



Final Report

GVA
Norfolk House
7 Norfolk Street
Manchester
M2 1DW



Quantitative Retail Study Update

High Peak Borough Council &
Staffordshire Moorlands District Council

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1. INTRODUCTION

1.1 GVA was jointly appointed by High Peak and Staffordshire Moorlands Councils in June 2013 to prepare a quantitative retail study to establish current and future need for new retail floorspace to inform respective emerging Local Plans. The joint study updates the previous retail study work completed by GVA for both Councils, as follows:

- **Peak Sub-Region Retail and Town Centres Study** (February 2009); quantitative-based study of main town centres in High Peak, Derbyshire Dales and Peak District National Park (PDNP).
- **Staffordshire Moorlands District Retail Study** (November 2006); quantitative-based study of the main town centres in the district.
- **Staffordshire Moorlands IDF**; impact assessments of potential additional convenience retail floorspace in Leek and Chedale and comparison retail in Leek (February 2008).

1.2 The terms of the study brief are as follows:

- To establish current shopping (convenience, comparison and bulky retail) and leisure expenditure patterns across the study area through commissioning a new up-to-date household telephone survey. The survey exercise should be consistent with the previous studies to enable a comparative assessment of changes in expenditure flows, market share and overall performance.
- Apply the latest population data and expenditure growth projections to reflect the current economic conditions.
- Provide a comparative review of the vitality and viability of the main town centres through completing new floorspace / fascia surveys to establish changes in representation and centre composition.
- To assess the future quantitative capacity and qualitative need for additional retail floorspace, having regard to new and planned developments / commitments.
- To provide strategic advice on the overall future retail and leisure need and confirm an appropriate forward development strategy for the main town centres.

1.3 The update study is intended to provide a sound basis on which the respective Councils can progress with their emerging Local Plans. The conclusions of the update study do

however represent a ‘point-in-time’ assessment of performance and opportunity. The quantitative need identified should be used to inform policy which will endure over the short to medium term as required. However, it will be important that the Councils continue to monitor the health of its principal centres through its forward planning function, adopting and revisiting the strategy to address changing circumstances.

REPORT STRUCTURE

1.4 In accordance with the terms of the Study Brief this report is structured as follows:

PART ONE – BACKGROUND DETAIL AND CONTEXT

- **SECTION 2 – RETAIL TRENDS;** summarises the current market conditions and developments within the retail and leisure sector.
- **SECTION 3 – PLANNING POLICY FRAMEWORK;** sets out the requirements of NPPF in terms of promoting competitive town centre environments.

PART TWO – QUALITATIVE ASSESSMENT

- **SECTION 4 – HEALTH CHECK ASSESSMENT;** assesses the changes in floorspace / fascia composition of the main town centres. The assessment seeks to comparatively assess and benchmark against Experian Goad regional averages.

PART THREE – QUANTITATIVE ASSESSMENT

- **SECTION 5 – RETAIL CAPACITY METHODOLOGY;** sets out the methodology underpinning the quantitative capacity modelling exercise.
- **SECTIONS 6 – 12 – CENTRE SPECIFIC ANALYSIS;** reviews and comparatively assesses changes in market share and performance of the respective centres since the previous retail studies. The need / capacity for new provision within the specific centres are identified, having regard to projected population and expenditure growth as well as planned / emerging commitments.
- **SECTION 13 – STRATEGIC RECOMMENDATIONS;** proposes changes to town centre boundaries, frontage policies and local impact threshold.

1.5 The next section therefore sets out the current retail and leisure trends which will influence the future performance of centres and forward strategy.

2. RETAIL AND LEISURE TRENDS

2.1 The study has been commissioned in part to assess the impact of the economic climate on retail and leisure provision across the study area and how the wider economic and social trends likely to influence both local residents and operator requirements in the future. This section therefore examines key trends and drivers for change in the retail industry and outlines those of particular relevance to the respective Councils. The review draws on a range of published data sources including Verdict, Mintel and Experian.

ECONOMIC OUTLOOK

2.2 The latest advice published by Experian (Retail Planner 10.1, September 2012) presents a bleak picture for the economy as the recovery from the recession continues to be weak. It is anticipated that household spending will continue to be constrained by subdued disposable income growth and a weak labour market. Pressures on disposable incomes will limit the extent to which consumers are able to save and consumers will therefore be more considered with their spending decisions and seeking to achieve best value for money. In many circumstances, the cost-savings offered by the Internet will be more readily seized.

2.3 Overall, consumers remain cautious with spending not only on discretionary items but also on needs, cutting wastage, which will impact on food & grocery volumes. There is an increased focus on buying efficiently. Big ticket and home-related purchases remain low, particularly as uncertainty continues to drive house prices and volumes down, as many are reluctant to move (stagnant housing market and limited availability of finance).

2.4 As the housing market recovery remains slow and uncertain, certain sectors (e.g. home furnishing and DIY) may benefit from increasing demand as home owners prioritise renovation of existing property rather than moving. However, it is anticipated that sales through the town centre will remain weak with online and out of centre retailers continuing to take a greater share. Space and store numbers in town centre locations are also expected to decline as retailers drive efficiencies by closing underperforming space (notable closures include Focus DIY and Comet); these trends are discussed in more detail below.

THE INTERNET/ 'E-TAILING'

- 2.5 Consistent with wider economic trends, growth in e-Retail declined in 2009 as a result of the recession reducing consumer demand. Austerity cuts on the spending ability of the most prolific online shoppers (35-44 year olds) also had an impact on reduced demand during this period. Overall the pace of growth in online shopping is set to slow down significantly as the channel matures and competition increases¹.
- 2.6 Despite overall more modest levels of growth in online shopping, there will continue to remain reasonable pressure on traditional bricks and mortar retailers. Shoppers are able to select their own retail mix online and shopping centres and high streets will need to compete with this choice, which is not only driven by price and range, but also service and expertise. Online shopping has driven expectations of convenience and service upwards and customers are expecting more from in-store ambience to tempt them to make a purchase². Town centres and high streets will increasingly have to provide a shopping 'experience' that the Internet is unable to match.
- 2.7 Trends also show that the online and in-store shopping channels are becoming gradually more blurred as shoppers increasingly research purchases online or in stores which are increasingly becoming showrooms. According to Verdict, in 2010, 63% of shoppers researched goods online before purchasing in stores, an increase from 54% in 2007. At the same time, it is estimated that 29% of consumers researched purchases in store before buying online, representing a huge increase from 13% in 2007³.

NEW TECHNOLOGIES

- 2.8 Technological advances will continue to drive changes in retailing, with greater interactions between work, entertainment, social networking and shopping using mobile devices. Quick Response codes (QR codes) have increased consumer and retailer interaction and engagement, enabling customers to scan QR barcodes on their mobiles to gain direct access to the product website, marketing, competitions and product information. Smartphones provide contactless payment services using Near Field Communications (NFC) technology. This allows customers to make payments via in-store terminals making the payment process more convenient.

¹Verdict Research, "Retail Futures H1 2011 - e-Retail", March 2011

²Verdict Research, "How Britain Shops: Overall 2011", March 2011

³Verdict Research, "UK e-Retail 2011", May 2011

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- 2.9 Retailers have and continue to develop 'augmented reality' technology which will merge the physical and virtual worlds to allow retailers (such as Ikea and Tesco) to provide an interactive view of how products such as televisions or furniture, will look in consumers own homes or provide 3D projections of life size products.
- 2.10 Fashion retailers including Net-a-Porter and Clarks for example already use augmented reality technology through pointing smartphones and tablets at an image or advertisement which triggers video content on the mobile device. This technology brings static adverts to life and allows consumers to view catwalk runways, video advertisements and product information, and to make purchases. Augmented reality will provide an interactive advertising platform for retailers, who will use this technology to break down the barriers between online and in-store shopping.
- 2.11 While the Internet and new technologies pose challenges to the high street, retailers are constantly looking for ways to exploit the trading opportunities available through offering a multichannel shopping experience. The advantages offered by physical stores, in terms of the experience and immediacy of products, will see a network of key stores remain a fundamental component of retailers' strategies to develop a more coherent and integrated multichannel proposition.

SALES EFFICIENCY

- 2.12 An efficiency growth rate represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies and is in accordance with good practice.
- 2.13 Although hard quantitative evidence is limited, comparison businesses in particular have, over time, increased sales densities by achieving improvements in productivity in the use of floorspace. Analysis of past data is difficult as sales densities increases have been affected by changes in the use of retail floorspace over the last 20 years, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday-trading and longer opening hours and the very strong growth of retail expenditure relative to the growth in floorspace.

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- 2.14 Following the recession many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, have led some retailers into closure. With the expectation of weaker expenditure growth, sales density growth is also expected to be lower than previous estimates, unless retailers accelerate store closures and more existing retail stock is taken out of use.
- 2.15 Based on continuing trends towards more modern, higher density stores and the demolition of older inefficient space, Experian expect relatively constrained efficiency growth. The scope for sales density increases for convenience goods is more limited as expanding store portfolios will increasingly overlap with the catchment of existing stores and result in the cannibalisation of existing sales.

OPERATOR SPACE REQUIREMENTS

- 2.16 One of the major trends to emerge from the economic downturn has been the decline in the amount of retail space in town centre locations. This is, in part, a consequence of the harsh economic conditions forcing out independent retailers whose margins became too tight to survive and some multiples which have either collapsed or their store portfolios have shrunk after entering a pre-pack administration. These losses have not been offset by new developments, as many town centre schemes have been put on hold or revised downwards in scale. With online presence allowing national coverage, it is expected that retailers will remain cautious about expansion.
- 2.17 As retailers cut back on space to improve efficiencies and online becomes a more important channel, a new model is emerging in town centres. Retailers are moving towards opening larger flagship stores in strategic locations which are supported by smaller satellite stores and transactional websites. The larger flagships will accommodate the fuller range while smaller stores will offer a more select range supplemented by internet kiosks allowing access to the wider range.
- 2.18 This model offers many advantages such as lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. Such models are already being trialled by retailers including Debenhams and House of Fraser. The first House of Fraser.com store, comprising just 140 sqm, opened at Hammerson's Union Square Shopping Centre, Aberdeen in October 2011, followed by a second in Liverpool in November 2011. It is reported that the retailer will open similar stores in locations with strong web sales, but without a store presence. Marks

& Spencer is also trialling a boutique offer with sample ranges of clothing combined with online video and ordering capabilities.

OUT-OF-CENTRE PRESSURES

- 2.19 As retailers opt to develop stores in the most strategic and cost effective locations, there has been a notable resurgence to out-of-centre destinations which offer the benefit of lower rents, better space and in most cases, free parking. According to Verdict, out-of-town is the only channel which has seen store numbers increase consistently since 2000. BIS report that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.
- 2.20 John Lewis for example, has developed a number of out-of-town stores through its At Home format. Reports suggest that the retailer is actively seeking to increase its out-of-town portfolio. Other retailers including H&M and Primark are also reported to be seeking to expand their portfolios in out-of-centre locations.

FOODSTORES

- 2.21 In the convenience sector, the 'race for floorspace' has significantly diminished with Tesco and latterly Sainsbury's downgrading their respective new store opening programmes in the short to medium term. The reduction in new store openings has been coupled with a move away from large stores towards the more traditional convenience orientated formats. The reduction in store sizes and realignment to predominantly convenience retail formats has been primarily driven by the increase in online sales of non-food retail goods.
- 2.22 Whilst there remains a significant development pipeline (Verdict estimate that between 2010 and 2015 the leading grocers will increase their space by 2 million sqm - almost double that of the new space opened between 2005 and 2010), the mainstream retailers are increasing being more selective in terms of future store opening locations and are no longer acquiring sites in order to restrict competition. Prime sites are now only being actively considered by the mainstream operators unless it is a 'once in a generation' opportunity to achieve representation in a long standing target area.

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- 2.23 The continuing fall out of independents from the market will provide further opportunities for the expansion of the leading brands. Smaller store formats are becoming more of a focus as top up shopping is becoming increasingly popular – a response to consumers being discouraged from travelling long distances by high fuel prices and as more are shopping online for staple goods. Following in the path of Tesco and Sainsbury's, Asda, Morrison's and Waitrose are all in the process of expanding smaller concept stores.
- 2.24 The (limited assortment) discount operators (Lidl and Aldi) are again embarking on a significant expansion programme (Lidl has announced plans to open a further 60 new stores in 2013). The proposed expansion programmes are based on the increasing market share which the discount operators are achieving from middle class shoppers who are price sensitive but retain a desire for quality produce. Discount operators are therefore increasing seeking to increase representation in more affluent areas.

THE ROLE OF THE TOWN CENTRE

- 2.25 The town centre has been the main shopping channel for the last 30 years. However, its role is set to change dramatically. Emerging trends suggest that it will be used more for leisure and social activities with more bars, restaurants, food outlets and community spaces opening in vacant units. The recent announcement by the Government to enable temporary changes of use from Class A1 to Class A3 amongst others is likely to precipitate this trend where market demand arises.
- 2.26 These trends are of major importance to the main town centres in both areas which will need to adapt to this broader role by broadening their non-retail offer. Data from the Local Data Company indicates that town centres with more non-retail outlets have seen an improvement in their performance. Between 2009 and 2011, 114 towns improved their town centre score and reduced their vacancy rate and of these, 60.5% had a lower proportion of retail outlets.
- 2.27 As retailers improve their multi-channel offer, town centre stores will be used more to support e-retailing with click and collect points and safe drop boxes for customers to collect their online orders as well as satellite stores opening for customers to make online purchases. As demand for retail floorspace declines, it is anticipated that more secondary and tertiary space which suffers from lower levels of footfall, will increasingly be converted into residential uses.

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- 2.28 In order to ensure that town centres have a viable function moving forwards, it will be important for the Council to aim to drive footfall to turn around their town centres and improve dwell time to increase awareness of offers and impulse purchases. This can be achieved by getting a better understanding of the catchment area and what local people want, improving the mix of retail and non-retail outlets in the centre to make them stay longer, and holding commercial, cultural and community events to create a 'unique selling point' for the town centre to differentiate it from the competition and encourage people to visit. Councils will also need to promote the wider area, to encourage further investment in jobs, and in the town centre, to persuade residents to spend their money in the area and support the town further.
- 2.29 Smaller town centres have already been greatly impacted by the pull of larger, higher order shopping destinations, leading to a high vacancy rate and weaker performance. For these centres, it will be increasingly important to create a differentiated offer, tailored to the local catchment and to encourage residents to shop and socialise more locally.

OVERALL SUMMARY

- 2.30 It is evident that the traditional high street faces a number of challenges not least from the tightening of retail spend and changing consumer behaviour but also from increasing competition posed by the Internet and out-of-centre developments. Whilst the future is uncertain, in light of the challenge currently faced, strategies which support the high street are considered ever more vital.
- 2.31 Whilst the town centre 'first' strategy must continue to prevail, strategies in some instances will need to adopt a degree of pragmatism and at worst consider the process of managing decline of some centres, particularly secondary ones, given the ongoing process of consolidation in the retail sector.

3. NPPF REQUIREMENTS

3.1 National Planning Policy Framework was adopted in late March 2012 and has replaced Planning Policy Statement 4: *Planning for Sustainable Economic Growth*. The PPS4 practice guidance on need, impact and sequential assessments does however remain as an informative tool for both plan making and development management functions.

TOWN CENTRE VITALITY AND VIABILITY

3.2 The NPPF (Section 2) specifies that planning policy should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Planning Authorities (LPAs) are directed to:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality.
- Define hierarchies and the extent of town centres and primary shopping areas.
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflects the individuality of town centres.
- Retain and enhance existing markets, ensuring they remain attractive and competitive.
- Allocate appropriate in-centre sites which are not compromised by limited site availability. If it is not possible to ensure a sufficient range of suitable sites, appropriate edge of centre sites that are well connected to a town centre should be allocated.
- Where town centres are in decline, local authorities should plan positively for their futures and encourage economic activity.

3.3 The long-standing sequential test is retained in the NPPF albeit that there is increased emphasis on LPAs to ensure an available supply of sites.

EVIDENCE BASE REQUIREMENTS

3.4 Local Plans should be based on adequate, up-to-date and relevant evidence. In relation to planning to meet business requirements, LPAs are required to have a clear

understanding of business needs within the economic markets operating in and across their area. LPAs are directed to use the evidence base to assess (amongst others):

- The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development.
- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

3.5 NPPF constitutes a material consideration which LPAs should take into account from the date of publication in development management decisions.

4. HIGH PEAK FLOORSPACE SURVEYS

4.1 The NPPF states that comprehensive up-to-date monitoring of town centre performance is essential in enabling local planning authorities to improve the vitality and viability of centres and effectively plan for the future. The floorspace composition of the main town centres in the borough has been defined utilising the following data sources:

- **EXPERIAN GOAD SURVEYS;** published floorspace plans and accompanying category reports for the main town centres in the two districts. These reports and plans have been utilised to enable a comparative assessment against national benchmarks from the Experian database.
- **GVA FLOORSPACE SURVEY UPDATES;** independent surveys have been completed given that Goad centre surveys are based on Experian's own interpretation of the true extent of retailing within a centre rather than the town centre (primary) shopping area boundaries as defined in adopted policy. GVA has therefore undertaken its own floorspace survey based on adopted boundaries (Appendix 5b).

4.2 In terms of existing local centres, no surveys have been completed as part of this exercise; the Council should however seek to survey centres as part of its monitoring function.

BUXTON

EXPERIAN GOAD FLOORSPACE SURVEY

4.3 The most recent Experian Goad survey of Buxton was completed in November 2012; the main survey results are as follows:

Retail Sector	No. Outlets	% Outlets		Floorspace (sqm)	% Floorspace	
		Buxton	National		Buxton	National
Convenience	22	6.15	7.10	7,478	12.0	11.63
Comparison	100	27.93	28.88	14,864	23.86	29.17
Retail Service	43	12.01	12.04	4,106	6.59	5.88
Leisure Service	70	19.55	19.34	16,518	26.51	18.32
Financial Service	32	8.94	9.60	4,375	7.02	6.69
Vacant	38	10.61	10.04	5,100	4.22	7.42
TOTAL	270	100	100	36,592	100	100

4.4 The survey results highlight the following:

- **CONVENIENCE;** whilst the number of units dedicated to convenience retailing is slightly below the Goad national average, the quantum of floorspace is slightly above the average. This reflects the relatively large number of convenience stores in the town including Aldi, Iceland and Waitrose.
- **COMPARISON;** the number of outlets and proportion of floorspace within the town dedicated to comparison retailing is below the Goad national average in both instances. The results suggest that the existing units are relatively small in size.
- **VACANT;** the number of vacant outlets is in line with the national Goad average whilst the quantum of vacant floorspace is lower. There is a particular concentration of vacancies around The Crescent and Spring Gardens at present.

4.5 The significant number of vacancies along the Crescent does however also reflect a 'point in assessment' whereby ongoing regeneration initiatives in the area, including intervention and redevelopment for alternative uses have yet to be realised.

COMPARATIVE ASSESSMENT (2009 STUDY)

4.6 The 2009 Study reported the composition of Buxton on the basis of an Experian Goad report from November 2008, as follows:

Retail Sector	No. Outlets	% Outlets		Floorspace (sqm)	% Floorspace	
		Buxton	National		Buxton	National
Convenience	23	8.49	9.08	6,754	17.16%	16.69%
Comparison	138	50.92	45.14	18,962	48.17%	51%
Service	85	31.37	33.3	9,597	24.38%	21.78%
Vacant	22	9.23	12.47	3,122	7.93%	9.41%
TOTAL⁴	268			38,435		

4.7 In headline terms, the differences between the Goad survey results are as follows:

- **CONVENIENCE;** whilst the number of outlets has remained relatively constant, there has been a significant decrease in convenience floorspace (c. 700 m²).

⁴ Miscellaneous floorspace / use excluded

- **COMPARISON**; the number of comparison retail outlets and floorspace has significantly decreased (38 units / c. 400 m²).
- **VACANT**; the number of vacant units has increased from 22 to 38 in 2013. The amount of floorspace has increased by c. 2,000 m².

4.8 Overall, there has been a significant increase in vacancies due to the closure of some retail units. Whilst this has been off-set by the significant increase in service uses, the town vitality and viability appears to be declining.

GVA FLOORSPACE SURVEY UPDATE (JULY 2013)

4.9 GVA has updated the Goad survey to account for changes since April 2012; the survey results (Appendix 5b), based on the defined shopping area boundaries, are set out below:

Retail Sector	Floorspace (sqm gross)	Units
Convenience	7,095	21
Comparison	13,745	102
Service	24,030	147
Vacant	6,003	32
TOTAL⁵	50,873	302

4.10 Comparative analysis of the GVA survey with Goad identifies the following:

- **CONVENIENCE**; there is a difference in terms of the number of units (2) and quantum of floorspace between the two surveys.
- **COMPARISON**; there is a difference of c. 1,100 m² between the two surveys. This difference may be attributable to the GVA survey excluding a small number of retail units on London Road beyond the southern boundary of the town centre and new vacancies in larger units in the intervening period between the surveys.
- **VACANT**; the number of units is less than identified in the Goad survey and may reflect the GVA survey only being limited to the Council's adopted shopping area boundaries (e.g. there are 4 vacant units alone to the south of London Road). There is a c. 900 m² floorspace difference between the two surveys.

⁵ Miscellaneous floorspace not included in overall total presented.

4.11 Overall, there continues to be some changes in retailer representation and the overall performance of Buxton as a viable retail destination. Whilst the Spring Gardens shopping centre performs a strong anchor function for the northern part of the town, the areas around London Road functions as a relatively separate service orientated destination. The area around The Crescent currently has a number of vacancies but this may be attributable to ongoing regeneration work.

GLOSSOP

EXPERIAN GOAD FLOORSPACE SURVEY

4.12 The Experian Goad survey for Glossop was last completed in December 2012 and is therefore relatively up-to-date. The GOAD national average is also provided to enable comparative analysis and ensure comparability with the floorspace survey data utilised in preparing the Peak Sub-Region Study.

Retail Sector	No. Outlets	% Outlets		Floorspace (sqm)	% Floorspace	
		Glossop	National		Glossop	National
Convenience	23	7.54	7.11	13,266	24.94	11.63
Comparison	91	29.84	28.85	14,149	26.60	29.17
Retail Service	39	12.79	12.06	3,948	7.42	5.88
Leisure Service	53	17.38	19.35	8,240	15.49	18.32
Financial Service	28	9.18	9.58	2,991	5.62	6.69
Vacant	20	6.56	10.03	3,558	6.69	7.42
TOTAL	254			46,152		

4.13 The main headline findings arising from the latest Experian Goad data is as follows:

- **CONVENIENCE;** the town centre convenience retail offer is broadly in line with the Goad national average in terms of the number of outlets. However, the amount of convenience floorspace is significantly above; this reflects the concentration of larger format convenience retail stores within the town including Tesco, Co-Op, Aldi and the M&S Simply Food at Howard Town Mill which had just opened at the time of the survey.
- **COMPARISON;** the number of outlets dedicated to comparison retailing is slightly above the Goad national average whereas the quantum of floorspace is slightly

below. This potentially reflects the traditional nature of retail accommodation within the town centre (small terraced shops) and the relatively small configuration of the modern retail units at Wren Nest and Howard Town Mill.

- **VACANT**; the number of units and amount of floorspace is significantly lower than the Goad national average. This is positive and highlights the ongoing viability of the centre. Several of the vacancies recorded by Goad are units within the Howard Town Mill scheme which have subsequently been let to a variety of retailers including Peacock's and Edinburgh Woollen Mill. Vacant units (3 and 4) are currently subject to a change-of-use application⁶ to extend the range of uses to include Class A1, Class A3 and Class A4 so as to increase the potential to secure new occupiers.

