Knight Frank

RETAIL

Crewe – The Opportunity

KEY FINDINGS…

- A solid, captive catchment, with limited local competition.
- Relatively high leakage, but with scope for clawback (achievable through an improved offer).
- Very polarized catchment demographics between young and old; affluent and socially challenged.
- Significant skews in the shopper profile vs catchment profile.
- Centre itself is probably downmarket of the wider catchment it serves.
- Potential to achieve a more broad-based and balanced retail proposition.
- Demonstrably under-supplied in cinemas (units and screens).
- Quantifiable significant cinema audience – with a mass- / value-orientated slant.

C R E W E I N N U M B E R S …

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591,000

Crewe's total catchment population

51,560

Crewe's 2016 shopper population

39%

Retention rate of Crewe's Primary Catchment

1,536

Projected shopper population growth 2016-26

+6.6%

Forecast growth in population 2011 -26

31%

Proportion of population younger than 25

19.8%

Proportion of the population that are 'Executive Wealth'

+90%

Proportion of 'Comfortable Seniors' vs national averages

£138m

Total comparison goods spend generated

181

'Young Hardship' - Skew in Shopper Pop vs Resi Pop

134

'Struggling Estates' - Skew in Shopper Pop vs Resi Pop

244th

Crewe's Retail Footprint ranking in 2017

51%

Mass-market's share of Crewe's retail mix

£40/sq ft

Prime Zone A retail rent in Crewe in 2016

101

No of missing retailers identified by 'gap analysis'

4-5

No of new cinema screens Crewe could potentially support

28%

Proportion of Crewe's shopper pop that are 'high propensity cinemagoers'

14,300

Total shopper pop that are 'high propensity cinemagoers'

TOTAL CATCHMENT AREA…

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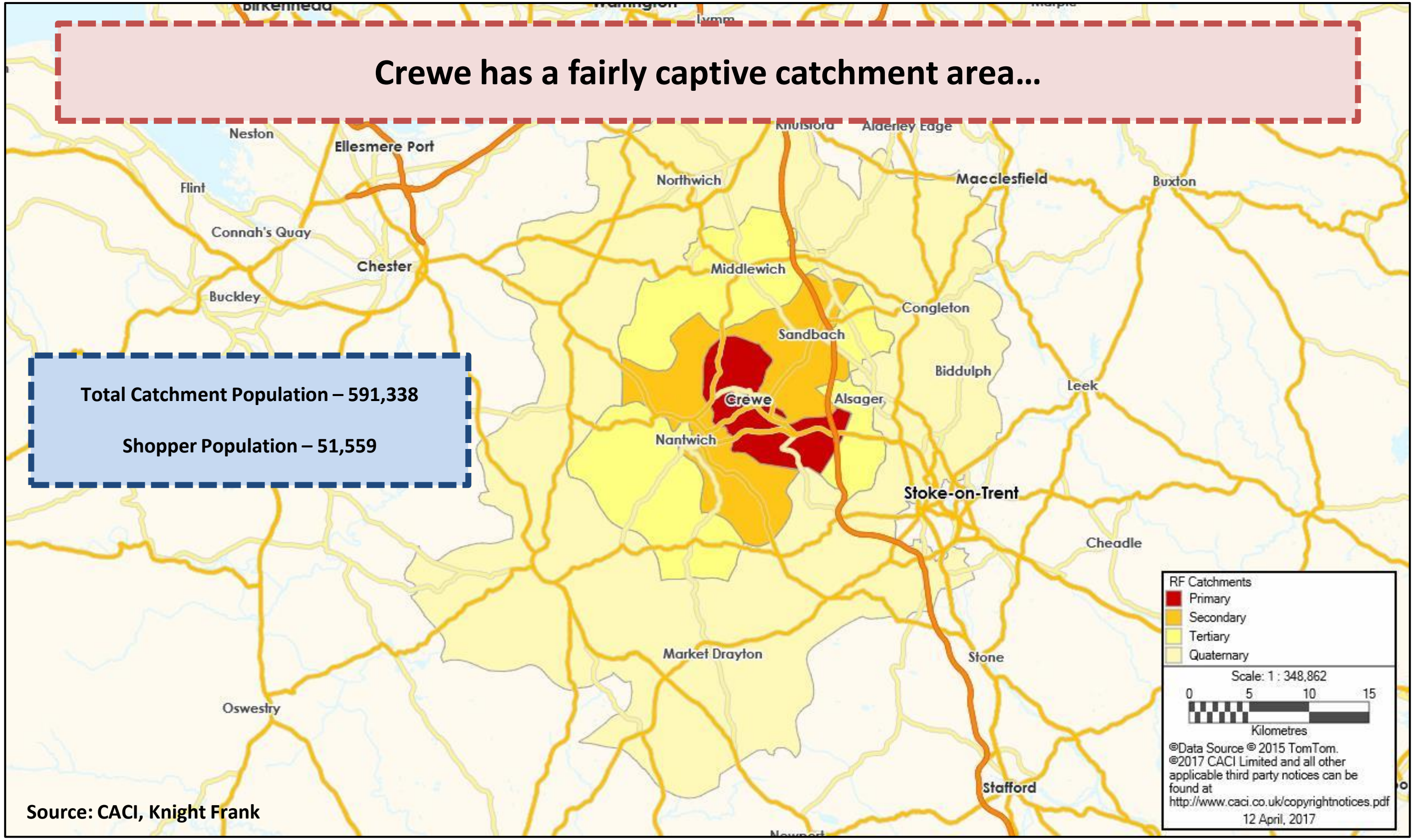
Crewe has a fairly captive catchment area…



