more detail below.

- **The parking facilities**
  29% of respondents thought that parking was one of the main problems with the shopping experience, and 45% rated the availability of public parking spaces as poor or very poor. See sections 9.2.2 and 9.2.3 for more details.

- **Traffic and road safety**
  35% of respondents said that traffic was one of the main problems with the shopping experience in Berwick-upon-Tweed town centre, and 21% gave ‘road safety’ as a problem. Numerous responses were also noted concerning the difficulty crossing the roads in Berwick-upon-Tweed. See section 9.1 for more details.
Figure 53: How would you make this town centre better?
(Excludes 'don't know' responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires
Base: 294 respondents

Figure 54: What are the main problems with the shopping experience in Berwick-upon-Tweed town centre?

Source: Northumberland Infonet Shopper Questionnaires
Base: 295 respondents
Retail

Throughout the survey, respondents have not been particularly positive about the retail offer in Berwick-upon-Tweed as can be seen in the points below.

- 20% of respondents said that one of the main problems with the shopping experience in Berwick-upon-Tweed town centre was the limited offer or range of shops/goods.

- 55% of respondents said that, in order to improve the town centre, the retail offer should be improved.

- Only 17% of respondents agreed that Berwick-upon-Tweed offers a wide choice of quality shops. 33% disagreed.

- When asked to rate Berwick-upon-Tweed as a place to shop, 32% gave a positive rating and 29% gave a negative rating.

However, as sections 12.2 and 12.3 show, despite not being very positive about the retail offer in Berwick-upon-Tweed, respondents still tend to use Berwick-upon-Tweed for a wide range of purchases in preference to other shopping centres such as Newcastle or Edinburgh.

Respondents were also asked about the types of improvement that they would like to see to the retail offer in Berwick-upon-Tweed town centre. Nearly one half (46%) of respondents said that they would like more chain stores, and one third said that they would like an increase in the variety of shops (Figure 53).

A list of the ‘other’ responses, together with some examples of shops that the respondents would like, is given in Appendix 2. Many of these related to shops for younger people / children.
Figure 55: What improvements would you like to see to the retail offer in Berwick-upon-Tweed?

(Excludes ‘don’t know’ responses unless otherwise specified)

<table>
<thead>
<tr>
<th>Improvement</th>
<th>Percentage of Respondents</th>
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<tr>
<td>More chain stores</td>
<td>46%</td>
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<tr>
<td>Increase variety of shops</td>
<td>33%</td>
</tr>
<tr>
<td>Fewer charity shops</td>
<td>22%</td>
</tr>
<tr>
<td>More shops offering local produce</td>
<td>7%</td>
</tr>
<tr>
<td>Longer opening hours</td>
<td>2%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>13%</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
</tr>
<tr>
<td>Nothing</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: Northumberland Infonet Shopper Questionnaires

Base: 293 respondents
13.0 INVESTMENT

The following developments are proposed for Berwick-upon-Tweed Town Centre;

- New shops and cafes have opened within the town

- Three major new housing developments have been agreed for the town centre, on the site of the former Playhouse Cinema, the former Youngman’s store and the former Blackburn and Price car dealer premises. Although it is expected that there will be a few delays until the property market improves.

- A new edge of town Tesco Supermarket has been given the go-ahead, subject to the detailed plans being agreed. Construction is likely to begin later this year.
14.0 CONCLUSION

Berwick-upon-Tweed is currently undergoing various developments in the Town Centre. Whilst the majority of the regeneration is residential properties, there is also edge of town Tesco planned of which construction should start late 2009 which is likely to have an impact on the town centre. These developments, which are set to be completed in early 2009, should therefore be taken into consideration when drawing conclusions about the health of the Town Centre.

In the Town Centre, 58% of the floorspace use was for retail (Figure 3). However, despite this high percentage of the amount of retail floorspace, shopper’s perceptions of the range of retail provision was somewhat negative with 33% disagreeing or strongly disagreeing to the statement “Berwick-upon-Tweed offers a wide choice of quality shops”, compared to 17% agreeing or strongly agreeing (Figure 5).