4.14 Overall, the Goad survey indicates that the town was relatively viable and vital in comparative terms.

COMPARATIVE ASSESSMENT (2009 STUDY)

4.15 The town centre floorspace survey which informed the 2009 Study was based on an Experian Goad report from November 2008. The study set out the retail composition of the centre on the basis of the number of units⁷, as follows:

Retail Sector	No. Outlets	% Outlets		Floorspace (sqm)	% Floorspace	
		Glossop	National		Glossop	National
Convenience	19	9.41	9.08	11,504	30.28%	16.69%
Comparison	97	48.02	45.14	14,205	42.35%	51%
Service	71	35.15	33.3	6,308	18.81%	21.78%
Vacant	14	6.93	11.17	1,456	8.37%	9.41%
TOTAL	201			33,473		

4.16 In comparative terms, the main changes between the two respective Goad reports are as follows:

- **CONVENIENCE**; the number of units has increased slightly whilst the quantum of floorspace has increased by c. 2,000 m². These changes are primarily attributable to the new M&S Simply Food opening at Howard Town Mill.

⁶ IPA application reference HPK/2013/0555

⁷ Table excludes Miscellaneous floorspace

- **COMPARISON**; the number of units has decreased since 2008 (97 to 91) despite of the Howard Town Mill scheme coming forward; this may in part reflect the current adverse economic conditions which has precipitated the closure of both national multiples and independent comparison retailers.
- **VACANT**; the number of vacant units has increased from 14 to 20; this is likely to reflect the current economic conditions as well as the completion of the Howard Town Mill scheme which has a number of units yet to be let.

4.17 Overall, there has been a significant quantitative increase in the number of units within the town (201 in 2008 to 254 in 2012); this reflects the quantitative expansion in the town (Howard Town Mill etc.). There has been a notable increase in retail and leisure service uses (Classes A1 – A5). The vacancy level has remained relatively low compared to Goad averages.

GVA FLOORSPACE SURVEY UPDATE (JULY 2013)

4.18 As detailed in the introduction, the Goad survey is based on its interpretation of the true extent of retailing within a centre rather than the town centre shopping area boundaries defined in the adopted Local Plan. GVA has therefore updated the Goad figures to remove all floorspace located beyond defined town centre boundaries (Appendix 5b).

4.19 The GVA survey figures are summarised below and underpin the quantitative capacity modelling assessment.

Retail Sector	Floorspace (sqm gross)	Units
Convenience	8,655	23
Comparison	6,508	74
Service ⁸	12,819	106
Vacant	2,849	15
TOTAL	30,831	218

4.20 The main differences between the Goad and the GVA update are as follows:

- **CONVENIENCE**; the GVA estimates are below the Goad figures due to the exclusion of the retail provision at Wren Nest (Iceland and large freestanding Tesco store).

⁸ Services comprise Retail Services (Class A1), Professional (Class A2), Food & Drink (Classes A3 – A5) and Other Services.

- **COMPARISON**; the GVA estimates are again lower than the GOAD survey due to Wren Nest scheme being excluded.
- **VACANT**; there are a total of 15 units within the defined town centre shopping area which are currently vacant; this is five less than the Goad 2012 survey and reflects the recent occupation of formerly vacant (under construction) units by retailers in the Howard Town Mill scheme.

4.21 Overall, the GVA floorspace survey identifies significant differences in floorspace composition relative to the wider Goad survey.

EDGE-OF-CENTRE/ OUT-OF-CENTRE RETAIL PROVISION

4.22 The town centre is physically constrained by surrounding residential to the north and Glossop Brook to the south which acts as a physical barrier. There has consequently been significant retail development outside of the town centre at Wrens Nest Retail Park. The retail park has a number of larger format stores including Tesco, Next, Argos and Brantano. The converted mill element of the scheme is occupied by Pets At Home, Iceland, Halfords and Carpetright.

CHAPEL-EN-LE-FRITH

EXPERIAN GOAD FLOORSPACE SURVEY

4.23 The latest Goad survey of Chapel was undertaken in October 2012. The survey results against the Goad national average is provided below for comparison.

Retail Sector	No. Outlets	% Outlets		Floorspace (sqm)	% Floorspace	
		Chapel-en-le-Frith	National		Chapel-en-le-Frith	National
Convenience	5	4.67	7.10	3,809	26.11	11.63
Comparison	22	20.56	28.88	2,833	19.43	29.17
Retail Service	18	16.82	12.04	1,309	8.98	5.88
Leisure Service	23	21.50	19.34	2,591	17.77	18.32
Financial Service	11	10.28	9.60	836	5.73	6.69
Vacant	12	11.21	10.04	1,393	7.32	7.42
TOTAL	91		100	12,771		100

4.24 The Goad survey results indicate the following:

- **CONVENIENCE**; whilst the number of outlets is below the Goad regional average, the quantum of floorspace is much higher than the national average; this is due to the Morrison's store.
- **COMPARISON**; the number of units and quantum of floorspace dedicated to comparison retailing is significantly below the Goad national average. This reflects the limited offer which is predominantly orientated to meeting daily 'top-up' comparison shopping needs.
- **VACANT**; the number of vacant units is slightly above the Goad national average although the overall quantum of vacant floorspace is slightly below. This suggests that the vacant units are relatively small.

4.25 Overall, the survey results highlight the relatively show that the town is a viable destination with relatively low vacancy levels.

COMPARATIVE ASSESSMENT (2009 STUDY)

4.26 The 2009 Study was informed by a floorspace survey undertaken by GVA in July 2008 which set out the following floorspace composition:

Retail Sector	Units	Floorspace (sqm gross)
Convenience	6	1,259
Comparison	23	2,077
Service	49	4,731
Vacant	6	306
TOTAL	84	8,373

GVA FLOORSPACE SURVEY UPDATE (JULY 2013)

4.27 GVA has completed a new floorspace survey of the town centre (Appendix 5b) to take account of floorspace and fascia changes since both the Goad (October 2012) and to enable a comparative assessment against the previous GVA survey (2008). The survey results are based on the defined shopping area boundaries and therefore exclude the edge-of-centre Morrison's store (c. 2,850 m²). The current floorspace is as follows:

Retail Sector	Units	Floorspace (sqm gross)
Convenience	6	1,021
Comparison	14	965
Service	47	4,540
Vacant	5	657
TOTAL⁹	72	7,183

4.28 The difference between the respective GVA surveys shows the following changes over a five year period:

- **CONVENIENCE**; the number of units is the same but the quantum of development has identified by the update survey is slightly reduced. This suggests natural churn in the convenience retail offer in the town centre.
- **COMPARISON**; the number of units has decreased from 23 to 14 with the quantum of comparison retail floorspace significantly reduced.
- **VACANT**; the number of units has remained relatively static albeit that the quantum of floorspace has increased. This suggests 'churn' within the town centre and that the vacancies are long-standing and possibly hard-to-let units.

4.29 Whilst there has been a significant reduction in the comparison retail offer within the town centre, its overall vitality and viability is relatively positive with a static level of vacancies.

EDGE-OF-CENTRE / OUT-OF-CENTRE RETAIL PROVISION

4.30 The town centre retail offer is limited and is predominantly orientated towards daily convenience and comparison shopping needs. The main full-range convenience store destination in the town is the edge-of-centre Morrisons on Market Street. Whilst the store is beyond the defined town centre boundary it effectively functions as the town centre anchor destination given its shared car park and ability to generate linked shopping trips.

⁹ Excludes floorspace defined as miscellaneous

NEW MILLS

EXPERIAN GOAD FLOORSPACE SURVEY

4.31 The latest Goad survey of New Mills was undertaken in December 2012. The survey results are set out below against the Goad national average for comparison.

Retail Sector	No. Outlets	% Outlets		Floorspace (sqm)	% Floorspace	
		New Mills	National		New Mills	National
Convenience	7	7.87	7.10	1,207	14.76	11.63
Comparison	21	23.60	28.88	1,755	21.45	29.17
Retail Service	13	14.16	12.04	789	9.65	5.88
Leisure Service	17	19.10	19.34	1,793	21.91	18.32
Financial Service	14	15.73	9.60	1,170	14.30	6.69
Vacant	7	7.87	10.04	668	8.17	7.42
TOTAL	79	100	100	7,382	100	100

4.32 The Goad survey results indicate the following:

- **CONVENIENCE**; whilst the number of outlets within the town is broadly in line with the Goad national average, the quantum of floorspace is slightly higher; this reflects the predominant convenience shopping function of the town (albeit that it lacks a main anchor foodstore).
- **COMPARISON**; the number of units and quantum of floorspace is significantly below the Goad national average. The existing comparison retail provision is relatively small-scale and predominantly orientated to meeting daily 'top-up' comparison shopping needs.
- **VACANT**; the number of vacant units is slightly below the Goad national average whilst the overall quantum of floorspace is slightly above.

4.33 Overall, the survey results show that, notwithstanding the limited convenience and comparison retail offer, the town centre is a viable destination with low vacancy levels.

GVA FLOORSPACE SURVEY UPDATE (JULY 2013)

4.34 GVA has updated the Goad survey to take account of floorspace and fascia changes since December 2012; the survey results (Appendix 5b) for the defined shopping area are as follows:

Retail Sector	Floorspace (sqm gross)	Units
Convenience	420	8
Comparison	2,035	23
Service	3,192	46
Vacant	613	5
TOTAL	6,260	82

4.35 The difference between the two surveys is as follows:

- **CONVENIENCE**; the number of outlets is broadly the same but the floorspace is lower (c. 800 m²) in the GVA survey. This may be due to the Goad measuring conventions.
- **COMPARISON**; the number of units is similar but the floorspace in the GVA survey is significantly above the Goad results.
- **VACANT**; the number of units and floorspace are similar between the two surveys.

4.36 Overall, the increase in vacancies since the Goad survey potentially suggests declining vitality and viability within the town centre.

WHALEY BRIDGE

EXPERIAN GOAD FLOORSPACE SURVEY

4.37 Given that the town centre offer is extremely limited, no GOAD survey was available at the time of the 2009 Study. Results for the GVA survey (Appendix 5b) undertaken in July 2013 are provided below.

Retail Sector	Floorspace (sqm gross)	Units
Convenience	856	7
Comparison	801	8
Service	2,856	31
Vacant	84	2
TOTAL	4,597	38

4.38 The survey results show that the town centre predominantly performs a service orientated function. The main retail provision in the town is an out-of-centre Tesco foodstore (extant planning permission to expand).

5. STAFFS MOORLANDS FLOORSPACE SURVEYS

- 5.1 As set out in the previous chapter, the floorspace composition of the main town centres in the district have been defined utilising the latest Experian Goad surveys (where available) and separate GVA floorspace surveys based on adopted town centre boundaries. No local centre surveys have been completed as part of this exercise and the Council should seek to survey the centres as part of its wider monitoring function.
- 5.2 A comparative assessment of the up-to-date floorspace survey results against the Goad surveys reported in the 2006 district-wide retail study is provided to identify the changes in the respective main centres.

LEEK

EXPERIAN GOAD FLOORSPACE SURVEY

- 5.3 The latest Experian Goad survey of Leek was completed in November 2012 and the results are summarised below; the Goad average is also provided to enable comparative analysis against wider national trends.

Retail Sector	No. Outlets	% Outlets		Floorspace (sqm)	% Floorspace	
		Leek	National		Leek	National
Convenience	22	5.93%	7.10%	6,289	10.96%	11.63%
Comparison	135	36.39%	28.88%	18,924	32.99%	29.17%
Retail Service	42	11.32%	12.04%	2,991	5.21%	5.88%
Leisure Service	51	13.75%	19.34%	7,153	12.47%	18.32%
Financial Service	29	7.82%	9.60%	5,769	10.06%	6.69%
Vacant	26	7.01%	10.04%	3,455	6.02%	7.42%
TOTAL	305			44,751		

- 5.4 The main headline findings arising from the latest Goad data is as follows:
- **CONVENIENCE**; the retail offer is slightly below the Goad national average in terms of both the number of outlets and also the quantum of floorspace. This reflects the relatively small-scale nature of the offer (local independent shops etc.).

- **COMPARISON;** the number of outlets and quantum of comparison floorspace is significantly above the Goad national averages. This reflects the relatively strong independent comparison retail offer (antiques etc.).
- **VACANT;** the number of units and quantum of floorspace is lower than the Goad national average.

5.5 Overall, the Goad survey indicates that the town is vital and viable. The limited number of vacancies is particularly positive given that the retail offer is predominantly orientated towards local independents.

COMPARATIVE ASSESSMENT (2006 STUDY)

5.6 The town centre floorspace survey which informed the 2006 study was based on an Experian Goad report from 2005. The study set out the retail composition of the centre¹⁰, as follows:

Retail Sector	No. Outlets	Floorspace (sqm)
Convenience	23	6,410
Comparison	146	19,420
Service	70	8,270
Vacant	20	2,510
TOTAL	259	36,610

5.7 In comparative terms, the main changes between the 2005 and 2012 Goad reports are:

- **CONVENIENCE;** the number of units and quantum of floorspace has remained relatively static. This reflects the fact that the current offer is relatively vital and viable despite out-of-centre competition from large food stores.
- **COMPARISON;** whilst the number of units has decreased since 2005, the quantum of floorspace has actually increased. This suggests that larger units may have been occupied by comparison retailers (a amalgamation of smaller units etc.).
- **VACANT;** the number of units and floorspace has actually decreased since 2005.

¹⁰ Table excludes Miscellaneous floorspace which was referenced in the 2005 Study for comparability purposes

5.8 Overall, it is clear that the town's retail offer has remained relatively viable since 2005. The decrease in vacant units is a particularly positive sign.

GVA FLOORSPACE SURVEY UPDATE (JULY 2013)

5.9 The GVA survey (Appendix 5a), based on defined town centre boundaries, identifies the following composition:

Retail Sector	Units	Floorspace
Convenience	20	3,335
Comparison	131	15,479
Service	123	13,623
Vacant	19	2,253
TOTAL	292	34,116

5.10 The main differences between the Goad (2012 survey) and the GVA update are:

- **CONVENIENCE**; the number of units and floorspace is below the Goad estimate given the exclusion of Co-Op on Buxton Road.
- **COMPARISON**; whilst the number of outlets is slightly less than the Goad survey, the quantum of floorspace is significantly less (c. 3,400 m²). This is attributable to the exclusion of units to the south of Brook Street.
- **VACANT**; the GVA survey identifies less units and floorspace than Goad. This is primarily attributable to the exclusion of areas to the west of St Edward Street.

5.11 Overall, the GVA floorspace survey identifies significant differences in floorspace composition. Vacancy levels remain relatively consistent with previous surveys and suggest that there are long-standing vacant units which are difficult to secure viable active uses for.

EDGE-OF-CENTRE / OUT-OF-CENTRE RETAIL PROVISION

5.12 The town centre is physically constrained by topography and surrounding residential. There has consequently been significant edge and out-of-centre retail development around Leek town centre. Working outwards in sequential terms, there are foodstores (Co-Op and Asda) located to the east of the town centre off Buxton Road and Springfield Road respectively.

- 5.13 Further out of town to the south west on the A53 corridor is a large (recently extended) out-of-centre Morrison's foodstore. A former Focus DIY shop further along Newcastle Road has recently been converted into a B&M Bargains (Home) outlet.
- 5.14 To the north of the town is a large freestanding out-of-centre Sainsbury's foodstore which opened in late 2012. The wider (approved) site masterplan includes retail warehousing which has yet to be developed.

CHEADLE

EXPERIAN GOAD FLOORSPACE SURVEY

- 5.15 The latest Experian Goad survey of Cheadle was completed in November 2012 and the results are summarised below; the national Goad average is also provided to enable comparative analysis.

Retail Sector	No. Outlets	% Outlets		Floorspace (sqm)	% Floorspace	
		Cheadle	National		Cheadle	National
Convenience	14	8.24%	7.10%	5,369	21.99%	11.63%
Comparison	42	24.71%	28.88%	6,131	25.10%	29.17%
Retail Service	26	15.29%	12.04%	2,090	8.56%	5.88%
Leisure Service	25	14.71%	19.34%	3,223	13.20%	18.32%
Financial Service	20	11.76%	9.60%	2,276	9.32%	6.69%
Vacant	18	10.59%	10.04%	1,142	4.68%	7.42%
TOTAL	145			20,231		

- 5.16 The main headline findings arising from the latest Goad data is as follows:
- **CONVENIENCE;** the number of units and floorspace is significantly beyond the Goad national average; this is due to Goad including the edge-of-centre Morrison's and Asda stores (former Somerfield and Netto).
 - **COMPARISON;** the number of outlets and quantum of floorspace is below the Goad national average; this reflects the current limitations of the offer which is predominantly small-scale independents with few national multiples.

- **VACANT**; whilst the number of vacant units is in line with the Goad national average, the quantum of floorspace is significantly below. This suggests that the existing vacant units have relatively small floorspace.

5.17 Overall, the Goad survey indicates that the town is vital and viable.

COMPARATIVE ASSESSMENT (2006 STUDY)

5.18 The 2006 Study was based on a GVA survey (2005) as no Goad survey data was available at the time. The study set out the retail composition of the town centre as follows:

Retail Sector	No. Outlets	Floorspace
Convenience	12	7,107
Comparison	40	4,518
Service	34	3,167
Vacant	7	319
TOTAL¹¹	76	15,111

5.19 In comparative terms, the main differences between the respective surveys are as follows:

- **CONVENIENCE**; whilst the number of units has increased, the quantum of floorspace has decreased substantially (c. 1,700 m²).
- **COMPARISON**; the number of units and floorspace has increased; this is primarily attributable to B&M occupying the former Kwik Save unit.
- **VACANT**; the number of vacant units and quantum of floorspace has significantly increased since 2005.

5.20 The floorspace figures show that the town centre offer has changed quite substantially since 2005. Whilst the occupation of the former Kwik Save unit by B&M is positive, the increase in vacancies generates some concerns in relation to wider town centre vitality and viability. The vacancies must be placed within the context of the current economic climate rather than any specific deficiencies in the town centre.

¹¹ Does not add up to 100% as Miscellaneous floorspace removed for comparability purposes

GVA FLOORSPACE SURVEY UPDATE (JULY 2013)

5.21 GVA has completed a new survey of the town centre, based on adopted town centre boundary definitions (Appendix 5a); the survey results are as follows:

Retail Sector	Units	Floorspace (sqm gross)
Convenience	7	2,507
Comparison	38	4,578
Service	52	5,456
Vacant	15	1,585
TOTAL	112	14,126

5.22 The main differences between the recent Goad (2012) and the GVA update surveys are:

- **CONVENIENCE;** the number of units and quantum of convenience floorspace identified in the GVA survey is significantly below the Goad survey due to the exclusion of units, including Morrison's and Asda, to the east of the town centre.
- **COMPARISON;** whilst the GVA survey only identifies four fewer comparison units within the town centre, the floorspace is significantly less (c. 1,600 m²).
- **VACANT;** there are fewer vacant units identified in the GVA survey. The quantum of vacant floorspace is however broadly comparable between the two surveys.

5.23 Overall, the GVA floorspace survey identifies significant differences in floorspace composition due to only surveying the defined town centre area. The reduction in vacancies is particularly positive although the relatively consistent quantum of vacant floorspace suggests that there are long-standing vacant units which are difficult to secure viable active uses for.

EDGE-OF-CENTRE / OUT-OF-CENTRE RETAIL PROVISION

5.24 The town centre is physically constrained by topography and surrounding residential. The main retail provision outside of the defined town centre is Morrison's and Asda stores to the east and south. However, both stores are located in close proximity to the town centre so as to facilitate linked trips.

BIDDULPH

EXPERIAN GOAD FLOORSPACE SURVEY

5.25 The latest Experian Goad survey of Biddulph was completed in November 2012 and the results are summarised below; the Goad average for comparable centres is also provided to enable comparative analysis.

Retail Sector	No. Outlets	% Outlets		Floorspace (sqm)	% Floorspace	
		Biddulph	National		Biddulph	National
Convenience	13	10.92%	7.10%	5,277	27.13%	11.63%
Comparison	29	24.37%	28.88%	5,704	29.32%	29.17%
Retail Service	19	15.97%	12.04%	1,505	7.74%	5.88%
Leisure Service	23	19.33%	19.34%	2,954	15.19%	18.32%
Financial Service	29	13.45%	9.60%	1,458	7.50%	6.69%
Vacant	13	10.92%	10.04%	901	4.63%	7.42%
TOTAL	126			17,799		

5.26 The main headline findings arising from the latest Goad data is as follows:

- **CONVENIENCE**; the convenience retail offer is significantly above the Goad national average in terms of floorspace; this is due to the large in-centre Sainsbury's store.
- **COMPARISON**; whilst the number of outlets is below the Goad national average, the floorspace is broadly the same. The Goad figures suggest that comparison retailers occupy larger floorspace units (e.g. former Somerfield and Co-Op stores).
- **VACANT**; whilst the amount of floorspace is significantly below the Goad national average, the number of units is broadly the same. This suggests that the vacant units consist of small floorspace units.

5.27 Overall, the Goad survey indicates that the town is relatively viable. The development of a new Sainsbury's within the town centre is reflected in the floorspace survey results.

COMPARATIVE ASSESSMENT (2006 STUDY)

5.28 GVA completed a town centre floorspace survey in 2005 to inform the 2006 district-wide study. The retail composition of the centre at the time was¹²:

Retail Sector	Units	Floorspace
Convenience	13	3,921
Comparison	21	1,866
Service	38	3,507
Vacant	4	384
TOTAL	76	9,678

5.29 In comparative terms, the main changes between the respective GVA surveys is set out in the table below:

GVA FLOORSPACE SURVEY UPDATE (JULY 2013)

5.30 The GVA update survey (Appendix 5a) identifies the following:

Retail Sector	Units	Floorspace (sqm gross)
Convenience	8	4,393
Comparison	25	3,380
Service ¹³	45	4,830
Vacant	11	1,296
TOTAL	89	13,899

5.31 The main differences between the GVA surveys (2006 and 2013) are as follows:

- **CONVENIENCE**; whilst the number of units has decreased from 13 to 8, the floorspace has increased significantly; this reflects the ongoing transition of the town's retail offer since Sainsbury's opened in the town centre (closure of Somerfield and Co-Op).
- **COMPARISON**; the number of outlets and quantum of floorspace dedicated to comparison retail is lower than the Goad survey due to the GVA survey only covering

¹² Table excludes Miscellaneous floorspace which was referenced in the 2005 Study for comparability purposes

¹³ Services comprise Retail Services (Class A1), Professional (Class A2), Food & Drink (Classes A3 – A5) and Other Services.

the defined AAP town centre shopping area boundaries. The former Somerfield unit on Wharf Road, which has recently been converted to a Home Bargains store (1,136 m² gross), is located outside of the adopted AAP boundary.

- **VACANT;** whilst there are two less vacant units identified in the GVA survey, there is a greater quantum of floorspace (c. 400 m² gross). This is within the defined town centre shopping area. The higher level of vacancies identified in the Goad survey reflects the six vacant high street units developed as part of the Sainsbury's scheme.

5.32 Overall, the GVA floorspace survey identifies significant differences in floorspace composition, particularly for comparison retail and vacancies, since the previous Goad survey in 2012. However, this is primarily attributable to the relatively tight AAP town centre boundaries adopted by GVA and the ongoing transition of the town centre retail offer after the opening of the new Sainsbury's store.

