MORPETH TOWN CENTRE HEALTH CHECK REPORT

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InfoNet would like to point out that the majority of the data in this report was collected before the September 2008 floods occurred in Morpeth. This includes the data collected in the shopper’s questionnaires which took place in October 2007. Therefore, the floods would not have had an impact on the views and responses gathered from the shopper's questionnaires.
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EXECUTIVE SUMMARY

- 53% of the floorspace use in Morpeth was for retail.
- Shoppers felt generally the range and quality of shops need to be improved.
- There were more comparison retail (clothing, household goods, furniture, DIY and electrical goods) than convenience or retail service.
- There was 8% of vacant floorspace in Morpeth.
- The majority of vacant buildings (55%) and floorspace (48%) in Morpeth were situated in the Sanderson Arcade.
- Between 2007 and 2008, the amount of vacant floorspace had increased in the town centre.
- 69% of shoppers interviewed found it easy to travel into the town centre by car.
- 34% of shoppers felt that the main problem with the shopping experience in Morpeth was parking.
- 39% of respondents thought that the availability of public parking spaces was poor or very poor. 52% of respondents also gave a poor or very poor rating for the cost of parking.
- Morpeth also has good bus and train connectivity with a wide range of destinations reached. 81% of shoppers interviewed found it easy to travel into the town centre by bus.
- Spring 2009 will see the opening of the “new” Sanderson Arcade. Retailers include Laura Ashley, Marks and Spencers, Waterstones and Starbucks to name but a few, already signed up.
- Approximately one half of shoppers gave a positive response when rating the quality, regularity and destinations served by public transport. Part of the Sanderson Arcade development includes a new transport interchange and long stay car park increasing the number of parking spaces within the town centre.
- 6% of Morpeth residents shopped in Morpeth. 21% of expenditure was lost to Newcastle and a further 18% to Ashington and 16% to the Metro Centre.
- The recent floods (September 2008) resulted in 23 businesses still closed for business six weeks later.
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 Morpeth 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 (ie. 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 (ie 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 Alnwick, Amble, Ashington, Bedlington, Belford, Berwick 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 Morpeth Town Centre Boundary

Throughout this report there are two different boundaries for Morpeth Town Centre that will be used depending on the section: the town centre boundary as defined by Castle Morpeth District Council (Figure 1), and the boundary as defined by Experian (from where a lot of data within this report has come) (Figure 2).

The area of Morpeth Town Centre in relation to the District Council boundary is 20,524.73 m².

Figure 1: Boundary for Morpeth Town Centre

Source: Castle Morpeth Borough Council, July 2008
2.2 Morpeth’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 Castle Morpeth Borough Council): Morpeth is the largest settlement in Castle Morpeth, lying in the valley of the River Wansbeck some 15 miles north of Newcastle upon Tyne. Its origins go back to Norman times but the physical form of the town was established in the medieval period with the formation of the existing town centre street pattern and long burgess plots stretching from the main streets down to the River Wansbeck. In the post war years the town has expanded onto the plateau land to the north and south but this has not been in an obtrusive way. There are clearly defined boundaries to the built up area on all sides and the problems of ribbon development have been avoided so that its character is still that of a market town.
surrounded by open countryside. Currently the town fulfils a wide variety of functions. It is an important Rural Service Centre with retail, service and facility offer. Located close to the A1 and on the East Coast Main Line and with good road links to all parts of the Borough, it is also an important dormitory town for southeast Northumberland and Tyneside. Despite all these functions, it has maintained the essential and attractive character of a market town. There are also positive signs of economic revitalisation now taking place in Morpeth through a major town centre redevelopment at Sanderson Arcade / Back Riggs which includes new retail floorspace and the relocation of the existing bus station (Appendix 3).

2.3 History and Development of Morpeth

Morpeth is situated in the valley of the River Wansbeck, around 15 miles north of Newcastle. It is one of Northumberland’s major market towns, with a population of around 15,000.

The name ‘Morpeth’ is thought to have derived from either ‘moor path’ or ‘murder path’, possibly named after the Great North Road on which the town lay, and which led north across the moors.

The Normans sited a castle at Haw Hill in the 11th century, overlooking the river crossing. However, this burned down in 1216 and only the mound remains. In the 14th century, this was replaced by a second castle built within the bailey of the original castle. The gatehouse still remains today, and is currently used as a private residence.

Although the origins of Morpeth date back to the Norman period, much of the existing street patterns date back to medieval times. Many of the roads, including Bridge Street, Oldgate and Hillgate, are recorded on historical documents from the 13th or 14th centuries.

Morpeth is now one of Northumberland’s major market towns, and is the administrative centre for the County Council. Together with the pharmaceutical manufacturers Pharmacia, the County Council is the major employer in the town.
One of the main attractions in Morpeth is Carlisle Park, which, last year, received the Enjoy England Tourist Attraction award for the 7th year running. Within the park stands the gateway of a 19th century Court House and jail.

Another popular attraction is the ‘Wednesday market’ which has been running for over 800 years, and which has recently been moved back to its original location in the marketplace.
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 Morpeth Town Centre and also the opinions of shoppers surveyed on the range of retail provision in Morpeth.

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 (53%) of the floorspace in Morpeth Town Centre are classed as shops. Business accounts for 12% of the floorspace, while financial and professional services, drinking establishments and assembly and leisure each account for 7% of the floorspace in Morpeth. Non-residential institutions occupy 6% of floorspace.
Figure 3: Floorspace by Use Class

Floorspace by Use Class - Morpeth Town Centre

Source: Experian, March 2008
Figure 4: Building Use class for Morpeth Town Centre

Source: Experian, March 2008
The map (Figure 4) shows that the majority of shops within the town centre are clustered around the two main streets: Bridge Street and Newgate Street. There are a number of businesses and financial and professional services distributed evenly throughout the town centre. The bottom of the map shows the Riverside Leisure Centre (assembly and leisure). However, the recent floods (see section 14) means that the future of the leisure centre is uncertain at this stage. The majority of drinking establishments are along Bridge Street, with a couple more on Newgate Street, which is where the majority of the hot food takeaways are situated. The non-residential institutions shown on the map are all situated on the edge of Morpeth Town Centre.

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 5 annual events that take place in Morpeth Town Centre throughout the year. The Morpeth Farmers Market currently takes place in the Market Place and Town Hall. This is a FARMA certified farmers’ market, currently held on the first Sunday of the month from 9am-12.30pm. This date will switch to the first Saturday in October from 9 - 1.30pm (to be confirmed). Around 1,500-1,800 attend.

The Morpeth Fair Day is a family fun day with a fun fair, continental market, huge range of stalls, craft fair and all day entertainment. The grand parade takes place at midday. Around 30,000 members of the public attend the event which is held in Morpeth town centre in June.

The Mistletoe Fair, which takes place at the Town Hall and the Market Place, has various craft stalls and attracts up to 1,000 attendees.

The annual Picnic in the Park held at Carlisle Park is another family fun day. The day is full of excitement with pony rides, face painting, story telling, a teddy bears' picnic, magic show and much more. This event has an attendance of around 600.

Open air ‘Summer Concerts’ take place on Saturdays in July/August.

3.3 Satisfaction with the range of provision – retail

Question 14 in the Morpeth Shopper Questionnaire asked:

To what extent do you agree/disagree with the statement “On the whole, Morpeth offers a wide choice of quality shops”?

Respondents were not very positive about this statement, only 30% agreeing or strongly agreeing, and 42% disagreeing or strongly disagreeing (Figure 5).
Figure 5: How would you rate “On the whole, Morpeth offers a wide choice of quality shops”?  
(Excludes ‘don’t know’ responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires, October 2007

Base: 221 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 - Morpeth

Figure 6 shows that in Morpeth town centre, the majority of businesses are comparison retail (70 independent, 1 multiple chain). The category which has the 2nd highest amount of businesses is leisure services: 23 of which are independent and
21 multiple chain. There are 21 convenience retail premises and 39 retail service in total.
5.0 RETAILER DEMAND

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

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).

Figure 7 shows that the enquiries for vacant properties within Morpeth Town Centre as recorded on the Northumberland Property Database (April 2007 – March 2008) were local (within Northumberland) and regional (within Northumberland and Tyne and Wear). Local enquiries were recorded for properties on Bridge Street which is a main shopping area in Morpeth. Local and regional enquiries were recorded for properties on Manchester Street towards the edge of the town centre. 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 Morpeth Town Centre April 2007 – March 2008

Property Enquiries for Morpeth Town Centre April 2007 - March 2008

Source: Northumberland Property Search.com, April 2008
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 Northumberland in comparison with the North East and England, as this data does not exist for Morpeth Town Centre. It has been assumed that the reason for this is “From Spring 2002 reporting locations with a yield of 10% or over will not be included in the time series on the assumption that such locations are not of major interest in terms of retail property investment. The locations however will still be monitored and if evidence indicates yields have fallen to less than 10% the time series will be continued.”

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.”

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.

1 www.voa.gov.uk
2 Valuation Office, October 2008
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 shows that unfortunately, a lot of the zone A rental information for Morpeth Town Centre is unknown. Of the properties for which this information is available, those which have the highest zone A rent at £400 - £499 per m², are situated on Bridge Street. On Newgate Street the highest zone A rent was £200 - £299 per m², for the properties situated closest to Bridge Street and the hub of the town centre. Towards the edge of the town centre, the zone A rent on Newgate Street was £100 - £199 per m².

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.” ³ It “provide a consistent basis for understanding how the property market assesses the

³ www.voa.gov.uk
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.\textsuperscript{4}

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

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

In Northumberland, this data is only available for 5 towns: Alnwick, Ashington, Berwick upon Tweed, Blyth and Hexham. There is therefore no available data for Morpeth, however Figure 9 shows the average yield for Northumberland, the North East of England, and England.

**Figure 9: Shopping Centre Yields – Northumberland**

![Shopping Centre Yields](https://example.com/graph.png)

Source: Valuation Office (www.voa.gov.uk), July 2008

The graph shows that since April 2001, the average yield for Northumberland has generally been higher than the average for the North East of England and England. The biggest difference in yield between Northumberland and the rest of the North East was by 0.86 in January 2005. Similarly for Northumberland and the rest of

\textsuperscript{4} www.voa.gov.uk
England in January 2005 it was 1.20. This indicates that based on yield, it has been derived that there is more of a “risk” associated with setting up business in Northumberland compared to the rest of the North East and England. The latest result, however, in July 2007, showed that this gap had decreased. The average yield for Northumberland was 7.05; the average yield for the North East was 7.02; and the average yield for England was 6.70.