Total Catchment Population – 591,338

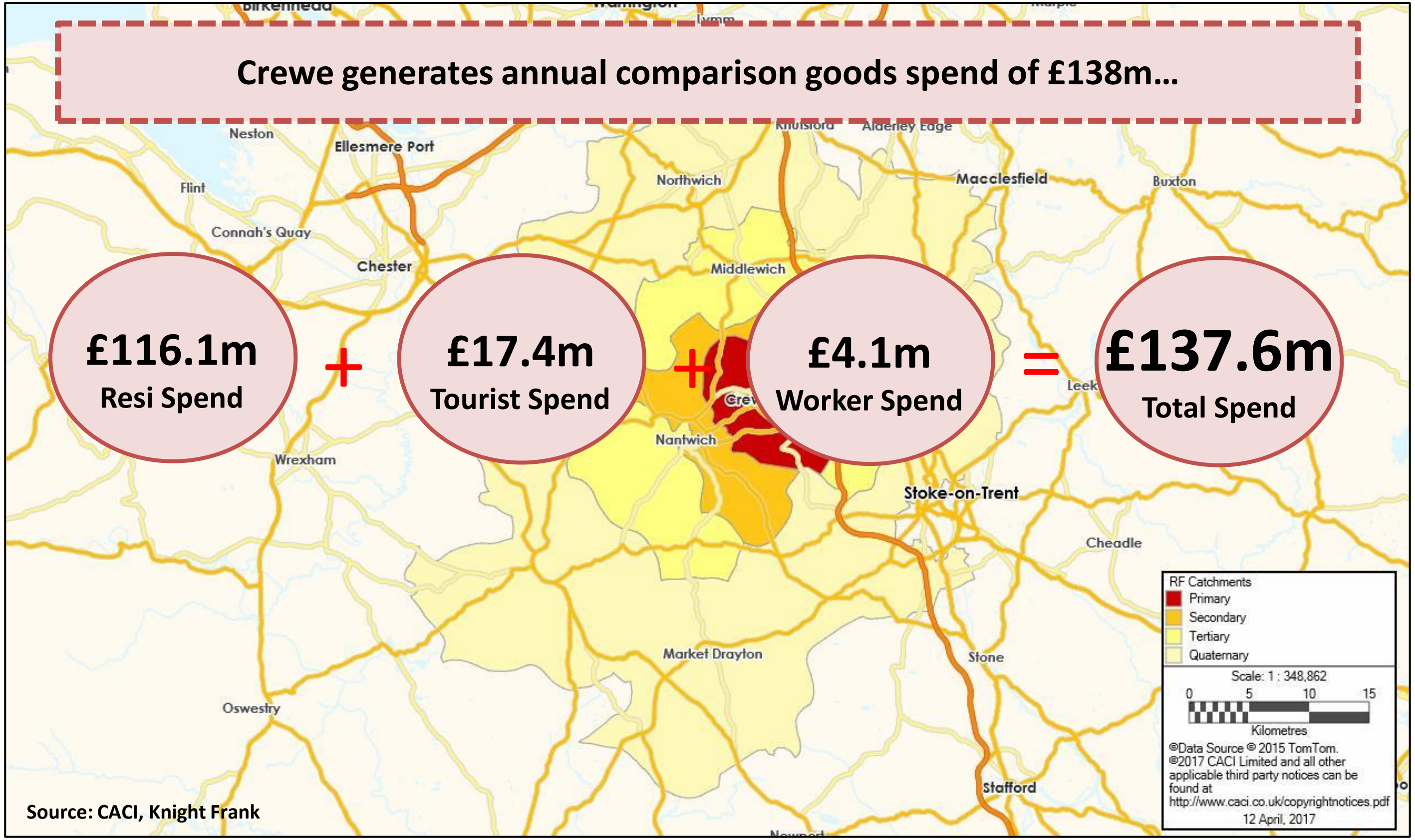
Shopper Population – 51,559

Source: CACI, Knight Frank

SPEND IN CREWE…

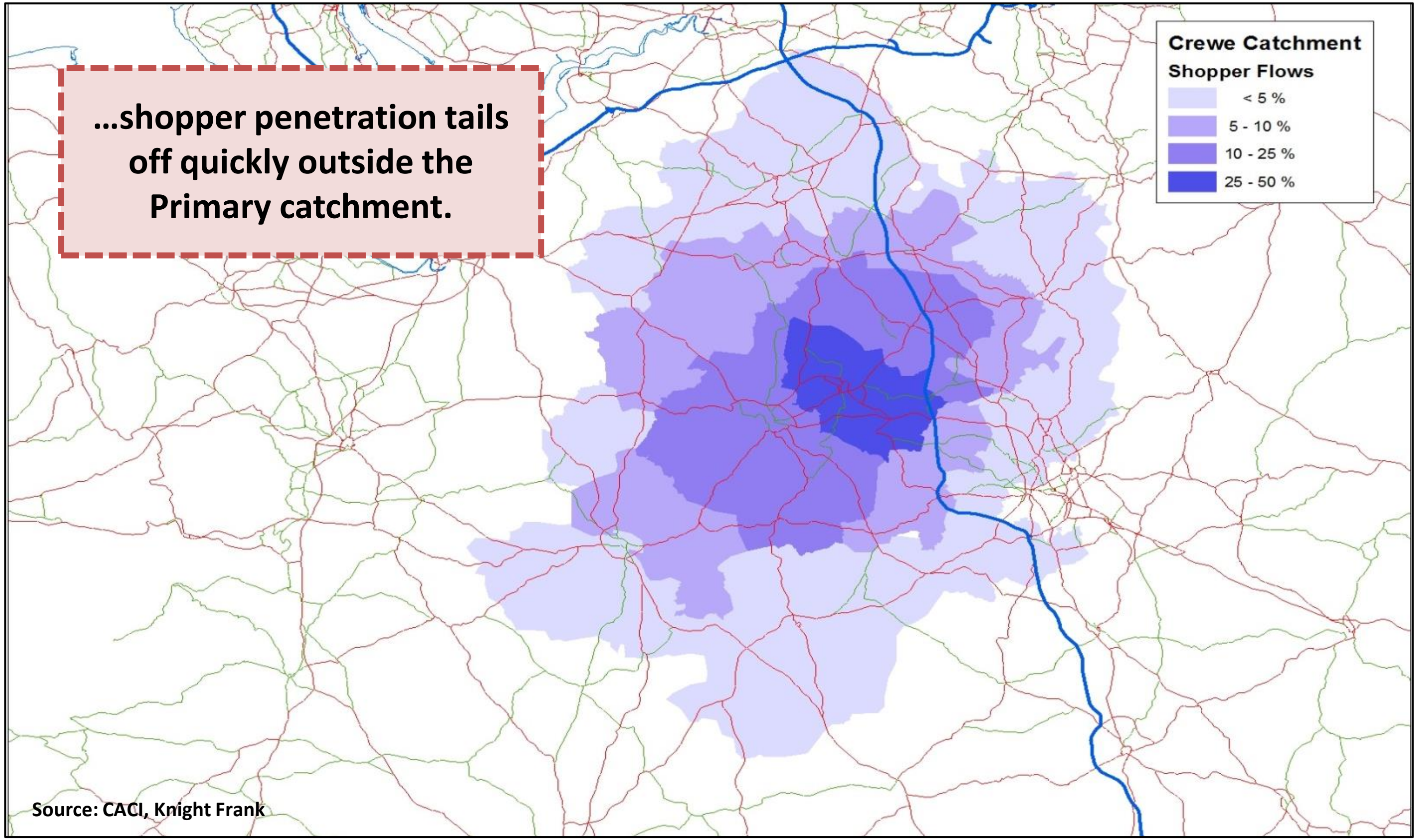
Crewe generates annual comparison goods spend of £138m…

£116.1m Resi Spend + **£17.4m** Tourist Spend + **£4.1m** Worker Spend = **£137.6m** Total Spend



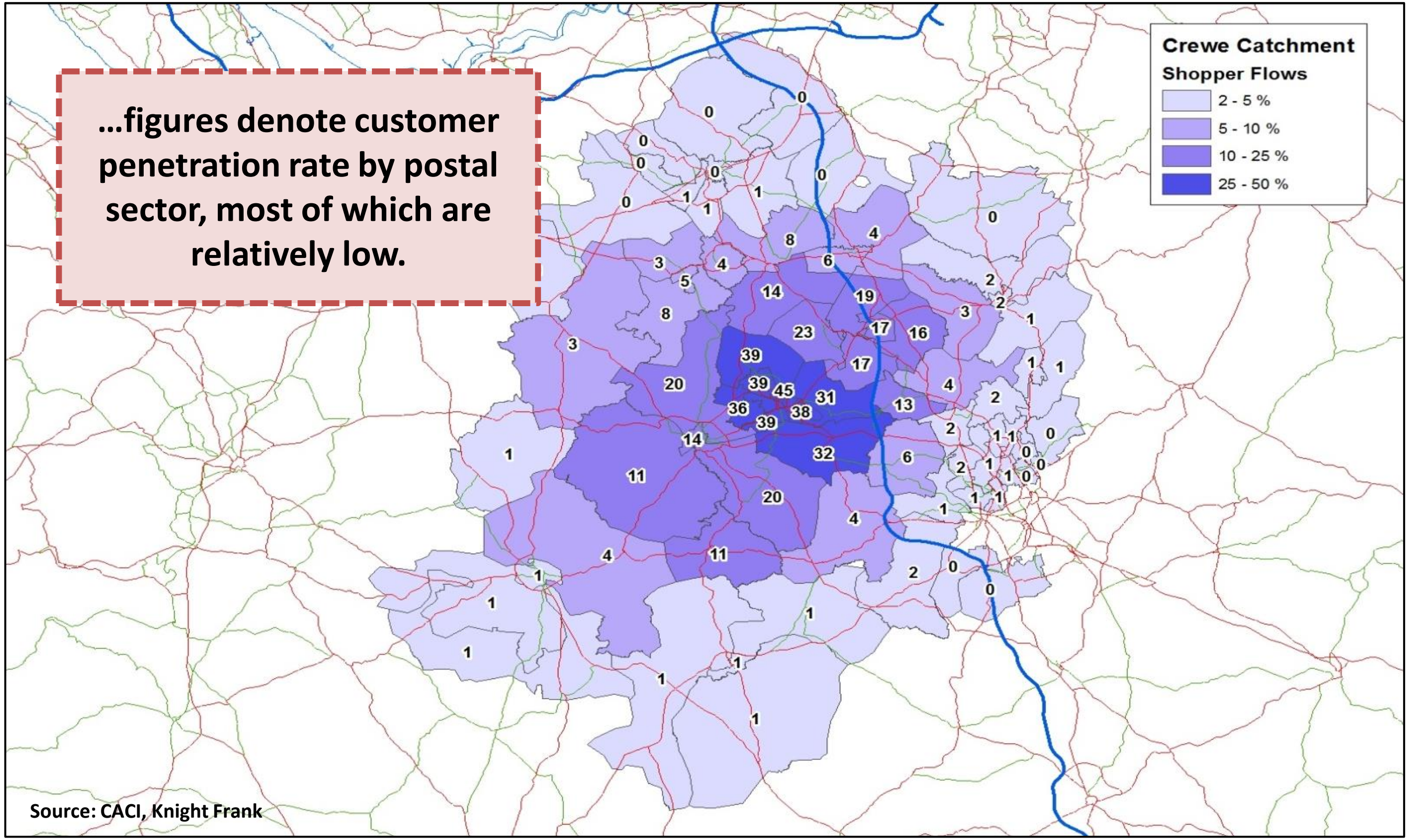
Source: CACI, Knight Frank

SHOPPER FLOWS…



S H O P P E R   F L O W S …

…figures denote customer penetration rate by postal sector, most of which are relatively low.



Source: CACI, Knight Frank

RETENTION VS LEAKAGE…

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Primary Catchment Only

Centre Name	Centre Type	Distance (miles)	Market Share (%)
Crewe	**Major Centres**	**0.0**	**38.64%**
Crewe - Grand Junction Retail Park	**Retail Parks**	**0.3**	**35.29%**
Nantwich - Middlewich Road	Retail Parks	3.4	5.36%
Crewe - Nantwich Road	**Urban Centres**	**0.7**	**3.41%**
Nantwich	Regional Towns	4.0	3.12%
Cheshire Oaks - McArthurGlen FOC	Outlet Centres	21.5	2.13%
Freeport Talke Outlet Centre	Outlet Centres	7.7	2.04%
Liverpool	Primary Centres	30.9	1.72%
Stoke-on-Trent - Hanley	Major Centres	12.2	1.38%
Sandbach	Regional Towns	4.5	0.87%
Stoke-on-Trent - Festival Retail Park	Retail Parks	11.5	0.86%
Chester	Primary Centres	19.7	0.72%
Birmingham	Primary Centres	48.5	0.70%
Newcastle-under-Lyme	Major Centres	10.8	0.68%
Manchester	Primary Centres	27.7	0.50%
OTHER			2.57%

Source: CACI, Knight Frank

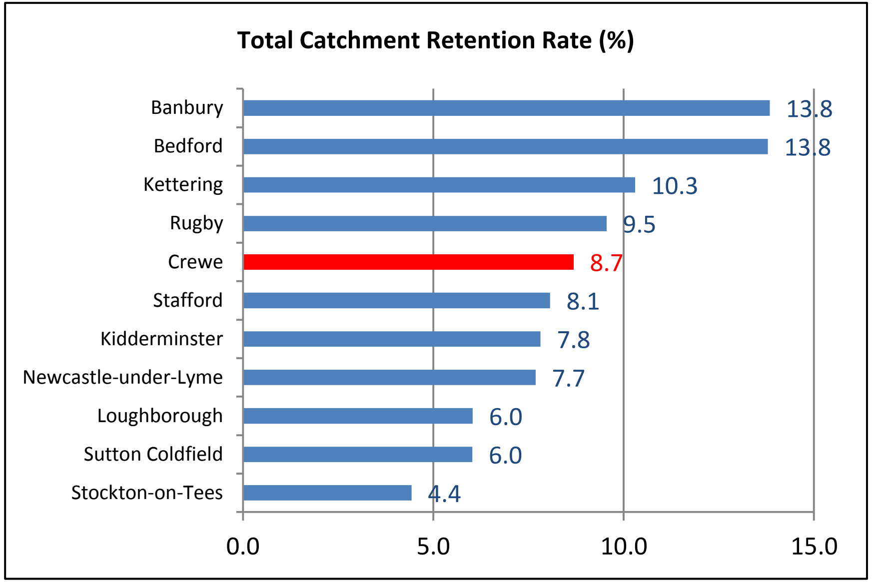
Crewe retains 39% of trade in its Primary Catchment and 9% in its Total Catchment – there is scope for clawback.

Total Catchment Area

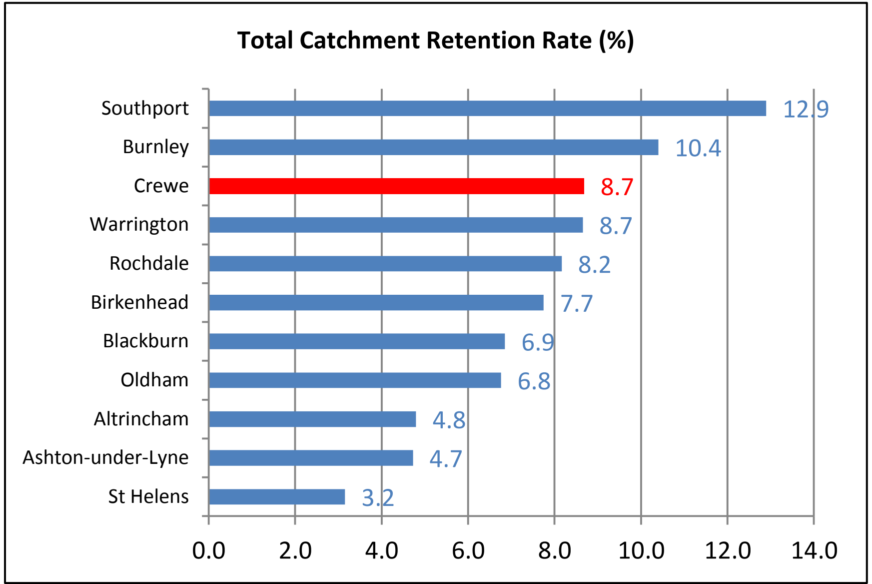
Centre Name	Centre Type	Distance (miles)	Market Share (%)
Stoke-on-Trent - Hanley	Major Centres	12.2	9.63%
Crewe - Grand Junction Retail Park	**Retail Parks**	**0.3**	**8.96%**
Crewe	**Major Centres**	**0.0**	**8.72%**
Newcastle-under-Lyme	Major Centres	10.8	6.08%
Cheshire Oaks - McArthurGlen Outlet Centr	Outlet Centres	21.5	5.97%
Stoke-on-Trent - Festival Retail Park	Retail Parks	11.5	5.37%
Freeport Talke Outlet Centre	Outlet Centres	7.7	3.97%
Northwich	Regional Towns	11.7	3.86%
Chester	Primary Centres	19.7	3.10%
Stoke-on-Trent - Tunstall	Urban Centres	10.1	3.09%
Manchester	Primary Centres	27.7	2.79%
Winsford	Regional Towns	7.4	2.44%
Northwich - Northwich Retail Park	Retail Parks	11.6	2.38%
Newcastle - Wolstanton Retail Park	Retail Parks	10.8	2.25%
Nantwich - Middlewich Road	Retail Parks	3.4	2.24%
Market Drayton	Regional Towns	13.5	2.13%
Nantwich	Regional Towns	4.0	2.08%
Stoke-on-Trent - Etruria Road	Retail Parks	11.8	1.94%
Trafford Centre	Regional Malls	25.7	1.75%
Congleton	Regional Towns	10.5	1.64%
Sandbach	Regional Towns	4.5	1.12%
Kidsgrove	Local Centres	8.4	1.04%
OTHER			17.46%