6. RETAIL CAPACITY METHODOLOGY

- 6.1 The quantitative assessment adopts a conventional step-by-step methodology, drawing upon the results of the household telephone survey to understand existing shopping patterns and to model existing flows of available expenditure to the main retail destinations within the respective Council areas and the wider sub-region.
- 6.2 Having established the baseline position, the quantitative capacity modelling exercise goes on to establish the performance of the town centres and separate retail stores and retail park destinations. The methodology, data inputs and assumptions adopted in the assessment exercise are set out below.

1) STUDY AREA DEFINITION

- 6.3 The catchment zones defined in the 2009 Peak Sub-Region study (High Peak Borough catchments only) and the 2006 Staffordshire Moorlands study have been maintained. The only exception is the original Buxton catchment defined within the 2009 study which has been reduced to reflect the overlap with the Leek North catchment in the 2006 study (both catchments originally included postcodes SK11 0 and SK17 0).
- 6.4 The updated catchment plan is provided at **Appendix 1** for reference. All catchment zones are defined on the basis of individual postcode sectors, so as to generate population and expenditure data from the *Experian Micromarker* system (derived from ONS mid-year estimates)¹⁴.

2) HOUSEHOLD TELEPHONE SURVEY

- 6.5 A total of **1,100 household surveys** have been completed across the study area, covering both local authority areas (as well as Bakewell to understand inflows to Buxton). The survey sample accords with the minimum 100 surveys per catchment zone recommended PPS4 practice guidance (Appendix B).
- 6.6 The survey has been designed to establish household shopping habits in terms of convenience (main food / top-up) and comparison goods expenditure. The results of the two types of food shopping questions are merged through the application of a weighting

¹⁴ Experian Retail Planner 10.1, September 2012

(75% main food; 25% top-up food shopping split), which reflects the estimated proportion of expenditure accounted for main (bulk) and daily top-up food shopping. This produces a composite pattern of convenience spending, enabling the identification of each main centre and foodstore market share.

- 6.7 With regards to comparison goods, the following questions have been included in the current household telephone survey so as to pick up finer grain understanding of local residents shopping patterns for particular individual comparison goods:

2013 STUDY
Clothing, Footwear and Other Fashion Goods
Furniture, Floor Coverings and Household Textiles
DIY and Decorating Goods
Major Household Appliances (incl. Washing Machines, Fridges and Cookers)
Large Electrical Goods (incl. TV, Hi-Fi, Radio, Photographic and Computer Equipment)
Personal Goods (i.e. Jewellery, Watches and Other Personal Effects)
Recreational Goods (i.e. Bicycles, Games, Toys, Sports Equipment, Musical Instruments)
Books and Stationary Items
Medical Goods, Therapeutic Appliances and Other Pharmaceutical Products (excl. Prescriptions)
Glassware, Tableware and Household Hardware Goods (Utensils)
CDs / DVDs and Computer Games
Small Domestic Appliances (incl. Personal Care Appliances and Small Electrical Goods including Kettles, Irons, Toasters and Hairdryers)
Garden Products and Pet-Related Products

- 6.8 The household survey results have been weighted in order to take account of the resident population in each respective zone to ensure a representative response. The results of all these questions were merged using weighting to reflect the amount of per capita expenditure in the survey zones for each of the different categories of goods.

- 6.9 In addition, the household survey also sought to understand where people presently go to pursue their main leisure activities (cinema, eating out etc.).

3) DATA VARIABLES

i) BASELINE POPULATION ESTIMATES

6.10 The population estimates and forecasts for each of the survey zones (Table 1, Appendices 2a and 3a) are derived from the *Experian Micromarketer* database (2011 Price Base). The population estimates are based on trend-line projections from the 2001 Census results and are calibrated to Local Authority District projections on the most recently available Government household and population data (ONS 2011-based projections).

ii) AVAILABLE EXPENDITURE

EXPENDITURE PER CAPITA

6.11 The latest *Experian Micromarketer* data (Briefing Note 10.1, September 2012) was used to provide estimates of per capita (person) expenditure on convenience and comparison goods in 2011 prices. The spend figures for convenience are set out in Table 2, Appendix 2a; and for comparison in Table 3 of Appendices 3a (non-bulky) and 4a (bulky).

EXPENDITURE GROWTH RATES

6.12 The current Experian expenditure growth projections (Briefing Note 10.1, September 2012) are relatively lower over the short term until post 2018 when Experian adopt historic longer-term growth projections, as follows:

CONVENIENCE	0.1% (2011-2012)	-0.1% (2012-2013)	0.5% p.a. (2013-2018)	0.8% p.a. (2018 – 2031)
COMPARISON	1.4% (2012)	1.8% (2013)	2.8% p.a. (2013–18)	2.9% p.a. (2018–2031)

6.13 Whilst Experian projects that expenditure growth will return to historic levels in the longer term, there is extremely limited growth projected in the short term which reflects the current ongoing squeeze on household incomes and living standards. There is a significantly reduced amount of available comparison expenditure in the short term and allied to slower growth projections have implications for forward quantitative capacity as will be highlighted later in the report.

SPECIAL FORMS OF TRADING

- 6.14 The latest Experian projections of special forms of trading (e.g. expenditure not available to spend in the shops - primarily internet sales¹⁵), is projected to rise towards the latter end of the plan period, as follows:

CONVENIENCE SFT DEDUCTIONS	2% (2012)	3.4% (2018)	4.6% (2028>)
COMPARISON SFT DEDUCTIONS	9.9% (2012)	12.9% (2013-18)	16% (2023-31)

- 6.15 It should however be noted that the current Experian projections identify that longer-term growth in non-store (i.e. internet) based sales, particularly for convenience goods, are less strong than historically predicted due to current logistical difficulties in servicing customer demand online (main retailers are beginning to open 'dark' stores¹⁶ to meet demand).
- 6.16 As previously detailed in the retail trends chapter, the overall trend for less expenditure being physically available to spend in traditional centres / stores poses significant challenges to traditional 'bricks and mortar' retailing and town centres as a whole.

iii) STORE PERFORMANCE

BENCHMARK TURNOVERS

- 6.17 In order to review the current turnover performance of the main centres as retail destinations and its main stores (particularly larger format food stores), published benchmark performances (estimates of trading at company average levels) has been compared against the survey-derived turnover figures identified in the capacity modelling assessment. The company benchmark (turnover) has been calculated from average sales density figures obtained from *Mintel Retail Rankings* and *Verdict*.

SALES DENSITY IMPROVEMENTS (TRADING EFFICIENCY)

- 6.18 The current Experian sales density projections (Briefing Note 10.1, September 2012) set out below are relatively static in the medium term due to the current economic conditions:

¹⁵ Experian define SFTs as expenditure that does not take place in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the Internet.

¹⁶ Dark Stores are large warehouses with interiors laid out like supermarkets so staff can walk around to compile orders (Class B8 warehouse and distribution use rather than Class A1 retail). They are not open to the general public.

CONVENIENCE SALES DENSITY	-0.7% (2012-13)	0.1% p.a. (2013-18)	0.2% p.a. (2018-2031)
COMPARISON SALES DENSITY	1.2% (2012-13)	2.1% p.a. (2013-18)	1.8% p.a. (2018-2031)

4) CAPACITY REVIEW

- 6.19 The quantitative capacity is presented on strategic dates according with the life span of the emerging Local Plans to 2031. Having established the baseline capacity position, the assessment then goes on to consider what may be achievable in terms of potential increases in market share and thus quantitative capacity.
- 6.20 It should be noted that the potential uplift in expenditure only represents actual capacity if retail proposals and operators that emerge can genuinely qualitatively add to the existing retail offer of a town centre by strengthening its attractiveness so as to achieve the envisaged improvements in market share.
- 6.21 Any market share enhancement assessment should be viewed against the positive planning policy framework provided by NPPF. Therefore, should proposals emerge for the development of new retail facilities within the primary shopping area of the town centre then the application should be considered on its merits.
- 6.22 In the same respect, there is no NPPF based policy support for the diversion of trade from sequentially preferable central locations to new provision which is outside of a centre and is likely to lead to the loss of trade and wider benefits including linked shopping trips and footfall within a centre.

5) COMMITMENTS

- 6.23 In assessing the quantitative and qualitative needs for new provision in the primary town centres, existing committed and emerging proposals which could materially influence future performance and thereafter forward strategy have been included. A schedule of existing commitments in both local authority areas are set out in Appendices 4b (High Peak) and 4c (Staffordshire Moorlands).
- 6.24 With respect to commitments outside of the respective local authority areas, the following schemes are considered to potentially influence strategy going forward:

- **MACCLESFIELD TOWN CENTRE REDEVELOPMENT**, planning permission recently granted (June 2013) for the development of a c. 23,000 m² (gross) retail-led regeneration scheme including a Debenhams department store (c. 6,500 m² gross), 22 large format retail units, food & drink units and a Cine world multiplex.
- **STOCKPORT TOWN CENTRE (BRIDGEFIELD DEVELOPMENT)**; outline planning permission has been granted in early 2013 for a new leisure and retail development in Stockport town centre. The scheme comprises a new cinema multiplex and retail units.
- **HANLEY CITY CENTRE REDEVELOPMENT (CITY SENTRAD)**; new city centre development comprising c. 70,000 m² (gross) of new retail floorspace (department store and 70 retail units), multiplex cinema and food & drink units.
- **POTTERIES SHOPPING CENTRE EXTENSION (HANLEY)**; partial redevelopment of existing shopping centre to facilitate new leisure scheme including multiplex cinema and food & drink units.
- **WOLSTANTON RETAIL PARK (NEWCASTLE)**; redevelopment of existing retail warehouse to accommodate new c. 14,000 m² (gross) M&S department store.
- **UTTOXETER TOWN CENTRE**; new town centre extension scheme including Asda food store (c. 2,880 m²) and non-food retail (c. 2,250 m²).

6.25 These schemes allied to the continuing trend for national retail and leisure multiples to concentrate representation in larger centres serving sub-regional catchments will potentially constrain the ability of the main towns in the respective local planning authority areas to attract new development (absorbing operator demand etc.).

7. BUXTON

7.1 The town is the primary centre in the southern part of High Peak borough. The town centre retail offer has developed in two distinct areas, as follows:

- **SPRING GARDENS CENTRE**; comprises the main shopping street and the indoor shopping centre. The majority of the national multiples are located within this area. The Quadrant and Crescent are located to the immediate west.
- **MARKET PLACE & HIGH STREET**; linear provision comprising predominantly small-scale independents catering for top-up shopping needs.

7.2 In terms of convenience retailing, the main food stores around the town centre are:

- **WAITROSE**; located within the Spring Gardens shopping centre mall.
- **AIDI**; freestanding store located to the immediate north of the defined shopping centre boundary beyond Station Road.
- **M&S (Foodhall)**; located within the Spring Gardens shopping centre. The small food offer predominantly caters for top-up shopping needs.

7.3 There are also a mix of smaller mainstream (Co-Op Spring Gardens, Sainsbury's Local Market Place), discounters (Iceland Spring Gardens) and local independent stores. However, the main food store destination within Buxton is the out-of-centre Morrisons store on Bakewell Road (A6) to the south of the town. The store is a significant distance from the town centre and is a standalone retail destination.

7.4 With respect to comparison retail, there is a small B&Q store located within the town. Unlike other comparable centres, there are no dedicated retail warehouse parks.

7.5 The leisure offer within the town centre comprises a mix of traditional evening economy uses including public houses and restaurants (including family orientated chains). Buxton Opera House is a significant year-round leisure attraction.

A) CONVENIENCE

7.6 As detailed in the retail methodology chapter, the Buxton catchment has been slightly amended for this study to take account of the catchment areas defined for the previous Staffordshire Moorlands study (2006). The assessment of the changes in the market share

performance of Buxton since the 2009 Sub-Region study therefore does not necessarily reflect a 'like-on-like' comparison but the catchments are sufficiently similar to enable meaningful analysis.

- 7.7 On the basis of the revised Buxton catchment (survey zone 5), the overall convenience expenditure pot (Table 3, Appendix 2a) is c. £54.9m (2013); this is projected to rise to £57.7m by 2018 and £68.8m in 2031 (£13.9m increase over emerging local plan period).

D) MAIN FOOD

IMMEDIATE CATCHMENT (SURVEY ZONES 5)

- 7.8 The main food expenditure pot (Table 4a, Appendix 2a) within the Buxton catchment (zone 5) is projected to rise from c. £41.2m in 2013 to £43.3m in 2018 and £51.6m by 2031.
- 7.9 The main food shopping patterns (Table 5, Appendix 2b) identified in the current household survey (2013) are summarised against the 2009 Sub-Region study results below:

DESTINATION / FOODSTORE	2009 STUDY BUXTON ZONE	2013 STUDY BUXTON ZONE
ALDI (STATION ROAD)	9.3%	25.6% (£10.5m)
ICELAND (SPRING GARDENS)	3.1%	1.4% (£0.6m)
WAITROSE (SPRING GARDENS)	8.1%	13.7% (£5.6m)
M & S (SPRING GARDENS)	1.9%	1.5% (£0.6m)
MORRISONS (BAKEWELL ROAD)	53.0%	42.4% (£17.4m)
LEEK FOODSTORES	3.7%	1.5% (£0.6m)
TESCO (WHALEY BRIDGE)	5.7%	0.7% (£0.3m)

- 7.10 The main changes are:

- There has been a significant improvement in performance of Aldi which now retains a quarter of main food expenditure arising within the Buxton catchment. Waitrose has also increased its main food market share performance.
- Whilst the out-of-centre Morrison's store is the primary main food shopping destination within the Buxton catchment, its market share has decreased by c. 10% since 2009; this is primarily attributable to the increased competition from Aldi.

- There has been a notable change in terms of leakage with significantly fewer shoppers visiting Tesco Whaley Bridge and more going to Morrison's Chapel-en-le-Frith. The opening of a new full-range Sainsbury's store to the north of Leek has had no impact on main food shopping patterns in the Buxton catchment area.

7.11 Overall, the 2009 Study identified the need for a new mainstream food store in or the edge of Buxton town centre to provide effective choice and competition due to the dominance of the out-of-centre Morrison's food store. However, the trading dominance of the out-of-centre store has decreased to the extent that the quantitative justification for promoting a new store is less conclusive than in 2009. The qualitative justification in terms of locating a new mainstream food store in close proximity to Buxton town centre to encourage linked shopping trips (etc.) does however remain.

INFLOW (FROM WITHIN BOROUGH)

7.12 The mainstream food stores also draw from a wider area beyond the town's immediate catchment (survey zone 5). A comparison of the changes since 2009¹⁷ is set out below:

DESTINATION / FOODSTORE	2009 STUDY		2013 STUDY	
	Z2 - HIGH PEAK CENTRAL	Z4 - PEAK DISTRICT CENT	Z2 - HIGH PEAK CENTRAL	Z3 - PEAK DISTRICT CENT
ALDI (STATION ROAD)	1.5%	-	3.2% (£2m)	2.4% (£0.4m)
WAITROSE (SPRING GARDENS)	1.5%	4.4%	1.4% (£0.3m)	1.7% (£0.3m)
MORRISONS (BAKEWELL ROAD)	0.8%	11.1%	-	13.6% (£2.4m)

7.13 The survey results identify that convenience provision within Buxton is now drawing slightly more trade from the Peak District Central catchment compared to 2009; Aldi and Morrison's have increased main good market share at the expense of Waitrose.

INFLOW (FROM OUTSIDE BOROUGH)

7.14 The main food stores in Buxton also attract some main food inflows from outside of the borough, namely from the Bakewell catchment¹⁸ as follows:

¹⁷ Peak District Central catchment changed from Zone 4 in the 2009 Study to Zone 3 in 2013 Study.

¹⁸ Different catchment number in the 2009 and 2013 Studies

	2009 STUDY	2013 STUDY
DESTINATION / STORE	Z6 BAKEWELL	Z4 BAKEWELL
ALDI (STATION ROAD)	3.3%	8.5% (£1.2m)
WAITROSE (SPRING GARDENS)	2.0%	3.0% (£0.4m)
MORRISONS (BAKEWELL ROAD)	7.8%	13.9% (£2.0m)

7.15 As the table highlights, Aldi and Morrison's in particular have significantly increased the respective main food market share derived from the Bakewell catchment.

7.16 In addition to drawing trade from the Bakewell catchment, the 2013 Study results also identify that the main food stores in Buxton draw from the Leek North catchment (survey zone 6) as follows:

	2013 STUDY
DESTINATION / STORE	Z6 - LEEK NORTH
ALDI (STATION ROAD)	3.9% (£0.5m)
WAITROSE (SPRING GARDENS)	6.3% (£0.7m)
MORRISONS (BAKEWELL ROAD)	12.4% (£1.5m)

7.17 The inflow from the Leek North catchment in one respect is not surprising given that the 2009 Study included this catchment within a wider Buxton zone. The opening of a new out-of-centre Sainsbury's store to the north of Leek has however had some influence on main food shopping patterns in the catchment, albeit at the expense of Morrison's Leek.

OVERALL MAIN FOOD RETENTION

7.18 Convenience provision within Buxton town centre retains 17.9% (£7.4m) of main food expenditure arising within the immediate Buxton catchment (zone 5). Aldi secures 25.6% (£10.5m) whilst the out-of-centre Morrisons store retains a further 42.4% (£17.5m).

7.19 Overall, drawing the market share of both in-centre and out-of-centre provision together, Buxton retains 86.6% (£35.7m) of main food expenditure arising within its immediate catchment. There is consequently limited expenditure leakage to competing destinations; the main alternative locations are M&S Simply Food in Glossop (3.8% / £1.6m) and Morrison's Chapel-en-le-Frith (4.5% / £1.9m). The leakage is likely to reflect brand loyalty and travel-to-work patterns.

II TOP-UP FOOD

IMMEDIATE CATCHMENT (SURVEY ZONES 5)

7.20 The top-up expenditure pot (Table 4b, Appendix 2a) within the Buxton catchment (zone 5) is projected to rise from c. £13.7m in 2013 to c. £17.2m by 2031. The survey results (Tables 6a – 6c, Appendix 2b) identify the following changes in market share since 2009:

	2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE	BUXTON ZONE	BUXTON ZONE
ALDI (STATION ROAD)	5.0%	21.7% (£2.9m)
ICELAND (SPRING GARDENS)	3.6%	2.9% (£0.4m)
WAITROSE (SPRING GARDENS)	5.6%	21.9% (£3.0m)
M & S (SPRING GARDENS)	1.4%	2.9% (£0.4m)
LOCAL INDEPENDENT SHOPS (TOWN CENTRE)	28.5%	3.7% (£0.5m)
SAINSBURYS LOCAL (EAGLES PARADE)	4.3%	2.9% (£0.4m)
MORRISONS (BAKEWELL ROAD)	20.7%	14.4% (£1.9m)

7.21 Similar to main food shopping, the results show that the top-up market share for both Aldi and Waitrose has increased since 2009. The remaining destinations in Buxton, particularly Morrison's and local independents, have seen a decline in market share.

INFLOW (FROM WITHIN BOROUGH)

7.22 Top-up shopping patterns are highly localised with extremely limited inflow; Aldi and Waitrose draw c. £0.3m and £0.2m respectively from the High Peak Central catchment.

INFLOW (FROM OUTSIDE BOROUGH)

7.23 Reflecting the wider changes in market share, the survey shows that there has been a shift from Morrison's to Aldi; this is in part unsurprising given its accessible edge-of-centre location (linked trips) and location next to the railway station (travel-to-work).

	2009 STUDY	2013 STUDY
DESTINATION / STORE	BAKEWELL ZONE	BAKEWELL ZONE
ALDI (STATION ROAD)	0.7%	3.7% (£0.4m)
WAITROSE (SPRING GARDENS)	1.4%	-
MORRISONS (BAKEWELL ROAD)	7.2%	3.3% (£0.2m)

- 7.24 In addition to inflow from the Bakewell catchment, the survey analysis also identifies inflows from the Leek North catchment to Morrison's (4.2% / £0.2m) and M&S Spring Gardens (2.5% / £0.1m) in particular.

OVERALL TOP-UP FOOD RETENTION

- 7.25 The town centre retains 35.9% (£4.9m) of top-up expenditure arising within the Buxton catchment. Aldi retains 21.7% (£3m) and provision outside of the town centre (Morrison's and Tesco Express) retains a further 30% (£4.1m). The town as a whole therefore retains 87.6% (£12m) of top-up expenditure arising within its immediate catchment (survey zone 5). The main alternative to p-up destination is Chapel-en-le-Frith (3.9% / £0.5m).

III) OVERALL MARKET SHARE (MAIN AND TOP-UP COMBINED)

IMMEDIATE CATCHMENT (SURVEY ZONE 5)

- 7.26 Taking the main and top-up food market shares together, the survey (Table 7, Appendix 2b) identifies that existing provision within the Buxton catchment (survey zone 5) retains 86.9% (£47.7m) of convenience expenditure arising within its immediate catchment. The main destinations are as follows:

	2013 STUDY
DESTINATION / FOODSTORE	BUXTON ZONE
AIDI (STATION ROAD)	24.6% (£13.5m)
WAITROSE (SPRING GARDENS)	15.8% (£8.6m)
MORRISONS (BAKEWELL ROAD)	35.4% (£19.4m)

- 7.27 Given the high retention levels for both main food and top-up shopping, there is extremely limited expenditure leakage from the catchment; the main leakage is to Chapel-en-le-Frith (4.4% / £2.4m).

- 7.28 The borough as a whole retains 94.6% (£51.9m) of convenience expenditure arising within the Buxton catchment.

IV) FOODSTORE TRADING PERFORMANCE

- 7.29 The survey results (Table 8, Appendix 2b) identify that there is a mixed trading performance of the main street food stores in Buxton, as follows:

DESTINATION / FOODSTORE	BENCHMARK	SURVEY TOTAL	DIFFERENCE
ICELAND (Spring Gardens)	£2.6m	£1.5m	-£1.1m
WAITROSE (Spring Gardens)	£12.6m	£11.2m	-£1.5m
ALDI (Station Road)	£3.9m	£18.1m	+£14.2m
MORRISON'S (Bakewell Road)	£17.1m	£25.9m	+£8.8m

- 7.30 The strong performance of the Aldi store in the town reflects the current gains that limited assorted discounters (LADs) are making from the mainstream operators (diversion from Morrison's in this case), the ongoing economic climate which has increased shoppers sensitivities to cost and the socio-demographic profile of the local area which LADs traditionally serve. The overtrading within the store has increased from c. £3.1m in 2009.
- 7.31 The out-of-centre Morrison's store continues to overtrade although at a reduced level from 2009 when it was trading c. £14m above benchmark. The approved extension to the existing store would, if implemented, absorb / alleviate a significant proportion of the current overtrading.
- 7.32 It is positive that the trading performance of the Waitrose store within the town centre has significantly improved since the 2009 Study when it was c. £16.6m under benchmark.

V) CONVENIENCE CAPACITY REVIEW

- 7.33 The baseline capacity modelling exercise (Table 13, Appendix 2c), assuming a constant market share and taking account of projected population and expenditure growth, as well as trading efficiency increases, generates the following floorspace requirement¹⁹ over the emerging Local Plan period to 2031:

MAINSIREAM RETAIL ²⁰	2018	2023	2031
BUXTON [BASELINE]	c. 150 m² (gross)	c. 385 m² (gross)	c. 775 m² (gross)

- 7.34 As the table highlights, the capacity identified over the emerging plan period is insufficient to support any substantive new convenience retail development.