6.3 Average Rental Rate
The average monthly rental rate for vacant commercial property in Morpeth town centre between 1st January 2006 and 31st December 2007 was £176.26 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, Morpeth has the 2nd highest average monthly rental rate in Northumberland for the towns recorded here, with only Ashington (£217.04 per square metre), with a higher rate. However, it must be noted that these rental figures are based solely on properties that were vacant between 1st January 2006 and 31st 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 Morpeth and other Northumberland Towns

Source: Northumberland Property Database, December 2007
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. Vacancies concentrated in an area may also reflect an ongoing land assembly in advance of a wider regeneration of part of a town. 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 Morpeth 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 street within Morpeth Town Centre with the most vacant premises is Sanderson Arcade with 55% of premises vacant. It also has the highest vacancy rate in terms of floorspace (48% vacant). However, it must be noted that Sanderson Arcade is currently undergoing a transformation costing £32 million (see section 13.1 and Appendix 3).

Biltons Court has the 2nd highest percentage of vacant properties (50%). However, this only accounts for 29% of vacant floorspace and is ranked 4th for streets with the most vacant floorspace. Back Riggs and Manchester Street had the 3rd (31%) and 4th (15%) highest amounts of vacant premises.

Figure 12 shows that in Morpeth Town Centre, there were 92% of occupied premises and 8% of vacant premises overall.
Figure 11: Vacancy Rates of Premises

<table>
<thead>
<tr>
<th>Road</th>
<th>Vacant (number of buildings)?</th>
<th>Vacant (floorspace sqm)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>SANDERSON ARCADE</td>
<td>yes</td>
<td>55%</td>
</tr>
<tr>
<td>BILTONS COURT</td>
<td>yes</td>
<td>50%</td>
</tr>
<tr>
<td>BACK RIGGS</td>
<td>yes</td>
<td>31%</td>
</tr>
<tr>
<td>MANCHESTER STREET</td>
<td>yes</td>
<td>15%</td>
</tr>
<tr>
<td>BRIDGE STREET</td>
<td>yes</td>
<td>5%</td>
</tr>
<tr>
<td>NEWGATE STREET</td>
<td>yes</td>
<td>5%</td>
</tr>
<tr>
<td>BELLS YARD</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>CHANTRY PLACE</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>DARK LANE</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>FAWCETTS YARD</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>GAS HOUSE LANE</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>GREYS YARD</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>LUMSDEN LANE</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>MARKET PLACE</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>NEW MARKET</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>NEW PHOENIX YARD</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>OLD BAKEHOUSE YARD</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>OLDGATE</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>OLYMPIA GARDENS</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>STANLEY STREET</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td>WHEATSHEAF YARD</td>
<td>no</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>yes</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Experian, March 2008

Figure 12: Is a Property Vacant

Is Property Vacant? (Morpeth Town Centre)

- No: 92%
- Yes: 8%

Source: Experian, March 2008
7.2 Changes in Town Centre Occupiers 2007 – 2008 (Property Flows)

Figure 13 shows changes in Town Centre Occupiers in 2007 and 2008 within Morpeth Town Centre. There has been a decrease in the number of Hairdressing shops from 14 in 2007 to 12 in 2008, as well as a decrease in the number of Jewellers from 7 in 2007 to 5 in 2008. There is also a decrease in the number of Cafes from 8 in 2007 to 7 in 2008 as well as the number of Bakers which has also decreased from 4 in 2007 to 3 in 2008 and the number of Florists from 2 in 2007 to 1 in 2008. However there has been an increase in the number of Ladies Wear businesses going from 8 in 2007 to 9 in 2008 and also in the number of Beauty Salons from 2 in 2007 to 4 in 2008. There has also been an increase in the number of Health Food businesses from 1 in 2007 to 2 in 2008.

Figure 13: Changes in Primary Activity Type 2007-2008

Source: Experian, March 2008
Figure 14 shows the type of changes in premises in Morpeth Town Centre between 2007 and 2008. Over half (58%) of the changes were a change in occupier. Only 12% of these changes were premises that were vacant in 2007 but were occupied in 2008. Almost one third (30%) of premises were occupied in 2007 but vacant in 2008, therefore an increase of vacant premises is evident.

**Figure 14: Type of Changes in Premises**

Source: Experian, March 2008
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 Morpeth Town Centre in October 2007 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 Wednesday 3rd October, Thursday 4th October and Saturday 6th October 2007. They were carried out by interviewers at the 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 daily footfall for a typical Saturday in Morpeth town centre is around 10,200, although this will obviously vary depending on the time of year. The footfall count suggests that this figure drops by around 2,500 for a ‘normal’ weekday, and drops a further 600 for Market Day, suggesting that Thursday is generally a more popular day for visiting the town.

Figure 15: Estimated daily footfall in Morpeth Town Centre

<table>
<thead>
<tr>
<th>Location (see Figure 2)</th>
<th>Wednesday (Market day)</th>
<th>Thursday (“normal” day)</th>
<th>Saturday (weekend)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chantry</td>
<td>1,434</td>
<td>2,220</td>
<td>2,400</td>
</tr>
<tr>
<td>Bridge Street</td>
<td>1,854</td>
<td>1,890</td>
<td>3,000</td>
</tr>
<tr>
<td>Newgate Street/ Clock Tower</td>
<td>2,556</td>
<td>2,700</td>
<td>2,934</td>
</tr>
</tbody>
</table>

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.
<table>
<thead>
<tr>
<th>Newgate Street/ Manchester Street</th>
<th>1,264</th>
<th>888</th>
<th>1,884</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>7,108</td>
<td>7,698</td>
<td>10,218</td>
</tr>
</tbody>
</table>

Source: Northumberland Footfall Counts, October 2007

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 Morpeth 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 and train connectivity.

9.1 Shoppers travelling to town by car

53% of respondents travelled into Morpeth by car on the day of the interview. Two thirds of these (67%) said that they go to Morpeth 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 21% in the evenings (Figure 16).

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

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

![Frequency of visit to the town centre by those respondents travelling in by car]

Source: Northumberland Infonet Shopper Questionnaires, October 2007

Base: 118 for daytime; 188 for evening
69% of the respondents that travelled by car found it very easy to travel into Morpeth town centre (Figure 17).

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

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

Source: Northumberland Infonet Shopper Questionnaires, October 2007  
*Base: 118*

### 9.2 Access to car parking

The availability of public parking spaces was not rated very highly by the respondents. Only 35% gave a good or very good rating, and 39% gave a poor or very poor rating (Figure 18).

The availability of disabled parking spaces was rated a bit more favourably, with 50% of respondents giving a positive rating and only 12% giving a negative rating.

62% of respondents gave a good or very good rating for the safety/security of the parking facilities.
Figure 18: Percentage of respondents giving each rating for parking related attributes

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

Source: Northumberland Infonet Shopper Questionnaires, October 2007
Base: 108 to 196 respondents depending on question (note: this excludes those respondents that gave a ‘don't know’ response)

A number of comments relating to parking were given in response to the question about the main problems with the shopping experience in Morpeth town centre. These comments are listed below:

- Parking (14 responses)
- Car park
- Car parking
- Not enough car parks
- Not enough parking
- Parking - not enough spaces
- Parking is not good - more car parks
- Parking is bad
- More disabled parking
When respondents were asked how they would make the town centre better, the second most common answer was to improve the parking (34% of respondents mentioned this). A number of comments were also made in answer to this question. However, these all related to the parking charges, and hence have been placed in section 9.2.3.

9.3 Cost of parking

Over half of the respondents (52%) gave a poor or very poor rating for the cost of parking, and only one quarter (25%) 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, October 2007
Base: 186 respondents (note: this excludes those respondents that gave a ‘don’t know’ response)
A number of comments were given by the respondents relating to the cost of parking. These were as follows:

1. The main problems with the town centre:
   - Cost of parking (2 responses).
   - Parking charges.
   - Parking charges too high.
   - Parking terrible charges.

2. Ways to make the town centre better:
   - Cheaper parking (2 responses).
   - Drop the parking charges.
   - Less charges on parking.
   - No charge – parking.
   - No parking charges.
   - Cheaper parking on periphery.
### 9.4 Morpeth’s Car parks

Figures 20 and 21 show the location of car parks within and surrounding Morpeth Town Centre. Any car parks listed in the table which are not shown on the map are therefore situated outside of the town centre.