The verbatim responses to what shoppers would like to see improved with the retail offer (Appendix 2) highlighted that more clothes shops and more choice of clothes shops were high on their priorities so that they didn’t have to travel further afield, such as Newcastle, for this type of shopping. Additionally, figure 6 highlighted that there were more comparison retail (clothing, household goods, furniture, DIY and electrical goods) than convenience or retail service. This may indicate that shoppers would like to see less comparison retail than convenience or service, or they would like more variation within that particular category. Further, within the comparison category, the majority of the businesses were independent as opposed to multiple chain such as high street shops which were also suggested when asking shoppers what would improve the retail offer (Appendix 2).

In July 2005, the yield for Berwick-upon-Tweed dropped lower than the average for Northumberland, North East and England for the first time since April 2002. This meant that Berwick-upon-Tweed was seen to be a more attractive place to set up business which could have been the result of various regeneration projects that have taken place in the town centre. This low yield is supported by the response given by
interviewed shoppers for their opinion on general appearance of the town which was reasonably positive (Figure 31).

There was 9% of vacant floorspace in Berwick-upon-Tweed (see Figure 12). Figure 13 also shows that between 2007 and 2008, the amount of vacant floorspace had reduced when looking at property flows. This was a result of more buildings changing from being vacant to occupied from 2007 to 2008, than occupied to vacant. There had been local interest for vacant properties in the Town Centre as recorded by Northumberland Property Search. However, this is not an exhaustive view of all enquiries made on properties within the town centre, just a snapshot.

Accessibility into the town was not a problem for some of the shoppers interviewed with 54% (of those travelling by car) finding it very or fairly easy (Figure 17). However, 45% of these shoppers felt that the parking in the town centre was either poor or very poor (Figure 18). Appendix 2 also shows that parking was mentioned several times when asked what the main problems with the shopping experience in Berwick-upon-Tweed were, notably the lack of spaces. Berwick-upon-Tweed also has good bus and train connectivity, which is shown in Figures 22 and 25 respectively by the frequency and number of destinations reached from Berwick-upon-Tweed. 68% of shoppers travelling into the town centre by bus also found it very or fairly easy to travel there (Figure 24) and all of the six shoppers who travelled by train found it fairly or very easy. These figures are supported by Figure 25 which shows the shopper's overall perception of the quality, regularity and destinations served by public transport. Even though less than half gave a positive response for public transport related attributes, almost one half of shoppers thought they were ok and less than 12% gave a negative rating for each aspect.

When looking at retaining shopper spend, 91% of Berwick-upon-Tweed residents shopped in Berwick-upon-Tweed. 2.4% of expenditure was lost to Princes Street in Edinburgh and a further 1.6% to Alnwick (Figure 47). Comparing this leakage figure to other town centres in Northumberland shows that the leakage from Berwick-upon-Tweed upon Tweed is a lot lower than the others. This may be to do with its location and distance from other major centres either in Northumberland, Tyne and Wear or in Scotland.
The responses from shoppers coupled with the various aspects that make up a town centre, suggest that generally Berwick-upon-Tweed was in reasonable health. Although there has been some negative responses from the shoppers' surveys with regards to the retail offer in general, the implementation of the various regeneration projects and increase in retail floorspace in the town centre should show hopefully show some improvements in forthcoming years.
15.0 RECOMMENDATIONS

The original intention was that town centre health checks would be carried out biennially and there are various recommendations that would ensure that the next report improves and builds upon this initial “baseline” report. In subsequent years comparisons will be able to be made within the same town over a period of time, and also between towns which have the similar roles or functions, (e.g. market towns).

Section 3, Diversity of Uses, focused on the different uses of commercial properties. Using the data from Experian, an analysis of property use class was carried out, however this data was only based on the ground floor of the properties and did not take into consideration any businesses that were situated on the upper floors. In order to give a more accurate picture of the use class of the town centre, these other floors would have to be considered. Another area to look at next time would be the location and quantity of residential properties in the town.