¹⁹ Rounded to nearest 5 metre floorspace increments

²⁰ Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

- 7.35 However, the baseline capacity position ignores the committed turnover of the approved Morrison's extension²¹ and that the existing edge-of-centre Aldi store is currently overtrading (c. £14.2m) relative to expected benchmark. Consequently, a hypothetical scenario (Table 13c, Appendix 2c) has been run whereby commitments and the overtrading surplus have been applied to the baseline position.
- 7.36 On this basis, the modelling exercise identifies the following capacity in Buxton over the emerging plan period:

MAINSTREAM RETAIL ²²	2018	2023	2031
BUXTON [OVERTRADING RE-ASSIGN; COMMITMENTS]	c. 1,580 m² (gross)	c. 1,815 m² (gross)	c. 2,200 m² (gross)

- 7.37 Whilst there is quantitative capacity identified under this hypothetical scenario, particularly towards the latter end of the emerging Local Plan, it is our view that it is unrealistic that this capacity would be readily (or solely) available to support a new mainstream food store in the town on quantitative or qualitative grounds.
- 7.38 It is clear from the household survey results that local residents are increasingly undertaking their main food shopping at Aldi, as a deep discounter, rather than the full-range Morrison's store in the town. A new large full-range food store would not effectively compete on a like-for-like basis with Aldi (as otherwise shoppers would have continued to visit Morrison's for main food trips instead of transferring).
- 7.39 In terms of future strategy, whilst the 2009 Study identified a quantitative and qualitative need for a new mainstream food store in the town on the basis of minor main food market share improvements and diversion from the overtrading (out-of-centre) Morrison's store, the justification is significantly less persuasive in this instance, given that:
- The present household survey results show that the main food market share which Buxton secures from its immediate catchment (survey zone 5) has increased since

²¹ The turnover of the Morrison's extension calculated by deducting the benchmark turnover of the approved extension from the store's current overtrading surplus

²² Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

2009 from 82% to 87%. There is consequently limited potential for further main food market share increase to support new provision.

- The dominance of the out-of-centre Morrison's store has significantly decreased. Whilst the store secured 53% of main food spend arising in the Buxton catchment in 2009, this has now decreased to 42%; this is even with the Buxton catchment being drawn tighter around the town compared to the 2009 Study²³. However, the store does continue to overtrade (c. £8.8m).
- The edge-of-centre Aldi store has significantly increased market share from c. 9% in 2009 to c. 25% at present; this has primarily been at the expense of Morrison's.
- The in-centre Waitrose store has significantly improved its trading performance since 2009 when it was identified as trading c. £16.6m under benchmark. The store is now only identified to be marginally under-performing (c. £1.5m).
- Morrison's has extant planning permission for a c. 700 m² net floorspace extension to its existing store which the convenience element will turnover in the order of £6.5m; the current overtrading position (c. £8.8m) is therefore largely addressed by the new additional floorspace (if constructed).
- There is no qualitative deficiency in convenience provision in the town with Buxton accommodating local independents, mainstream (Morrison's), discounters (Iceland and Aldi) and higher order provision (Waitrose). There is effective choice to local residents and competition between retailers.

7.40 Whilst the edge-of-centre Aldi store is substantially overtrading, the significant increase in market share and therefore enhanced competition with Morrison's has delivered positive benefits by increasing the number of shoppers being able to potentially make linked shopping trips with the town centre.

7.41 Therefore, drawing the above quantitative and qualitative conclusions together, it is our view that there are no real grounds for the Council to proactively plan for new convenience retail provision in the town over the early to mid-phase of the emerging Local Plan. The need for additional floorspace should be reviewed again during the plan period (informed by a future update to this study)

²³ Leek North catchment comprised part of the Buxton catchment in 2009 Study.

B) COMPARISON

- 7.42 The total (non-bulky) comparison expenditure pot (Tables 4a-d, Appendix 3a) within the Buxton catchment (survey zone 5) is c. £48.9m in 2013; this is projected to rise to £65.1m by 2018 (£16.2m increase) and £86.4m in 2031 (£37.6m increase over emerging local plan).

D) COMBINED (NON-BULKY) COMPARISON GOODS MARKET SHARE

IMMEDIATE CATCHMENT (SURVEY ZONE 5)

- 7.43 The assessment (Table 13, Appendix 3b) details that Buxton retains 45.1% (£22m) of all (non-bulky) comparison goods expenditure arising within its immediate catchment (survey zone 5); this is based on the town centre retaining 43.4% (£21.2m) and out-of-centre provision (primarily Morrison's) retaining 1.7% (£0.8m).
- 7.44 There is extremely limited outflow from the Buxton catchment (c. 0.8%) to other centres and stores in High Peak Borough. The main destinations are larger centres outside of the borough; the changes in market share since the 2009 Study are summarised below:

	2009 STUDY	2013 STUDY
DESTINATION	BUXTON ZONE	BUXTON ZONE
BUXTON TC	53.1%	43.4% (£21.2m)
STOCKPORT TC	9.4%	12.1% (£5.9m)
MANCHESTER CC	5.4%	8.0% (£3.9m)
MACCLESFIELD TC	11.4%	8.3% (£4.0m)

- 7.45 Overall, the survey shows that there has been a decrease of around 10% in the overall comparison goods market share which Buxton town centre retains from its immediate catchment (survey zone 5) since 2009. The main competition is from Stockport and Manchester which have increased market share. In addition, Chesterfield town centre is now identified (2013 survey) as a prominent retail destination, attracting 6.3% (£3.1m) of overall comparison expenditure arising within the Buxton catchment.

INFLOW (FROM WITHIN BOROUGH)

- 7.46 The 2009 Study did not provide detailed analysis of the overall market share of Buxton from catchment zones within the borough; it is therefore not possible to provide a

comparative assessment in this instance. Notwithstanding this, the survey results do identify the following comparison expenditure inflows to Buxton town centre from the other catchment zones in the borough:

	2013 STUDY		
DESTINATION	GLOSSOP	HIGH PEAK CENT	PEAK DISTRICT CENT
BUXTON TOWN CENTRE	1.1% (£0.8m)	18.7% (£15.1m)	7.8% (£1.7m)

7.47 The relatively limited market share which the town attracts from the Glossop and Peak District Central catchment zones reflects the distance, existing comparison provision in Glossop and the current limitations of the comparison retail offer in Buxton.

INFLOW (FROM OUTSIDE BOROUGH)

7.48 The new survey results (2013) identify that the town centre draws a notable quantum of trade (as inflow) from the surrounding catchment zones beyond the borough, as follows:

	2013 STUDY			
DESTINATION	BAKEWELL	LEEK NORIH	LEEK	LEEK SOUTH
BUXTON TOWN CENTRE	5.3% (£0.8m)	18.2% (£2.8m)	4.2% (£1.5m)	0.8% (£0.4m)

7.49 Once again it is not possible to complete a comparative assessment against the 2009 Study results.

COMBINED COMPARISON GOODS TURNOVER

7.50 Drawing together the market share which the town centre attracts from catchment zones both within and outside of the borough, the study (Table 13, Appendix 3b) identifies that the comparison turnover of the town centre is c. £44.5m. Out-of-centre provision in the town (primarily Morrison's) draws a further c. £1.2m.

II) INDIVIDUAL (NON-BULKY) COMPARISON GOODS MARKET SHARES

7.51 The market share which the town centre secures for individual (non-bulky) comparison goods is provided below (Tables 6-17, Appendix 3b). The tables show that there is a significant variance for different types of comparison retail shopping.

	2013 STUDY
COMPARISON GOODS	BUXTON ZONE
PERSONAL GOODS	54.9% (£2.2m)
SMALL DOMESTIC APPLIANCES	82.3% (£6m)
CDs / DVDs	39.6% (£0.7m)
BOOKS & STATIONARY	94.5% (£2.9m)
GLASSWARE / TABLEWARE	48.3% (£0.8m)
MEDICAL GOODS	90.3% (£3.5m)
RECREATIONAL GOODS	15.4% (£1.4m)

7.52 The survey results indicate that out-of-centre provision in Buxton, primarily Morrison's, attracts only a minor quantum of comparison goods expenditure; this reflects the relatively limited non-food offer in the store (as compared to other mainstream food store operators who have greater ranges of non-food goods).

III) CLOTHING

7.53 Comparison shopping is destination based with shoppers prepared to travel further to undertake shopping for clothing and fashion items in particular; these sectors are the key determinants in shoppers' choice of destination. Therefore, detailed analysis of the changes in clothing shopping patterns and overall performance of Buxton town centre since the 2009 Study is summarised below.

	2009 STUDY	2013 STUDY
DESTINATION	BUXTON ZONE	BUXTON ZONE
BUXTON TC	43.2% (£8.9m)	20.6% (£3.7m)
STOCKPORT TC	9.6% (£1.8m)	15.5% (£2.8m)
MANCHESTER CC	10.3% (£1.9m)	16.1% (£2.9m)
MACCLESFIELD TC	11.5% (£2.2m)	7.5% (£1.3m)

7.54 As the survey results (Table 5, Appendix 3b) highlight, the town centre market share has decreased by over 20% since 2009; this is at the same time that leakage to centres outside of the borough, particularly Stockport and Manchester, has significantly increased. The changes in market share reflect the limitations of the town centre fashion offer and wider national trends whereby national multiple retailers are concentrating representation in larger centre rather than secondary retail centres such as Buxton.

INFLOWS (FROM WITHIN BOROUGH)

7.55 In terms of inflows to Buxton for clothing and fashion goods from other catchment zones within the borough, the survey results identify the following:

DESTINATION	2009 STUDY			2013 STUDY		
	GLOSSOP	HIGH PEAK CENT	PEAK DISTRICT CENT	GLOSSOP	HIGH PEAK CENT	PEAK DISTRICT CENT
BUXTON TC	1.5%	16.9%	9.1%	2.6% (£0.7m)	18.5% (£5.7m)	7.8% (£0.6m)

7.56 The survey results show that there have been minor changes in the clothing and fashion goods market share which the town centre attracts since the 2009 Study.

INFLOWS (FROM OUTSIDE BOROUGH)

7.57 The inflows which the town centre secures from catchment zones outside of the borough are set out below:

DESTINATION	2013 STUDY			
	BAKEWELL	LEEK NORTH	LEEK	LEEK SOUTH
BUXTON TOWN CENTRE	6.2% (£0.4m)	17.5% (£1.1m)	9% (£1.3m)	1.8% (£0.4m)

7.58 The market share which the town centre draws from the Bakewell catchment has not changed significantly since 2009 (6.7% market share).

C) BULKY COMPARISON

7.59 The assessment (Tables 4 a-c, Appendix 4a) details that the bulky comparison expenditure pot within the immediate Buxton catchment (survey zone 5) is currently £22.7m (2013); this

is projected to rise to £30.1m in 2018 (£7.5m increase) and £39.9m by 2031 (emerging Local Plan end-date).

D) COMBINED (BULKY) COMPARISON GOODS MARKET SHARE

IMMEDIATE CATCHMENT (SURVEY ZONE 5)

- 7.60 The assessment (Tables 10 a-b, Appendix 4b) details that Buxton retains 32.2% (£7.3m) of all (bulky) comparison goods expenditure arising within its immediate catchment (survey zone 5). Retail provision outside of the town centre (Morrison's and B&Q) retains a further 18.7% (£4.2m). The town as a whole therefore retains 50.9% (£11.5m) of bulky retail expenditure arising within its immediate catchment.
- 7.61 The changes in market share since the 2009 Study are summarised below along with main competing destinations:

	2009 STUDY	2013 STUDY
DESTINATION	BUXTON ZONE	BUXTON ZONE
BUXTON²⁴	54.8%	50.9% (£11.5m)
STOCKPORT^{TC}	6.4%	7% (£1.6m)
MACCLESFIELD (TC / RETAIL PKS)	14.3%	16.4% (£3.7m)

- 7.62 As the table highlights, there has been a slight reduction in the market share which the town retains from its immediate catchment allied to minor increases in outflow to Stockport and Macclesfield. Beyond these two destinations, expenditure is dissipated.

INFLOW (FROM WITHIN BOROUGH)

- 7.63 The 2009 Study did not provide detailed analysis of the overall market share of Buxton secures from other catchment zones within the borough; it is therefore not possible to provide a comparative assessment in this instance.
- 7.64 However, the 2013 survey results (Table 10, Appendix 4b) identify that Buxton attracts bulky comparison expenditure from the other catchment zones in the borough, as follows:

²⁴ Town Centre and out-of-centre retail provision combined.

DESTINATION	2013 STUDY		
	GLOSSOP	HIGH PEAK CENT	PEAK DISTRICT CENT
BUXTON TOWN CENTRE	0.4% (£0.1m)	5.4% (£2m)	1.1% (£0.1m)
BUXTON - NON TOWN CENTRE	-	2.7% (£1m)	2.0% (£0.2m)

7.65 As with comparison (high street shopping), the town draws a relatively limited quantum of expenditure from the catchment zones in the north of the borough.

INFLOW (FROM OUTSIDE BOROUGH)

7.66 The new survey results (2013) identify that the town centre draws a small quantum of trade (as inflow) from the surrounding catchment zones beyond the borough, as follows:

DESTINATION	2013 STUDY			
	BAKEWELL	LEEK NORTH	LEEK	LEEK SOUTH
BUXTON TOWN CENTRE	2% (30.2m)	10.7% (£0.8m)	0.3% (£0.1m)	-
BUXTON - NON TOWN CENTRE	2.8% (£0.2m)	8.3% (0.6m)	0.4% (£0.1m)	-

7.67 Once again it is not possible to complete a comparative assessment against the 2009 Study results.

COMBINED BULKY COMPARISON GOODS TURNOVER

7.68 The total bulky comparison turnover of the town centre is c. £10.5m; the out-of-centre provision in the town draws a further c. £6.4m. The combined bulky turnover is £16.9m.

II) INDIVIDUAL (BULKY) COMPARISON GOODS MARKET SHARES

7.69 The town centre market share for bulky comparison goods is summarised below (Tables 5 – 9, Appendix 4b) against the 2009 Study results (where available). The market share for the town as a whole (including out-of-centre B&Q at Staden Lane) for DIY goods and Garden & Pets is provided in brackets.

	2009 STUDY	2013 STUDY
BULKY COMPARISON GOODS	BUXTON ZONE	BUXTON ZONE
FURNITURE & FLOORING	42%	33.5% (£2.5m)
DIY GOODS	64.7% (74%)	20.6% (£0.9m) (90.5% / £3.8m)
MAJOR HOUSEHOLD APPLIANCES	58.3%	41.2% (£0.5m)
LARGE ELECTRICAL GOODS	56.5%	30.6% (£1.9m)
GARDEN & PEIS	60.3% (67.1%)	42.8% (£1.5m) (79.7% / £2.7m)

7.70 As the table shows, the town's market share for all bulky comparison goods has decreased since 2009. The overall town's market share for DIY goods is however above the 2009 Study findings; this may be attributable to B&Q taking over the out-of-centre Focus DIY unit at Staden Lane and fine grain differences in reporting between the two respective studies given that ultimately there has been no material quantitative change in DIY based provision in the Buxton catchment in the intervening period.

D) OVERALL COMPARISON GOODS MARKET SHARE

7.71 Drawing the individual non-bulky and bulky expenditure pots together, there is an overall total of c. £71.4m of comparison expenditure arising within the Buxton catchment (survey zone 5). The assessment (Appendix 4a) shows that Buxton town centre retains 39.9% (£28.5m) of this total comparison expenditure. Out-of-centre provision in Buxton retains a further 7.1% (£5.1m). The town as a whole therefore retains 46.9% (£33.5m) of total comparison expenditure arising within the Buxton catchment.

7.72 The main alternative destinations are Stockport town centre (10.5% / £7.5m), Macclesfield town centre (8.4% / £6m) and Manchester city centre (6.7% / £4.8m).

E) OVERALL COMPARISON CAPACITY REVIEW

7.73 On the basis of forward population and expenditure growth, assuming a constant market approach (no change), the quantitative assessment (Table 5, Appendix 4b) identifies the following capacity²⁵ to support new retail provision in Buxton:

	2018	2023	2031
BUXTON - BASELINE	1,035 m² (gross)	2,735 m² (gross)	5,655 m² (gross)
BUXTON - COMMITMENTS²⁶	550 m² (gross)	2,255m² (gross)	5,175 m² (gross)

7.74 The quantitative capacity assessment identifies no significant need for the Council to proactively plan for new comparison provision in the early phase of the emerging Local Plan (i.e. to 2018). However, substantive capacity is identified beyond 2018 on the basis of forward population and expenditure growth.

7.75 However, notwithstanding the longer-term capacity identified, we do not consider that there is an overriding need for the Council to proactively identify new sites at this stage given that there are several vacant units (modern regular floor plates) available within the town centre (primarily Spring Gardens Shopping Centre) which could be readily occupied by national multiples. The short-term priority should be encouraging active uses within existing provision rather than planning for further quantitative expansion in the retail offer within the town.

7.76 In terms of the longer term comparison retail capacity identified over the plan period, the Spring Gardens extension site, which was previously subject to a (multi-storey) Sainsbury's foodstore scheme²⁷, remains the sequentially preferable opportunity for new development within the town centre.

7.77 Beyond the Spring Gardens site, an update to this study should be completed in the future to identify needs for the latter phases of the plan so as to establish how the committed redevelopment of Macclesfield town centre, if subsequently delivered, has impacted upon the vitality and viability of Buxton town centre.

²⁵ Floorspace capacity rounded up to nearest five metre increment

²⁶ Application Reference HPK/2010/0664

7.78 In qualitative terms, the primary focus for the town centre should be on seeking to distinguish its offer to local residents and visitors alike given that its ability to compete with larger regional centres on a like-for-like basis is likely to be limited due to existing competition and underlying economic and retailer trends (rationalisation of portfolio towards larger centres etc.).

7.79 A mix of high street multiples alongside attractive niche retail and leisure independents would distinguish the town; the completion of the regeneration of the immediate area around The Crescent, which includes specialist shops and a quality hotel, will be a significant positive development in diversifying the town centre offer. The project is scheduled for completion in 2016.

F) LEISURE

7.80 The quantum of available leisure expenditure (as per specific leisure activity) within the Buxton catchment is summarised below:

	Average Spend (£)	Available Expenditure (£)	UK Average Spend per person (£) ²⁸
Restaurants/Cafes	£420	£12.2m	£440
Alcoholic Drinks	£216	£6.3m	£232
Cinema	£17	£0.5m	£18
Theatre / Concerts	£31	£0.9m	£33
Recreation and Sporting	£102	£3m	£117

7.81 The town centre appears to retain a significant proportion of local residents for most leisure activities aside from cinema and bingo, as follows:

- **CINEMA:** 53.9% of residents in the catchment regularly visit the cinema. Over half (53.7%) most frequently visit the Cineworld at Alma Leisure Park, Chesterfield. A further 16.8% visit the Cineworld in Stockport. Beyond these two destinations, local residents visit a variety of destinations.

²⁸ Annual spend

- **INDOOR SPORTS / HEALTH & FITNESS:** a total of 23.9% of local residents in the catchment regularly visit gym facilities. Buxton Swimming and Fitness Centre is the most popular (59.8%). The New Bodies Gym on Tongue Lane Industrial Estate in Buxton attracts a further 23.5% of local residents.
- **RESTAURANTS AND SOCIALISING:** a total of 77.2% of local residents regularly visit restaurants. The majority (82.7%) remain in Buxton town centre to eat out. The most popular alternative destination is Manchester city centre (13.5%).
- **PUBS/ CLUBS:** a total of 62.8% of local residents regularly visit pubs and clubs. Most residents go out in Buxton (80.5%) with a further 7% visiting Manchester city centre. A small number of residents go to other towns including Chesterfield (5.8%).

7.82 In terms of the town's wider evening economy offer, it is considered that the town meets the needs of local residents, visitors and students (University of Derby campus). There are national chain restaurants (Pizza Express etc.) in the town centre and the regeneration of The Crescent will further improve its attraction.

7.83 However, aside from the Opera House, the wider family orientated leisure offer is limited; there is no cinema and most local residents travel significant distances to Stockport or Chesterfield (possibly as part of a wider linked shopping trip). The town centre proposals for Macclesfield include a new cinema multiplex which will be attractive to local residents in the Buxton catchment given proximity and accessibility. The proposals will in our view potentially further constrain commercial (operator) demand for a new cinema in Buxton.

7.84 On this basis, it is considered that there is limited potential for new commercial leisure provision within Buxton; there is no overriding requirement for the Council to proactively plan for new provision at present. However, if leisure-based proposals should come forward outside of the plan making process then subject to appropriate NPPF assessment (sequential and impact) there is potential for the Council to support new provision.

7.85 Appropriate (continued) planning and licencing policies should continue to be applied to avoid the over-concentration of leisure uses which would be detrimental to town centre viability and surrounding residential amenity.

8. GLOSSOP

- 8.1 Glossop is a linear centre with a traditional High Street which supports a range of local independent shops and services alongside small national multiple shops. There are also a range of restaurants, pubs and bars on the High Street which provide a focus for the evening economy. A medium sized Co-Op foodstore is located adjacent to the railway station and an Aldi store is located to the rear of the High Street.
- 8.2 To the east of the High Street within the town centre is the recently completed Howard Town Mill complex which comprises a mix of retailers including M&S Simply Food, Cotton Traders, Edinburgh Woollen Mill, Peacock's and Mountain Warehouse. The scheme also comprises a Domino's pizza takeaway, Travelodge hotel and a JD Wetherspoon public house. There are also a number of vacant units as the scheme has recently been completed. An application for the change of use of two of the current vacant units from Class A1 retail to flexible Class A1, A3 (restaurant / café) and A4 (bar) uses is presently under consideration.
- 8.3 Further west along the High Street is the out-of-centre Wren Nest Retail Park development, where the existing mill complex has been converted for a mix of retail and residential uses. National retailers present include a large Tesco store, Next, Argos and Wickes DIY.

A) CONVENIENCE

- 8.4 The overall convenience expenditure pot within the Glossop catchment is c. £78.6m (2013) and is projected to rise to c. £100.5m by 2031 (£21.9m increase).

D) MAIN FOOD

IMMEDIATE CATCHMENT (SURVEY ZONE 1)

- 8.5 The main food expenditure in the Glossop catchment (zone 1) is c. £58.9m in 2013; this is projected to rise to c. £75.4m by 2031. The current main food shopping patterns (Table 5a, Appendix 2b) are summarised against the 2009 Study results below:

	2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE	GLOSSOP ZONE	GLOSSOP ZONE
CO-OP (NORFOLK STREET)	7.3%	5.6% (£3.3m)
ALDI (ARUNDEL STREET)	11.7%	24.5% (£14.4m)
M & S (HOWARD TOWN MILL)	-	3.6% (£2.1m)
LOCAL SHOPS	0.7%	1.5% (£0.8m)
GLOSSOP TOTAL	19.7%	35.2% (£20.1m)
TESCO (WREN NEST)	60.6%	37.1% (£21.9m)
OVERALL TOWN TOTAL	80.3%	72.3% (£42.6m)

8.6 The survey results indicate that:

- The town centre market share has actually increased since 2009 from c. 20% to c. 35% due to the significant improvement in Aldi's performance. The new M&S Simply Food store has had a limited impact on main food market share.
- The improvement in the town centre (primarily Aldi) market share has come at the expense of the out-of-centre Tesco store at Wren Nest; the market share of the Tesco store has decreased from c. 60% to c. 37%. The improvement in Aldi's performance relative to Tesco is potentially indicative of current wider economic trends in terms of shoppers increasing being value-driven.
- The new Tesco Extra store at Hattersley has only had a limited impact on main food shopping patterns (2.5% market share from the Glossop catchment). The other outflows to stores in Tameside (Stalybridge and Hyde) are similar to those identified in the 2009 Study.