#### Figure 20: Location of Car Parks

<table>
<thead>
<tr>
<th>Car Park</th>
<th>Cost of Parking</th>
<th>Type of Car Park</th>
<th>Spaces</th>
<th>Long/Short Stay</th>
<th>Disabled Spaces</th>
<th>Coach Parking</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Error! Hyperlink reference not valid. Yard, Oldgate</td>
<td>£2.00</td>
<td>Surface Car Park</td>
<td>15</td>
<td>All Day</td>
<td>0</td>
<td>0</td>
<td>15 approx (this car park will be resurfaced shortly and new design will have slightly less bays)</td>
</tr>
<tr>
<td>2 Newmarket West, Newmarket</td>
<td>0.30 for up to 30 minutes, 0.50 for up to one hour, £1 up to 2 hours</td>
<td>Surface Car Park</td>
<td>62</td>
<td>3 hrs</td>
<td>2</td>
<td>0</td>
<td>closed - site of new town centre development</td>
</tr>
<tr>
<td>3 Lumsden’s Lane</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>closed - site of new town centre development</td>
</tr>
<tr>
<td>4 Back Riggs South</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>closed - site of new town centre development</td>
</tr>
<tr>
<td>5 Newmarket East, Newmarket</td>
<td>0.50 for up to one hour, £1 up to 2 hours</td>
<td>Surface Car Park</td>
<td>102</td>
<td>5 hrs</td>
<td>4</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>6 Whalebone Lane</td>
<td>0.30 for up to 30 minutes, 0.50 for up to one hour, £1 up to 2 hours</td>
<td>Surface Car Park</td>
<td>40</td>
<td>3 hrs</td>
<td>6</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>Location</td>
<td>Charges</td>
<td>Parking Type</td>
<td>Duration</td>
<td>Max Stay</td>
<td>Min Stay</td>
<td></td>
</tr>
<tr>
<td>-----</td>
<td>---------------------------------</td>
<td>--------------------------------------------------</td>
<td>--------------------</td>
<td>----------</td>
<td>----------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Corporation Yard</td>
<td>0.30 for up to 30 minutes, 0.50 for up to one hour, £1 up to 2 hours</td>
<td>Surface Car Park</td>
<td>25</td>
<td>3 hrs</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Back Riggs North</td>
<td>0.30 for up to 30 minutes, 0.50 for up to one hour, £1 up to 2 hours</td>
<td>Surface Car Park</td>
<td>29</td>
<td>3 hrs</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Matheson’s Gardens</td>
<td>£2.00</td>
<td>Surface Car Park</td>
<td>51</td>
<td>All Day</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>St James’, Well Way</td>
<td>£2.00</td>
<td>Surface Car Park</td>
<td>64</td>
<td>All Day</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Morrisons, Stanley Terrace North</td>
<td>0.30 for up to 30 minutes, 0.50 for up to one hour, £1 up to 2 hours</td>
<td>Surface Car Park</td>
<td>205</td>
<td>2 hrs</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Dacre Street</td>
<td>£2.00</td>
<td>Surface Car Park</td>
<td>28</td>
<td>All Day</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Castle Square</td>
<td>0.30 for up to 30 minutes, 0.50 for up to one hour, £1 up to 2 hours</td>
<td>Surface Car Park</td>
<td>13</td>
<td>3 hrs</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>The Terrace, Gas House Lane</td>
<td>0.50 for 1 hour, £1 up to 2 hours, £1.30 up to 3 hours and £2 lll day</td>
<td>Surface Car Park</td>
<td>82</td>
<td>All Day</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Low Stanners</td>
<td>Currently flat rate £2 for up to all day but soon 11 spaces will be designated short stay only at 50p for 1 hour, £1 for 2 hours and £1.30 for 3 hours £2 for the rest</td>
<td>Surface Car Park</td>
<td>in process of expanding when finished in a few weeks there will be 84</td>
<td>All Day</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dark Lane</td>
<td>0.50 for 1 hour, £1 up to 2 hours, £1.30 up to 3 hours and £2 all day</td>
<td>Surface Car Park</td>
<td>115</td>
<td>All Day</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>---</td>
<td>-----------</td>
<td>---------------------------------------------------------------------</td>
<td>------------------</td>
<td>-----</td>
<td>---------</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>17</td>
<td>Lidl, Stanley Terrace South</td>
<td>0.30 for up to 30 minutes, 0.50 for up to one hour, £1 up to 2 hours</td>
<td>Surface Car Park</td>
<td>80</td>
<td>2hrs</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>18</td>
<td>Error! Hyperlink reference not valid.</td>
<td>Station, Coopies Lane</td>
<td>Surface Car Park</td>
<td>free</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Castle Morpeth Borough Council, August 2008
Figure 21: Location of Car Parks

Source: Castle Morpeth Borough Council, August 2008
### 9.5 Bus Connectivity

The direct connections linking Morpeth to surrounding towns and villages are listed below.

**Figure 22: Destination and Frequency of Buses from Morpeth**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Mon - Fri</th>
<th>Sat</th>
<th>Sun</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alnmouth</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Alnwick</td>
<td>Approx 2 per hour</td>
<td>2 per hour</td>
<td>At least one per hour</td>
</tr>
<tr>
<td>Ashington</td>
<td>Approx 4 per hour</td>
<td>Approx 4 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Alwinton</td>
<td>2 per day</td>
<td>1 per day</td>
<td>None</td>
</tr>
<tr>
<td>Amble</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Bedlington</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 2 per 3 hours</td>
</tr>
<tr>
<td>Belford</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>6 per day</td>
</tr>
<tr>
<td>Berwick Upon Tweed</td>
<td>8 per day</td>
<td>8 per day</td>
<td>5 per day</td>
</tr>
<tr>
<td>Cambo</td>
<td>3 per day</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Choppington</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Blyth</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Cramlington</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>4 per day</td>
</tr>
<tr>
<td>Dyke Neuk</td>
<td>2 per day</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>East Hartford</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>Approx 1 per hour</td>
</tr>
<tr>
<td>Foulmartlaw</td>
<td>1 per day</td>
<td>1 per day</td>
<td>None</td>
</tr>
<tr>
<td>Guide Post</td>
<td>Approx 3 per hour</td>
<td>Approx 3 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Haggerston</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Harbottle</td>
<td>2 per day</td>
<td>1 per day</td>
<td>None</td>
</tr>
<tr>
<td>Hartburn</td>
<td>2 per day</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Hepscott</td>
<td>Approx 2 per hour</td>
<td>Approx 2 per hour</td>
<td>4 per day</td>
</tr>
<tr>
<td>High Pit</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>4 per day</td>
</tr>
<tr>
<td>Killingworth</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>None</td>
</tr>
<tr>
<td>Loansdean</td>
<td>Approx 7 per hour</td>
<td>Approx 7 per hour</td>
<td>Approx 2 per hour</td>
</tr>
<tr>
<td>Longframlington</td>
<td>9 per day</td>
<td>9 per day</td>
<td>None</td>
</tr>
<tr>
<td>Longhorsley</td>
<td>9 per day</td>
<td>9 per day</td>
<td>None</td>
</tr>
<tr>
<td>Meldon</td>
<td>1 per day</td>
<td>1 per day</td>
<td>None</td>
</tr>
<tr>
<td>Middleton</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>5 per day</td>
</tr>
<tr>
<td>Mitford</td>
<td>3 per day</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Nedderton</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>4 per day</td>
</tr>
<tr>
<td>Netherton</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>None</td>
</tr>
<tr>
<td>Newbiggin by the Sea</td>
<td>Approx 3 per hour</td>
<td>Approx 3 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Location</td>
<td>Morning Frequency</td>
<td>Midday Frequency</td>
<td>Evening Frequency</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Newcastle upon Tyne</td>
<td>Approx 5 per hour</td>
<td>Approx 5 per hour</td>
<td>Approx 3 per hour</td>
</tr>
<tr>
<td>Newton on The Moor</td>
<td>3 per day</td>
<td>3 per day</td>
<td>None</td>
</tr>
<tr>
<td>North Choppington</td>
<td>Approx 3 per hour</td>
<td>Approx 3 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>North Seaton</td>
<td>Approx 3 per hour</td>
<td>Approx 3 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Pegswood</td>
<td>Approx 5 per hour</td>
<td>Approx 5 per hour</td>
<td>Approx 2 per hour</td>
</tr>
<tr>
<td>Rothbury</td>
<td>9 per day</td>
<td>9 per day</td>
<td>None</td>
</tr>
<tr>
<td>Scremerston</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>5 per day</td>
</tr>
<tr>
<td>Shadfen</td>
<td>Approx 3 per hour</td>
<td>Approx 3 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Shilbottle</td>
<td>Approx 1 per 2 hours</td>
<td>Approx 1 per 2 hours</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Shiremoor</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>None</td>
</tr>
<tr>
<td>Stakeford</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>None</td>
</tr>
<tr>
<td>Stannington</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>Stobhill</td>
<td>Approx 3 per hour</td>
<td>Approx 3 per hour</td>
<td>At least 1 per hour</td>
</tr>
<tr>
<td>Swarland</td>
<td>3 per day</td>
<td>3 per day</td>
<td>None</td>
</tr>
<tr>
<td>Thropton</td>
<td>9 per day</td>
<td>9 per day</td>
<td>None</td>
</tr>
<tr>
<td>Warkworth</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
</tr>
<tr>
<td>West Edington</td>
<td>2 per day</td>
<td>1 per day</td>
<td>None</td>
</tr>
<tr>
<td>Widdrington</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
</tr>
</tbody>
</table>

Source: Travel Search (http://www.carlberry.co.uk/index.htm); North East Travel Line (http://jplanner.travelinenortheast.info), July 2008

9.6 Shoppers travelling to town by bus

14% of respondents travelled into Morpeth town centre by bus on the day of the interview. The majority of these (94%) said that they go to Morpeth 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 22% in the evenings (Figure 23).
Figure 23: Frequency of visit to the town centre by those respondents travelling in by bus
(Excludes 'don’t know' responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires, October 2007

Base: 32 for daytime; 32 for evening

Over three quarters of respondents (81%) who travelled into the centre by bus found it easy or very easy. 13% found it difficult or very difficult (Figure 24).
Figure 24: How easy/difficult do you feel it is to travel into Morpeth town centre (those respondents that travelled by bus)

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

Source: Northumberland Infonet Shopper Questionnaires, October 2007

Base: 32 respondents

9.7 Train Connectivity

Morpeth 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 Morpeth

<table>
<thead>
<tr>
<th>Destination</th>
<th>Mon - Fri</th>
<th>Sat</th>
<th>Sun</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newcastle upon Tyne</td>
<td>At least one per hour</td>
<td>Approx 1 per hour</td>
<td>4 per day</td>
</tr>
<tr>
<td>Morpeth</td>
<td>5 per day</td>
<td>3 per day</td>
<td>2 per day</td>
</tr>
<tr>
<td>Alnmouth</td>
<td>9 per day</td>
<td>8 per day</td>
<td>3 per day</td>
</tr>
<tr>
<td>Cramlington</td>
<td>Approx 1 per hour</td>
<td>Approx 1 per hour</td>
<td>None</td>
</tr>
<tr>
<td>Dunbar</td>
<td>4 per day</td>
<td>2 per day</td>
<td>1 per day</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>8 per day</td>
<td>6 per day</td>
<td>3 per day</td>
</tr>
<tr>
<td>Widdrington</td>
<td>1 per day</td>
<td>1 per day</td>
<td>None</td>
</tr>
</tbody>
</table>

Source: Travel Search (http://www.carlberry.co.uk/index.htm); North East Travel Line (http://planner.travelinenortheast.info), July 2008
9.8 Shoppers travelling to town by train
No shopper’s questionnaire respondents said that they travelled to Morpeth town centre by train.

9.9 Perception of Public Transport Services
The attributes related to public transport were given a good/very good rating by around one half of the responses, with the lowest of these ratings (and the highest poor/very poor rating) relating to regularity of bus/rail services (Figure 26).