RETENTION COMPARISONS…

Vs GB Benchmark Centres



Vs Other Centres in North West



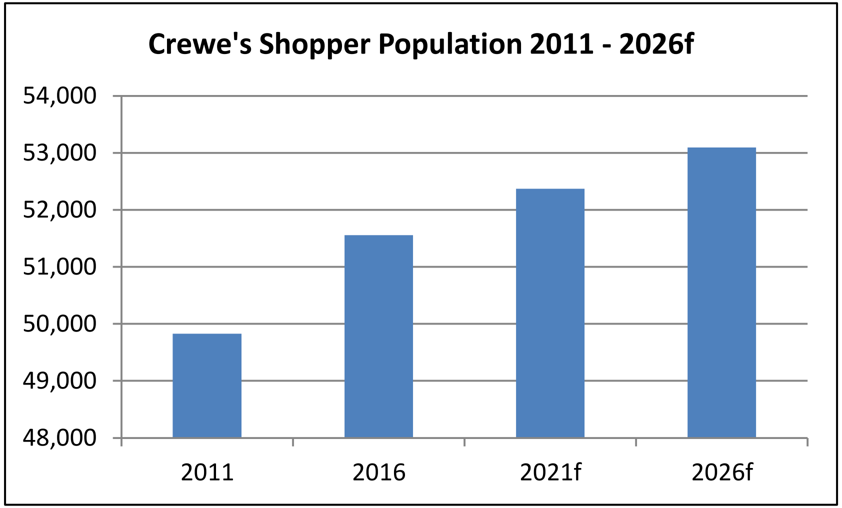
Source: CACI, Knight Frank

Crewe's retention rates are broadly in line with both regional and national benchmark centres…

POP GROWTH – CACI FORECASTS…

2011 Households	**21,263**
2011 Population	49,828
2016 Population	51,559
2021f Population	52,368
2026f Population	53,095
Pop. Growth 2011 - 2016 (Total)	1,731
Pop. Growth 2011 - 2016 (%)	3.5%
Pop. Growth 2016 - 2026f (Total)	1,536
Pop. Growth 2016 - 2026 (%)	3.0%
Pop. Growth 2011 - 2026f (Total)	3,267
Pop. Growth 2011 - 2016f (%)	6.6%

Source: CACI, Knight Frank



Crewe's shopper population is forecast to grow by nearly 7% between 2011 and 2026, an increase of over 3,200 people.

CHESHIRE EAST LOCAL PLAN…

- Crewe to have 7,700 new homes between 2010 and 2030. Some 907 completed by March 2016, a further 1,979 have planning consent. An additional 5,145 are allocated in strategic sites within Crewe.

- Wider South Cheshire area expected to have 20,600 new homes developed between 2010 and 2030. Some 3,206 completed by March 2016, a further 6,183 have planning consent. An additional 15,482 are allocated in strategic sites within the towns in question.

- Applying an average HH size of 2.36, total population in Crewe is expected to expand by 17,000 between 2010 and 2030; the southern towns in South Cheshire are expected to expand by 51,000 people over the same period.

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Cheshire East Local Plan Strategy (2010-30): Proposed Growth Distribution (extract of southern key service centres only)					
	Key Service Centre	Expected level of development	Completions (to 31/3/16)	Commitments (to 31/3/16)	Additional Local Plan / Strategic Allocations
Homes	Crewe	7,700	907	1,979	5,145
	Alsager	2,000	131	512	1,300
	Congleton	4,150	638	975	2,925
	Middlewich	1,950	400	293	960
	Nantwich	2,050	491	597	2,182
	Sandbach	2,750	693	1,827	2,970
	TOTAL (South Cheshire)	**20,600**	**3,260**	**6,183**	**15,482**
Population	Based on average household size of 2.36	48,616	7,694	14,592	36,538

Source: Cheshire East Council Local Plan Strategy

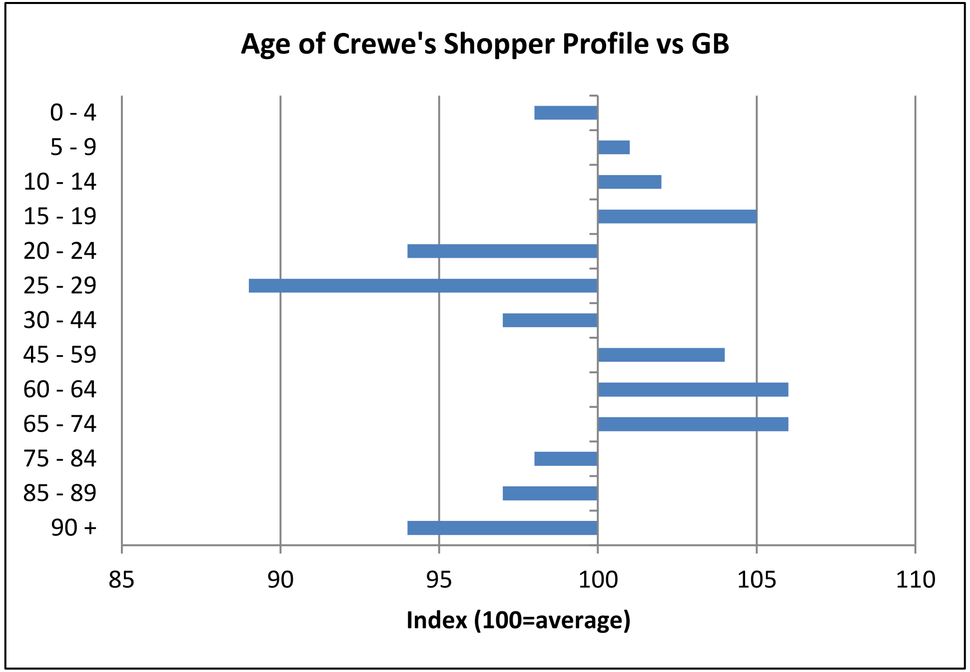
OTHER CONSIDERATIONS…

- Crewe is part of the **Constellation Partnership** (formerly the Northern Gateway Development Zone).
- This is part of a Growth Strategy being developed as part of a proposed Growth Deal with the Government.
- For Crewe alone, it is expected that 10,600 homes and 60,000 jobs will be created by 2043.
- These figures exclude any HS2 related growth.
- The advent of **HS2** will be a general catalyst to huge positive change, over and above these figures.
- Expected arrival of HS2 is 2027.

A G E P R O F I L E …

Age Band	Shopper Population	Crewe (%)	GB %)	Index to GB (100=average)
0 - 4	3,061	6.1	6.2	98
5 - 9	**2,845**	**5.6**	**5.5**	**101**
10 - 14	**2,980**	**5.9**	**5.8**	**102**
15 - 19	**3,360**	**6.6**	**6.3**	**105**
20 - 24	3,240	6.4	6.8	94
25 - 29	3,055	6.0	6.8	89
30 - 44	10,064	19.9	20.5	97
45 - 59	**10,269**	**20.3**	**19.6**	**104**
60 - 64	**3,234**	**6.4**	**6.1**	**106**
65 - 74	**4,649**	**9.2**	**8.7**	**106**
75 - 84	2,755	5.4	5.6	98
85 - 89	721	1.4	1.5	97
90 +	359	0.7	0.8	94
All Ages	50,592	100.0	100.0	100

Source: CACI, Knight Frank

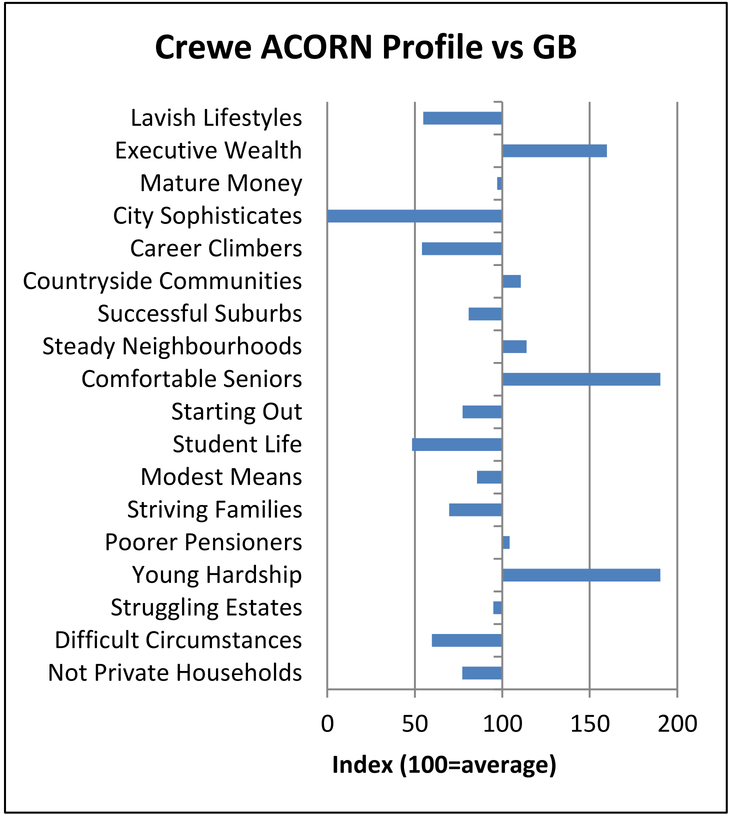


Polarised age profile: over-indexation in both older (45-75) and younger (5-20) age brackets.

