

Appendix 1 CIneSCOPE North West Regional Focus

TRIP

Targeted Research
& Intelligence Programme



Nathaniel Lichfield
& Partners

Planning. Design. Economics.

CINeSCOPE

Cinema Development Intelligence

North West Regional Focus

Spring 2014

Regional Focus: The North West Cinema Market

A Flick through Existing Provision

The NLP VENU database identifies that there are currently 57 cinemas run by 20 different operators in the North West region, providing 88,550¹ seats and 445 screens. This includes new cinemas in Wirral and Widnes that opened their doors to business in 2013.

The total population of the region is 7,052,300,² which translates to an average of 80 people per seat, or 15,848 people per existing screen.

Cinema provision in the North West region is clustered in the main urban areas of Merseyside and Greater Manchester which account for 45% of all cinema screens in the North West.

The Warrington and Wigan travel to work area alone accounts for 12% of the cinema screens in the North West.

Cinema Hotspots Trailer

The NLP CINESCOPE hotspots map details existing cinema provision against population densities across the North West, identifying potential cinema development opportunities where there is a high population density but little cinema provision.

Operators and developers have already seen the benefits of CINESCOPE through its use with a number of successful planning applications in the North East including the Feetham's Leisure Scheme (mixed use development) in Darlington Town Centre.

<http://nlplanning.com/news/nlp-raise-curtain-in-darlington>

In the North West, potential cinema hotspots include Nelson, Colne and Clitheroe (although there is a cinema in Burnley) and Sale. There is no cinema in Chorley or West Wirral, and limited provision across Cheshire.

The model unveils other cinema hotspots in Oldham and Bolton where there is already planning permission in place for new venues and Chester where a new cinema is proposed.

The CINESCOPE Model

The NLP CINESCOPE Capacity and Impact model is informed by the comprehensive NLP VENU database which is kept up-to-date and includes commitments in the pipeline and proposals for new cinema development. The CINESCOPE model is constructed having regard to the Government practice guidance on need, impact and the sequential approach³.

The CINESCOPE model has a dual use. It can be **used to assist an appraisal of commercial viability** and extend beyond the initial testing stage, **to assess the scope for additional cinema-space**. Secondly, once a decision is taken to promote a cinema through the planning application process, the CINESCOPE model can be used to **inform sequential and impact assessments**. To assist developers and operators, NLP combines its VENU database intelligence with demographic profiling, to assess whether a potential catchment area matches the planned business model.