Figure 26: Percentage of respondents giving each rating for public transport related attributes
(Excludes ‘don’t know’ responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires, October 2007
Base : 146 to 154 respondents depending on attribute (note: this excludes those respondents that gave a ‘don’t know’ response)

A few comments were made regarding public transport. These are listed below:

1. The main problems with the town centre:
   - Bus service.
   - Bus times.
2. Ways to make the town centre better:
   - Better bus options.
   - Better bus service to outlying areas.
   - Better buses.
   - Bus service tailored to retired generation.
   - More reliable buses.

9.10 Perception of Accessibility

When asked how they would make the town centre better, 19 shopper’s questionnaire respondents (10% of respondents) said that improved accessibility was needed. Three of these respondents also gave comments relating to accessibility:
   - Better buses.
   - Improved transport.
   - Ramps.

Another question asked for suggested improvements to the retail offer. One of the responses to this was “improved wheelchair access”.

In addition, a perceived problem with the shopping experience in Morpeth town centre was, “bad in morning for access”.

9.11 Origin and method of travel of Shoppers Interviewed

As Figure 27 shows, most of the respondents from the Morpeth Shopper Survey came from the Morpeth district. The majority of these were concentrated in or around Morpeth itself. The mode of transport used to get into the town varied, with some using a car or a bus, and others using an alternative form of transport (mainly walking), particularly those that lived in Morpeth town.

A number of respondents said that they came from the Alnwick district, and a few came from the Wansbeck or Blyth districts. These travelled into Morpeth mainly by
car, although a few used the bus or some other method of travel. In addition, a few respondents said that they travelled by car from the Tyne & Wear region.

A handful of respondents came from further afield across the UK.
Figure 27: Visitors to Morpeth within Northumberland

Visitors to Morpeth within Northumberland and Tyne & Wear (Shopper's Survey) - Home Towns

Source: Northumberland Shopper Questionnaires, October 2007
Figure 28: Visitors to Morpeth outside Northumberland

Visitors to Morpeth outside of Northumberland and Tyne & Wear (Shopper's Survey) - Home Towns

Source: Northumberland Shopper Questionnaires, October 2007
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 Morpeth:

- Morpeth have done well in Britain in Bloom, there are a number of flower baskets and flower beds that are maintained by Heighley Gate and also through partnership working with Castle Morpeth Borough Council, Morpeth Town Council and the Chamber of Trade.

- The flower baskets outside the shops are also maintained through partnership working but the local shops also contribute towards these

- The seating throughout the town is maintained through partnership working and there is a programme of maintenance. The seating in the Market Place is jointly maintained by Northumberland County Council and Castle Morpeth Borough Council.

- Friends of Carlisle Park maintain the seats, gates within the park

- The bins are provided and paid for by Town Council and District Council and the District Council maintain them. There are also recycling bins in Carlisle Park which have worked well and it is possible that these bins will be placed around the town.
• Morpeth Town Centre receive funding from ‘Neighbour Regeneration Funding’ and this funding goes towards the signage around the town

• Castle Morpeth Borough Council have an environmental partnership with King Edward VI High School, each class has a recycling competition and they are also helping the school develop the school garden. The council assisted by clearing away the land and help create the pond. This project will hopefully help protect squirrels, create bat and bird boxes, and develop wild flowers all within the school garden.

10.2 Shopper perception of the town

10.2.1 Pedestrianisation
Views on pedestrianisation were not specifically asked about in the survey. However, when asked about suggested ways to make the town centre better, a few comments were made relating to this subject:
- Pedestrianise (4 responses);
- Pedestrianised (3 responses);
- Pedestrianise main street;
- Sanderson Arcade Pedestrianised Areas

Further to comments on pedestrianisation in the shopper’s questionnaire, were related comments including:
- More crossings
- Pavements improved for better walking
- New Arcade
- Improve payments

It must be noted that the comments above “Sanderson Arcade Pedestrianised Areas” and “New Arcade” will be realised through the £32 million Sanderson Arcade development (See Section 13.0).
10.2.2 Signage, Street furniture and Open Spaces

**Signage**

None of the respondents made any comments about signage.

**Street Furniture**

Shopper questionnaire respondents were asked to rate street furniture as part of two different questions. 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 similar. Over three quarters of respondents gave a good or very good rating, and less than 6% gave a poor or very poor rating (Figure 29).

**Figure 29: Street furniture ratings**

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

<table>
<thead>
<tr>
<th>Rating</th>
<th>Street furniture</th>
<th>General state of town centre - Street furniture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Poor</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Poor</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>OK</td>
<td>46%</td>
<td>57%</td>
</tr>
<tr>
<td>Good</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Very Good</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: Northumberland Infonet Shopper Questionnaires, October 2007

Base : 216 to 220 respondents depending on question (note: this excludes those respondents that gave a ‘don’t know’ response)

A couple of respondents gave comments related to the street furniture in Morpeth: “more seating” and “outside sitting areas – for coffee”.
Open Spaces
Most of the respondents (94%) gave a positive rating for the parks and open spaces in Morpeth. Only 1 respondent gave a poor response (Figure 30).

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

Source: Northumberland Infonet Shopper Questionnaires, October 2007
Base : 211 respondents (note: this excludes those respondents that gave a ‘don’t know’ response)

10.2.3 Litter and Cleanliness
The overall level of cleanliness in Morpeth town centre was perceived to be quite good, with 78% of respondents giving a good or very good rating, and only 3% giving a poor or very poor rating. Litter within the town centre received a slightly lower rating (73% positive and 9% negative) (Figure 31).
Figure 31: Ratings given for litter and overall cleanliness
(Excludes ‘don’t know’ responses unless otherwise specified)

When asked how the respondents would make the town centre better, a number of responses were given relating to litter and cleanliness:

- Less litter.
- Less rubbish from takeaways, cleaner streets.
- Get rid of chewing gum.
- more litter bins.

10.2.4 General Appearance of the Town

Respondents were reasonably positive about the general appearance of the town, with at least three quarters giving a good or very good rating in each case (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, October 2007

Base: 211 to 220 respondents; (note: this excludes those respondents that gave a ‘don’t know’ response)

A number of suggestions of ways to make the town centre better were made. Comments relating to the appearance of the town are given below:

- Do up town hall and interior
- Facelift
- Left it how it used to be years ago
- More traditional like Alnwick - its drifted towards "modern"
- Once its refurbished & there's more for youngsters to do it'll be better
- The shops fronts are too "outstanding"/ they should pay more attention to the architecture
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, December 2007
Looking at the map of Morpeth town centre (Figure 33) the occurrences of “all crime” and “rowdy and/ or nuisance” crime in 2005 – 2007 are fairly evenly spread throughout Morpeth town centre. There is a slight clustering of incidents behind the Market Place/ Newgate Street but this isn’t too significant. There has been a low number of cases of “other ASB” in Morpeth town centre and even fewer cases of “street drinking”.

Looking at the chart (Figure 34), the types of crime have been broken down further. The most frequent type of crime occurring in Morpeth Town Centre between 2005 and 2007 was rowdy and/or nuisance of which there were 232 occurrences. The 2nd most frequent type of crime was fraud and forgery of which there were 78 occurrences.
11.2 Perception or Fear of Crime

A high proportion of shopper questionnaire respondents (89%) felt that safety/security during the daytime was good or very good. This figure dropped to 58% for night-time safety/security (Figure 35).

Figure 35: Ratings given for safety/security
(Excludes ‘don’t know’ responses unless otherwise specified)

Source: Northumberland InFonet Shopper Questionnaires, October 2007
Base: 161 respondents (nighttime); 207 respondents (daytime); (note: this excludes those respondents that gave a ‘don’t know’ response)

On respondent thought that ‘drinking on the street’ was a problem in Morpeth town centre, and three respondents gave a safety/security related comment when asked how they would make the town centre better:

- More policing at pub closing.
- Better policing.
- More community policemen for crowds of young people.

As can be seen in section 9.2.2, 62% of respondents felt that the safety/security of the parking facilities was good/very good.
11.3 Initiatives to Address Town Centre-Related Crime

According to the Castle Morpeth Crime and Disorder Reduction Partnership (CRDP) the following initiatives exist in the Castle Morpeth District (October 2008):

- Earlier in 2008, Castle Morpeth CDRP upgraded the Morpeth Shop Watch scheme by linking the radio message to the CCTV monitoring system at Killingworth so the CCTV operator can proactively use the Town Centre CCTV to monitor an ongoing situation as well as using their police radio to alert local patrols. The system has now been extended to Morpeth Pub Watch members and it is anticipated that when the re-development of Morpeth Town Centre is complete the scheme will be further extended.
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 Morpeth 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 Morpeth’s catchment area; spending patterns and retaining shopper spend within the town centre.

12.1 Regularity of visits

80% of respondents go to Morpeth town centre during the daytime at least once a week, with the most common frequencies of visit being every day (35%) and twice a week (34%) (Figure 36).

Respondents visit the centre far less often during the evenings, with only 29% visiting at least once a week. 27% said that they never visit the town centre during the evening.

Figure 36: Approximately how often are you in Morpeth Town Centre?

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

Source: Northumberland Infonet Shopper Questionnaires, October 2007

Base: 222 respondents (daytime and evening)
12.2 Expenditure/Type of Purchases

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

As the tables show, respondents are most likely to do their food shopping and other domestic shopping in Morpeth, but for other non-food items they are more likely to travel further afield. The most popular place for respondents to do non-food shopping (particularly clothes and shoes) appears to be Newcastle.