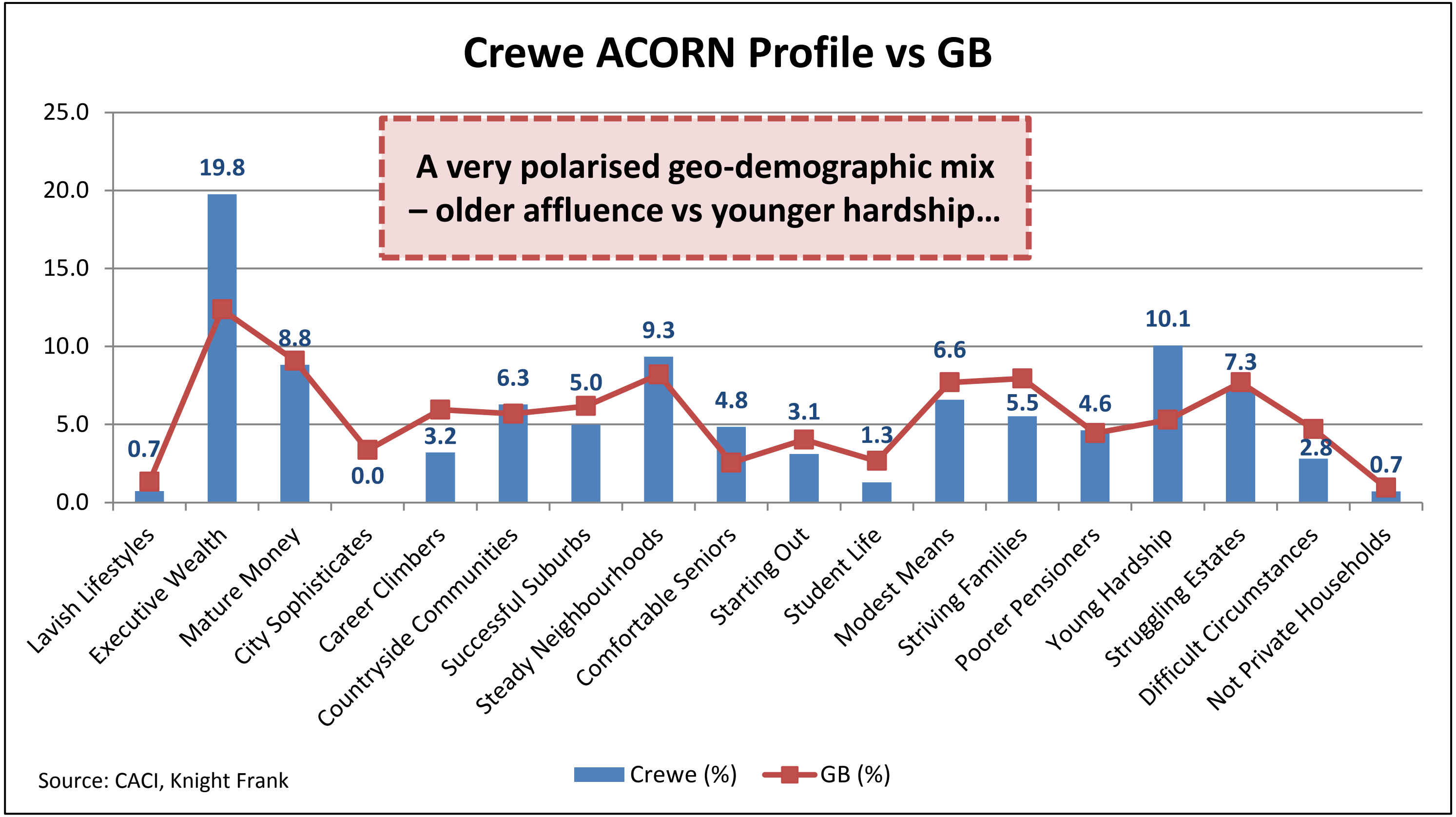
ACORN PROFILE VS GB …

ACORN Group	Crewe Pop.	Crewe (%)	GB (%)	Crewe Index to GB
Lavish Lifestyles	373	0.7	1.3	55
Executive Wealth	**10,187**	**19.8**	**12.4**	**160**
Mature Money	4,549	8.8	9.1	97
City Sophisticates	1	0.0	3.4	0
Career Climbers	1,655	3.2	5.9	54
Countryside Communities	**3,239**	**6.3**	**5.7**	**111**
Successful Suburbs	2,571	5.0	6.2	81
Steady Neighbourhoods	**4,813**	**9.3**	**8.2**	**114**
Comfortable Seniors	**2,498**	**4.8**	**2.5**	**190**
Starting Out	1,605	3.1	4.0	77
Student Life	662	1.3	2.6	48
Modest Means	3,396	6.6	7.7	86
Striving Families	2,848	5.5	7.9	70
Poorer Pensioners	**2,388**	**4.6**	**4.4**	**104**
Young Hardship	**5,191**	**10.1**	**5.3**	**190**
Struggling Estates	3,762	7.3	7.7	95
Difficult Circumstances	1,451	2.8	4.7	60
Not Private Households	370	0.7	0.9	77

Source: CACI, Knight Frank



ACORN PROFILE VS GB



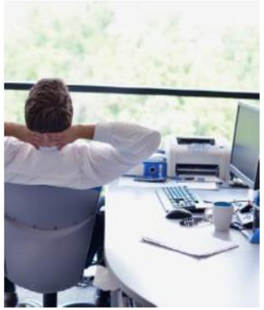
KEY ACORN GROUPS (1)

Knight Frank

Share of Shopper Pop.

19.8%

Group B: Executive Wealth

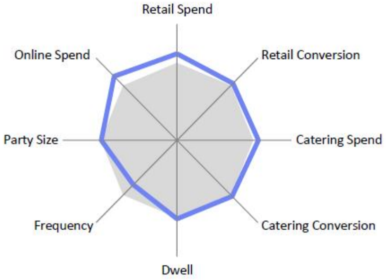


These are wealthy families living in larger detached or semi-detached properties either in the suburbs, the edge of towns or in semi-rural locations.

They tend to be financially literate people, more likely to have multiple banks accounts and credit cards and the ability to spend relatively freely.

They are frequent users of the internet, generally more for practical than entertainment purposes such as shopping and keeping up with current affairs.

These are high income households, successfully combining jobs and families.



Jo Malone London
Cath Kidston EST. LONDON 1993
John Lewis
KAREN MILLEN
HOBBS LONDON
Waitrose
MOLTON BROWN LONDON

PRET
Jamie's ITALIAN
STRADA
WHOLE FOODS MARKET
wagamama
PIZZA EXPRESS
Caffè Concerto LONDON

acorn The consumer classification

CACI

Index to GB Average

160

KEY ACORN GROUPS (2)

Share of Shopper Pop.

10.1%

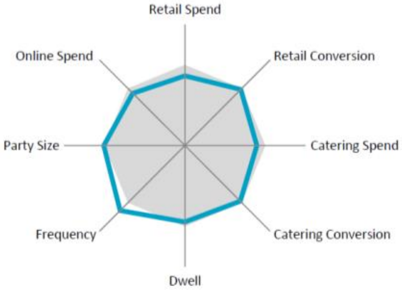
Group O: Young Hardship

Younger people are more prevalent in these streets. They own or rent small terraced houses or flats in the cheaper areas of towns and cities.

Single people or parents are found more frequently than average. Some may be financially supporting a child that does not live with them.

There are pockets of deprivation in this group. Incomes range from moderate to low and the unemployment rate is higher than the national average.

These people have a modest lifestyle and some may be struggling to get by in the current economic climate.



acorn
The consumer classification

CACI

CCI | Commercial in Confidence

Index to GB Average

190

KEY ACORN GROUPS (3)

Share of Shopper Pop.

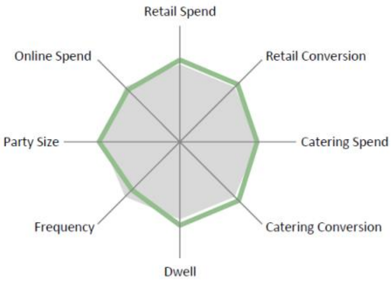
9.3%

Group H: Steady Neighbourhoods

These home-owning families, often middle-aged, are living comfortably in suburban or urban locations. They mainly own older, lower priced terraced or semi-detached homes, which they may have occupied for many years.

Their spending and interaction with financial services broadly mirrors the national average. Most in this group have some small savings, an ISA and perhaps a few shares. Although they do generally use the internet, few of these people will go online extensively on a regular basis.

These working families form the bedrock of many towns across Britain.



acorn
The consumer classification

CACI

Index to GB Average

114

KEY ACORN GROUPS (4)

Knight Frank

Share of Shopper Pop.

4.8%

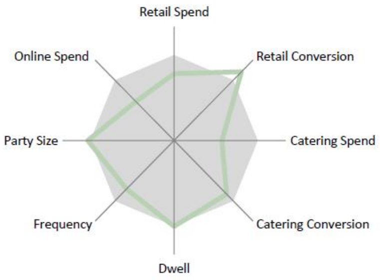
Group I: Comfortable Seniors

These established communities are generally made up of retired and older empty nester couples. Property tends to be two and three bedroom semi-detached houses, bungalows and some smaller purpose-built flats and many will own their homes outright.

The working population are in a mix management and supervisory jobs. Overall incomes are relatively modest since a good number of these people are now living off their pension.

They are unlikely to use the internet and prefer to be contacted by regular mail.

Broadly these people feel comfortable with few in financial difficulties.



Waitrose

LAKELAND

Boots

ALDI

HOME SENSE

YOUR M&S

CAFÉ giardino naturally good.