8.7 The 2009 Study identified a potential need for a new mainstream food store in the town so as to provide effective competition and enhance choice for local residents due to the dominance at the time of the out-of-centre Tesco store. However, the new study clearly shows that Tesco's dominance has been significantly eroded and the justification for a new store may not be as persuasive as back in 2009. The retail planning justification is therefore revisited in detail later in the chapter.

INFLOW (FROM WITHIN THE BOROUGH)

8.8 The table below details the changes between the respective studies:

DESTINATION	2009 STUDY		2013 STUDY	
	Z2 - HIGH PEAK	Z3 - PEAK DISTRICT	Z2 - HIGH PEAK	Z3 - PEAK DISTRICT
ALDI (ARUNDEL STREET)	1.5%	0.0%	1.5% (£1.2m)	0.0% (£0.0m)
M & S (HOWARD TOWN MILL)	-	-	0.2% (£0.1m)	0.0% (£0.0m)
GLOSSOP TOTAL	1.5%	0.0%	1.7% (£1.3m)	0.0% (£0.0m)
TESCO (WREN NEST)	5.3%	0.0%	8.2% (£6.7m)	0.8% (£0.1m)

8.9 The survey results shows that there has been a minor increase in the main food market share which the out-of-centre Tesco store at Wren Nest attracts from the High Peak catchments (survey zone 2); this is slightly surprising given that there is an existing out-of-centre Tesco store at Whaley Bridge.

LEAKAGE

8.10 As the table below highlights, there is no table expenditure leakage to mainstream stores in surrounding centres.

DESTINATION / FOODSTORE	2009 STUDY	2013 STUDY
	GLOSSOP ZONE	GLOSSOP ZONE
ASDA (HYDE)	5.8%	3.9% (£2.3m)
MORRISON'S (HYDE)	7.3%	6% (£3.5m)
TESCO (STALYBRIDGE)	-	3.2% £1.9m
TESCO EXTRA (HATTERSLEY)	-	2.5% (£1.5m)

8.11 The outflows to the mainstream food stores in Tameside are similar to those identified in the 2009 Study despite the subsequent opening of a new Tesco Extra store in Hattersley; the continued outflows therefore suggests brand loyalty rather than any qualitative deficiency in the catchment.

OVERALL MAIN FOOD RETENTION

8.12 When the main food market share of the town centre (35.2%) and the out-of-centre provision at Wren Nest (37.1%) are combined, the survey results identify that existing convenience provision in Glossop retains 72.3% (£42.6m) of main food expenditure arising

within its immediate catchment (survey zone 1). There are negligible outflows from the Glossop catchment to other stores within the borough. A total of 21.6% (£12.7m) of main food expenditure flows to food store destinations outside of the borough.

II) TOP-UP FOOD

IMMEDIATE CATCHMENT (SURVEY ZONES 1)

- 8.13 The top-up food shopping expenditure pot for the Glossop catchment (zone 1) is £19.6m in 2013; this is projected to rise to £25.1m by 2031.
- 8.14 The top-up food shopping patterns (Table 5b, Appendix 2b) identified in the current household survey (2013) are summarised against the 2009 Study results below:

	2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE	GLOSSOP ZONE	GLOSSOP ZONE
CO-OP (NOFOLK STREET)	16.7%	8.6% (£1.6m)
AIDI (ARUNDEL STREET)	7.0%	25.3% (£5m)
M & S (HOWARD TOWN MILL)	-	2.2% (£0.4m)
LOCAL SHOPS	18.4%	6.6% (£1.3m)
GLOSSOP TC TOTAL	42.1%	42.7% (£8.3m)
TESCO (WRENS NEST)	27.2%	22.2% (£4.3m)

- 8.15 In comparative terms, the results highlight the following:
- The town centre top-up market share has remained relatively static at c. 42%. The in-centre Aldi store has however significantly increased its market share at the expense of the Co-Op and pertinently, local independents.
 - The new M&S Simply Food has a limited top-up market share; this may in part be attributable to its less prominent location off the High Street.
 - Tesco's market share has decreased by c. 5%; as with Buxton this may predominantly be attributable to shoppers changing brand preference to Aldi.
- 8.16 Local centres around Glossop (primarily Charlesworth, Hadfield and Simmondley) secure 10.1% (£2m) of top-up expenditure arising within the catchment.

INFLOW

- 8.17 Given the highly localised nature of top-up shopping, both the 2009 and 2013 studies identified extremely limited inflows from the other catchment zones to Glossop; the out-of-centre Tesco store does however attract a minor market share (4.4% / £0.9m) from the High Peak Central zone.

LEAKAGE

- 8.18 The Tesco Extra store at Hattersley secures 8.8% (£1.7m) of top-up expenditure arising within the Glossop catchment.

OVERALL TOP-UP FOOD RETENTION

- 8.19 The town as a whole (including Tesco Extra and local centres) retains 68.1% (£13.4m) of top-up expenditure arising within its immediate catchment (survey zone 1). When the market share of local centres is combined, the overall retention level for the borough as a whole is 78.2% (£15.4m).

III) OVERALL MARKET SHARE (MAIN AND TO-P-UP COMBINED)

- 8.20 The assessment (Table 7, Appendix 2b) identifies that Glossop town centre retains 37.1% (£29.1m) of total convenience expenditure arising in its immediate catchment (survey zone 1). The out-of-centre food stores at Wren Nest retain a further 34.2% (£26.9m).
- 8.21 The town as a whole retains 71.3% (£56m) of convenience expenditure arising within its immediate catchment. Local centres in the catchment draw an additional 3.1% (£2.4m).

IV) FOODSTORE TRADING PERFORMANCE

DESINATION / FOODSTORE	BENCHMARK	SURVEY TOTAL	DIFFERENCE
ALDI (Arundel Street)	£4.1m	£20.6m	+£16.6m
CO-OP (Norfolk Street)	£11.4m	£5m	-£6.4m
M&S SIMPLY FOOD (Howard Town Mill)	£12.1m	£4.3m	-£7.8m
TESCO (Wren Nest)	£33.7m	£33.1m	-£0.6m
ICELAND (Wren Nest)	£2.3m	£0.6m	-£1.6m

- 8.22 As set out in the Buxton analysis, the strong performance of the Aldi store in the town reflects the current gains that limited assorted discounters (IADs) are making from the

mainstream operators. The store has improved its trading performance from c. £4.3m above benchmark in 2009 to c. £16.6m at present.

- 8.23 The improvement in Aldi's trading performance has come at the expense of the out-of-centre Tesco store which now trades close to benchmark (compared to overtrading by c. £4.2m in 2009).
- 8.24 In terms of other stores in the town, it is clear from the survey results that the Co-Op store in particular is significantly under-performing; this may be due to the increased competition from Aldi store and also the new M&S Simply Food. It is however possible that the Co-Op store picks up additional trade not recorded by the household survey due to its location adjacent to the railway station.
- 8.25 With respect to M&S Simply Food, the store has recently opened and it is likely to improve its performance over time as becomes an established top-up orientated destination. The store may be attracting some inflow from visitors to the town centre although it is not prominent from the High Street.

V) CAPACITY REVIEW

- 8.26 The baseline capacity modelling exercise (Table 10a, Appendix 2c), assuming a constant market share and taking account of projected population and expenditure growth, as well as trading efficiency increases, generates the following floorspace requirement²⁹ over the emerging Local Plan period to 2031:

MAINSTREAM RETAIL ³⁰	2018	2023	2031
GLOSSOP - BASELINE	c. 160 m ² (gross)	c. 400 m ² (gross)	c. 805 m ² (gross)

- 8.27 As the table highlights, the capacity identified over the emerging plan period is insufficient to support any substantive new convenience retail development. However, the existing in-centre Aldi store is identified to be significantly overtrading (c. £16.6m) relative to expected company benchmark. A hypothetical assessment has therefore

²⁹ Rounded to nearest 5 metre floorspace increments

³⁰ Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

been completed whereby the overtrading surplus of the Aldi store is made available to support new convenience provision in the town. The capacity position, which also takes account of the existing Tesco Express commitment in Hadfield (shared catchment with Glossop), identifies the following need over the plan period (Table 10d, Appendix 2c):

MAINSIREAM RETAIL ³²	2018	2023	2031
GLOSSOP [OVERTRADING RE-ASSIGN; COMMITMENTS]	c. 1,715 m² (gross)	c. 1,955 m² (gross)	c. 2,360 m² (gross)

8.28 Whilst the 2009 Study identified a need for a new mainstream food store in Glossop on the basis of main food market share improvements and to facilitate competition with the then overtrading (out-of-centre) Tesco Wren Nest store, the retail justification is significantly less persuasive in this instance, given that:

- The trading dominance of the out-of-centre Tesco store has significantly declined. Whilst the store secured c. 60% of main food spend arising in the Glossop catchment in 2009, this has now decreased to c. 37%. The store is now trading around benchmark rather than c. £4m overtrading as identified in 2009.
- The in-centre Aldi store has significantly increased market share from c. 12% in 2009 to c. 25% at present; this has primarily been at the expense of Tesco. Whilst the store is significantly overtrading, utilising the surplus would be unrealistic on qualitative grounds given that there is a clear qualitative distinction between mainstream operators and deep discounters and the recent changes in shopping patterns may be due to the socio-demographic profile of the town's catchment.
- A new M&S Simply Food store has opened within the Howard Town Mill scheme in the town centre which has further enhanced choice and competition.
- A new Tesco Extra store has opened in Hattersley; this constrains the potential for substantive increases in market share given its location on the western side of the Glossop catchment.

³² Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

- The trading performance of the existing Co-Op store has significantly deteriorated due to increased competition from Aldi and to a lesser extent M&S Simply Food. The future trading viability of the store may be uncertain should additional convenience provision be delivered in Glossop.
- There are no genuine deficiencies in the convenience retail provision in Glossop; the town has a qualitative breadth of provision which has been further enhanced by the new M&S Simply Food store (higher order quality operator).
- The new Tesco Express store³³ in Hadfield town centre within the Glossop catchment has opened since the household telephone survey was completed and is likely to have had a notable impact on local top-up shopping patterns in particular.

8.29 On the basis of the above, whilst quantitative capacity for new convenience provision is identified towards the latter end of the emerging Local Plan period, it is our view that there is no immediate and overriding quantitative or qualitative requirement for the Council to proactively plan for new provision in the town.

8.30 To this extent, it is noted that there is a long-standing proposed food store allocation at the edge-of-centre Woods Mill site under emerging Local Plan policy DS1³⁴. It is our view that there is presently no need for the allocation and any provision could only realistically be supported on regeneration grounds (e.g. food store required to cross-subsidise the mixed-use regeneration of an important strategic regeneration site).

B) COMPARISON

8.31 The comparison retail expenditure pot (Tables 4a-d, Appendix 3a) within the Glossop catchment (survey zone 1) is £75.2m (2013); this is projected to rise to £100.9m (2018) and £135.1m by 2031 (£60.5m increase over emerging Local Plan period).

D) COMBINED (NON-BULKY) COMPARISON GOODS MARKET SHARE

IMMEDIATE CATCHMENT (SURVEY ZONE 1)

8.32 The survey results (Table 13a, Appendix 3b) identifies that Glossop town centre retains 30.0% (£22.6m) of all (non-bulky) comparison retail expenditure (£75.2m) arising within its

³³ Permitted Change of Use from former pub to convenience store

³⁴ Preferred Option February 2013 consultation

immediate catchment (survey zone 1). The retail provision at Wren Nest secures 9.6% (£7.2m) from the Glossop catchment.

- 8.33 As the table below indicates, the town as a whole retains 39.7% (£29.8m) of the non-bulky comparison expenditure arising within its immediate catchment; this is a particularly positive performance given the existing retail offer and the proximity / accessibility to higher order centres in Greater Manchester.

	2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE	GLOSSOP ZONE	GLOSSOP ZONE
GLOSSOP TOWN CENTRE	23.1%	30.0% (£22.5m)
WRENS NEST (INCL TESCO)	-	9.6% (£7.2m)
OVERALL RETENTION	23.1%	39.7% (£29.8m)

- 8.34 In comparative terms, the survey results indicate that the town centre has actually increased its overall comparison (non-bulky) market share since the 2009 Study; this may be attributable to the new comparison retailers, including Edinburgh Woollen Mill, Cotton Traders and Peacock's which have opened within the Howard Town Mill scheme.

INFLOW

- 8.35 The town attracts minor inflows from the High Peak Central catchment (4.1% / £3.4m).

LEAKAGE

- 8.36 There is no real outflow from the Glossop catchment to other centres in the borough. As the table below highlights, most local residents in the Glossop catchment look towards higher order centres and retail park destinations in the Greater Manchester conurbation for their overall comparison (non-bulky) shopping needs.

	2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE	GLOSSOP ZONE	GLOSSOP ZONE
MANCHESTER CITY CENTRE	23%	20.1% (£15.1m)
ASHTON-U-LYNE ³⁵	15.1%	11.6% (£8.8m)
STOCKPORT TOWN CENTRE	15.3%	10.1% (£7.6m)
TRAFFORD CENTRE	4.5%	6.8% (£5.1m)

³⁵ Ashton-u-Lyne comprises Ashton town centre and Tameside retail park responses.

8.37 There have been relatively limited changes in overall comparison shopping patterns since the 2009 Study. Expenditure is highly dissipated with no dominant location.

II) INDIVIDUAL (NON-BULKY) COMPARISON GOODS MARKET SHARE

8.38 As with the Buxton analysis, a summary of the market share which the town centre secures for individual comparison goods items is provided below. A detailed assessment of clothing shopping patterns and market share performance is summarised separately.

	2009 STUDY	2013 STUDY
COMPARISON GOODS	GLOSSOP ZONE	GLOSSOP ZONE
PERSONAL GOODS	30.8%	39.7% (£2.7m)
SMALL DOMESTIC APPLIANCES	-	48.3% (£5.2m)
CDs / DVDs	-	12.3% (£0.3m)
BOOKS & STATIONARY	-	35% (£1.4m)
GLASSWARE / TABLEWARE	-	25.3% (£0.6m)
MEDICAL GOODS	-	54% (£3.1m)
RECREATIONAL GOODS	22.1%	32.4% (£4.4m)

8.39 The survey results show that there is significant variance in the market share which the town centre draws for individual comparison goods items. The relatively low market share for CDs / DVDs reflects the dominance of food stores in this market sector (Tesco Glossop achieves a 40.6% / £1.1m market share).

III) CLOTHING

8.40 The expenditure pot for clothing within the Glossop catchment (survey zone 1) is £29.1m; this is projected to rise to £39.1m in 2018 and £52.5m by 2031 (£23.4m increase over the emerging Local Plan period. The changes in market share since the 2009 Study are summarised below:

	2009 STUDY	2013 STUDY
	GLOSSOP ZONE	GLOSSOP ZONE
GLOSSOPTIC	16.2%	16.5% (£4.8m)
WREN NEST RETAIL PARK	1.5%	0.9% (£0.2m)

- 8.41 The minor increase in market share may be attributable to the improvement in the comparison retail offer facilitated by the Howard Town Mill scheme.

LEAKAGE / OVERALL RETENTION

- 8.42 Given the relatively low market share which the town as a whole retains from its own immediate catchment (survey zone 1), there is significant leakage of clothing expenditure to retail destinations outside of the borough; the table below shows the changes since the 2009 Study:

	2009 STUDY	2013 STUDY
	Z1 - GLOSSOP	Z1 - GLOSSOP
ASHTON-U-LYNE TC	16.1% (£4.2m)	10.3% (£2.9m)
STOCKPORT TC	10.8% (£2.8m)	9.3% (£2.7m)
MANCHESTER CC	28.5% (£7.5m)	32.5% (£9.4m)
TRAFFORD CENTRE	3.8% (£1.0m)	11.1% (£3.2m)

- 8.43 As indicated, Manchester city centre and Trafford Centre have both increased clothing market share since 2009; this is attributable to the higher order regional retail offer.

C) BULKY COMPARISON

- 8.44 The assessment (Tables 4 a-c, Appendix 4a) details that the bulky comparison expenditure pot within the Glossop catchment (survey zone 1) is currently £33m; this is projected to rise £44.3m in 2018 and £59.6m by 2031 (£26.6m increase over emerging Local Plan period).

D) COMBINED (BULKY) COMPARISON GOODS MARKET SHARE

- 8.45 The survey results (Table 10, Appendix 4b) indicate that Glossop town centre retains 31.3% (£10.3m) of all bulky comparison goods expenditure arising within the town's immediate catchment. Wren Nest Retail Park in Glossop secures an additional 8.3% (£2.7m). The town as a whole therefore retains 39.5% (£13.1m).
- 8.46 The changes in market share since the 2009 Study are summarised below along with main competing destinations:

	2009 STUDY	2013 STUDY
	ZI - GLOSSOP	ZI - GLOSSOP
GLOSSOP ³⁶	30.4%	39.5% (£13.1m)
ASHTON-UNDER-LYNE TC	21.8%	6.3% (£2.1m)
ASHTON RETAIL PARKS	11%	20.3% (£6.7m)
STOCKPORT TC	12.5%	6.8% (£2.3m)
MANCHESTER CC	8.8%	9.1% (£3m)

8.47 The results show that the town centre market has increased since 2009. There has also been a shift in where shoppers go in Tameside with more now going to retail parks rather than Ashton-under-Lyne town centre.

INFLOW

8.48 The town attracts an extremely limited inflow (3% (£1.1m) from the High Peak Central catchment (survey zone 2). There are no inflows from other catchment zones both within and outside of the borough.

OVERALL BULKY COMPARISON GOODS TURNOVER

8.49 The overall town centre bulky comparison turnover is c. £11.4m; Wren Nest Retail Park secures a further £2.8m. The combined bulky turnover of the town is therefore £14.2m.

II INDIVIDUAL (BULKY) COMPARISON GOODS MARKET SHARES

8.50 The town centre market share for individual bulky comparison goods is summarised below (Tables 5 – 9, Appendix 4b) against the 2009 Study results (where available). The market share for the town as a whole (e.g. including Wren Nest) is provided in brackets.

	2009 STUDY	2013 STUDY
COMPARISON GOODS	GLOSSOP ZONE	GLOSSOP ZONE
FURNITURE/ FLOOR	21.9% (24.0%)	26.4% (£3.1m) (35.9% / £4.2m)

³⁶ Town Centre and Out-of-Centre combined

DIY	37.2% (40.5%)	25.8% (£1.4m) (47.3% / £2.5m)
MAJOR HOUSEHOLD APPLIANCES	46.8% (46.8%)	44.5% (£1m) (48.1% / £1.1m)
LARGE ELECTRICAL GOODS	20.9% (20.9%)	27.7% (£2.5m) (31.3% / £2.8m)
GARDENS & PETS	61.5% (62.4%)	51.3% (£2.3m) (52.2% / £2.3m)

8.51 The survey results show that the town's overall market share has actually increased for all individual bulky comparison goods categories since 2009; there is no particular reason for this given that there has been no new bulky retail development in the town in the intervening period (albeit Wickes has taken over the Focus DIY store).

D) OVERALL COMPARISON GOODS MARKET SHARE

8.52 Drawing the individual non-bulky and bulky expenditure pots together, there is an overall total of c. £108.2m of comparison expenditure arising within the Glossop catchment (survey zone 1). The assessment (Appendix 4a) shows that Glossop town centre retains 30.4% (£32.9m) of this total comparison expenditure. Out-of-centre provision (Wren Nest) retains a further 9.2% (£10m). The town as a whole therefore retains 39.6% (£42.9m) of total comparison expenditure arising within its immediate catchment.

8.53 The main competing destinations are Manchester city centre (16.8% / £18.1m), retail parks in Tameside (9.9% / £10.7m) and Stockport town centre (9.1% / £9.9m).

E) COMPARISON CAPACITY REVIEW

8.54 On the basis of forward population and expenditure growth, assuming that the current market share of the town centre is projected forward on a constant basis (i.e. no improvement over time), the capacity assessment identifies the following floorspace requirement³⁷ over the emerging Local Plan period to 2031 (Table 3, Appendix 4b):

	2018	2023	2031
GLOSSOP - BASELINE	790 m² (gross)	2,085 m² (gross)	4,315 m² (gross)

³⁷ Floorspace rounded to nearest 5 square metre increment

8.55 The assessment identifies that there is a substantive need for new retail development in the latter phases of the emerging Local Plan period.

8.56 Ordinarily, whilst NPPF requires Councils to identify sites to meet the need identified over the emerging plan period, it is our view in the first instance that there is no immediate or overriding requirement to plan for any future quantitative-based expansion of the comparison retail offer in Glossop given that:

- The town has been recently subject to quantitative based expansion through the completion of the Howard Town Mill scheme. It is likely that current commercial requirements for the town have been satisfied and there are remaining vacant units.
- The retail warehousing (bulky retail) provision in the town at Wren Nest adequately meets local shopping needs in terms of furniture, DIY, pets and gardening items. The Tesco store also stocks a range of electric and household appliances.

8.57 On this basis, it is our view that comparison retail site allocations should be based on an update to this study which should be completed in the future as part of any subsequent Local Plan review.

F) LEISURE

8.58 The quantum of available leisure expenditure (as per specific leisure activity) within the Glossop catchment (survey zone 1) is summarised below:

	Average Spend (£)	Available Expenditure (£)	UK Average Spend per person (£) ³⁸
Restaurants/Cafes	£434	£17.8m	£440
Alcoholic Drinks	£240	£9.9m	£232
Cinema	£18	£0.7m	£18
Theatre / Concerts	£32	£1.3m	£33
Recreation and Sporting	£113	£4.6m	£117

8.59 The town centre retains most residents for eating and drinking and also sports / health & fitness activities. However, given its limited offer for other leisure activities, areas of Manchester and Tameside attract a significant proportion of the catchment's residents:

³⁸ Annual Spend

- **CINEMA:** 47.7% of local residents in the catchment regularly visit the cinema. The majority of residents (82.5%) visit the out-of-centre Cineworld at Ashton Moss most frequently. Other destinations include Manchester city centre (6.7%) and the Trafford Centre (4.6%).
- **INDOOR SPORTS / HEALTH & FITNESS:** a total of 22.3% of local residents in the catchment regularly visit gym facilities. The most popular facilities are the Council operated DC Leisure Centre in Glossop (45.2%) and Glossop Swimming Pool (10.3%). Beyond the two facilities, visitation patterns are highly dissipated.
- **RESTAURANTS AND SOCIALISING:** a total of 76.9% of local residents regularly visit restaurants. The majority (62.5%) eat out in Glossop town centre. The most popular alternative destination is Manchester city centre (21.1%). Smaller town centres and villages in the wider area make up the remaining destinations.
- **PUBS/ CLUBS:** over half (56.3%) of the residents of this catchment regularly visit pubs or clubs. Similar to the restaurant offer, the majority remain within Glossop (57.3%) with Manchester city centre (20.1%) being the most popular alternative.

- 8.60 The town's wider evening economy offer is limited to traditional pubs and restaurants along the High Street. A new JD Wetherspoons pub within the Howard Town Mill scheme further adds to this.
- 8.61 Given the proximity and access from the town to larger leisure based destinations in the Greater Manchester conurbation (Ashton Moss, Stockport and Manchester city centre), it is unlikely in our view that the centre would be able to attract the necessary critical mass of commercial demand to deliver a step change in its offer. Whilst the town's leisure offer lacks any qualitative depth, there is no overriding need for the Council to proactively plan for new provision in the town centre.
- 8.62 As with the other smaller centres, it is our view that there is no need for the Council to proactively plan for new leisure development in the town over the emerging plan period. However, if leisure-based proposals should come forward outside of the plan making process then subject to appropriate NPPF compliant assessment (sequential and impact) there is potential for the Council to support new provision.
- 8.63 However, appropriate (continued) planning and licencing policies should continue to avoid the over-concentration of leisure uses which would be detrimental to town centre viability and surrounding residential amenity.