**Figure 37: Proportion of respondents shopping in Morpeth and other areas**

<table>
<thead>
<tr>
<th></th>
<th>Main 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>Morpeth</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Morpeth only</td>
<td>43%</td>
<td>50%</td>
<td>11%</td>
<td>17%</td>
<td>16%</td>
<td>14%</td>
<td>23%</td>
<td>26%</td>
</tr>
<tr>
<td>Morpeth + local area</td>
<td>16%</td>
<td>13%</td>
<td>9%</td>
<td>8%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Morpeth + internet/non-local/local mix</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Non-Morpeth</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local area (not Morpeth)</td>
<td>30%</td>
<td>28%</td>
<td>70%</td>
<td>66%</td>
<td>61%</td>
<td>64%</td>
<td>52%</td>
<td>39%</td>
</tr>
<tr>
<td>Internet or other</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>6%</td>
<td>15%</td>
<td>12%</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Mixture of places (not Morpeth)</td>
<td>0%</td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

---

6 ‘Local area’ is defined as being one of the following: Blyth, Cramlington, Ashington, Hexham, Alnwick, Newcastle, Metro Centre.
<table>
<thead>
<tr>
<th>Don't buy</th>
<th>1%</th>
<th>0%</th>
<th>0%</th>
<th>0%</th>
<th>2%</th>
<th>3%</th>
<th>4%</th>
<th>9%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base</td>
<td>222</td>
<td>222</td>
<td>222</td>
<td>222</td>
<td>221</td>
<td>222</td>
<td>222</td>
<td>222</td>
</tr>
</tbody>
</table>

Source: Northumberland Infonet Shopper Questionnaires, October 2007

**Figure 38: Could you indicate where you go to purchase the following items?**

<table>
<thead>
<tr>
<th></th>
<th>Food</th>
<th>Other domestic</th>
<th>Clothes</th>
<th>Shoes</th>
<th>Electrical goods</th>
<th>Furniture/carpets</th>
<th>DIY goods</th>
<th>CDs/DVDs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morpeth</td>
<td>62%</td>
<td>64%</td>
<td>20%</td>
<td>25%</td>
<td>19%</td>
<td>17%</td>
<td>29%</td>
<td>34%</td>
</tr>
<tr>
<td>Blyth</td>
<td>5%</td>
<td>5%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Cramlington</td>
<td>16%</td>
<td>12%</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>Ashington</td>
<td>10%</td>
<td>9%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>7%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>Hexham</td>
<td>1%</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>Alnwick</td>
<td>5%</td>
<td>5%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Newcastle</td>
<td>16%</td>
<td>12%</td>
<td>64%</td>
<td>58%</td>
<td>48%</td>
<td>50%</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>Metro Centre</td>
<td>4%</td>
<td>5%</td>
<td>30%</td>
<td>27%</td>
<td>20%</td>
<td>14%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Internet</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
<td>1%</td>
<td>6%</td>
<td>3%</td>
<td>1%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>13%</td>
<td>14%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Don't buy</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>9%</td>
</tr>
<tr>
<td>Base</td>
<td>221</td>
<td>222</td>
<td>222</td>
<td>222</td>
<td>221</td>
<td>222</td>
<td>221</td>
<td>222</td>
</tr>
</tbody>
</table>

Source: Northumberland Infonet Shopper Questionnaires, October 2007
Over two thirds of respondents (69%) planned to spend less than £25 in Morpeth on the day they were interviewed, with a further 17% expecting to spend between £25 and £100 (Figure 39).

**Figure 39: How much do you plan to spend in Morpeth today?**
(Excludes 'don't know' responses unless otherwise specified)

![Bar Chart](chart.png)

Source: Northumberland Infonet Shopper Questionnaire, October 2007s

**Base: 221 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. Within the context of the RSS and the Castle Morpeth Local Development Framework, the town of Morpeth is defined as being a Rural Service Centre: a settlement that provides jobs, services and facilities for a wider rural hinterland. The other settlements within the Castle Morpeth borough are Secondary Settlements: towns and villages that are smaller in scale or function than Rural Service Centres.
The map (Figure 40) shows the catchment area for Morpeth town centre, 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 town 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”\(^7\).

\(^7\) “Goad Town Centre Shopper Report - Interpretation and Methodology 2008” Experian
12.4 Spending Patterns

In addition to the town of Morpeth and a number of smaller adjacent settlements, including Pegswood and Hepscott, the catchment embraces much of the Wansbeck district, the Rural Coalfield and over to the Northumberland National Park in the West. Altogether, the catchment covers an area of 2,226.10 km², is home to approximately 76,300 people and 33,000 households. Together, these households and residents spend an estimated £332.7 million per annum on retail goods and services, with 35.6% of expenditure on convenience retail goods (£118.5 million) and 64.4% on comparison retail (£214.2 million). This balance differs slightly from the national (UK) average, which reports 36.7% of expenditure on convenience retail and 63.3% 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 Morpeth 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: Morpeth Catchment Summary Profile**

<table>
<thead>
<tr>
<th>Morpeth Catchment Summary Profile</th>
<th>Totals</th>
<th>Morpeth Catchment</th>
<th>%</th>
<th>UK</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007 Population</td>
<td>76,255.00</td>
<td>60,796,178.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007 Households</td>
<td>33,002.00</td>
<td>26,018,847.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Comparison</td>
<td>214,234,912.00</td>
<td>171,926,829,196.00</td>
<td>64.4%</td>
<td>63.4%</td>
<td>101.63</td>
<td></td>
</tr>
<tr>
<td>Total Convenience</td>
<td>118,506,924.00</td>
<td>99,464,696,627.00</td>
<td>35.6%</td>
<td>36.6%</td>
<td>97.18</td>
<td></td>
</tr>
<tr>
<td>Total Retail</td>
<td>332,741,836.00</td>
<td>271,391,525,823.00</td>
<td>100.0%</td>
<td>100.0%</td>
<td>100.00</td>
<td></td>
</tr>
<tr>
<td>Total Comparison per household</td>
<td>6,491.57</td>
<td>6,607.78</td>
<td></td>
<td></td>
<td></td>
<td>98.24</td>
</tr>
<tr>
<td>Total Convenience per household</td>
<td>3,590.90</td>
<td>3,822.79</td>
<td></td>
<td></td>
<td></td>
<td>93.93</td>
</tr>
<tr>
<td>Total Retail per household</td>
<td>10,082.47</td>
<td>10,430.57</td>
<td></td>
<td></td>
<td></td>
<td>96.66</td>
</tr>
</tbody>
</table>

Source: Experian, August 2008
Total retail expenditure per household per annum within the catchment stands at £10,082, with average comparison retail spend at £6,492 per annum and convenience spend at £3,591 per annum. All of these Figures are below the national average, with total spend 96.66% of the UK Figure.

Figure 42 provides a breakdown of Comparison retail expenditure within the Morpeth catchment and in the UK. Clearly the largest expenditure type within comparison retail is Clothing Material & Garments, accounting for £47.9 million or 22.4% of total Comparison Expenditure within the catchment. Clothing is followed by Audio-visual, photographic and information processing equipment (£25.9 million or 12.1%) and Games, toys and hobbies; sport and camping; musical instruments (£22.0 million or 10.3%). The pattern of expenditure nationally is similar, but with some notable differences. Referring to the index, households in Morpeth spend 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, Major tools and equipment and Materials for maintenance and repair of the dwelling.
### Figure 42: Expenditure on Comparison Retail

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Morpeth Catchment</th>
<th>%</th>
<th>UK</th>
<th>%</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>10% of Non-Durable household goods</td>
<td>415,539.00</td>
<td>0.19%</td>
<td>357,185,476.00</td>
<td>0.21%</td>
<td>93.36</td>
</tr>
<tr>
<td>Appliances for personal care</td>
<td>18,568,053.00</td>
<td>8.67%</td>
<td>15,298,262,865.00</td>
<td>8.90%</td>
<td>97.40</td>
</tr>
<tr>
<td>Audio-visual, photographic and information processing equipment</td>
<td>25,881,251.00</td>
<td>12.08%</td>
<td>14,926,597,385.00</td>
<td>8.68%</td>
<td>139.15</td>
</tr>
<tr>
<td>Bicycles</td>
<td>285,178.00</td>
<td>0.13%</td>
<td>1,345,908,674.00</td>
<td>0.78%</td>
<td>17.00</td>
</tr>
<tr>
<td>Books and stationery</td>
<td>7,449,503.00</td>
<td>3.48%</td>
<td>6,968,169,166.00</td>
<td>4.05%</td>
<td>85.80</td>
</tr>
<tr>
<td>Clothing materials and garments</td>
<td>47,881,635.00</td>
<td>22.35%</td>
<td>37,197,970,202.00</td>
<td>21.64%</td>
<td>103.30</td>
</tr>
<tr>
<td>Furniture and furnishings; carpets and other floor coverings</td>
<td>20,960,541.00</td>
<td>9.78%</td>
<td>18,218,052,893.00</td>
<td>10.60%</td>
<td>92.33</td>
</tr>
<tr>
<td>Games, toys and hobbies; sport and camping; musical instruments</td>
<td>22,020,418.00</td>
<td>10.28%</td>
<td>18,951,364,780.00</td>
<td>11.02%</td>
<td>93.25</td>
</tr>
<tr>
<td>Gardens, plants and flowers</td>
<td>3,444,763.00</td>
<td>1.61%</td>
<td>3,402,000,385.00</td>
<td>1.98%</td>
<td>81.26</td>
</tr>
<tr>
<td>Glassware, tableware and household utensils</td>
<td>5,139,138.00</td>
<td>2.40%</td>
<td>4,753,009,610.00</td>
<td>2.76%</td>
<td>86.77</td>
</tr>
<tr>
<td>Household textiles</td>
<td>7,027,496.00</td>
<td>3.28%</td>
<td>5,378,572,610.00</td>
<td>3.13%</td>
<td>104.85</td>
</tr>
<tr>
<td>Jewellery, clocks and watches</td>
<td>5,235,104.00</td>
<td>2.44%</td>
<td>4,533,353,900.00</td>
<td>2.64%</td>
<td>92.67</td>
</tr>
<tr>
<td>Major household appliances (electric or not)</td>
<td>8,087,867.00</td>
<td>3.78%</td>
<td>4,457,482,024.00</td>
<td>2.59%</td>
<td>145.61</td>
</tr>
<tr>
<td>Major tools and equipment</td>
<td>320,041.00</td>
<td>0.15%</td>
<td>370,528,409.00</td>
<td>0.22%</td>
<td>93.32</td>
</tr>
<tr>
<td>Materials for maintenance and repair of the dwelling</td>
<td>5,959,436.00</td>
<td>2.78%</td>
<td>6,826,571,834.00</td>
<td>3.97%</td>
<td>70.06</td>
</tr>
<tr>
<td>Medical goods and other pharmaceutical products</td>
<td>4,048,007.00</td>
<td>1.89%</td>
<td>3,904,354,994.00</td>
<td>2.27%</td>
<td>83.20</td>
</tr>
<tr>
<td>Other personal effects</td>
<td>2,511,255.00</td>
<td>1.17%</td>
<td>2,276,336,174.00</td>
<td>1.32%</td>
<td>88.53</td>
</tr>
<tr>
<td>Pets and related products</td>
<td>2,508,412.00</td>
<td>1.17%</td>
<td>2,747,999,981.00</td>
<td>1.60%</td>
<td>73.25</td>
</tr>
</tbody>
</table>
### MORPETH TOWN CENTRE HEALTH CHECK REPORT