BHS CAFÉ

YOUR M&S

apostrophe the accent on taste

COFFEE REPUBLIC

acorn The consumer classification

CACI

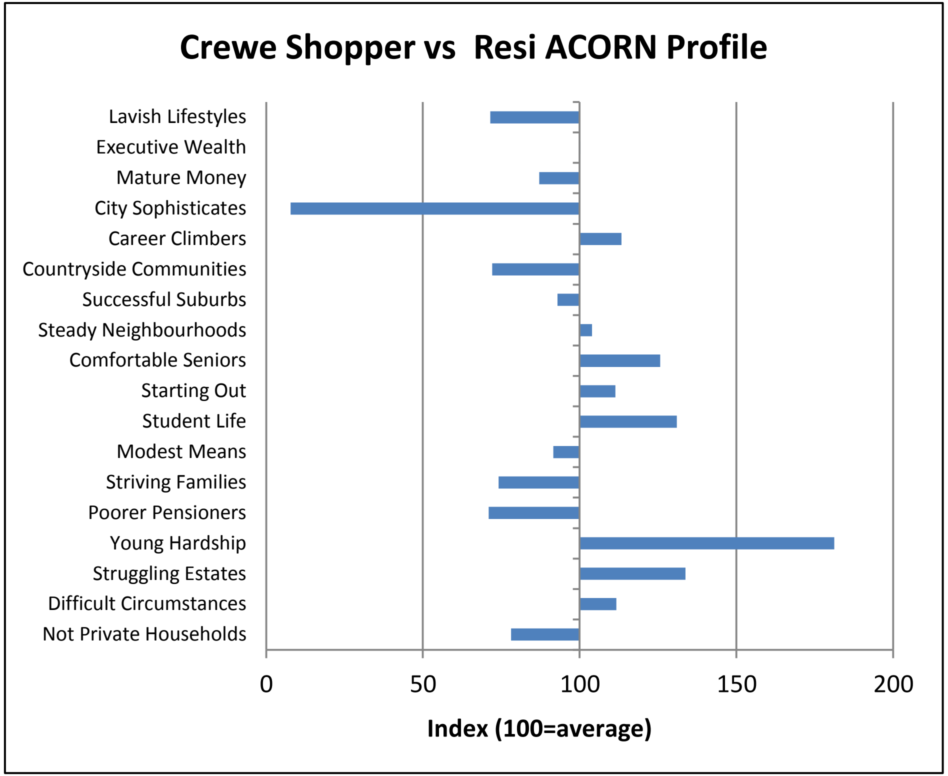
Index to GB Average

190

SHOPPER VS RESI PROFILE…

ACORN Group	Residential Pop. (%)	Shopper Pop. (%)	Shopper to Resi Index
Lavish Lifestyles	1.0	0.7	71
Executive Wealth	19.7	19.8	100
Mature Money	10.1	8.8	87
City Sophisticates	0.0	0.0	8
Career Climbers	**2.8**	**3.2**	**113**
Countryside Communities	8.7	6.3	72
Successful Suburbs	5.4	5.0	93
Steady Neighbourhoods	**9.0**	**9.3**	**104**
Comfortable Seniors	**3.9**	**4.8**	**126**
Starting Out	**2.8**	**3.1**	**111**
Student Life	**1.0**	**1.3**	**131**
Modest Means	7.2	6.6	92
Striving Families	7.4	5.5	74
Poorer Pensioners	6.5	4.6	71
Young Hardship	**5.6**	**10.1**	**181**
Struggling Estates	**5.5**	**7.3**	**134**
Difficult Circumstances	**2.5**	**2.8**	**112**
Not Private Households	0.9	0.7	78

Source: CACI, Knight Frank



RANKING TRENDS…

	2014	2015	2016	2017
Retail Footprint Score	473	492	441	**508**
Retail Footprint Rank	241	220	263	**244**

Source: CACI, Knight Frank

Crewe's ranking has yo-yoed between 220th and 250th over the last four years...

CREWE'S RETAIL RANKING

Ranking	Centre Name	Major Class	Minor Class	GSR
1	London - West End	Primary Centres	International Centres	Greater London
2	Glasgow	Primary Centres	National Centres	Scotland
...				
230	Blackburn - Grimshaw Park	Retail Parks	Shopping Parks	North West
231	Cambridge - Cambridge Retail Park	Retail Parks	Shopping Parks	East Anglia
232	Ashton-Under-Lyne - Snipe Retail Park	Retail Parks	Shopping Parks with Major Anchor	North West
233	Rugby	Major Centres	Value Major Centres	West Midlands
234	Bristol - Eastgate Retail Park	Retail Parks	Shopping Parks with Major Anchor	South West
235	Rotherham - Parkgate Shopping Park	Retail Parks	Major Shopping Parks	Yorkshire And The Humber
236	St Helens	Major Centres	Lower Average Major Centres	North West
237	Scunthorpe	Major Centres	Value Major Centres	Yorkshire And The Humber
238	Chatham	Major Centres	Value Major Centres	South East
239	Stockton-on-Tees - Portrack Lane	Retail Parks	Shopping Parks	North
240	Bristol - Gallagher Retail Park	Retail Parks	Major Shopping Parks	South West
241	Altrincham	Metropolitan Towns	Medium Metropolitan Towns	North West
242	Talbot Green - Talbot Green Retail Park	Retail Parks	Shopping Parks (Regional Towns)	Wales
243	London - East Ham	Urban Centres	Value Inner London Urban Centres	Greater London
244	**Crewe**	**Major Centres**	**Value Major Centres**	**North West**
245	Llanelli - Trostre Retail Park	Retail Parks	Shopping Parks (Regional Towns)	Wales
246	Walsall	Metropolitan Towns	Small Metropolitan Towns	West Midlands
247	King's Lynn - Hardwick Road	Retail Parks	Medium Retail Parks (Regional Towns)	East Anglia
248	Keighley	Major Centres	Lower Average Major Centres	Yorkshire And The Humber
249	Great Yarmouth	Regional Towns	Large Regional Towns	East Anglia
250	Newton Abbot	Major Centres	Lower Average Major Centres	South West
251	Tunbridge Wells - Longfield Road	Retail Parks	Shopping Parks with Major Anchor	South East
252	Romford - Gallows Corner Retail Park	Retail Parks	Outer London Retail Parks	Greater London
253	Slough	Major Centres	Lower Average Major Centres	South East
254	Kidderminster	Major Centres	Value Major Centres	West Midlands
255	Chester - Greyhound Retail Park	Retail Parks	Shopping Parks with Major Anchor	North West
256	Stockport - Peel Centre Retail Park	Retail Parks	Shopping Parks	North West
257	Wigan - Robin Retail Park	Retail Parks	Shopping Parks	North West
258	Paisley	Metropolitan Towns	Medium Metropolitan Towns	Scotland
259	Hemel Hempstead	Major Centres	Lower Average Major Centres	South East
260	Trowbridge	Regional Towns	Large Regional Towns	South West

Source: CACI, Knight Frank

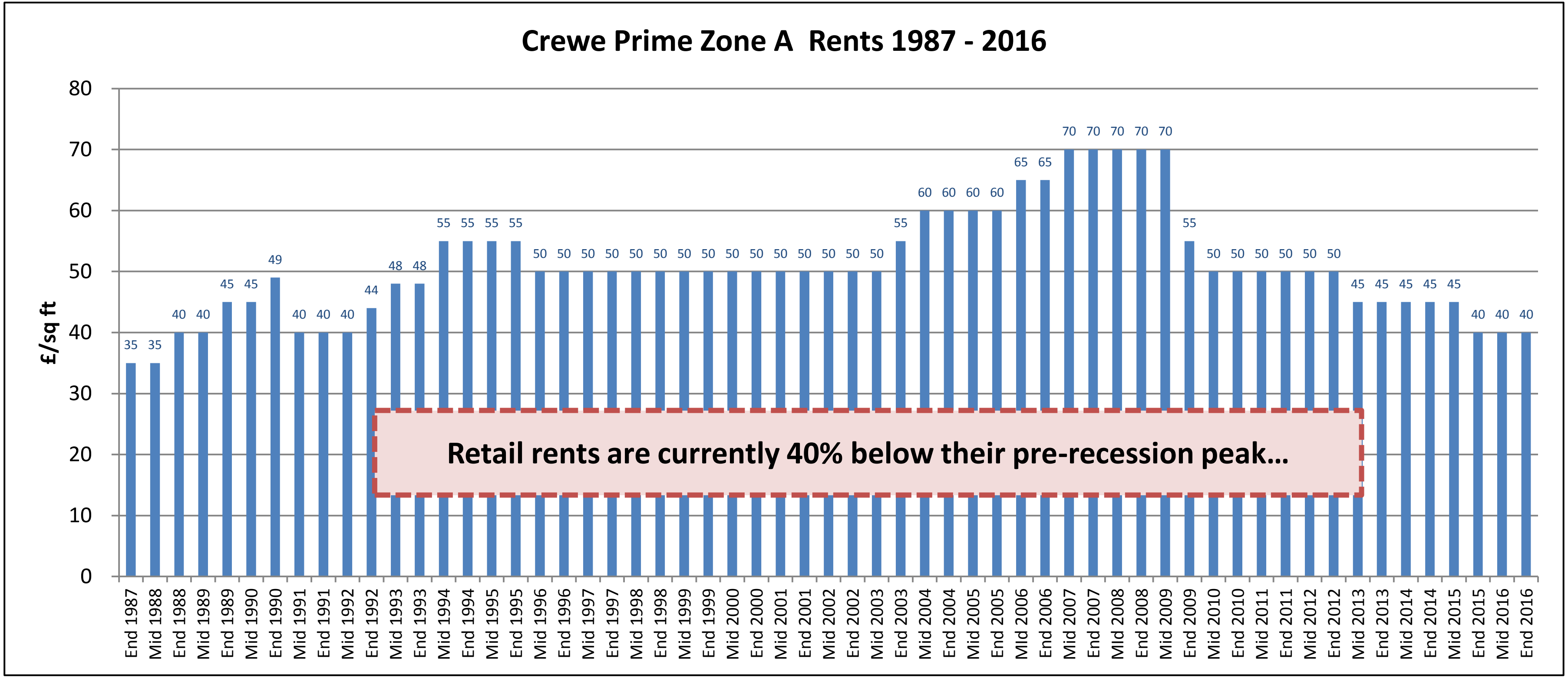
REGIONAL RETAIL RANKING

NW Ranking	National Ranking	Centre Name	Major Class	Minor Class	GSR
1	3	Manchester	Primary Centres	National Centres	North West
2	6	Liverpool	Primary Centres	National Centres	North West
3	10	Trafford Centre	Regional Malls	Large Premium Regional Malls	North West
4	43	Cheshire Oaks - McArthurGlen Outlet Centre	Outlet Centres	Premium Major Outlet Centres	North West
5	49	Chester	Primary Centres	Quality Regional Centres	North West
6	63	Preston	Primary Centres	Average Regional Centres	North West
7	83	Blackpool	Primary Centres	Average Regional Centres	North West
8	109	Bolton	Metropolitan Towns	Medium Metropolitan Towns	North West
9	112	Bury	Metropolitan Towns	Medium Metropolitan Towns	North West
10	113	Stockport	Metropolitan Towns	Medium Metropolitan Towns	North West
11	129	Wigan	Major Centres	Major Centres	North West
12	130	Lancaster	Regional Towns	Large Regional Towns	North West
13	135	Warrington	Metropolitan Towns	Medium Metropolitan Towns	North West
14	161	Liverpool - Aintree Racecourse Retail Park	Retail Parks	Shopping Parks with Major Anchor	North West
15	171	Preston - Deepdale Shopping Park	Retail Parks	Major Shopping Parks	North West
16	174	Birkenhead	Metropolitan Towns	Medium Metropolitan Towns	North West
17	176	Bolton - Middlebrook Retail Park	Retail Parks	Shopping Parks with Major Anchor	North West
18	181	Liverpool - New Mersey Shopping Park	Retail Parks	Major Shopping Parks with Major Anchor	North West
19	198	Southport	Major Centres	Major Centres	North West
20	202	Blackburn	Major Centres	Value Major Centres	North West
21	205	Rochdale	Metropolitan Towns	Small Metropolitan Towns	North West
22	209	Burnley	Major Centres	Lower Average Major Centres	North West
23	216	Oldham	Metropolitan Towns	Small Metropolitan Towns	North West
24	228	Ashton-under-Lyne	Metropolitan Towns	Small Metropolitan Towns	North West
25	230	Blackburn - Grimshaw Park	Retail Parks	Shopping Parks	North West
26	232	Ashton-Under-Lyne - Snipe Retail Park	Retail Parks	Shopping Parks with Major Anchor	North West
27	236	St Helens	Major Centres	Lower Average Major Centres	North West
28	241	Altrincham	Metropolitan Towns	Medium Metropolitan Towns	North West
29	**244**	**Crewe**	**Major Centres**	**Value Major Centres**	**North West**
30	255	Chester - Greyhound Retail Park	Retail Parks	Shopping Parks with Major Anchor	North West