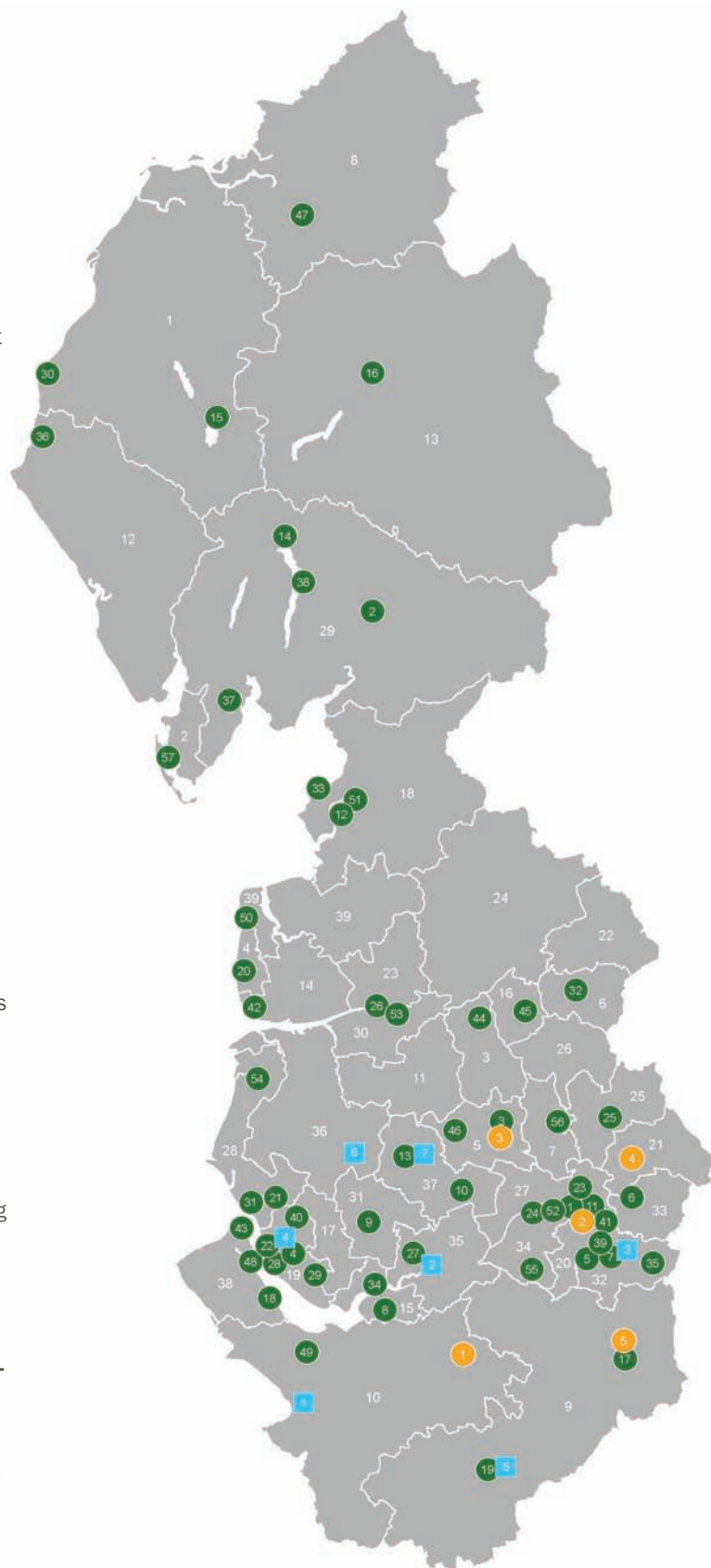
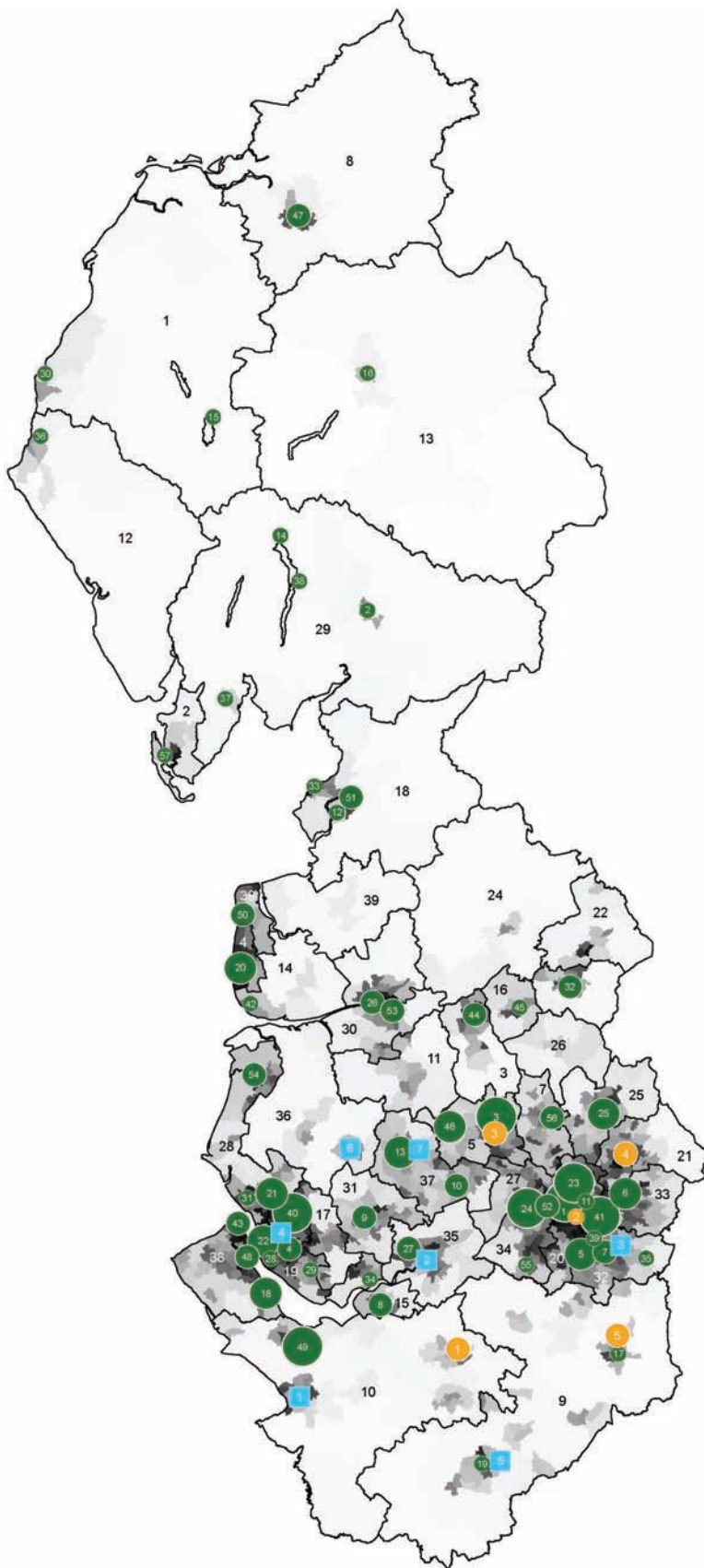