9. HIGH PEAK CENTRAL

9.1 The High Peak Central area comprises the small towns of Whaley Bridge, New Mills and Chapel-en-le-Frith. Whaley Bridge and New Mills town centres are relatively limited in terms of retail and service offer. Whereas New Mills is predominantly top-up orientated (small Sainsbury's Local), there is a medium sized Tesco store on the outskirts of Whaley Bridge. Chapel-en-le-Frith comprises a traditional linear high street anchored by a medium sized edge-of-centre Morrison's food store.

A) CONVENIENCE

9.2 The overall convenience expenditure pot within the High Peak Central catchment (survey zone 2) is c. £82.2m (2013); this is projected to rise to £85.4m by 2018 and £98.9m in 2031 (£16.7m increase over emerging Local Plan period).

D) MAIN FOOD

IMMEDIATE CATCHMENT (SURVEY ZONE 2)

9.3 The main food expenditure pot for the High Peak Central catchment (zone 2) is £61.7m in 2013; this is projected to rise to £74.2m by 2031. The main food shopping patterns (Table 5a, Appendix 2b) identified in the current household survey (2013) are summarised against the 2009 Study results below:

		2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE		HIGH PEAK CENTRAL ZONE	HIGH PEAK CENTRAL ZONE
WHALEY BRIDGE	CO-OP (BUXTON ROAD)	0.8%	-
	LOCAL SHOPS TC	-	0.6% (£0.3m)
	TESCO (BRIDGEMOND)	36.1%	27.9% (£17.2m)
CHAPEL-EN-LE-FRITH	CO-OP (ECCLES ROAD)	-	-
	LOCAL SHOPS TC	-	-
	MORRISONS (MARKET STREET)	28.6%	33.9% (£20.9m)
NEW MILLS	SAINSBURY'S LOCAL (TOR TOPS ST)	-	-
	LOCAL SHOPS TC	-	-
	CO-OP (CHURCH STREET)	3.8%	2.0% (£1.2m)
HIGH PEAK CENTRAL TOTAL		69.3%	64.4% (£39.7m)
TESCO (WREN NEST, GLOSSOP)		5.3%	9.4% (£5.8m)
HAZEL GROVE FOODSTORES		-	8.7% (£5.4m)

9.4 The main changes in main food shopping patterns in the catchment are as follows:

- The Morrison's store in Chapel-en-le-Frith has improved its market share relative to the Tesco Whaley Bridge store; this may be attributable to brand loyalty.
- The leakage to Tesco Glossop has increased; this is slightly surprising given the existing Tesco store in the High Peak Central catchment. This may be due to the enhanced attraction of Glossop due to its retail and service offer.
- There is increased leakage to food stores in Hazel Grove; this may reflect some brand loyalty (Sainsbury's and Asda located in Hazel Grove).

9.5 Given that there have been no changes in foodstore provision in other surrounding centres the small differences in main food shopping patterns may be attributable to brand loyalty.

INFLOW

9.6 There is limited inflow to the Morrison's in Chapel-en-le-Frith from the Peak District (8.9% / £1.6m) and Buxton (4.5% / £1.9m) catchment zones.

OVERALL MAIN FOOD RETENTION

9.7 Existing convenience provision within High Peak Central retains 64.4% (£39.6m) of main food expenditure arising within its immediate catchment (survey zone 2); this is a slight reduction from 2009 when provision retained c. 70%.

9.8 The main outflows of main food expenditure from the catchment are to Tesco Glossop (9.4% / £5.9m) and Aldi in Buxton (2.4% / £1.9m).

II) TOP-UP FOOD

IMMEDIATE CATCHMENT (SURVEY ZONES 2)

9.9 The top-up expenditure pot in the High Peak Central catchment is projected to rise from £20.6m in 2013 to £24.7m by 2031.

9.10 The top-up food shopping patterns (Table 4b, Appendix 2b) identified in the current household survey (2013) are summarised against the 2009 Study results below:

		2009 STUDY	2013 STUDY
	DESTINATION / FOODSTORE	HIGH PEAK CENTRAL ZONE	HIGH PEAK CENTRAL ZONE
WHALEY BRIDGE	CO-OP (BUXTON ROAD)	1.9%	1.4% (£0.2m)
	LOCALS HOPSTC	1.9%	8.8% (1.8m)
	TESCO (BRIDGEMONT)	16.2%	11.2% (£2.3m)
CHAPEL- EN-LE-FRITH	CO-OP (ECCLES ROAD)	1.9%	6.4% (£1.3m)
	LOCALS HOPSTC	5.7%	1.5% (£0.3m)
	MORRISONS (MARKET STREET)	16.2%	22.3% (£4.5m)
NEW MILLS	SAINSBURY'S LOCAL (TOR TOPS ST)	-	0.8% (£0.1m)
	LOCALS HOPSTC	16.2%	5.9% (£1.2m)
	CO-OP (CHURCH STREET)	19.0%	9.2% (£1.8m)
	HIGH PEAK CENTRAL TOTAL	79.0%	67.5% (£13.8m)
	TESCO (WREN NEST, GLOSSOP)	-	4.4% (£0.9m)

9.11 The survey results show that there have been minor changes in top-up shopping patterns since 2009. The new Sainsbury's Local store in New Mills has had an extremely limited impact. The overall decrease in the total amount of expenditure retained within the catchment by the three main centres is primarily due to the notable increase in the market share achieved by local centres in the High Peak catchment; Chinley for example retains 7.9% (£1.6m) of top-up expenditure.

INFLOW

9.12 Top-up food shopping is highly localised and the survey results only indicate minor inflows (1.8% / £0.1m) to Chapel-en-le-Frith from outside of survey zone 2.

LEAKAGE

9.13 There are minor outflows from the High Peak Central catchment to food stores in Glossop (5.2% / £1.1m) and Buxton (3.6% / £0.7m).

OVERALL TOP-UP RETENTION

9.14 The assessment (Table 7, Appendix 2b) identifies that the three towns retain 67.5% (£13.9m) of top-up expenditure arising within the High Peak Central catchment. A total of 85% (£17.5m) of top-up spend arising within its immediate catchment is retained within the borough as a whole. There is consequently extremely limited expenditure leakage.

III) OVERALL MARKET SHARE [MAIN FOOD AND TOP-UP COMBINED]

9.15 The assessment (Table 7, Appendix 2b) identifies that the main towns in High Peak Central retain 65.2% (£53.5m) of convenience expenditure arising within its immediate catchment (survey zone 2). The borough as a whole retains 82.2% (£67.6m). There is limited expenditure leakage.

IV) FOODSTORE PERFORMANCE

9.16 The assessment (Table 8, Appendix 2b) identifies the following trading performance of the main food stores in High Peak Central:

	DESTINATION / FOODSTORE	BENCHMARK (£)	SURVEY TOTAL (£)	DIFFERENCE
WHALEY BRIDGE	TESCO (BRIDGEMOND)	£19.4m	£19.8m	+£0.4m
CHAPEL	MORRISONS (MARKET STREET)	£18.3m	£29.3m	+£10.9m
NEW MILLS	CO-OP (CHURCH STREET)	£5.6m	£3.1m	-£2.5m

9.17 As the table shows, the Morrison's in Chapel is performing strongly; this is due to its location on the edge of the High Peak Central catchment which therefore generates additional trade from the adjacent Peak District Central and Buxton catchment zones. The overtrading performance is relatively positive in our respect given the store occupies an edge-of-centre location with its car park effectively functioning as the wider town centre park, thereby generating linked shopping trips.

9.18 The out-of-centre Tesco store in Whaley Bridge is current trading around expected benchmark; this is surprising given that the approved extension to the existing store³⁹ (c. 624 m² net convenience floorspace) was primarily based on the need to alleviate overtrading. It is however possible that the store picks up additional drive-by trade given its prominent location off the A6 bypass.

V) CAPACITY REVIEW

9.19 The baseline capacity modelling exercise (Table 12a, Appendix 2c), assuming a constant market share and taking account of projected population and expenditure growth, as

³⁹ Planning Application reference HPK/2010/0603

well as trading efficiency increases, generates the following floorspace requirement⁴⁰ across the High Peak Central area over the emerging Local Plan period to 2031:

MAINSIREAM RETAIL ⁴¹	2018	2023	2031
HIGH PEAK - BASELINE	c. 140 m ² (gross)	c. 350 m ² (gross)	c. 695 m ² (gross)
HIGH PEAK - [BASELINE - PLUS COMMITMENTS]	c. - 820 m ² (gross)	c. - 610 m ² (gross)	c. - 260 m ² (gross)

9.20 As the table highlights, the baseline capacity identified over the emerging plan period is insufficient to support any substantive new convenience retail development. Likewise, when the committed extension (624 m² net convenience floorspace) to the out-of-centre Tesco store in Whaley Bridge is taken into account (Table 12b, Appendix 2c) then there is a substantive negative capacity.

9.21 However, the baseline capacity position ignores that the existing edge-of-centre Morrison's store in Chapel-en-le-Frith is significantly overtrading (c. £10.9m) relative to expected benchmark. A hypothetical quantitative-based scenario (Table 12d, Appendix 2c) has therefore been run whereby the overtrading surplus is re-assigned to support new convenience provision in the High Peak Central catchment. This assessment, which also takes into account the committed extension to the Tesco Whaley Bridge store, identifies the following quantitative need over the emerging Local Plan period:

MAINSIREAM RETAIL ⁴²	2018	2023	2031
HIGH PEAK [OVERTRADING RE-ASSIGN; COMMITMENTS]	c. 485 m ² (gross)	c. 695 m ² (gross)	c. 1,045 m ² (gross)

9.22 As the table highlights, there is only limited capacity to support new convenience provision until the latter phase of the emerging Local Plan. However, this scenario ignores the continuing spatial deficiency in mainstream foodstore provision in the High Peak

⁴⁰ Rounded to nearest 5 metre floorspace increments

⁴¹ Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

⁴² Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

Central catchment. The 2009 Study specifically recommended that the Council proactively plan for a new food store in the New Mills locality to address the clear spatial deficiency in main food shopping provision, balance network of centres and reduce overtrading at the existing mainstream food stores in the catchment (Tesco Whaley Bridge and Morrison's Chapel-en-le-Frith continue to trade over benchmark).

- 9.23 The New Mills locality therefore remains the first priority for new convenience development in the catchment although it is our understanding that the Council has been unable to identify an appropriate through the emerging Local Plan process. However, in accordance with NPPF, the Council should develop and thereafter set an appropriate policy to accommodate a new food store in an accessible location which is well connected to New Mills town centre.
- 9.24 In terms of the quantum of convenience development which the Council should plan to accommodate in the town, whilst the capacity analysis only identifies c. 1,045 m² (gross) by the emerging Local Plan end date (2031), it is our view that there are clear quantitative and qualitative grounds for the Council to plan for a higher level of floorspace. A relatively small store would effectively reflect the current Co-Op store in New Mills and would not facilitate the necessary clawback and re-balancing of provision.
- 9.25 A new store must of an appropriate scale and offer to genuinely compete on a like-for-like basis and provide an attractive alternative to shoppers. Proposed policy must therefore build in sufficient flexibility so as to enable a commercially responsive proposal to come forward during the plan period. The scale of provision should be subject to the NPPF tests as appropriate.
- 9.26 With respect to the other centres in the High Peak Central catchment, in light of the significant overtrading position of the edge-of-centre Morrison's store in Chapel-en-le-Frith, it is recommended that the Council proactively plans to identify a suitable site in the town to accommodate new convenience retail provision.
- 9.27 Whilst it is not possible for the Council to be prescriptive in identifying the actual nature of new provision in emerging policy, given that the primary foodstore destinations in the catchment are mainstream operators (Tesco and Morrison's) there is a qualitative based justification for a new deep discount foodstore to provide additional competition and choice for local residents.
-

- 9.28 The survey results already identify that presently there are main food outflows from the High Peak Central catchment to Aldi stores in Glossop (£1.2m) and Buxton (£2m) and consequently there is potential to reverse main food outflows through clawback. Additional quantitative based support is provided by the fact that Chapel is located to the east of the High Peak Central catchment and therefore attracts inflows from the western part of the Peak District Central catchment (survey zone 3) and the northern extent of the Buxton catchment (zone 5).
- 9.29 A new deep discount foodstore in Chapel, assuming a standard format (c. 1,000 m² net sales), would be appropriate in both quantitative⁴³ and qualitative terms. However, in seeking to identify an appropriate site for new convenience provision in the town, it will be important that the linked trips and wider 'spin-off' benefits generated by the edge-of-centre Morrison's store (shared car park) are not lost to a sequentially inferior location (e.g. out-of-centre with no prospects of integration or linked trips).

B) COMPARISON

- 9.30 There is a total of £81.1m of (non-bulky) comparison goods expenditure (Tables 4a-c, Appendix 3a) arising in the High Peak Central catchment (zone 2). The expenditure pot is projected to rise to £106.7m in 2018 and £137.7m by 2031 (£56.6m increase).

D) COMBINED (NON-BULKY) COMPARISON GOODS MARKETSHARE

- 9.31 The survey results (Table 13, Appendix 3b) identifies that the three main towns in the High Peak Central catchment as a whole⁴⁵ retain just 12.6% (£10.2m) of the total non-bulky comparison expenditure arising within the immediate catchment (zone 2).
- 9.32 As the table below highlights, there have been only minor changes in the respective town's overall comparison market share since the 2009 Study.

	2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE	HIGH PEAK CENTRAL ZONE	HIGH PEAK CENTRAL ZONE
WHALEY BRIDGE TOWN CENTRE	2.0%	2.3% (£1.8m)
NEW MILLS TOWN CENTRE	2.7%	2.8% (£2.3m)
CHEPEL EN-LE-FRITH TOWN CENTRE	1.9%	4.2% (£3.4m)

⁴³ Assuming a new store attracts some inflow and has lower convenience sales density

⁴⁵ Including the out-of-centre Tesco at Whaley Bridge

- 9.33 Given the low levels of expenditure retention currently, the survey results identify that most local residents in the catchment look towards higher order provision in Greater Manchester for their comparison shopping needs:

	2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE	HIGH PEAK CENTRAL ZONE	HIGH PEAK CENTRAL ZONE
BUXTON TOWN CENTRE	21%	18.7% (£15.1m)
STOCKPORT TOWN CENTRE	42.7%	30.7% (£24.9m)
MANCHESTER CITY CENTRE	7.9%	7.8% (£6.3m)
TRAFFORD CENTRE	4.1%	5.3% (£4.3m)
MACCLESFIELD TOWN CENTRE	7.3%	6.9% (£5.6m)

- 9.34 There has been relatively limited change in overall comparison shopping patterns in the catchment aside from the significant decrease in the market share which Stockport attracts. There is also increased competition from out-of-centre retail parks within Stockport (Peel Centre) and Tameside (Ashton) in particular.

INFLOW (WITHIN AND OUTSIDE BOROUGH)

- 9.35 Given the limitations of the existing comparison retail offer within the respective town centres, the survey results identify negligible inflows (c. £0.2m in total).

OVERALL COMPARISON GOODS TURNOVER

- 9.36 Whaley Bridge as a whole (including Tesco) achieves a non-bulky comparison goods turnover of £3.1m. New Mills town centre achieves a turnover of £2.4m whilst Chapel-en-le-Frith (including Morrison's) achieves £5.2m.

II) INDIVIDUAL (NON-BULKY) COMPARISON GOODS MARKETSHARES

- 9.37 The market share which the respective towns secure for individual (non-bulky) comparison goods is provided below (Tables 6 – 17, Appendix 3b). The table show that there is a significant variance for different types of comparison retail shopping (where centre not specified it achieves no market share for the respective goods category).

	2013 STUDY
COMPARISON GOODS	HIGH PEAK CENTRAL ZONE
PERSONAL GOODS	Chapel 11% (£0.1m)
SMALL DOMESTIC APPLIANCES	Whaley Bridge 8.4% (£1m) New Mills 4.1% (£0.5m) Chapel 7.3% (£0.9m)
CDs / DVDs	Whaley Bridge 2.3% (£0.1m) New Mills 4.6% (£0.1m) Chapel 27% (£0.7m)
BOOKS & STATIONARY	Whaley Bridge 3.9% (£0.2m) New Mills 8.2% (£0.4m) Chapel 19.9% (£1.0m)
GLASSWARE/ TABLEWARE	Whaley Bridge 1.9% (£0.1m) New Mills 1.8% (£0.1m) Chapel 7.3% (£0.2m)
MEDICAL GOODS	Whaley Bridge 14.3% (£1.0m) New Mills 15.5% (£1.1m) Chapel 30.3% (£2.1m)
RECREATIONAL GOODS	Whaley Bridge 5.3% (£0.7m)

9.38 The survey results show the respective town centres perform a limited comparison shopping function aside from daily top-up based items such as medical goods. Most shoppers within the catchment look towards larger centres in the wider sub-region to meet their main comparison shopping needs.

III) CLOTHING

9.39 There is a total of £31.1m of clothing / fashion expenditure arising within the High Peak Central catchment (Tables 4a-c, Appendix 3b); this is projected to rise to £40.9m in 2018 and £52.8m by 2031.

9.40 The survey results identify that the three main towns retain only 0.6% (£0.2m) of the total clothing goods expenditure arising within the catchment; this is similar to the 2009 Study which identified a 1.6% retention level. The main destinations for clothing shopping are summarised below against the 2009 Study findings.

	2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE	HIGH PEAK CENTRAL ZONE	HIGH PEAK CENTRAL ZONE
BUXTON TOWN CENTRE	16.9%	18.5% (£5.8m)
MACCLESFIELD TOWN CENTRE	11.3%	6.4% (£2m)
STOCKPORT TOWN CENTRE	42.7%	44.4% (£13.8m)

MANCHESTER CITY CENTRE	8.1%	13.1% (£4.1m)
TRAFFORD CENTRE	5.6%	8.7% (£2.7m)

9.41 The table clearly shows that outflow has remained relatively constant with few changes between the 2009 and 2013 survey results. The decrease in market share of Macclesfield town centre is likely to be reversed to a certain extent when the committed town centre redevelopment scheme proceeds.

C) BULKY COMPARISON

9.42 The assessment (Tables 4a-c, Appendix 4a) details that the bulky comparison goods expenditure pot within the High Peak Central catchment (survey zone 2) is currently £36.9m; this is projected to rise to £38.6m in 2018 and £62.7m by 2031 (£25.8m increase over the emerging Local Plan period).

D) COMBINED (BULKY) COMPARISON GOODS MARKET SHARE

9.43 The assessment (Tables 10a-b, Appendix 4b) details that as a whole, the main towns retain 16.2% (£6m) of the bulky comparison expenditure arising in the High Central catchment (survey zone 2). The borough as a whole retains 24.4% (£9m).

9.44 The changes in market share since the 2009 Study are summarised below along with main competing destinations⁴⁶:

	2009 STUDY	2013 STUDY
DESTINATION / FOODSTORE	HIGH PEAK CENTRAL ZONE	HIGH PEAK CENTRAL ZONE
WHALEY BRIDGE TOWN CENTRE	1.3%	3.5% (£1.3m)
NEW MILLS TOWN CENTRE	8.2%	3.8% (£1.4m)
CHAPEL EN-LE-FRITH TOWN CENTRE	4.1%	8.3% (£3.0m)
BUXTON	14.1%	8.1% (£3.0m)
MANCHESTER CITY CENTRE	2.9%	1.3% (£0.5m)
MACCLESFIELD	10.2%	10.6% (£3.8m)
STOCKPORT	43.3%	35.8% (£13.2m)
CHEADLE	5.4%	8.9% (£3.3m)

⁴⁶ Macclesfield and Stockport results respectively are town centre and retail parks combined.

9.45 The table clearly shows that the market share of the main centres in the High Peak Central catchment have fluctuated since 2009; there is no specific reason for the changes. In terms of wider shopping trends in the catchment, the market share which Buxton draws from the catchment has decreased whereas the outflows to centres and locations outside of the borough have remained relatively similar.

INFLOW

9.46 There are no inflows to the main centres in the catchment from the study area.

OVERALL BULKY COMPARISON GOODS TURNOVER

9.47 The overall turnover of Whaley Bridge (including out-of-centre Tesco) is £1.4m; New Mills turnover £1.5m; and Chapel (including Morrison's) is £3.3m.

II) INDIVIDUAL (BULKY) COMPARISON GOODS MARKET SHARES

9.48 The overall catchment market share for bulky comparison goods is summarised below (Tables 5-9, Appendix 4b) against the 2009 Study results (where available).

	2009 STUDY	2013 STUDY
BULKY COMPARISON GOODS	HIGH PEAK CENTRAL ZONE	HIGH PEAK CENTRAL ZONE
FURNITURE & FLOORING	11.9%	15.2% (£2.0m)
DIY GOODS	21%	23.1% (£1.5m)
MAJOR HOUSEHOLD APPLIANCES	-	15.3% (£0.3m)
LARGE ELECTRICAL GOODS	9.8%	4.5% (£0.4m)
GARDEN & PETS	-	31.9% (£1.8m)

9.49 As the table shows, the overall combined market share of the three towns for furniture / flooring and DIY goods has slightly increased since 2009. The market share for large electrical (audio-visual) goods has halved in the same period.

D) OVERALL COMPARISON GOODS MARKET SHARE

9.50 Drawing the individual non-bulky and bulky expenditure pots together, there is an overall total of c. £118 m of comparison expenditure arising within the High Peak Central catchment (survey zone 2).

9.51 The assessment (Appendix 4a) shows that the main town centres in the catchment retain 13.7% (£16.2m) of this total comparison expenditure. This is broken down individually to comprise Whaley Bridge (including Tesco) achieving a 3.7% (£4.4m) overall market share, New Mills 3.1% (£3.7m) and Chapel (including Morrison's) achieving 6.9% (£8.1m). The main destination from the catchment is Stockport town centre (26.6% / £31.4m).

E) COMPARISON CAPACITY REVIEW

9.52 On the basis of forward population and expenditure growth, assuming that the current market share of the High Peak catchment (town centres combined) is projected forward on a constant basis (i.e. no improvement over time), the capacity assessment identifies the following floorspace requirement⁴⁷ over the emerging Local Plan period to 2031 (Table 4a, Appendix 4b):

	2018	2023	2031
HIGH PEAK CENTRAL- BASELINE	280 m² (gross)	735 m² (gross)	1,520 m² (gross)

9.53 The assessment identifies that there is limited quantitative need for new comparison retail development in the High Peak Central catchment over the emerging Local Plan period. However, the capacity position in the catchment is further reduced by two committed schemes, as follows:

- Proposed Tesco Whaley Bridge extension (c. 750 m² net comparison floorspace).
- Proposed Non-Food Retail at Hogs Yard, Whaley Bridge (adjacent to Tesco). A new scheme⁴⁸ (2,230 m² gross; 1,784 m² net comparison retail) has recently been approved and supersedes a previous scheme (c. 1,860 m² net comparison retail).

9.54 When the comparison retail turnover (c. £10.9m) of the respective schemes is applied to the capacity modelling exercise (Table 4b, Appendix 4b), the following capacity is identified over the plan period:

	2018	2023	2031
HIGH PEAK CENTRAL- COMMITMENTS	-5,680 m² (gross)	-5,220 m² (gross)	-4,440 m² (gross)

⁴⁷ Floorspace rounded to nearest 5 square metre increment

⁴⁸ LPA application reference HPK/2013/0300

9.55 There is clearly a significant negative capacity the catchment in the period to 2031; there is consequently no need for the Council to proactively plan for new comparison retail development in the first instance.