Source: CACI, Knight Frank

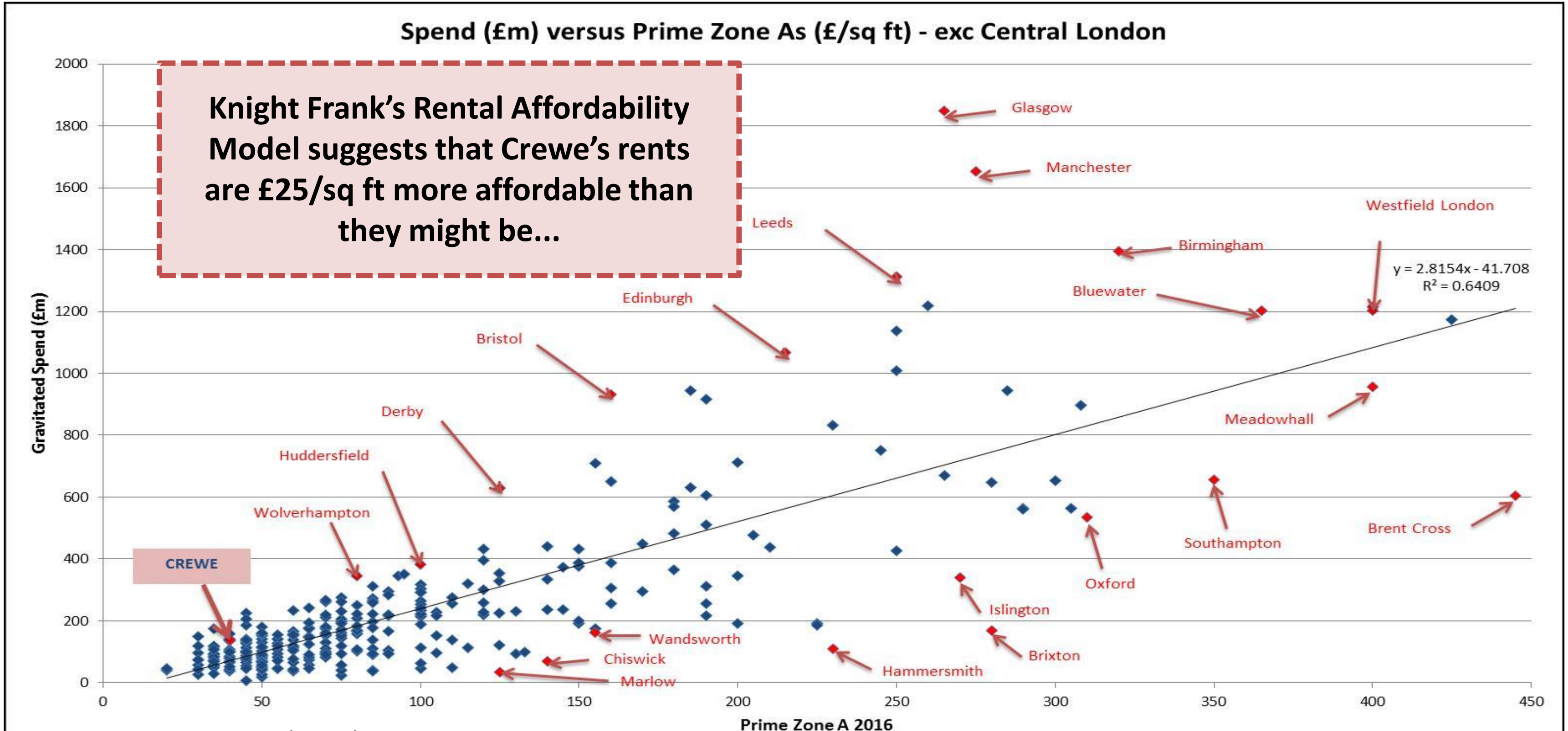
Crewe is one of the Top 30 centres in the North West…

RETAIL RENTS…



Source: PMA, Knight Frank

R E N T A L   A F F O R D A B I L I T Y …



Source: CACI, PMA, Knight Frank

BENCHMARK CENTRES…

Knight Frank

Rank	Centre Name	RF Minor Class	Region	Geodemographic Correlation*
165	Bedford	Lower Average Major Centres	South East	0.79
167	Sutton Coldfield	Medium Metropolitan Towns	West Midlands	0.82
175	Stafford	Major Centres	West Midlands	0.87
193	Perth	Major Regional Towns	Scotland	0.68
210	Newcastle-under-Lyme	Value Major Centres	West Midlands	0.87
217	Loughborough	Value Major Centres	East Midlands	0.85
222	Kettering	Value Major Centres	East Midlands	0.88
233	Rugby	Value Major Centres	West Midlands	0.93
244	**Crewe**	**Value Major Centres**	**North West**	**1.00**
254	Kidderminster	Value Major Centres	West Midlands	0.87
262	Stockton-on-Tees	Value Major Centres	North	0.86

Source: CACI, Knight Frank   * Denotes similarity of ACORN profile. Correlations range from 1.00 (Total Correlation) to -1.00 (No Correlation).

These are comparable centres to Crewe on the basis of similar retail ranking, spend and shopper populations and geo-demographic similarity of their respective catchment areas…

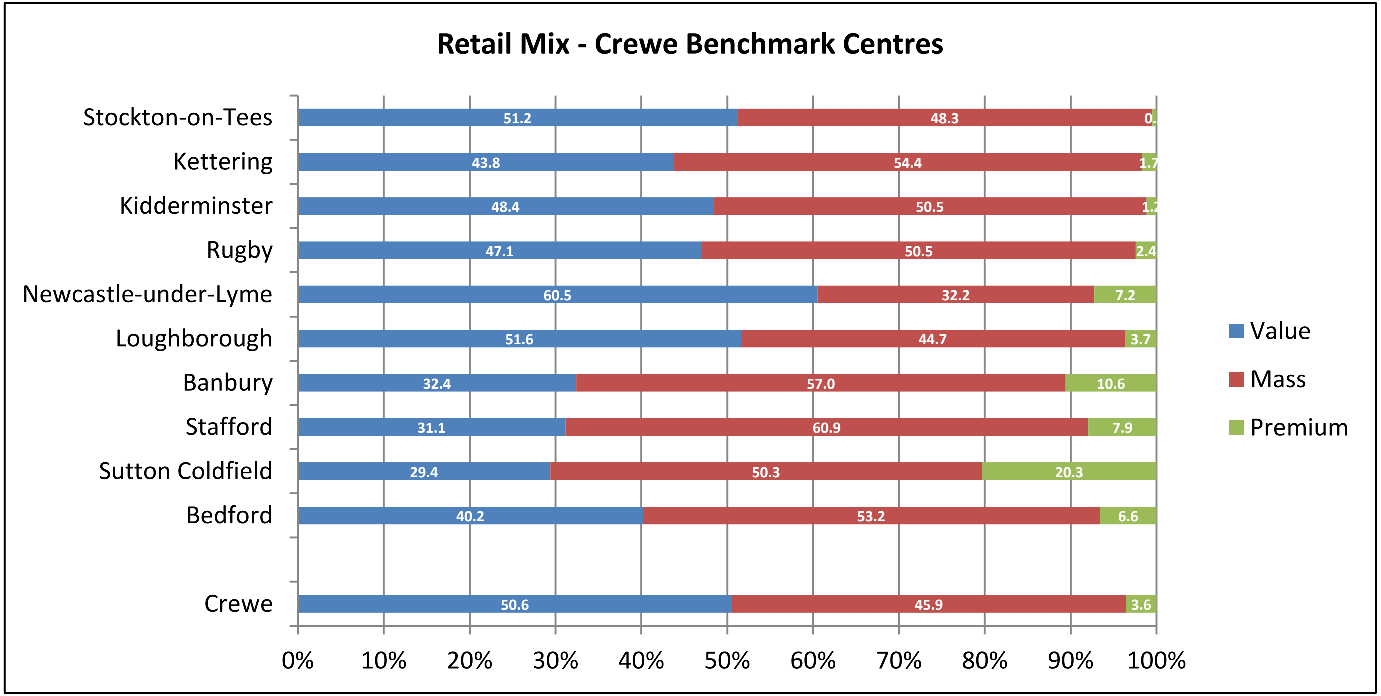
B E N C H M A R K   C E N T R E   C O M P S …

Centre Name	National Rank	Gravitated Spend (£m)*	Shopper Population	Total Catchment Retention (%)	Prime Zone A Rent (£/sq ft)
Bedford	165	201.5	76,522	13.8	75
Sutton Coldfield	167	186.5	81,273	6.0	105
Stafford	175	183.7	66,831	8.1	65
Banbury	192	167.0	58,940	13.8	80
Newcastle-under-Lyme	210	157.8	66,818	7.7	40
Loughborough	217	149.6	56,952	6.0	55
Kettering	222	146.2	60,103	10.3	60
Rugby	233	142.7	54,143	9.5	42.5
Crewe	**244**	**137.7**	**51,559**	**8.7**	**40**
Kidderminster	254	128.8	52,831	7.8	35
Stockton-on-Tees	262	122.3	45,829	4.4	35
PEER GROUP AVERAGE (INC CREWE)	**213**	**156.7**	**61,073**	**8.7**	**58**
PEER GROUP AVERAGE (EXC CREWE)	**210**	**158.6**	**62,024**	**8.8**	**59**

Source: CACI, PMA, Knight Frank

Crewe is one of the more affordable trading locations of the benchmark centres – benchmark average prime zone A rent of the 10 peer group centres is £59/sq ft…

RETAIL MIX COMPARISONS…



Source: CACI, Knight Frank

The is still an opportunity for Crewe to achieve a more balanced tenant-mix…

GAP ANALYSIS (1)…

Knight Frank

Frequency: 8, 6, 4, 2

Value

- The Fragrance Shop
- TK Maxx
- bodycare
- Sports Direct.com
- B&M
- Save the Children
- sense for deafblind people
- Sue Ryder
- The Edinburgh Woollen Mill
- Poundstretcher – the original value store…

Mass-market

- Thorntons
- Carphone Warehouse
- next
- The Body Shop
- Roman Originals
- Warren James
- Greenwoods Menswear
- bathstore
- Pandora
- H&M
- Trespass
- Debenhams
- The Entertainer – TheToyShop.com
- Ann Summers
- LloydsPharmacy

Source: Goad, Knight Frank

Gap analysis highlights ca. 68 'missing' comparison and convenience goods retailers , who could potentially take space in Crewe…