Figure 1: Existing and proposed cinema provision in the North West

¹Includes disabled seating

²Census 2011

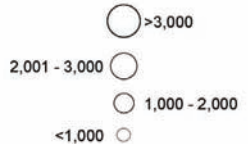
³Communities and Local Government - Planning for Town Centres: Practice guidance on need, impact and the sequential approach, 2009.



Population Density, 2011 by MSOA:
number of persons per hectare



Cinema: number of seats



Source: Office for National Statistics
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□ Proposed Cinema:
number of seats unknown

Local Authority

- | | |
|-------------------------------|---------------------|
| 1. Allerdale | 21. Oldham |
| 2. Barrow-in-Furness | 22. Pendle |
| 3. Blackburn with Darwen | 23. Preston |
| 4. Blackpool | 24. Ribble Valley |
| 5. Bolton | 25. Rochdale |
| 6. Burnley | 26. Rossendale |
| 7. Bury | 27. Salford |
| 8. Carlisle | 28. Sefton |
| 9. Cheshire East | 29. South Lakeland |
| 10. Cheshire West and Chester | 30. South Ribble |
| 11. Chorley | 31. St. Helens |
| 12. Copeland | 32. Stockport |
| 13. Eden | 33. Tameside |
| 14. Fylde | 34. Trafford |
| 15. Halton | 35. Warrington |
| 16. Hyndburn | 36. West Lancashire |
| 17. Knowsley | 37. Wigan |
| 18. Lancaster | 38. Wirral |
| 19. Liverpool | 39. Wyre |