Section 5, Retailer Demand, summarised the interest of vacant outlets in the town centre. In this report, the source of this data was Northumberland Property Search. This cannot be taken as an exhaustive source of this information, and it would be beneficial to work in partnership with the various estate agents within the County to gain a more reliable and accurate insight. Additionally, a substantial amount of enquirers from the Northumberland Property Search referred to out of town properties such as those situated on business parks or industrial estates and therefore were excluded for the purpose of this report.

Section 8, Pedestrian Flows, analysed the footfall counts that had taken place within the town centres alongside the shopper’s surveys. As they had taken place on a “normal” weekday, a market day (where applicable) and a Saturday, it was not possible to estimate a weekly footfall count without including a footfall on a Sunday. This is something that would have to be considered next time.

Section 9, Accessibility, gathered all of the destinations reached from Berwick-upon-Tweed by bus. This information was drawn up into a table, however a map showing
all of these routes would have been even more useful and easier to present in the report, but unfortunately this was not available at the time of publishing.

Section 11, Perception of Safety and Occurrence of Crime, analysed the number of crimes that had taken place within the town centre between 2005 and 2007, and also the initiatives designed to address town centre-related crime. It will be interesting in the next report to investigate what impact these initiatives have had on the number of crimes reported in the town centre.

Section 13, Investment, looked at future proposals for the town centre. The perception of town centre shoppers should be reviewed when the report is next updated, in order to see if their opinions have been considered within future proposals for the area.
APPENDIX 1
Use Class Order
(www.planningportal.gov.uk)

The following classes of use for England are set out in the Town and Country Planning (Use Classes) Order 1987 and its subsequent amendments.

- **A1 Shops** - Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners and funeral directors.
- **A2 Financial and professional services** - Banks, building societies, estate and employment agencies, professional and financial services and betting offices.
- **A3 Restaurants and cafés** - For the sale of food and drink for consumption on the premises - restaurants, snack bars and cafes.
- **A4 Drinking establishments** - Public houses, wine bars or other drinking establishments (but not a night clubs).
- **A5 Hot food takeaways** - For the sale of hot food for consumption off the premises.

- **B1 Business** - Offices, research and development, light industry appropriate in a residential area.
- **B2 General industrial**
- **B3-B7 Special Industrial Groups** - See 'Use Classes Schedule'.
- **B8 Storage or distribution** - This class includes open air storage.

- **C1 Hotels** - Hotels, boarding and guest houses where no significant element of care is provided.
- **C2 Residential institutions** - Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.
- **C2A Secure Residential Institution** - Use for a provision of secure residential accommodation, including use as a prison, young offenders institution, detention centre, secure training centre, custody centre, short term holding centre, secure hospital, secure local authority accommodation or use as a military barracks.
- **C3 Dwellinghouses** - Family houses, or houses occupied by up to six residents living together as a single household, including a household where care is provided for residents.
• **D1 Non-residential institutions** - Clinics, health centres, crèches, day nurseries, day centres, schools, art galleries, museums, libraries, halls, places of worship, church halls, law court. Non residential education and training centres.

• **D2 Assembly and leisure** - Cinemas, music and concert halls, bingo and dance halls (but not night clubs), swimming baths, skating rinks, gymnasiums or sports arenas (except for motor sports, or where firearms are used).

• **Sui Generis** - Theatres, houses in multiple paying occupation, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses, amusement centres. Casinos.
APPENDIX 2
VERBATIM RESPONSES FOR SHOPPER’S SURVEY

Verbatim responses to ‘Q12 Can you tell me what, if anything, are the main problems with the shopping experience in Berwick-upon-Tweed Town Centre?