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
<th>Percentage</th>
<th>2007 Value</th>
<th>2008 Value</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recording media</td>
<td>12,563,393.00</td>
<td>5.86%</td>
<td>7,513,288,250.00</td>
<td>4.37%</td>
<td>134.19</td>
</tr>
<tr>
<td>Shoes and other footwear</td>
<td>6,366,670.00</td>
<td>2.97%</td>
<td>5,348,647,704.00</td>
<td>3.11%</td>
<td>95.53</td>
</tr>
<tr>
<td>Small electrical household appliances</td>
<td>1,455,349.00</td>
<td>0.68%</td>
<td>748,364,529.00</td>
<td>0.44%</td>
<td>156.07</td>
</tr>
<tr>
<td>Small tools and miscellaneous accessories</td>
<td>2,836,006.00</td>
<td>1.32%</td>
<td>3,301,806,678.00</td>
<td>1.92%</td>
<td>68.93</td>
</tr>
<tr>
<td>Therapeutic appliances and equipment</td>
<td>3,269,859.00</td>
<td>1.53%</td>
<td>3,101,000,673.00</td>
<td>1.80%</td>
<td>84.62</td>
</tr>
<tr>
<td>Total Comparison</td>
<td>214,234,912.00</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, August 2008
Figure 43: Expenditure on Comparison Retail

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

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

Source: Experian, August 2008

Figure 44: Expenditure on Comparison Retail

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

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

Source: Experian, August 2008

Figure 45 below provides a breakdown of Convenience retail expenditure within the Morpeth catchment and in the UK. Clearly the largest expenditure type within comparison retail in Morpeth is Food and non-alcoholic beverages, accounting for £84 million or 70.9% of total Comparison Expenditure within the area. Food and non-alcoholic beverages is followed by Alcohol (£14.8 million or 12.5%) and Tobacco.
(£10.1 million or 8.6%). The pattern of expenditure nationally differs a little. Referring to the index, households in Morpeth proportionately more on spend more on Newspapers and Periodicals substantially less on Tobacco.

### Figure 45: 2007 Total Expenditure Convenience Retail

<table>
<thead>
<tr>
<th>2007 Total Expenditure (in 2006 prices) Convenience Retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Totals Morpeth Catchment</td>
</tr>
<tr>
<td>--------------------------</td>
</tr>
<tr>
<td>90% of Non-Durable household goods</td>
</tr>
<tr>
<td>Alcohol (off-trade)</td>
</tr>
<tr>
<td>Food and non-alcoholic beverages</td>
</tr>
<tr>
<td>Newspapers and periodicals</td>
</tr>
<tr>
<td>Tobacco</td>
</tr>
<tr>
<td>Total Convenience</td>
</tr>
</tbody>
</table>

Source: Experian, August 2008

### 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 Morpeth town. What the information does not indicate is how much of the expenditure is spend purchasing goods and services in Morpeth 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 Morpeth catchment that shops in Morpeth and the proportion that shop at other centres.
- The percentage of expenditure spent on goods and services in Morpeth and the extent to which spending leaks to other centres.

The Figures in the tables (Figure 46 and Figure 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.

**Figure 46: Population Leakage**

<table>
<thead>
<tr>
<th>Retail Centre</th>
<th>Percentage (%)</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newcastle upon Tyne - Central</td>
<td>21.40</td>
<td>16,322</td>
</tr>
<tr>
<td>Ashington</td>
<td>17.68</td>
<td>13,485</td>
</tr>
<tr>
<td>Metro Centre</td>
<td>15.97</td>
<td>12,177</td>
</tr>
<tr>
<td>Alnwick</td>
<td>11.31</td>
<td>8,623</td>
</tr>
<tr>
<td>Cramlington</td>
<td>6.86</td>
<td>5,232</td>
</tr>
<tr>
<td>Blyth</td>
<td>5.99</td>
<td>4,566</td>
</tr>
<tr>
<td><strong>Morpeth</strong></td>
<td><strong>5.89</strong></td>
<td><strong>4,495</strong></td>
</tr>
<tr>
<td>North Shields - Silverlink Retail Park</td>
<td>3.48</td>
<td>2,655</td>
</tr>
<tr>
<td>Newcastle upon Tyne - Kingston Park Centre</td>
<td>2.04</td>
<td>1,555</td>
</tr>
<tr>
<td>North Shields</td>
<td>1.82</td>
<td>1,390</td>
</tr>
<tr>
<td>Wallsend</td>
<td>1.50</td>
<td>1,144</td>
</tr>
<tr>
<td>Amble</td>
<td>0.99</td>
<td>755</td>
</tr>
<tr>
<td>Gateshead - Team Valley Retail World</td>
<td>0.86</td>
<td>654</td>
</tr>
<tr>
<td>Sunderland</td>
<td>0.84</td>
<td>643</td>
</tr>
<tr>
<td>Bedlington</td>
<td>0.66</td>
<td>502</td>
</tr>
<tr>
<td>Newcastle upon Tyne - Byker Shields</td>
<td>0.63</td>
<td>480</td>
</tr>
<tr>
<td>South Shields</td>
<td>0.50</td>
<td>378</td>
</tr>
<tr>
<td>Gateshead</td>
<td>0.38</td>
<td>287</td>
</tr>
<tr>
<td>Rothbury</td>
<td>0.26</td>
<td>195</td>
</tr>
<tr>
<td>Washington</td>
<td>0.22</td>
<td>166</td>
</tr>
<tr>
<td>Berwick-upon-Tweed</td>
<td>0.19</td>
<td>145</td>
</tr>
<tr>
<td>Hexham</td>
<td>0.17</td>
<td>129</td>
</tr>
<tr>
<td>Newbiggin by the Sea</td>
<td>0.13</td>
<td>101</td>
</tr>
<tr>
<td>Seahouses</td>
<td>0.13</td>
<td>97</td>
</tr>
<tr>
<td>Wooler</td>
<td>0.04</td>
<td>29</td>
</tr>
<tr>
<td>Ponteland</td>
<td>0.02</td>
<td>14</td>
</tr>
<tr>
<td>Jedburgh</td>
<td>0.01</td>
<td>11</td>
</tr>
<tr>
<td>Belford</td>
<td>0.01</td>
<td>9</td>
</tr>
<tr>
<td>Chester-le-Street</td>
<td>0.01</td>
<td>8</td>
</tr>
<tr>
<td>Hawick</td>
<td>0.01</td>
<td>7</td>
</tr>
</tbody>
</table>

Source: Experian, August 2008

With regards to population, Experian estimates that only 6% of the resident population shop in Morpeth (16,322). The main shopping destinations for households in the catchment area are Newcastle City Centre (16,322 or 21.4%), Ashington (13,485 or 17.7%), the MetroCentre (12,177 or 16.0%), Alnwick (8,623 or 11.3%), Cramlington (5,232 or 6.9%) and Blyth (4,566 or 6%).
The pattern with regards to spend is relatively similar. Experian estimates that around 6% of retail spend by residents and households domiciled within the Morpeth catchment, representing £20.5 million per annum, is spent in the town. It must be noted, that this Figure is based on this large catchment area as defined by Experian and therefore may differ to like Figures that have been published previously.

More than £72 million of expenditure is lost to Newcastle City Centre (22%), with other notable leakage to Ashington (£56 million or 17%), MetroCentre (£54 million or 16%), Alnwick (£37 million or 11%) and Cramlington (£23 million or 7%). 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>Retail Centre</th>
<th>Percentage (%)</th>
<th>Spend (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newcastle upon Tyne - Central</td>
<td>21.73</td>
<td>72,297,900</td>
</tr>
<tr>
<td>Ashington</td>
<td>16.88</td>
<td>56,158,275</td>
</tr>
<tr>
<td>Metro Centre</td>
<td>16.23</td>
<td>53,994,166</td>
</tr>
<tr>
<td>Alnwick</td>
<td>11.26</td>
<td>37,481,917</td>
</tr>
<tr>
<td>Cramlington</td>
<td>6.91</td>
<td>22,992,939</td>
</tr>
<tr>
<td>Morpeth</td>
<td><strong>6.16</strong></td>
<td><strong>20,510,301</strong></td>
</tr>
<tr>
<td>Blyth</td>
<td>5.83</td>
<td>19,382,358</td>
</tr>
<tr>
<td>North Shields - Silverlink Retail Park</td>
<td>3.48</td>
<td>11,591,043</td>
</tr>
<tr>
<td>Newcastle upon Tyne - Kingston Park Centre</td>
<td>2.07</td>
<td>6,904,236</td>
</tr>
<tr>
<td>North Shields</td>
<td>1.82</td>
<td>6,070,284</td>
</tr>
<tr>
<td>Wallsend</td>
<td>1.50</td>
<td>4,993,634</td>
</tr>
<tr>
<td>Amble</td>
<td>0.98</td>
<td>3,253,831</td>
</tr>
<tr>
<td>Gateshead - Team Valley Retail World</td>
<td>0.87</td>
<td>2,900,771</td>
</tr>
<tr>
<td>Sunderland</td>
<td>0.84</td>
<td>2,808,990</td>
</tr>
<tr>
<td>Bedlington</td>
<td>0.65</td>
<td>2,148,132</td>
</tr>
<tr>
<td>Newcastle upon Tyne - Byker Shields</td>
<td>0.64</td>
<td>2,114,696</td>
</tr>
<tr>
<td>South Shields</td>
<td>0.49</td>
<td>1,642,569</td>
</tr>
<tr>
<td>Gateshead</td>
<td>0.39</td>
<td>1,310,451</td>
</tr>
<tr>
<td>Rothbury</td>
<td>0.29</td>
<td>964,765</td>
</tr>
<tr>
<td>Washington</td>
<td>0.23</td>
<td>777,907</td>
</tr>
<tr>
<td>Berwick-upon-Tweed</td>
<td>0.20</td>
<td>667,209</td>
</tr>
<tr>
<td>Hexham</td>
<td>0.17</td>
<td>568,874</td>
</tr>
<tr>
<td>Seahouses</td>
<td>0.14</td>
<td>461,801</td>
</tr>
<tr>
<td>Newbiggin by the Sea</td>
<td>0.12</td>
<td>388,743</td>
</tr>
<tr>
<td>Wooler</td>
<td>0.04</td>
<td>140,017</td>
</tr>
</tbody>
</table>
The map (Figure 48) shows the Morpeth catchment area and is colour coded to indicate the proportion of retail expenditure that is spent by the resident population in Morpeth. From the map, it can be seen that households located within Morpeth and the adjacent hinterland spend between 10 and 15% of their total retail expenditure in Morpeth. Propensity to shop in Morpeth diminishes as you travel further afield, dropping to between 5 and 10% in the Rural Coalfields and Ashington and to between 0-5% in the Northumberland National Park.
12.6 Opinions on and use of Leisure and Entertainment

9% of respondents said that they were in Morpeth town centre for leisure on the day of the interview.