GAP ANALYSIS (2)…

Knight Frank

Frequency

8
6
4
2

Domino's Pizza
CAFFÈ NERO
KFC
PIZZA EXPRESS
Pizza Hut
PIZZA PAPA JOHN'S
PREZZO
Nando's
STARBUCKS COFFEE

F&B

Source: Goad, Knight Frank

SUPERCUTS
Johnsons THE CLEANERS
halfords autocentre MOT | service | repairs
KwikFit
Francesco GROUP
PADDYPOWER.
amplifon
The co-operative funeralcare

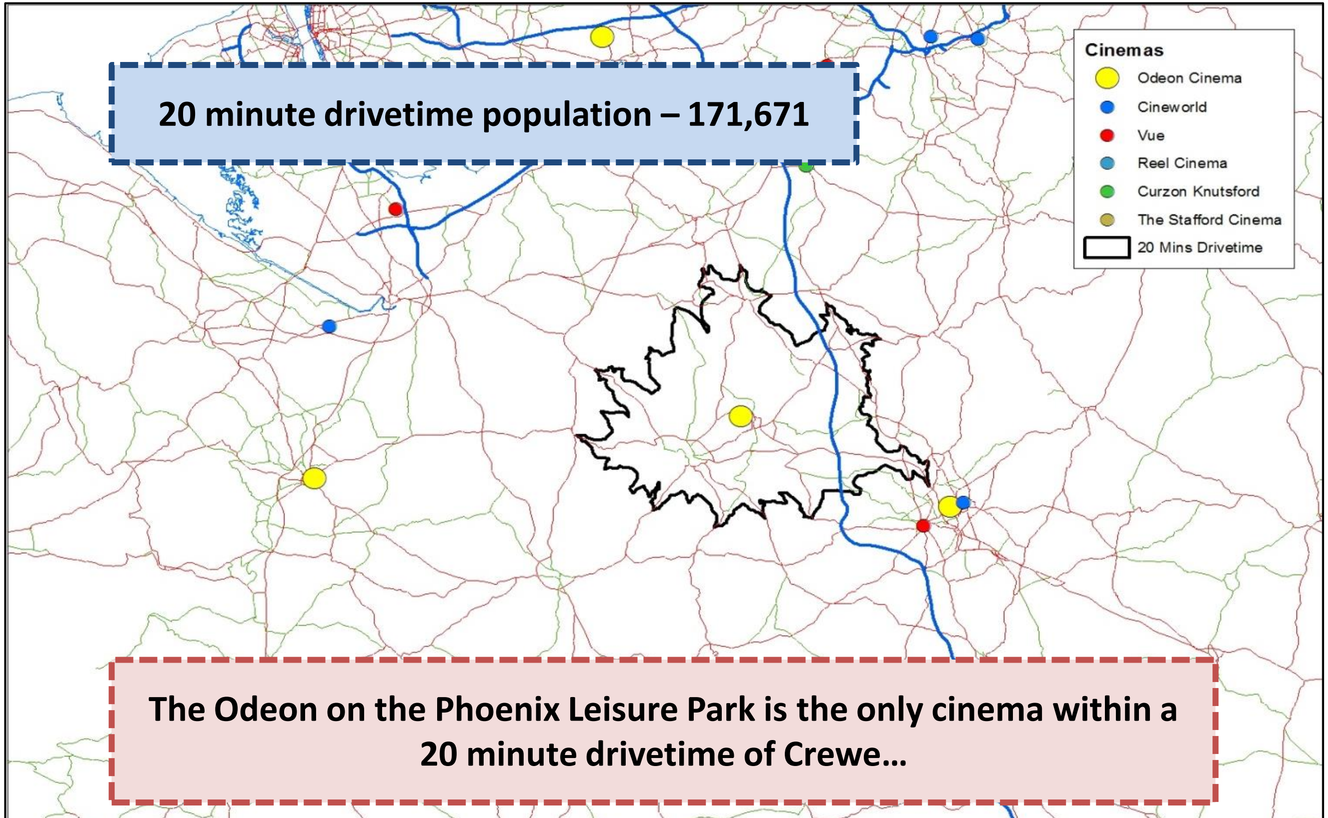
Other

Frequency

8
6
4
2

Gap analysis highlights ca. 33 'missing' leisure and retail service retailers, who could potentially take space in Crewe…

EXISTING CINEMA PROVISION…



Source: LDC, CACI, Knight Frank

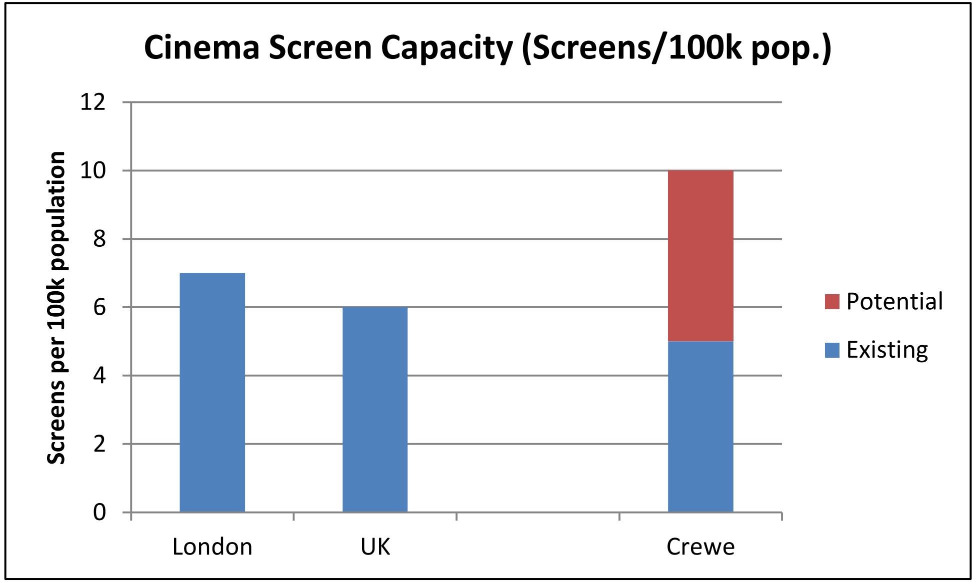
EXISTING CINEMA PROVISION…

Cinema Fascia	Town/City	County	Location	Postcode	Distance (m)
Odeon Cinema	**Crewe**	**Cheshire**	**Town Centre**	**CW 1 3AW**	**0.0**
Vue	Newcastle-Under-Lyme	Staffordshire		ST 5 1PT	18.2
Odeon Cinema	Stoke-On-Trent	Staffordshire	Hanley	ST 1 5SN	19.3
Cineworld	Stoke-On-Trent	Staffordshire	Stoke	ST 1 5AF	20.1
Curzon Knutsford	Knutsford	Cheshire	Town Centre	WA16 0PE	23.3
Cineworld	Runcorn	Cheshire	Town Centre	WA 7 2FQ	30.2
Vue	Altrincham	Cheshire	Town Centre	WA14 2WG	32.6
Reel Cinema	Widnes	Cheshire		WA 8 0GY	34.3
Vue	Ellesmere Port	Cheshire	Little Stanney	CH65 9HD	34.4
Cineworld	Chester	Cheshire	City Centre	CH 4 0DE	35.4
Odeon Cinema	Wrexham	Clwyd	Town Centre	LL13 8EN	36.1
Odeon Cinema	Warrington	Cheshire	Westbrook	WA 5 8UD	36.3
Cineworld	Manchester	Greater Manchester	Didsbury	M 20 5PG	37.9
Cineworld	Stockport	Greater Manchester	Town Centre	SK 1 3TA	39.5
The Stafford Cinema	Stafford	Staffordshire	Town Centre	ST16 2HH	39.9
Woolton Picture House	Liverpool	Merseyside	Gateacre	L 25 5JH	41.3

Source: CACI, LDC, Knight Frank

CAPACITY ASSESSMENT…

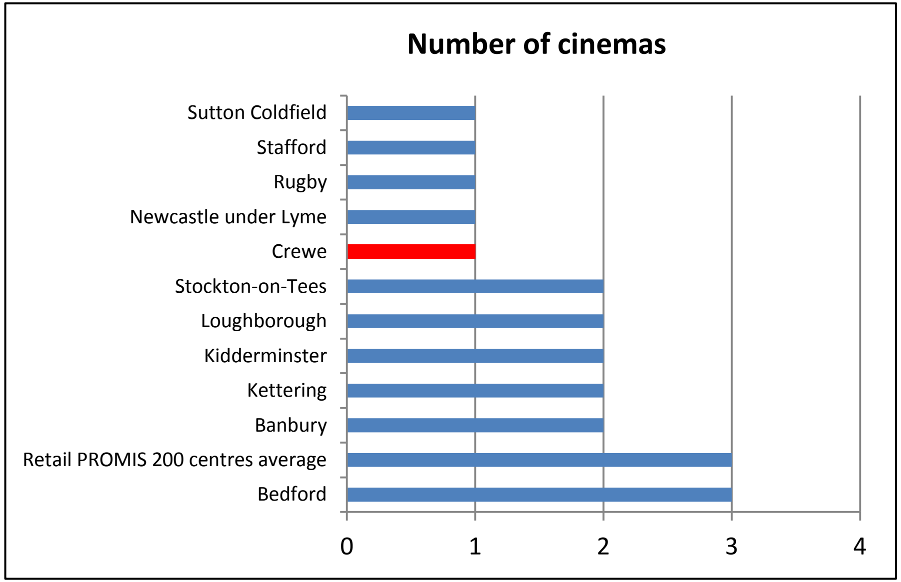
Applying BFI metrics, Crewe is currently under-supplied in cinema screens…

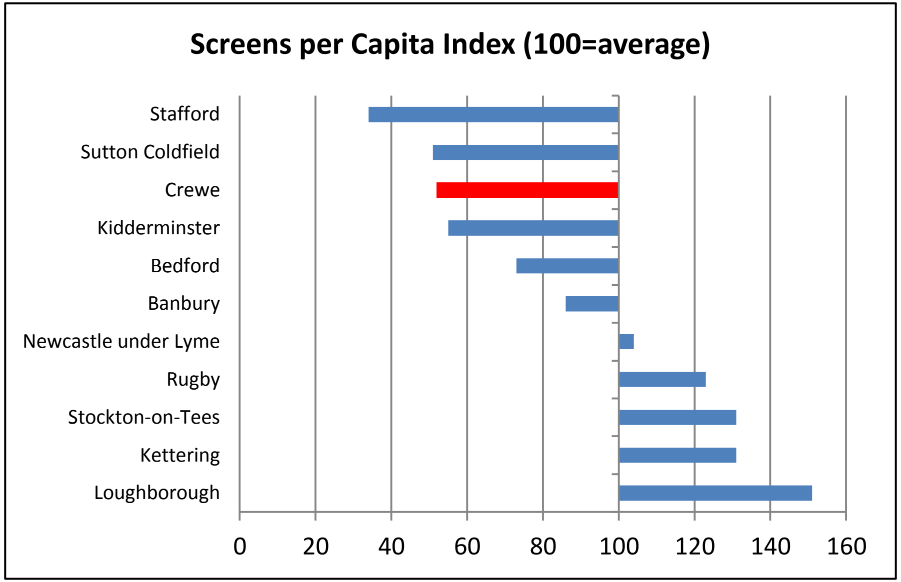


Source: CACI, LDC, BFI, Knight Frank

…population stats. suggest that a further 5 screens could be supported.