9.56 The respective developments, if realised, should assist in improving comparison market share going forward. The Hogs Yard scheme in particular could comprise either high street style or bulky comparison retailing.

F) LEISURE

9.57 The expenditure capacity pot (2013) within the High Peak Central catchment (survey zone 2) for specific leisure activities is set out below⁴⁹.

	Average Spend (£)	Available Expenditure (£)	UK Average Spend per person (£)
Restaurants/ Cafes	£370	£6.1m	£440
Alcoholic Drinks	£206	£3.4m	£232
Cinema	£13	£0.2m	£18
Theatre / Concerts	£22	£0.4m	£33
Recreation and Sporting	£86	£1.4m	£117

9.58 As previously detailed, the leisure offer in the main town centres in the High Peak Central catchment is extremely limited. The main leisure offer within the town centre comprises public sports facilities and traditional pubs. The main leisure destinations for local residents in the High Peak Central catchment (zone 2) are as follows:

- **CINEMA:** a total of 51.3% of regularly go to the cinema. The most popular destinations are Cineworld Stockport (33.3%) and Cineworld at Parnswood (25%). The remainder go to cinemas in the Greater Manchester conurbation including Ashton Moss and Manchester city centre.
- **INDOOR SPORTS / HEALTH & FITNESS:** a total of 17.4% regularly visit facilities. The main destinations are New Mills leisure centre (40%), followed by Buxton Swimming and Fitness centre (30.7%). A further 13.7% visit Chapel-en-le-Frith leisure centre.

⁴⁹ Experian Retail Planner Reports; Expenditure Pot generated by applying spend per head figure to 2013 population

- **RESTAURANTS:** a total of 76.2% of local residents regularly eat out. Chapel town centre is the most popular location (30.5%), followed by Manchester city centre (14.3%). Whaley Bridge is the primary destination for 9.3% and New Mills 5.9%.
- **PUBS/ CLUBS:** a total of 65.9% of local residents regularly socialise. The most popular destinations are Chapel town centre (26.4%) and Whaley Bridge town centre (23.2%). New Mills is attended by 12.1%. Hayfield (local centre) is identified as the primary destination by 9.1%.

9.59 Given the existing limitations of the respective towns leisure offer and given proximity to Glossop, Buxton and the larger centres in Greater Manchester, it is unlikely in our view to attract the necessary critical mass (commercial demand) to deliver a step change in the leisure offer. However, if leisure-based proposals should come forward outside of the plan making process then subject to appropriate NPPF compliant assessment (sequential and impact) there is potential for the Council to support new provision.

10. LEEK

- 10.1 The historic retail core of the town centre is focused around Market Place and along Derby Street. More modern development is located to the south of the main shopping street with a multi-storey unit off Brook Street which accommodates discount comparison operators. A freestanding Aldi store is located off Hayward Street and The Smithfield Centre shopping precinct is opposite to the south. Further removed from the town centre to the north and east are Co-Op and Asda (former Netto) stores.
- 10.2 Given the historic constraints of the town centre, there has been significant out-of-centre development. To the south west of the town on the A53 Newcastle Road is a large Morrison's food store, B&M Bargain unit (former Focus DIY) and a Halfords store. To the far north of the town is a Sainsbury's food store which opened in early 2013; the planning permission for the wider includes bulky retail warehousing.
- 10.3 The leisure offer within the town centre comprises a mix of traditional evening economy uses including public houses and restaurants.

A) CONVENIENCE

- 10.4 The overall convenience expenditure pot (Table 4, Appendix 2a) within the immediate Leek catchment (survey zone 7) is currently £39.1m; this is projected to rise to £40.8m in 2018 and £47.8m by 2031 (£8.7m increase over emerging Local Plan period).
- 10.5 The expenditure pot in the Leek North catchment (survey zone 6) is projected to rise from £15.9m to £16.1m in 2018 and £17.8m by 2031 (£1.9m increase). The Leek South catchment (survey zone 8) expenditure pot is projected to rise from £59.1m to £60.3m and £67.2m respectively over the same period.

D) MAIN FOOD

- 10.6 The main food expenditure pot (Table 4a, Appendix 2a) for the immediate Leek catchment (survey zone 7) is £29.4m. The available main food expenditure in the Leek North (zone 6) and South (zone 8) catchments is £11.9m and £44.3m respectively.
- 10.7 The main food shopping patterns (Table 5a, Appendix 2b) are summarised against the 2006 Study results below.
-

DESTINATION / FOODSTORE	2006 STUDY			2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH	LEEK NORTH	LEEK	LEEK SOUTH
ALDI (HEYWOOD STREET)	1.9%	4.5%	3.9%	7.1% (£0.8m)	18.8% (£5.5m)	5.9% (£2.6m)
MORRISONS (NEWCASTLE ROAD)	13.2%	55.4%	24.5%	12.7% (£1.5m)	46.7% (£13.7m)	33.1% (£14.6m)
SAINSBURYS (CHURNETWAY)	-	-	-	15.0% (£1.7m)	12.5% (£3.6m)	6.8% (£3.0m)
ASDA (SPRINGFIELD ROAD) ⁵⁰	-	4.5%	0.8%	3.4% (£0.4m)	5.3% (£1.5m)	2.5% (£1.1m)
CO-OP (PORTLAND STREET NORTH)	7.5%	18.8%	3.1%	2.2% (£0.2m)	8.1% (£2.3m)	1.4% (£0.6m)

10.8 The headline changes in main food shopping patterns since 2009 are:

- The Aldi store on Heywood Street has increased its market share across all the catchment zones; this reflects a wider national trend whereby discount food store operators are achieving significant increases in market share.
- Morrison's market share from the Leek and Leek North catchments has decreased; this is attributable to the competition from Aldi and the new Sainsbury's. The market share from the Leek South catchment has actually increased which may reflect the improved store offer following its extension.
- Co-Op's market share from all of the Leek catchment zones has significantly decreased; this is primarily due to competition from Aldi and Sainsbury's.

10.9 The survey results show that the re-branding of the former Kwik Save (later Netto) store on Springfield Road to Asda has had a limited impact on main food shopping patterns across the Leek catchment; this is primarily due to the top-up orientated nature of the store offer (relative to enhanced main food provision at Sainsbury's and Morrison's).

10.10 It is apparent from the survey results that the new Sainsbury's store achieves an extremely limited market share from all of the Leek catchment zones; this may be attributable to the fact that the store has been open for a relatively limited period of time and its location to the far north of the town. The development of new bulky retail warehousing may increase the attractiveness of the store (linked shopping trips).

⁵⁰ Asda store was originally Kwik Save (Springfield Road) at time of the 2006 Study. The store was converted into a Netto store prior to Asda's acquisition of Netto.

INFLOW (FROM WITHIN THE DISTRICT)

10.11 The changes in main food inflows from other catchments in the district since 2006 are set out below.

DESTINATION / FOODSTORE	2006 STUDY			2013 STUDY		
	BIDDULPH	CHEADLE	CHEADLE OUTER	BIDDULPH	CHEADLE	CHEADLE OUTER
ALDI (HEYWOOD STREET)	-	-	0.5%	-	-	5.6% (£2.0m)
MORRISON'S (NEWCASTLE ROAD)	2.1%	4.0%	10.8%	0.8% (£0.2m)	-	3.9% (£1.4m)
SAINSBURY'S (CHURNETWAY)	-	-	-	-	-	1.3% (£0.5m)
ASDA (SPRINGFIELD ROAD)	-	-	0.5%	-	-	-
CO-OP (PORTLAND ST NORTH)	-	-	1.0%	-	-	-

10.12 The survey results show that only the in-centre Aldi store in Leek has increased its main food market share. The decrease in Morrison's market share is due to the subsequent opening of a new full-range Sainsbury's store in Biddulph town centre and the conversion of the former Somerfield store in Chedale to Morrison's.

INFLOW (FROM OUTSIDE THE DISTRICT)

10.13 The survey results identify that existing provision in Leek draws negligible inflows (c. £0.2m) from the Buxton catchment (High Peak).

OVERALL MAIN FOOD RETENTION

10.14 Overall, drawing the market share of both in-centre and out-of-centre provision together, the survey results identify that Leek retains the following market share from its immediate catchment zones:

DESTINATION / FOODSTORE	2006 STUDY			2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH	LEEK NORTH	LEEK	LEEK SOUTH
OVERALL TOWN	22.6%	85.2%	32.6%	42.1% (£5.0m)	95.9% (£28.2m)	51.1% (£23.1m)

10.15 The overall main food market share which Leek secures from its respective catchment zones has significantly increased since 2006. The retention levels for the immediate Leek catchment (survey zone 7), as to be expected, are particularly high with extremely limited expenditure leakage to alternative centres and stores.

II TOP-UP FOOD

10.16 The top-up expenditure pot (Table 4b, Appendix 2a) in the immediate Leek catchment (survey zone 7) is c. £9.8m; this is projected to rise to c. £10.2m in 2018 and £11.9m by 2031. In the same period to 2031, the top-up expenditure pot in the Leek North catchment (zone 6) is projected to rise from c. £4m to c. £4.4m. The available top-up expenditure in the Leek South catchment (zone 8) is projected to rise from c. £14.8m to c. £16.8m.

10.17 The top-up food shopping patterns (Table 5b, Appendix 2b) identified in the current household survey (2013) are summarised against the 2006 Study results below:

DESTINATION / FOODSTORE	2006 STUDY			2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH	LEEK NORTH	LEEK	LEEK SOUTH
ALDI (HEYWOOD STREET)	3.8%	6.9%	2.3%	2.9% (£0.1m)	13.1% (£1.2m)	5.9% (£0.8m)
LOCAL SHOPS ETC	-	10%	1.5%	4.5% (£0.1m)	16.7% (£1.6m)	7.2% (£1.0m)
MORRISONS (NEWCASTLE ROAD)	1.9%	23.3%	11.7%	2.6% (£0.1m)	14.7% (£1.4m)	12.5% (£1.8m)
SAINSBURYS (CHURNETWAY)	-	-	-	1.5% (£0.1m)	8.0% (£0.7m)	4.1% (£0.6m)
ASDA (SPRINGFIELD ROAD) ⁵¹	-	3.5%	0.8%	1.2% (£0.04m)	22.3% (£2.1m)	-
CO-OP (PORTLAND STREET NORTH)	-	20.8%	2.3%	1.2% (£0.04m)	5.0% (£0.4m)	4.1% (£0.6m)

10.18 The main changes in top-up shopping patterns since 2006 are as follows:

- The Aldi store has significantly increased its market share from the immediate Leek catchment (survey zone 7).
- The out-of-centre Morrison's store market share from the immediate Leek catchment (survey zone 7) has significantly decreased; this is due to the increased competition from Aldi, the new out-of-centre Sainsbury's store and Asda (re-branded from Netto).
- The Co-Op store only performs a minor top-up shopping function compared with 2006; this is again due to the increased competition.

10.19 Positively, the survey results do indicate that the market share which local independent shops within the town centre secure for top-up shopping has increased since 2006.

⁵¹ Asda converted from former Kwik Save

INFLOW

10.20 There are minor inflows (c. £0.5m) from the Cheadle Outer catchment to existing convenience provision within Leek. There is extremely negligible inflow of top-up-food expenditure (c. £0.1m) from the Buxton catchment (survey zone 5) to existing convenience provision within Leek.

LOCAL CENTRES

10.21 The survey results identify that 35.6% (£5.3m) of top-up expenditure arising within the Leek South catchment (survey zone 8) is retained by local centres outside of Leek, including Brown Edge, Cheddleton and Werrington.

OVERALL TOP-UP RETENTION

10.22 The survey results (Table 6a, Appendix 2b) identify the following overall retention rates for Leek from its defined catchment zones:

DESTINATION / FOODSTORE	2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH
LEEK TOWN CENTRE	7.4% (£0.3m)	32% (£3.1m)	14% (£2.1m)
LEEK - NON TIC	6.5% (£0.3m)	67.1% (£6.6m)	20.7% (£3.1m)
LEEK OVERALL TOTAL	13.9% (£0.6m)	99.1% (£9.7m)	34.7% (£5.1m)
LOCAL CENTRES	-	-	35.6% (£5.3m)
STAFFS MOORLANDS OVERALL TOTAL	13.9% (£0.6m)	99.1% (£9.7m)	72.5% (£10.7m)

10.23 As detailed in the table, nearly all top-up expenditure arising within the immediate Leek catchment (survey zone 7) is retained in the town. Top-up shopping in the Leek North catchment (zone 6) is to a number of towns including Buxton (15.6% / £0.6m), Macclesfield (14.2% / £0.6m) and Ashbourne (7.4% / £0.3m). In terms of the Leek South catchment (zone 8), nearly three quarters of top-up expenditure are retained within the district. The main outflows are to Stoke-on-Trent (10.4% / £1.5m).

III) OVERALL MARKET SHARE [MAIN FOOD AND TOP-UP COMBINED]

10.24 Taking the main and top-up food market shares together, the survey (Table 7, Appendix 2b) identifies that Leek retains the following quantum of convenience expenditure arising within its defined catchment zones.

DESTINATION / FOODSTORE	2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH
LEEK TOWN CENTRE	8.5% (£1.3m)	24.8% (£9.7m)	9.7% (£5.7m)
LEEK – NON TC	26.6% (£4.2m)	71.9% (£28.1m)	38% (£22.5m)
LEEK OVERALL TOTAL	35.1% (£5.6m)	96.7% (£37.9m)	47.8% (£28.2m)
LOCAL CENTRES	-	-	10% (£5.9m)
STAFFS MOORLANDS OVERALL TOTAL	35.1% (£5.6m)	97.4% (£38.1m)	63.3% (£37.4m)

10.25 The results show that existing foodstores located outside of Leek town centre are the dominant convenience shopping destinations for local residents. Whilst there is some leakage from the Leek North and Leek South catchment zones, this is attributable to the geographical extent of the zones with local residents further away from Leek looking towards other centres in close proximity (i.e. Chaddley, Macclesfield, Buxton and Stoke).

IV) FOODSTORE PERFORMANCE

10.26 The assessment (Table 8, Appendix 2b) identifies the following trading performance of the main foodstores in Leek:

DESTINATION / FOODSTORE	BENCHMARK	SURVEY TOTAL	DIFFERENCE
ALDI (Haywood Street)	£3.2m	£13.4m	+£10.2m
ASDA (Springfield Road)	£12.8m	£5.4m	-£7.4m
MORRISON'S (Newcastle Road)	£29.6m	£35m	+£5.4m
CO-OP (Portland Street North)	£10.7m	£4.4m	-£6.3m
SAINSBURY'S (Chumet Way)	£34.7m	£10.4m	-£24.3m

10.27 The results show that the Aldi and Morrison's stores are significantly over-performing compared to expected benchmarks. The overtrading of the Aldi store is particularly positive given its in-centre location and potential to generate linked trips with the wider town centre.

10.28 The trading dominance of the Morrison's store, which was overtrading by c. £8.8m in 2006, has been reduced by increased competition from both Aldi and the new Sainsbury's store; this is despite the store having been extended (c. 1,000 m² net).

10.29 The edge-of-centre Co-Op store is significantly under-performing relative to benchmark; this is due to the increased competition in the north of the town arising from the new

Sainsbury's store. Given the trading performance of the Co-Op, it is possible that the approved extension to the store (c. 788 m²) will not be implemented.

10.30 The under-performance of the Asda is possibly attributable to the store performing a predominant top-up orientated role given that the size and constraints of its layout (former Netto store). The store is unable to stock a full range of goods and is unlikely in our view to trade at the wider company benchmark.

10.31 However, the most notable performance recorded by the survey results is the significant under-performance (c. £24.3m below benchmark) of the out-of-centre Sainsbury's store to the north of the town. Whilst the store has only recently opened (early 2013) and has yet to fully establish its market share, it is possible that the store's relatively peripheral location to the northernmost extent of the town allied to local demographics may be contributing to its under-performance.

V) CAPACITY REVIEW

10.32 The baseline capacity modelling exercise (Table 17, Appendix 2d), assuming a constant market share and taking account of projected population and expenditure growth, as well as trading efficiency increases, generates the following floorspace requirement⁵² over the emerging Local Plan period to 2031:

MAINSTREAM RETAIL ⁵³	2018	2023	2031
LEEK - BASELINE	c. 185 m ² (gross)	c. 470 m ² (gross)	c. 940 m ² (gross)

10.33 As the table highlights, the capacity identified over the emerging plan period is insufficient to support any substantive new convenience retail development.

10.34 The capacity is further reduced when the approved extension to the edge-of-centre Co-Op scheme (c. £3.7m additional convenience turnover) is taken into account; the assessment (Table 17b, Appendix 2d) subsequently identifies the following capacity:

⁵² Rounded to nearest 5 metre floorspace increments

⁵³ Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

MAINSTREAM RETAIL ⁵⁴	2018	2023	2031
LEEK - COMMITMENTS	c. - 255 m ² (gross)	c. 30 m ² (gross)	c. 500 m ² (gross)

- 10.35 On this basis, there is no quantitative need for the Council to proactively plan for new convenience provision in the town over the early phase of the emerging Local Plan period. There is no potential for main food market share enhancement (c. 96% retention in the immediate Leek catchment). A future update study should identify quantitative needs for the latter phase of the plan.
- 10.36 Allied to the limited quantitative need arising, there is also no qualitative requirement to plan for new provision as Leek is well provided for in terms of mainstream operators (Morrisons and Sainsbury's) and discounters (Aldi and Farmfoods).
- 10.37 Whilst the capacity assessment (Table 14, Appendix 2d) identifies that the existing in-centre Aldi store is significantly overtrading relative to its expected company benchmark, it is our view that this is extremely positive given the store is within the town centre and generates linked trips with other shops and services; there would consequently be no economic or sustainability benefits in seek to provide additional competition by planning for new deep discount provision in the town in a sequentially inferior location.
- 10.38 Likewise, the study identifies that several stores in the town (Co-Op and Asda in particular) are under-performing relative to benchmark and any new provision could adversely impact upon future trading potential.

B) COMPARISON

- 10.39 There is a total of c. £35m of non-bulky comparison goods expenditure (Tables 4a-d, Appendix 3a) arising in the immediate Leek catchment (survey zone 7). The expenditure pot is projected to rise to £46.2m in 2018 and £60.3m by 2031 (£25.3m increase over emerging Local Plan period).

⁵⁴ Mainstream Retailer is Asda, Morrisons, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

10.40 The non-bulky expenditure pot in the Leek North catchment (survey zone 6) is projected to rise from c. £15.4m at present to c. £24.4m by 2031. The increase in the Leek South catchment (survey zone 8) is projected to rise at the same time from £53.6m to £86.1m.

D) COMBINED (NON-BULKY) COMPARISON GOODS MARKET SHARE

10.41 The survey results (Table 13, Appendix 3b) below summarise the overall comparison goods market shares that Leek town centre draws from its defined catchment zones; the 2006 Study findings are also provided for comparative purposes.

DESTINATION / FOODSTORE	2006 STUDY			2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH	LEEK NORTH	LEEK	LEEK SOUTH
LEEK TOWN CENTRE	11.0%	30.1%	11.0%	16.4% (£2.5m)	54.6% (£19.1m)	18.0% (£9.7m)

10.42 Comparatively, it is clear that the overall comparison goods market share that the town centre draws from the immediate Leek catchment (survey zone 7) has significantly increased (c. 25%) since 2006. The overall market share which the town centre secures from the other Leek catchments has also slightly increased over the same period.

10.43 As the 2006 Study did not identify overall comparison goods leakage from the Leek catchment zones, it is not possible to provide a comparative assessment against the current survey results which identify the following outflows⁵⁵:

DESTINATION / FOODSTORE	2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH
MACCLESFIELD	33.3% (£5.1m)	4.0% (£1.4m)	0.7% (£0.4m)
STOKE-ON-TRENT	8.5% (£1.3m)	28.5% (£10.1m)	67% (£35.9m)
BUXTON	19.5% (£3m)	4.2% (£1.5m)	0.8% (£0.4m)

10.44 Whilst Leek town centre is the primary comparison shopping destination for local residents in the immediate Leek catchment (zone 7), the survey results for the Leek North and Leek South catchments identify that most residents look towards mainstream provision in

⁵⁵ Macclesfield, Stoke-on-Trent and Buxton market shares are town centre and retail parks combined.

Macclesfield, Stoke-on-Trent and to a lesser extent Buxton to meet their comparison shopping needs.

INFLOW

10.45 The town draws in some inflow from the Cheadle Outer (6.9% / £3m) catchment. However, the inflow from the Biddulph (1.1% / £0.4m) and Cheadle (1.3% / £0.2m) catchments are extremely limited.

OVERALL COMPARISON GOODS TURNOVER

10.46 Drawing together the market share which the town centre attracts from catchment zones within and outside of the district, the study (Table 13, Appendix 3b) identifies that the overall town centre comparison turnover is c. £35.2m. The overall turnover of out-of-centre provision in Leek is c. £3.2m.

II INDIVIDUAL (NON-BULKY) COMPARISON GOODS MARKET SHARES

10.47 The 2006 Study only provided an overall comparison goods market share for the town centre. However, the 2013 Study details the market share which the town centre secures for individual (non-bulky) comparison goods; this is summarised below (Tables 6-12, Appendix 3b). The tables show that there is significant variance in the town centre market share for different types of comparison shopping.

	2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH
LEEK TOWN CENTRE			
PERSONAL GOODS	20% (£0.2m)	66.2% (£2m)	12.5% (£0.5m)
SMALL DOMESTIC APPLIANCES	17.4% (£0.4m)	82.3% (£4.1m)	27.4% (£2.1m)
CDs / DVDs	-	21.4% (£0.3m)	6.9% (£0.1m)
BOOKS & STATIONARY	28.1% (£0.3m)	87.8% (£1.8m)	36.2% (£1.2m)
GLASSWARE / TABLEWARE	23.7% (£0.1m)	67.6% (£0.8m)	20.7% (£0.4m)
MEDICAL GOODS	24.5% (£0.3m)	87% (£1.7m)	37% (£1.4m)
RECREATIONAL GOODS	21.9% (£0.5m)	54.8% (£3.5m)	19.1% (£1.8m)

10.48 The survey results show that the town performs strongly in respect of small domestic appliances, books / stationary and medical goods. The relatively limited market share for CDs / DVDs for example is due to the relatively dominant market position of large food stores such as the out-of-centre Morrison's and Sainsbury's stores in Leek.

III) CLOTHING

10.49 The current patterns of clothing shopping within the wider Leek catchment is summarised in the table below⁵⁶:

DESTINATION	2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH
LEEK TOWN CENTRE	10.2% (£0.6m)	35.1% (£5m)	9.9% (£2.1m)
BUXTON TOWN CENTRE	17.5% (£1.1m)	9% (£1.3m)	1.8% (£0.4m)
MACCLESFIELD	34.1% (£2.1m)	5.4% (£0.8m)	1.7% (£0.4m)
STOKE-ON-TRENT	12.4% (£0.8m)	41.2% (£5.9m)	75.5% (£16.1m)

10.50 The survey results show that whilst Leek is performing relatively well in securing just over a third of clothing / fashion expenditure arising within its immediate catchment (survey zone 7), it is a secondary destination for residents in the other Leek catchments. Stoke-on-Trent is the main sub-regional shopping destination reflecting its higher order fashion offer.