Congestion / traffic / roads

- Bad roads - sb. one way system.
- should be one way
- It gets really busy with visitors and could do with some order on the roads.
- Congested (2 responses)
- Congestion - when busy is terrible
- Congestion
- Very congested - not as good as I hoped
- Too busy - congestion
- Too busy
- Traffic - very busy
- Lots of traffic - but unsafe
- Unsafe - cars and people all over
- Cars all over the place
- Can get a little crowded at times

Parking

- Parking (2 responses)
- Parking in general
- poor parking overall
- Parking is a nightmare!
- Parking spaces (2 responses)
- Not many places to park
- Need more disabled parking
Crossings / Pedestrianisation

- Bad crossings
- Place to cross. Hundreds of traffic
- Nowhere to cross the road - traffic is really bad
- A lot of pedestrians around and nowhere to cross roads - unsafe.
- Should be pedestrianised - main road too busy
- Should be pedestrianised (2 responses)

Mixture of things / other

- Congestion, should be pedestrianised
- Too much traffic/parking ltd.
- Road system could be better/too many rough people
- Everything - it's full of smack heads and druggies
- Not much here apart from shopping for food
- Not much things to do
- Not a lot of facilities for disabled

Verbatim responses to ‘Q17 What improvements would you like to see to the retail offer in Berwick-upon-Tweed?’

Suggested examples of improvements

Types of shops

- Children's shops
- More shops for younger people especially men. Topshop, river island etc
- More shops for young people, department store maybe?
- Young peoples shops
- Young shops
- Better shops in gen. for youngsters
- Shops like Primark - more modern shops for girls
- More modern shops
• More clothes shops so don't need to go into Newcastle
• M&S
• Better quality shops
• Just more shops - Metrocentre shops
• New shops - or more of what we've already got - increased no's of shops - nothing there!

Other
• A covered in outlet - large
• Better leisure facilities - things to do - better shops for boys
• Anything really for younger people
• anything
• Too many building soc.s

Suggested examples of shops
• Baby or children's shop, New Look, ASDA
• Children's cloths, more modern adult clothes and ASD
• More shops for boys
• younger fasion shops
• Dont (2 responses)
• Anything
Verbatim responses to ‘Q23 How would you make this town centre better?’

Crossings / pedestrian areas
- Better crossing (2 responses)
- Better crossings
- Better crossings for people e.g. zebra
- Make pedestrian crossing - traffic free zone
- Pedestrian crossings - make it look a bit nicer
- Pedestrianised - the roads are bad to cross
- Pedestrianise it (3 responses)
- Safer for crossing roads
- Road crossings

Leisure
- Better pubs
- Better sports events
- More for kids to do - leisure activities maybe
- More parks
- More pubs/clubs
- Things for kids to play
- Better park

Traffic / congestion / roads
- Better road systems - very jammed
- Better transport system - cars
- Centre is too busy sometimes with cars and people - needs to be reduced
- Congestion
- Not as much traffic, feels bit safer
- Not just as many cars - just for people
- Improved traffic
- Less congestion
• Quite busy - maybe police to manage the traffic
• Reduce the congestion
• Safety from traffic and cars in the city centre
• Something done about the traffic
• road safety
• Traffic needs addressing

Retail
• Could do with better shops
• More clothes shops - less need to go to Newcastle and further
• Better shops for younger people

Mixture of things
• More crossings by CO-OP - bigger mkt.
• Clothes - have to go to ncle. - ice rink
• More Shops for children and better lesuire facilities
• Congestion/more shops

Parking
• Better disabled parking
• More spaces to park

Other
• More for children
• More for younger people
• More for youngsters
• Nothing for youngsters
• Police should stop parking on high street
• More police/security - can be quite frightening at night
• Make space to move arround as it is cramped
• Make the main street better with a fountain with seats and a new pedestrian crossing
• Too many visitors
• Where fun comes to die!
• All really!
• Everything
The Corporate Research Unit

Contacts

Philip Hanmer – Research Manager
Tel: (01670) 533919
Laurie Turnbull – Research Assistant
Tel: (01670) 533038
Fax: (01670) 533967

E-mail: InfoNet@northumberland.gov.uk

Website: www.northumberlandinfonet.org.uk

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