Events attended

79% of respondents had attended at least one of the events mentioned in the survey. The weekly market and the Morpeth Town Fair were attended by the highest proportions of respondents (61% and 57% respectively) (Figure 49).
Figure 49: Have you ever attended any of these events?
(Excludes ‘don’t know’ responses unless otherwise specified)

<table>
<thead>
<tr>
<th>Event</th>
<th>Percentage of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christmas lights switch on</td>
<td>28%</td>
</tr>
<tr>
<td>Morpeth Gathering</td>
<td>34%</td>
</tr>
<tr>
<td>Morpeth Town Fair</td>
<td>57%</td>
</tr>
<tr>
<td>Weekly Market</td>
<td>61%</td>
</tr>
<tr>
<td>Continental Market</td>
<td>37%</td>
</tr>
<tr>
<td>I have not attended any</td>
<td>21%</td>
</tr>
<tr>
<td>I have not attended any</td>
<td></td>
</tr>
</tbody>
</table>

*Base: 222 respondents*

*Source: Northumberland Infonet Shopper Questionnaires, October 2007*

**Eating and drinking**

The eating and drinking venues in Morpeth were generally rated quite highly by the respondents. Coffee shops and restaurants were rated the highest, with 86% and 81% of respondents giving a good/very good rating respectively.

Takeaways had the lowest proportion of respondents giving a good/very good rating (68%). However, only 5% gave a poor/very poor rating for this type of venue (Figure 50).
Figure 50: How would you rate the following venues for eating and drinking in Morpeth?

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

```
% respondents

<table>
<thead>
<tr>
<th>Venue</th>
<th>Very Poor</th>
<th>Poor</th>
<th>OK</th>
<th>Good</th>
<th>Very Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants</td>
<td>3%</td>
<td>14%</td>
<td>49%</td>
<td>28%</td>
<td>1%</td>
</tr>
<tr>
<td>Sandwich shops</td>
<td>1%</td>
<td>23%</td>
<td>47%</td>
<td>27%</td>
<td>1%</td>
</tr>
<tr>
<td>Takeaways</td>
<td>1%</td>
<td>27%</td>
<td>43%</td>
<td>43%</td>
<td>1%</td>
</tr>
<tr>
<td>Coffee shops</td>
<td>4%</td>
<td>14%</td>
<td>47%</td>
<td>47%</td>
<td>0%</td>
</tr>
<tr>
<td>Pubs and clubs</td>
<td>0%</td>
<td>15%</td>
<td>45%</td>
<td>34%</td>
<td>3%</td>
</tr>
</tbody>
</table>
```

Source: Northumberland Infonet Shopper Questionnaires, October 2007

**Base: 165 to 200 respondents depending on type of venue (note: this excludes those respondent’s that gave a ‘don’t know’ response)**

**Arts and leisure facilities**

The parks and open spaces in Morpeth were rated very highly by the respondents, with 94% saying that they were good or very good, and none of the respondents giving a poor rating.

78% of respondents rated the sports centre as at least good, but 8% thought that it was poor or very poor.

The Chantry had a slightly lower proportion (74%) of respondents giving a favourable rating, but only 3% giving a poor rating (Figure 51).
Figure 51: How would you rate the following arts and leisure facilities in Morpeth?

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

Source: Northumberland InforNet Shopper Questionnaires, October 2007

Base: 148 to 211 respondents, depending on venue (note: this excludes those respondent’s that gave a ‘don’t know’ response)

General

When asked how they would rate Morpeth as a place to enjoy yourself, 78% of respondents gave a good or very good response. Over one third of these were ‘very good’ responses’ (Figure 52).
Figure 52: How do you rate Morpeth as a place to enjoy yourself
(Excludes 'don't know' responses unless otherwise specified)

Source: Northumberland Infonet Shopper Questionnaires, October 2007

Base: 216 (note: this excludes those respondents that gave a ‘don't know’ response)

When respondents were asked how they would make the town centre better, 4% gave an answer relating to improving the leisure facilities. A few comments were also made on this subject:

- picture hall;
- arts/sports;
- need a cinema;
- more culture, films, shows.

A related comment was also made in response to the question ‘what improvements would you like to see to the retail offer in Morpeth’. The response was “music / art / dancing / sports”.

12.7 The Future: what will improve the town as a place to shop or visit?

From the analysis of the Morpeth shopper survey, it appears that in order to improve the town as a place to shop or visit, three issues need to be addressed:

- the retail offer;
- parking;
- traffic.

The first two of these were given by various respondents as a way to make the town centre better (50% mentioned the retail offer and 34% mentioned parking). The third (traffic) was seen to be a main problem with the shopping experience in Morpeth by 66% of respondents (Figure 53).

**Figure 53: How would you make this town centre better?**

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

![Bar chart showing responses](chart.png)

Source: Northumberland Infonet Shopper Questionnaires, October 2007

**Base: 183 respondents**

Respondent's views on parking have already been covered in sections 9.2. Opinions on the retail offer and on traffic are covered in more detail below.
Retail

- Just less than half (49%) of respondents gave a good or very good rating for Morpeth as a place to shop. 17% gave a negative rating.
- 50% gave the response, ‘better retail offer’ as a way to make the town centre better.
- 58% of respondents that that the main reason they were in the town centre on the day of the interview was to do some shopping.
- When asked whether respondents agreed with the statement ‘on the whole, Morpeth offers a wide choice of quality shops’, only 30% agreed but 42% disagreed.
- Comments with regards to the main problems with the retail in Morpeth included:
  - More selection
  - Not enough choice
  - Lack of Retail
  - Too many charity shops
  - Too many charity shops - killing ordinary trade
  - Lunchtime closing
- Comments with regards to the improvements to the retail offer in Morpeth can be found in Appendix 2 (Q17).

Parking

See sections 9.2 and 9.3.

Traffic

As already mentioned above, 66% of respondents gave ‘traffic’ as being a main problem with the shopping experience in Morpeth town centre. A number of comments related to traffic were also given in response to this question:

- Roadworks (6 responses).
- Road Works & Parking.
- Road works into Morpeth.
- Traffic on Main Street.
• Congestion in centre - to many lorries.
• Lorries parked up illegally.
• Road can be a bit dangerous.

Ways to make the town centre better also included suggestions related to traffic:
• Less traffic (5 responses).
• Less traffic and roadworks.
• Less traffic in centre.
• Make big lorries not allowed through centre.
• Town centre bypass.
• The traffic bypassed onto the A1.
• Better variety & better road infrastructure to by pass traffic congestion.
• Less congestion.
13.0 INVESTMENT

Redevelopment
The following developments are proposed for Morpeth Town Centre;

- Demolition work is now well underway at the Sanderson Arcade. The shopping centre is being transformed into the £32 million (8,360m²) masterplanned scheme incorporates an elegant new-build shopping arcade, a landscaped piazza, an extension to the existing Morrison's store, a new bus interchange and additional short and long stay car parking. Phase one of the works is now complete and has delivered highway improvements and a new long stay car park. Construction on the main scheme is due to start within the next two months. The development also includes the construction of a new transport interchange and an extension to the adjacent Morrisons supermarket. The will strengthen Morpeth’s role as a retail and service centre.

- St Georges Hospital situated to the North of Morpeth the former hospital site is considered the best location to deliver the majority of future growth within Morpeth. The LDF Core Strategy Submission by Castle Morpeth Borough Council suggests predominantly residential development for at least 450 dwellings with an element of employment.

- Fairmoor, Northgate Hospital is another former site to the northern edge of the town. The site is located beside the A1 and requires highways improvements to be fully developed. This is also considered to be a major employment site within the district to attract high quality employment developments.
14.0 MORPETH FLOODS (SEPTEMBER 2008)

An estimated 1,000 properties were flooded in Morpeth after the River Wansbeck burst its banks. Coastguards, Firefighters and the RSPCA were among the services going to the aid of those stranded by the rising water.

As a result of the flood in Morpeth a number of clean up fees and the goodwill and support from Northumberland County Council, Environment Agency, NEDL and the Fire and Rescue Service made the whole process a lot easier. Free skips were provided by Castle Morpeth Borough Council where there was a free collection from the homes affected as and when required. The whole town has been continuously cleansed and swept. Northumberland County Council and Castle Morpeth Borough Council have continued to empty the drains to make sure everywhere is completely clean.

There are around 30 public buildings, shops, pubs and other commercial premises in Morpeth Town Centre that remain closed to visitors and customers, six weeks after the flooding. The Library, ambulance station and health centre as well as the Riverside Leisure Centre and historic Chantry building. The Riverside Care Home is still closed, with its elderly residents moved to various other homes. Other businesses which are closed are Barclays Bank and town centre pubs such as The Old Red Bull and Chambers. Work has started to repair flood damaged floors, walls and fittings in a bid to get the businesses opened as soon as possible. However some businesses will remain closed for months while others are hoping to be open in again within the next few weeks. One North East has £500,000 worth of funding to help businesses affected by the floods and “more than 65 businesses had claimed a total of £66,000 in grants from the funds”.8

Figure 54 shows a map of Morpeth after the flood and which businesses are closed.

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8 The Journal, Thursday, October 16, 2008
Figure 54: Morpeth after the flood and which businesses are closed

It must be noted that the majority of the data in this report was collected before the floods occurred in Morpeth. This is including the data collected in the shopper’s questionnaires which took place in October 2007. Therefore, the floods would not have had an impact on the views and responses gathered from the shopper’s questionnaires.
15.0 CONCLUSION

Morpeth is currently undergoing a huge programme of redevelopment (the £32 million Sanderson Arcade project) which must be taken into consideration when drawing conclusions about the health of the Town Centre (see plan of new development in Appendix 3).