PROVISION BENCHMARKING…

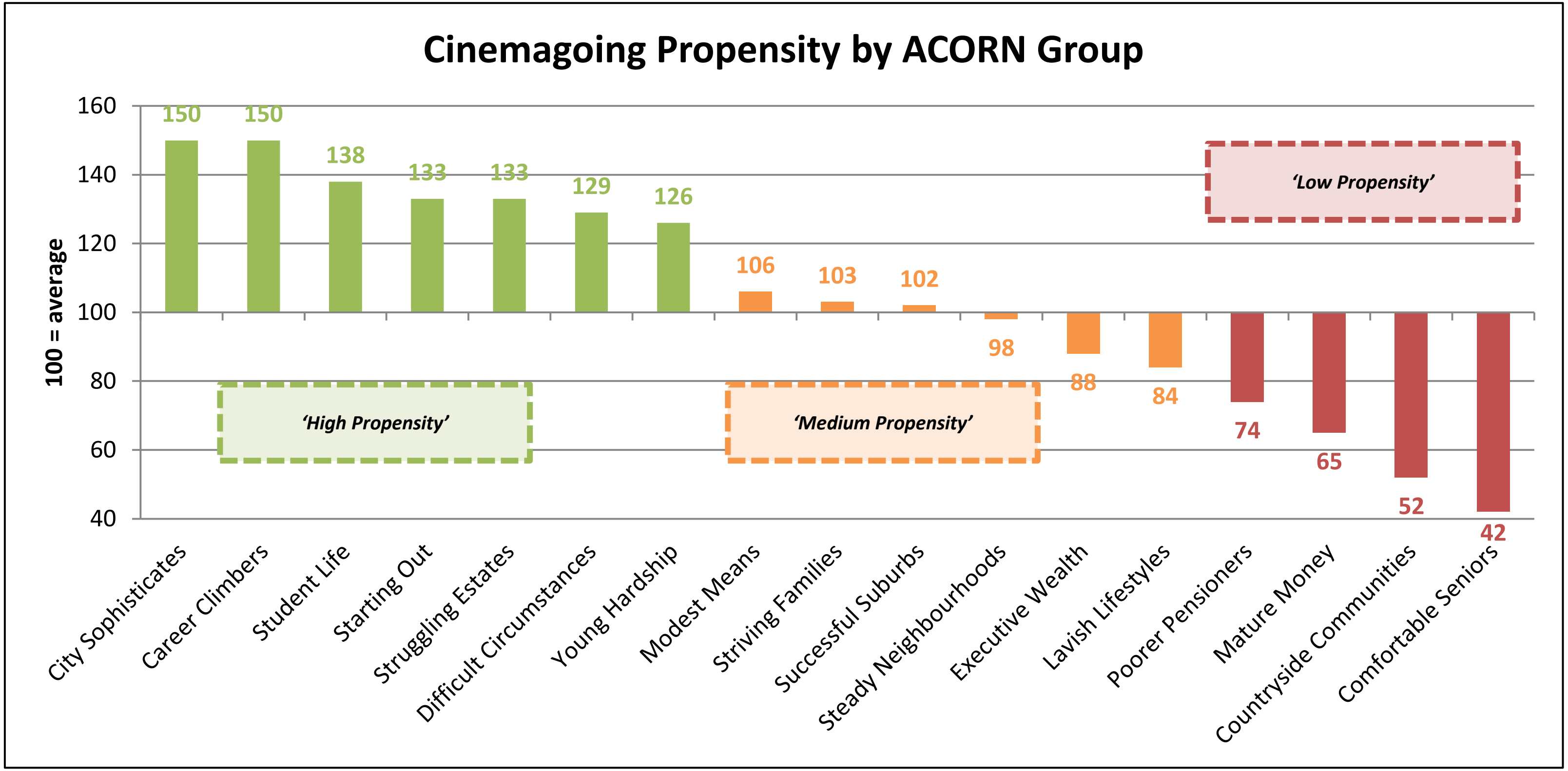




Source: PMA, Knight Frank

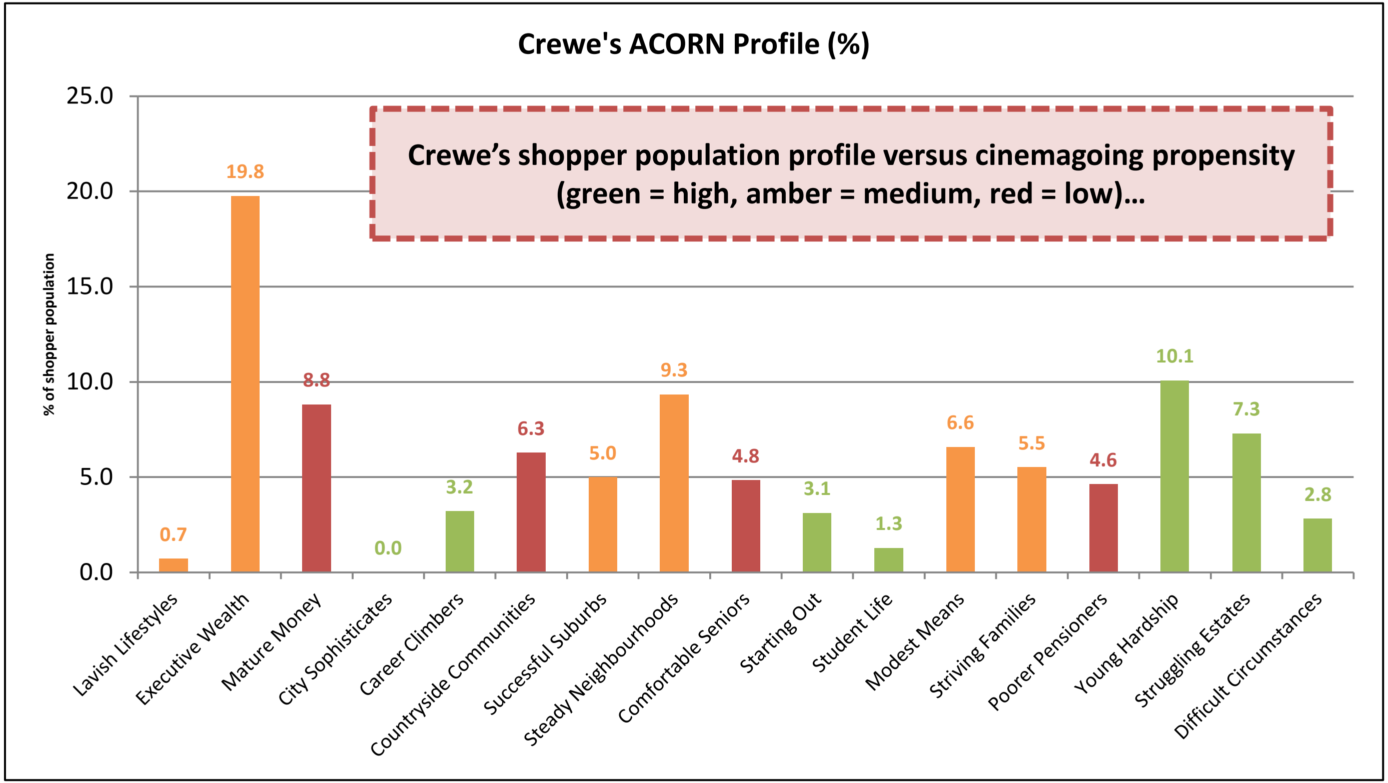
Relative to its peer group, Crewe is modestly supplied in cinemas…

CINEMAGOING BY ACORN GROUP…



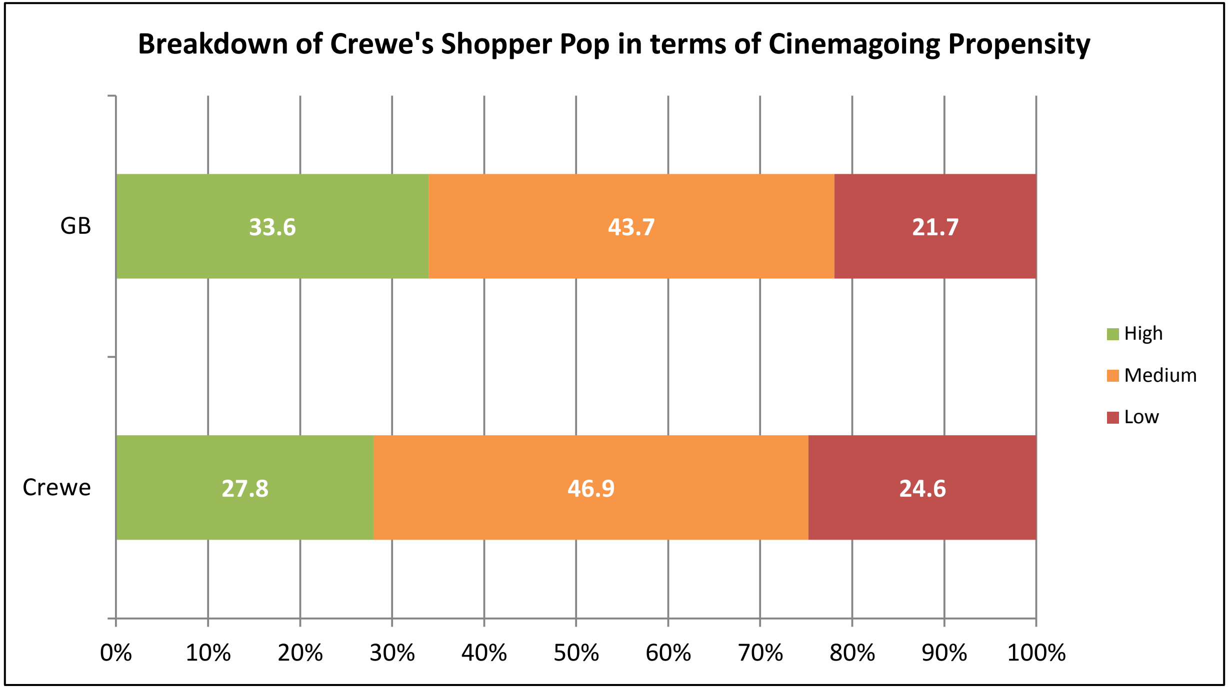
Source: CACI, Knight Frank

CREWE'S CINEMA AUDIENCE…



Source: CACI, Knight Frank

C R E W E ' S   C I N E M A   A U D I E N C E …



Source: CACI, Knight Frank

Ca. 28% of Crewe's shopper population are high propensity cinemagoers – 14,300 people in absolute terms…

Q U E S T I O N S ?

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'Occupiers are at the heart of everything we do'