Existing North West Cinema

- | | |
|---|--|
| 1. AMC Great Northern 16, Manchester | 29. Picture House, Woolton |
| 2. Brewery Arts Centre, Kendal | 30. Plaza, Workington |
| 3. Cineworld, Bolton | 31. Plaza, Liverpool |
| 4. Cineworld, Liverpool (Edge Lane Retail Park) | 32. Reel Cinema, Burnley |
| 5. Cineworld, Didsbury | 33. Reel Cinema, Morecombe |
| 6. Cineworld, Ashton-under-Lyne | 34. Reel Cinema, Widnes |
| 7. Cineworld, Stockport | 35. Regent, Stockport |
| 8. Cineworld, Halton | 36. Rosehill, Whitehaven |
| 9. Cineworld, St Helens | 37. Roxy Cinema, Ulverston |
| 10. Cineworld, Leigh | 38. Royalty, Windermere |
| 11. Cornerhouse, Manchester | 39. Savoy, Stockport |
| 12. Dukes, Lancaster | 40. Showcase, Norris Green |
| 13. Empire, Wigan | 41. Showcase, Belle Vue |
| 14. Fellini Cinema and Zeffirelli's, Ambleside | 42. The Island Cinema, St Annes |
| 15. Lonsdale Alhambra, Keswick | 43. The Light, New Brighton |
| 16. Lonsdale Cinema, Penrith | 44. Vue, Blackburn |
| 17. Macclesfield Cinema, Macclesfield | 45. Vue, Accrington |
| 18. Odeon, Bromborough | 46. Vue, Bolton |
| 19. Odeon, Crewe | 47. Vue, Carlisle |
| 20. Odeon, Blackpool | 48. Vue, Wirral |
| 21. Odeon, Liverpool (Switch Island Leisure Park) | 49. Vue, Ellesmere Port |
| 22. Odeon, Liverpool (Liverpool One) | 50. Vue, Cleveleys |
| 23. Odeon, Manchester (The Printworks) | 51. Vue, Lancaster |
| 24. Odeon, Trafford (The Trafford Centre) | 52. Vue, Salford Quays (Lowry Outlet Mall) |
| 25. Odeon, Rochdale | 53. Vue, Preston |
| 26. Odeon, Preston | 54. Vue, Southport |
| 27. Odeon, Warrington | 55. Vue, Altrincham |
| 28. Picture House at FACT, Liverpool | 56. Vue, Bury |
| | 57. Vue (Apollo), Barrow |

Cinema with Planning Approval

- | | |
|---|------------------------------|
| 1. Barons Quay, Northwich | 4. Old Town Hall, Oldham |
| 2. Central Retail Park, Manchester | 5. Silk Street, Macclesfield |
| 3. Market Place Shopping Centre, Bolton | |

Proposed Cinema

- | | |
|----------------------|--|
| 1. Chester Central | 5. Crewe Central (Proposed Cinema Extension) |
| 2. Warrington North | 6. Skelmersdale Central |
| 3. Stockport Central | 7. Wigan Central |
| 4. Liverpool Central | |

Figure 2: Existing and proposed cinema provision in the North West mapped against population density

About NLP

Nathaniel Lichfield & Partners (NLP) is an independent planning, economics and urban design consultancy, with offices in Cardiff, Leeds, London, Manchester and Newcastle.

NLP celebrated its 50th birthday in 2012 and was named Just-Giving company of the year, in recognition of our fundraising achievements. The RTPI named NLP Planning Consultancy of the Year in 2012 and 2013, making us the first company to win the award in consecutive years.

We are one of the largest independent planning consultancies in the UK and we offer the broadest range of skills of any specialist planning firm. This includes services in demographics, economics, heritage, sustainability, urban design and sunlight and daylight, as well as a full range of planning skills.

The NLP Town Centres and Retail team specialises in the planning and delivery of town centre uses, such as cinemas, food & beverage units, and commercial leisure and cultural developments, as well as retail, offices, housing and mixed use schemes, in town, edge and out-of-centre locations.

Our clients include local authorities and government bodies, as well as developers, landowners and operators in the housing, retail, leisure, commercial, and infrastructure sectors.

We prepare accessible and clear reports, underpinned by robust analysis and stakeholder engagement, and provide expert witness evidence to public inquiries and examinations.

Our targeted research reports explore current planning / economic issues and seek to offer practical ways forward.

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