In the Town Centre, 53% 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 42% disagreeing or strongly disagreeing to the statement “Morpeth offers a wide choice of quality shops”, compared to 30% agreeing or strongly agreeing (Figure 5). Appendix 2 showing the verbatim responses to what improvements to the retail offer were needed shows that they feel generally the range and quality of shops need to be focused on. 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.

However, these responses should be monitored carefully when comparisons between this report and the next report are made. The opening of the “new” Sanderson Arcade (due Spring 2009) will see 27 new retail units with retailers such as Laura Ashley, Marks and Spencers, Waterstones and Starbucks to name but a few, already signed up (Appendix 3).

There was 8% of vacant floorspace in Morpeth (see Figure 12). However, Figure 11 showed that the majority of vacant buildings (55%) and floorspace (48%) in Morpeth was situated in the Sanderson Arcade. Therefore, the assumption is there that we will see a significant change in these Figures in the next town centre health check. Figure 13 also shows that between 2007 and 2008, the amount of vacant floorspace had increased when looking at property flows. This was a result of fewer buildings changing from being vacant to occupied from 2007 to 2008, than occupied to vacant.
There had been local and regional 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 the shoppers interviewed with 69% (of those travelling by car) finding it very or fairly easy (Figure 17). However, 34% of shoppers felt that the main problem with the shopping experience in Morpeth was parking and 39% of respondents thought that the availability of public parking spaces was poor or very poor.

Appendix 2 also shows that the specific parking problems shoppers commented on was the lack of parking and the cost of parking. Further, 52% of respondents also gave a poor or very poor rating for the cost of parking (Figure 19). Morpeth also has good bus and train connectivity, which is shown in Figures 22 and 24 respectively, by the frequency and number of destinations reached from Morpeth. This is important as 14% of shoppers on the days of the shopper’s survey had travelled by bus. However, no respondents had actually travelled by train. 81% of shoppers travelling into the town centre by bus also found it very or fairly easy to travel there (Figure 24). Additionally, Figure 26 shows that approximately one half of shoppers gave a positive response when rating the quality, regularity and destinations served by public transport. Part of the Sanderson Arcade development includes a new transport interchange and long stay car park increasing the number of parking spaces within the town centre which will hopefully have a positive impact on the accessibility to Morpeth Town Centre in the future.

When looking at retaining shopper spend, just 6% of Morpeth residents shopped in Morpeth. 21% of expenditure was lost to Newcastle and a further 18% to Ashington and 16% to the Metro Centre (Figure 45). However, the current regeneration of the Sanderson Arcade (Appendix 3) will hopefully have a dramatic effect on reducing the amount of leakage from Morpeth to surrounding centres.

The recent floods (September 2008) had a serious impact on the town centre with 23 businesses still closed for business six weeks after they hit (Figure 54). However, with services such as the County and District councils, Environment Agency, NEDL
and Fire and Rescue Service all pulling together, and funding from One North East, they tried to ensure that there was as little disruption as possible to the functioning of the town.

The responses from shoppers coupled with the various aspects that make up a town centre, suggest that generally Morpeth was in reasonable health. Although there have been some negative responses from the shoppers’ surveys with regards to the variety of retail offer in general, and large amounts of leakage to surrounding centres the implementation of the various regeneration projects, notably the Sanderson Arcade should show hopefully show some improvements in forthcoming years (Appendix 3).
16.0 RECOMMENDATIONS

The town centre health checks will 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 Morpeth 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 Morpeth Town Centre?

Parking
- parking (13 responses)
- car park
- car parking
- cost of parking (2 responses)
- parking charges
- parking charges too high
- parking terrible charges
- not enough car parks
- not enough parking
- parking - not enough spaces
- parking is not good - more carparks
- parking is bad
- more disabled parking

Roadworks
- roadworks (6 responses)
- road works & parking
- road works into Morpeth

Other
- traffic on Main Street
- congestion in centre - to many lorries
- lorries parked up illegally
- road can be a bit dangerous
- bus service
- bus Times
- shopping ok. Bad in morning for access.
- expensive
- you have to pay to shop
- more selection
- not enough choice
- lack of retail
- too many charity shops
- too many charity shops - killing ordinary trade
- lunchtime closing
- only at certain times
- re-development
- too busy
- too spread out
• boring
• drinking on street

• ot enough
Verbatim responses to ‘Q17 What improvements would you like to see to the retail offer in Alnwick?’

**Clothes & shoes**
- Next, H & M
- Next (2 responses)
- men's clothes shops
- Marks and Spencers/ clothes
- M & S, gents outfitters
- M & S clothes. More clothes
- large M&S
- ladies clothes for older generation
- ladies clothes and shoe shops
- more womens wear, shoe shops
- Debenhams, M&S
- clothes shops, not chain
- clothes shops for younger people
- clothes shops for over 40s
- clothes - Men, Women, Kids
- clothes (3 responses)
- children's clothes
- River Island, Jane Norman
- Pumpkin Patch/ children's clothing shops
- more clothes shops for plus size eg Evans, New Look
- more clothes shops (younger)
- more clothes shops for larger sizes

**Mixture of retail types**
- KFC, Fast food, HMV,
- high street shops, clothes, CDs, DVDs
- grocery, clothes
- furniture shops, DIY shops
- shoes, clothe, electricals
- shoe shops, DIY
- more specialist shops, not chain, clothes and food shops
- mens clothes, electricals
- clothes shops, River Island, KFC, Pizza
- fast food outlets, skateboard stores, etc
- clothes, electricals
- electrical/ clothes
- electrical, clothes
- electrical goods, DIY, gardening
- DIY- clothes shops and CD and DVD shops
- decorating, shoes and mens clothing
- card, clothes, variety Wilkinsons
- bigger shops, DIY, M&S clothing

Other
- tea shop
- KFC
- more food shops like Safeway
- longer opening hours for Morrisons
- proper butchers and proper bakers
- not chain, specialist, beer & wine
- quality shops, record shop, no chains
- HMV or Music Store
- more men's shops
- men's shops (2 responses)
- confectionary & Tobacconist Shops
- computer shops- PC World
- less chain stores, less pubs
- fewer coffee shops, hairdressers
- Fenwicks
- Fat Face
- electricals (2 responses)
- DIY, like B&Q
- less Estate Agents
- more ranges
- better shops
- better quality shops
- better quality shops, less building societies
- music/ art/ dancing/ sports
- anything really
- improved wheelchair access
Verbatim responses to ‘Q23 How would you make this town centre better?’

**Retail offer**

- clothes (6 responses)
- clothes for older people
- clothes shops (8 responses)
- clothes stores
- clothing
- better clothing shops/ TK Maxx
- better Variety of clothes shops
- BHS, Primark
- different clothes shops
- different variety clothes shops etc
- good clothes shops, designer for kids/ teenagers
- good job Rutherfords is here or we’d have nothing
- M&S Clothing
- M&S, clothes shops
- mens clothes stores, more variety
- mens clothing shops (2 responses)
- more clothes shops
- more younger children's clothes
- New Look, Clothes
- River Island
- high street shops, clothes shops
- HMV, New Look, McDonalds
- bigger range of shops/ DIY
- individual shops clothing, produce, restaurants
- men’s shops
- men's shops and chain stores
- mobile phone shops
- cheaper supermarkets
- womens wear and Shoe Shops
- better Selection Of Shops-Men and Women
- electrical, clothes
- electricals
- fast food outlets
- have a Tea Shop
- more variety
- more variety like M&S
- more variety of shops
- more variety, department store
- more younger stores
- Next, Tesco
- nice card shop, nice shoe shop
• River Island, cheaper cafes  
• superstore like Morrisons  
• more shops  
• more shops in general  
• more shops. McDonalds.  
• more mens, electrical, sports shops  
• more interesting shops/  
  Main stream - like Argos  
• get rid of charity shops - not everyone wants to shop there.  
• anything instead of charity shops  
• less charity shops. Improved transport.  
• more good shops, less charity shops  
• remove charity shops

Traffic / parking / pedestrians  
• cheaper Parking (2 responses)  
• drop the parking charges  
• less charges on parking  
• no charge - parking  
• no parking charges  
• better bus options  
• better bus service to outlying areas  
• better buses  
• bus service tailored to retired generation  
• more reliable buses  
• less traffic (3 responses)  
• less traffic and roadworks  
• less traffic in cetre, cheaper parking on periphery  
• less traffic, ramps  
• make big lorries not allowed through Centre  
• town Centre ByPass  
• the traffic bypassed onto the A1  
• better variety & better road infrastructure to by pass traffic congestion  
• pedestrianise main street  
• pedestrianise, improve pavements. less trendy bars  
• pedestrianise, less new build, less congestion  
• pedestrianise, less traffic  
• pedestrianise, more policing at pub closing  
• pedestrianised (2 responses)  
• pedestrianised, lights at Goose Hill, Lower rents for shops  
• more crossings
• Sanderson Arcade pedestrianised areas
• pavements improved for better walking
Arts / leisure
• picture hall
• arts/ sports
• need a cinema
• more culture, films, shows

General / other
• do up town hall and interior
• facelift
• left it how it used to be years ago
• more traditional like Alnwick - its drifted towards "modern"
• more seating
• outside sitting areas - for coffee. A more cosmopolitan feel.
• new Arcade
• new town centre, general improvement
• for younger people
• once its refurbished & there's more for youngsters to do it'll be better
• the shops fronts are too "outstanding"/ they should pay more attention to the architecture
• they're shutting too many shops, keep shops open, lower rent?
• reduced prices, local traders
• get rid of chewing gum, less traffic
• less litter, more local shops, clothes shops
• less rubbish from takeaways, cleaner streets
• more litter bins
• council taking notice of the people. Better policing.
• more community policemen for crowds of young people
• more Employment
• publicity of events
• training Free More Choice Of Shops
• anything really
• anything really
APPENDIX 3

Plan of the redeveloped Sanderson Arcade (at October 2008)
(www.sandersonarcade.co.uk)
The Northumberland Information Network

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e-mail: infonet@northumberland.gov.uk

## Working Paper Number/Name

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<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
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<tr>
<td>Did you/your organisation find this report useful?</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Would you like to see this report updated in future?</td>
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<td>In your view was this publication needed?</td>
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<td>Were the maps/tables clear?</td>
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