10.51 The survey results identify that there are no inflows to the town from the wider district.

C) BULKY COMPARISON

10.52 The assessment (Tables 4a-c, Appendix 4a) details that the bulky comparison expenditure pot within the immediate Leek catchment (survey zone 7) is currently c. £17.1m; this is projected to rise to c. £22.6m in 2018 and c. £29.5m by 2031 (£12.4m increase over the emerging Local Plan period).

10.53 The bulky comparison expenditure pot within the Leek North catchment (survey zone 6) is projected to rise from c. £7.5m to £11.8m (£4.3m increase). The Leek South catchment (survey zone 8) will increase from c. £28.1m to c. £45.1m.

⁵⁶ Macclesfield and Stoke-on-Trent market shares reflect town centre and retail parks combined.

D COMBINED (BULKY) COMPARISON GOODS MARKET SHARE

10.54 The assessment (Table 10, Appendix 4b) summarises the present town centre market share for bulky comparison goods against the 2006 Study findings:

DESTINATION	2006 STUDY			2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH	LEEK NORTH	LEEK	LEEK SOUTH
LEEK TOWN CENTRE	11.7%	34.9%	10.9%	12.8% (£1m)	48.4% (£8.3m)	11.5% (£3.2m)

10.55 It is clear from the results that there has been a notable increase since 2006 in the overall bulky comparison goods market share which the town centre draws from its immediate catchment (survey zone 7); the re-opening of the former Focus DIY unit as B&M may have actually had a positive impact on shopping patterns.

10.56 In terms of leakage from the Leek catchment zones, given that the 2006 Study did not detail leakage destinations, the table below only highlights current shopping patterns⁵⁷:

DESTINATION	2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH
BUXTON	19% (£1.4m)	0.6% (£0.1m)	-
MACCLESFIELD	33.7% (£2.5m)	6.2% (£1.1m)	3.7% (£1m)
STOKE-ON-TRENT	7.8% (£0.6m)	35.5% (£6.1m)	60.3% (£17m)

10.57 The survey results show that Macclesfield and Stoke, both of which have large retail warehouse parks, draw significant amounts of trade away from the Leek catchment.

INFLOW

10.58 Given the relatively limited mainstream bulky retail offer in Leek as a whole, the survey results identify minor inflows from adjoining catchment zones; the town draws a 4.3% (£1m) market share from the Chedale Outer catchment.

⁵⁷ Destinations detailed below relate to town centre and retail park market shares combined.

OVERALL BULKY COMPARISON GOODS TURNOVER

10.59 The overall town centre bulky comparison turnover is c. £13.9m; the out-of-centre provision in the town draws a further c. £0.5m. The combined bulky goods turnover of the town as a whole is therefore c. £14.5m.

II) INDIVIDUAL (BULKY) COMPARISON GOODS MARKET SHARES

10.60 The town centre market share for bulky comparison goods is summarised below (Tables 5 – 9, Appendix 4b). A comparison against the 2006 Study results is not possible given that the previous study did not specify the individual goods market shares.

LEEK TOWN CENTRE	2013 STUDY		
	LEEK NORTH	LEEK	LEEK SOUTH
FURNITURE & FLOORING	14.4% (£0.4m)	37.1% (£2m)	4.4% (£0.4m)
DIY GOODS	7.6% (£0.1m)	56.2% (£1.8m)	15.9% (£0.8m)
MAJOR HOUSEHOLD APPLIANCES	8.1% (£0.1m)	37% (£0.4m)	4.9% (£0.1m)
LARGE ELECTRICAL GOODS	12.7% (£0.2m)	48.7% (£2.6m)	13.3% (£1.1m)
GARDEN & PETS	15.8% (£0.2m)	72.7% (£1.4m)	22.4% (£0.8m)

10.61 The survey results indicate that the town centre performs relatively well for garden / pets and DIY goods but less well in terms of furniture and major household appliances. This is unsurprising given the difficulties in retailing larger bulky goods such as major household appliances from traditional retail units rather than retail warehousing with dedicated car parking provision. The retail warehouse of the Sainsbury's scheme would have a positive impact on shopping patterns in the locality.

D) OVERALL COMPARISON GOODS MARKET SHARE

10.62 Drawing the individual non-bulky and bulky expenditure pots together, there is an overall total of c. £52.1 m of comparison expenditure arising within the immediate Leek catchment (survey zone 7). The total expenditure pot for the Leek North catchment (survey zone 6) is c. £22.9m whilst in the Leek South catchment it is c. £81.8m

10.63 The assessment (Appendix 4a) shows that Leek retains 55.3% (£28.8m) of the total comparison expenditure arising within the immediate Leek catchment. The retention level is 17.2% (£3.9m) from the Leek North catchment and 17.2% (£14.1m) also from the Leek South catchment.

10.64 Most local residents in the respective Leek catchment zones look towards centres and retail parks in the Stoke-on-Trent conurbation for the main comparison shopping needs.

E) COMPARISON RETAIL CAPACITY REVIEW

10.65 On the basis of forward population and expenditure growth, assuming that the current market share of the town centre is projected forward on a constant basis (i.e. no improvement over time), the capacity assessment identifies the following floorspace requirement⁵⁸ over the emerging Local Plan period to 2031 (Table 4a, Appendix 4c):

	2018	2023	2031
LEEK - BASELINE	875 m ² (gross)	2,315 m ² (gross)	4,785 m ² (gross)

10.66 The assessment identifies that there is a substantive need for new comparison retail development in the latter phases of the emerging Local Plan period in particular. However, this capacity position does not take account of the committed (bulky) comparison retail development (c. 2,300 m² net floorspace) as part of the out-of-centre Sainsbury's scheme which has recently opened.

10.67 When the comparison retail turnover (c. £6.9m) of the schemes is applied to the capacity modelling exercise (Table 4b, Appendix 4c), the capacity projections are as follows:

	2018	2023	2031
LEEK - COMMITMENTS	-2,410 m ² (gross)	-970 m ² (gross)	1,500 m ² (gross)

10.68 On this basis there is no need for the Council to proactively plan for new development in the early to mid-period of the emerging Local Plan; a future update to this study should identify needs for the latter period once committed schemes in Leek and the wider sub-region (Hanley City Centre and M&S at Wolstanton) have come forward.

10.69 Whilst this position is significantly removed from the conclusions of the 2006 district-wide study which identified the potential for the town to achieve a significant increase in comparison market share through the Council proactively planning for quantitative-based expansion of its retail offer, it is our view that this no longer realistic given that:

⁵⁸ Floorspace rounded to nearest 5 square metre increment

- The town has actually increased its comparison retail market share from its wider catchment without the benefit of significant expansion of its existing retail offer.
- National multiple retailers who would be required to deliver a significant quantitative and qualitative based enhancement in the town's comparison retail offer (and profile) are increasingly concentrating in primary (higher order) centres which serve larger catchments. The proximity of the town to the Stoke-on-Trent conurbation makes it unlikely that it would be able to attract the retailers necessary to deliver the step-change in performance.
- There is significant planned quantitative and qualitative improvements to the retail and leisure offer within the Stoke-on-Trent conurbation, principally Hanley city centre (City Central) and M&S at Wolstanton) which further undermine the commercial reality of quantitative based expansion in Leek.

10.70 On this basis, the Council should continue to proactively monitor the performance of the town centre and seek to qualitatively distinguish it in the sub-regional retail hierarchy by emphasising its niche independent offer (i.e. centre for antiques etc.). There is no need for retail warehousing provision given the existing commitment at the Sainsbury's site to the north of the town.

F) LEISURE

10.71 The expenditure capacity pot (2013) within the respective Leek catchment zones for specific leisure activities is set out below⁵⁹.

	LEEK NORTH (ZONE 6)			LEEK (ZONE 7)			LEEK SOUTH (ZONE 8)		
	Av. Spend	Av. Expend.	UK Av. Spend	Av. Spend	Av. Expend.	UK Av. Spend	Av. Spend	Av. Expend.	UK Av. Spend
Restaurants/Cafes	£541	£4.1m	£440	£364	£7.6m	£440	£418	£12.8m	£440
Alcoholic Drinks	£254	£1.9m	£232	£234	£4.9m	£232	£242	£7.4m	£232
Cinema	£17	£0.1m	£18	£15	£0.3m	£18	£15	£0.5m	£18
Theatre / Concerts	£41	£0.3m	£33	£26	£0.5m	£33	£29	£0.9m	£33
Recreation	£145	£1.1m	£117	£88	£1.8m	£117	£97	£3m	£117

⁵⁹ Experian Retail Planner Reports; Expenditure Pot generated by applying spend per head figure to 2013 population

10.72 As the leisure offer in Leek town centre is extremely limited, the survey results identify that most local residents look towards larger centres and destinations in the Stoke-on-Trent conurbation, as follows:

- **CINEMA:** 40.8% of residents from the immediate Leek catchment (zone 7) regularly visit the cinema. A total of 45% from the Leek North (zone 6) and 43.2% from Leek South catchment (zone 8) regularly visit.

The most frequently visited cinema location for residents in the Leek and Leek South catchments is the Odeon at Festival Park (71.1% from zone 7; and 71.7% from zone 8). Residents in the Leek North catchment visit the Cinemas in Macclesfield (23.7%) followed by Cineworld Panswood (17.3%) and Odeon Festival Park (16.3%).

- **INDOOR SPORTS / HEALTH & FITNESS:** the proportion of residents who regularly visit such facilities varies between the respective Leek catchments (12.3% for Leek North; 6.6% for Leek; and 20.1% for Leek South).

Most residents in the Leek North catchment go to Macclesfield leisure centre (41.5%) or the out-of-centre DW Fitness in Macclesfield (22.7%). Residents in the Leek catchment visit Brough Park leisure centre in the town (84%). The Leek South catchment looks more to facilities in Stoke-on-Trent although Brough Park attracts 25.4% of residents.

- **RESTAURANTS:** the proportion of residents who regularly visit such facilities varies between the respective Leek catchments (69.7% for Leek North; 77.7% for Leek; and 70.8% for Leek South).

The main destinations for Leek North residents are Buxton (26.3%) and Macclesfield (24.5%). Leek town centre is the primary destination for 83.3% of residents in the immediate Leek catchment and 41.4% for the Leek South catchment.

- **PUBS/ CLUBS:** the proportion of residents who regularly visit such facilities varies between the respective Leek catchments (63.4% for Leek North; 59.5% for Leek; and 59.1% for Leek South).

As with restaurants, the main destinations for Leek North residents are Buxton (21.7%) and Macclesfield (19.2%). Most residents in the Leek catchment (97.2%) socialise in Leek. The Leek South survey results are more localised with only 30% of residents visiting Leek most regularly. A number of villages (Werrington and Cheddleton) are popular destinations.

10.73 The town centre leisure offer is extremely limited and given its proximity to the larger sub-regional centre of Stoke-on-Trent, it is unlikely to attract the necessary critical mass (commercial demand) to deliver a step change in its offer. The proposed new schemes in Hanley at City Central and the Potteries shopping centre (extension) include new cinema multiplexes.

10.74 It is our view that there is no need for the Council to proactively plan for new leisure development in the town over the emerging plan period. If leisure-based proposals should come forward outside of the plan making process then subject to appropriate NPPF assessment (sequential and impact) there is potential for the Council to support new provision in the town.

11. BIDDULPH

- 11.1 Biddulph is a linear town centre with retail provision focused along the High Street and northwards on to Congleton Road. A large Sainsbury's store opened in late 2010 and has precipitated a significant change in the town centre retail offer with the former Somerfield and Co-Op convenience stores being converted into B&M Bargains and Home Bargains outlets. In addition to the mainstream retailers, there is a mix of smaller local independent shops and services in the town centre.
- 11.2 Outside of the town centre, planning permission was granted⁶⁰ in mid-2008 for a non-food retail park (c. 6,900 m² gross) to the west of the town centre beyond the bypass. Whilst the scheme has not progressed with the planning permission having subsequently lapsed, it remains allocated for non-food retail uses, including a DIY store anchor and up to 10 retail units, in the adopted Town Centre Area Action Plan (AAP).

A) CONVENIENCE

- 11.3 The overall convenience expenditure pot (Table 3, Appendix 2a) within the Biddulph catchment (survey zone 9) is c. £38.2m (2013); this is projected to rise to c. £39.7m in 2018 and c. £45.9m by 2031 (£7.7m increase over re-emerging Local Plan period).

D) MAIN FOOD

- 11.4 The main food expenditure pot (Table 4a, Appendix 2a) for the Biddulph catchment (zone 9) is £28.7m in 2013; this is projected to rise to £34.4m by 2031. The main food shopping patterns (Table 5a, Appendix 2b) identified in the current household survey (2013) are summarised against the 2006 Study results below:

	2006 STUDY	2013 STUDY
DESTINATION / FOODSTORE	BIDDULPH	BIDDULPH
SOMERFIELD	12.6% (£2.6m)	CLOSED
KWIK SAVE	6.3% (£1.3m)	CLOSED
CO-OP	4.3% (£0.9m)	CLOSED
SAINSBURYS (WHARF ROAD)	-	54.5% (£15.6m)

⁶⁰ Application Reference 07/00170/OUT_MJ

- 11.5 As detailed above, the opening of the new Sainsbury's store has had a significant impact on convenience provision within the town centre with three previous (top-up orientated) stores having subsequently closed. The Sainsbury's store has also generated a positive increase in the town centre main food market share (c. 40% increase since 2006).

INFLOW

- 11.6 The Sainsbury's store (as in Biddulph as a whole) serves a relatively discrete catchment with only minimal inflows (1.7% / £0.7m) from the Leek South catchment (zone 8).

OVERALL MAIN FOOD RETENTION

- 11.7 Existing convenience provision within Biddulph retains 55.3% (£15.8m) of main food expenditure arising within its immediate catchment (survey zone 9). There are consequently significant outflows (c. 43%) of main food expenditure from the Biddulph catchment to food stores in Congleton, Kidsgrove, Tunstall and Stoke-on-Trent.

II) TOP-UP FOOD

- 11.8 The top-up expenditure pot (Table 4b, Appendix 2a) in the Biddulph catchment is projected to rise from c. £9.6m in 2013 to £11.5m by 2031.
- 11.9 The top-up food shopping patterns (Table 5b, Appendix 2b) identified in the current household survey (2013) are summarised against the 2006 Study results below:

	2006 STUDY	2013 STUDY
DESTINATION / FOODSTORE	BIDDULPH	BIDDULPH
SOMERFIELD	24.7%	CLOSED
KWIK SAVE	12.7%	CLOSED
CO-OP	7.6%	CLOSED
SAINSBURYS (WHARF ROAD)	-	64.1% (£6.1m)
LOCAL SHOPS TC	22.2%	22.1% (£2.1m)

- 11.10 Overall, despite the significant changes in retailer representation in the town since 2006, the top-up retention level has increased due to the new Sainsbury's store. The market share of local independent shops has remained similar to that identified in the 2006 Study.

INFLOW

11.11 Given the localised nature of top-up shopping, there is no top-up expenditure flowing to convenience provision in Biddulph from other catchment zones in the district; this is the same as the 2006 Study.

OVERALL TOP-UP RETENTION

11.12 The assessment (Table 6a, Appendix 2b) identifies that Biddulph as a whole retains 86.2% (£8.2m) of top-up spend arising within its immediate catchment. Biddulph Moor local centre retains a further 3.2% (£0.3m). The overall borough-wide retention level is therefore 89.4% (£8.5m). Expenditure leakage is therefore extremely negligible (c. 4% / £0.4m to foodstores in Congleton).

III) OVERALL MARKET SHARE [MAIN FOOD AND TOP-UP COMBINED]

11.13 Drawing the main food and top-up market shares together, the assessment (Table 7, Appendix 2b) identifies that Biddulph town centre retains 63% (£24.1m) of convenience expenditure arising within its immediate catchment (survey zone 9). Notwithstanding the Sainsbury's store, the survey identifies that there remains significant outflows (c. 34.9% / £13.3m) of convenience expenditure from the Biddulph catchment to surrounding centres (Congleton and Stoke-on-Trent conurbation).

IV) FOODSTORE PERFORMANCE

11.14 The assessment (Table 8, Appendix 2b) identifies the following trading performance of the main foodstores in Biddulph:

DESTINATION / FOODSTORE	BENCHMARK	SURVEY TOTAL	DIFFERENCE
SAINSBURY'S (Wharf Road)	£21.8m	£22.8m	+£0.9m

11.15 The survey results indicate that the relatively new Sainsbury's store is trading slightly above benchmark at present; this is positive due to its in-centre anchor function. The store is also likely to attract some drive-by trade given its prominent location off Wharf Road and proximity to residential areas to the south of Congleton.

V) CAPACITY REVIEW

11.16 The baseline capacity modelling exercise (Table 16, Appendix 2d), assuming a constant market share and taking account of projected population and expenditure growth, as well as trading efficiency increases, generates the following floorspace requirement⁶¹ over the emerging Local Plan period to 2031:

MAINSTREAM RETAIL ⁶²	2018	2023	2031
BIDDULPH - BASELINE	c. 60 m² (gross)	c. 155 m² (gross)	c. 305 m² (gross)

11.17 As the table highlights, the capacity identified for Biddulph over the emerging plan period is insufficient to support any substantive new convenience retail development.

11.18 Whilst the new Sainsbury's store has addressed the significant quantitative and qualitative deficiencies in the convenience retail offer in Biddulph, the town still only retains c. 55% of main food spend arising within its tightly drawn catchment. There remains significant outflow of main food expenditure to mainstream and deep discount food stores in Congleton and the wider Stoke-on-Trent conurbation (Tunstall, Kidsgrove etc.).

11.19 Whilst there is no overriding quantitative need for a new mainstream food store in the town given the Sainsbury's store anchor, there is potentially a qualitative need in our view for a new deep discount food store in the town so as to provide additional competition and choice for local residents. The closure of the Co-Op and Somerfield stores (converted to discount comparison) within the town centre has reduced local choice and a new deep discount store would provide a genuine alternative for residents.

11.20 The survey results already identify that presently there are main food outflows from the Biddulph catchment to Aldi stores in Congleton (7.4% / £2.1m), Kidsgrove and Tunstall (both 1% / £0.3m). There is consequently potential to achieve a further increase in main food market share above and beyond that achieved by Sainsbury's.

11.21 The Sainsbury's store is currently identified to be trading above benchmark and a new deep discount store, assuming a relatively standard format (c. 1,000 m² net sales), is

⁶¹ Rounded to nearest 5 metre floorspace increments

⁶² Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

unlikely in our view to generate any significant adverse impacts on Sainsbury's due to the potential for a significant proportion of its convenience turnover to be derived through expenditure clawback.

11.22 The Sainsbury's store is however centrally located within the town centre and any new deep discount store would have to be sustainably located so as not to lose any of the linked trips / 'spin-off' benefits that it currently delivers for the wider town centre.

11.23 On this basis, notwithstanding the wider benefits which the in-centre Sainsbury's scheme has delivered, it is our view that there is an economic and sustainability justification (clawback / market share enhancement) for the Council to proactively identify an available and suitable sequentially compliant site through the emerging plan process to accommodate a deep discount foodstore to enhance choice and competition.

B) COMPARISON

11.24 There is a total of £35.2m of non-bulky comparison goods expenditure (Tables 4a-d, Appendix 3a) arising in the Biddulph catchment (survey zone 9). The expenditure pot is projected to rise to £46.3m in 2018 and £59.6m by 2031 (£24.5m increase).

D) COMBINED (NON-BULKY) COMPARISON GOODS MARKET SHARE

11.25 The survey results (Table 10, Appendix 3b) identify that Biddulph town centre, including Sainsbury's, currently retains 22.5% (£7.9m) of the total non-bulky comparison expenditure arising within its immediate catchment (survey zone 9). There are minor inflows (c. £0.5m) from the Leek South catchment.

11.26 The changes in overall comparison market share since 2006 (set out below) shows that the town centre has actually achieved a significant increase in market share due to the Sainsbury's scheme and the subsequent conversion of former convenience units in the town centre (Co-Op and Somerfield) to discount comparison retail outlets (B&M and Home Bargains).

	2006 STUDY	2013 STUDY
DESTINATION / FOODSTORE	BIDDULPH	BIDDULPH
BIDDULPH TOWN CENTRE	5.8%	22.5% (£7.9m)

11.27 In terms of the main (overall) comparison expenditure outflows from the Biddulph catchment, the survey results identify that most local residents look towards provision in the Stoke-on-Trent conurbation for their main comparison shopping needs:

	2013 STUDY
DESTINATION / FOODSTORE	BIDDULPH
CONGLETON	6.8% (£2.4m)
STOKE-ON-TRENT CONURBATION	57.2% (£20.1m)

11.28 The main destination within the Stoke-on-Trent conurbation is Hanley (city centre) which draws an overall 30.8% (£10.8m) market share from the Biddulph catchment. This reflects the higher order sub-regional offer within the city centre; this is likely to be further enhanced by a planned City Central scheme which includes a new department store, 70 new retail units as well as a cinema multiplex and associated food & drink uses.

II) INDIVIDUAL (NON-BULKY) COMPARISON GOODS MARKET SHARES

11.29 The 2006 Study does not detail individual comparison goods shopping patterns. The table below therefore highlights the current market share which the town centre draws from its immediate catchment (survey zone 9).

	2013 STUDY
COMPARISON GOODS	BIDDULPH
PERSONAL GOODS	7.7% (£0.2m)
SMALL DOMESTIC APPLIANCES	53.1% (£2.6m)
CDs / DVDs	34% (£0.4m)
BOOKS & STATIONARY	47.6% (£1m)
GLASSWARE/ TABLEWARE	39.4% (£0.5m)
MEDICAL GOODS	69.5% (£1.7m)
RECREATIONAL GOODS	4.4% (£0.3m)

11.30 The survey results show the town centre performs strongly in relation to everyday comparison items such as medical goods. The relatively low market share for recreational goods reflects the lack of a sports shop within the town centre.

III) CLOTHING

- 11.31 The town centre presently retains 8.7% (£1.2m) of clothing / fashion expenditure arising within its immediate catchment (survey zone 9); this is attributable to the limited offer within the town centre aside from the Sainsbury's store.
- 11.32 As to be expected, the main outflows of clothing expenditure are to the Stoke-on-Trent conurbation (69.3% total) with Hanley (city centre) the most popular destination (47.5% / £6.8m market share from the Biddulph catchment).

C) BULKY COMPARISON

- 11.33 The bulky expenditure pot (Tables 4a-c, Appendix 4a) within the Biddulph catchment (survey zone 9) is currently £18m; this is projected to rise to £23.8m in 2018 and £30.6m by 2031 (emerging Local Plan end date).

D) COMBINED (BULKY) COMPARISON GOODS MARKET SHARE

- 11.34 The assessment (Tables 10a-b, Appendix 4b) details that Biddulph town centre presently retains 18.8% (£3.4m) of bulky goods expenditure arising within its immediate catchment (survey zone 9). The changes in market share since 2006 are summarised below:

	2006 STUDY	2013 STUDY
DESTINATION / FOODSTORE	BIDDULPH	BIDDULPH
BIDDULPH TOWN CENTRE	9.6%	18.8% (£3.4m)

- 11.35 The increase in market share is attributable to the bulky retail offer within the new Sainsbury's store and the B&M / Home Bargains stores (conversions from former convenience stores). In terms of the main outflows from the Biddulph catchment, the survey results identify that most local residents look towards Stoke-on-Trent:

	2013 STUDY
DESTINATION / FOODSTORE	BIDDULPH
CONGLETON	5.8% (£1.1m)
STOKE-ON-TRENT CONURBATION	58% (£10.5m)

11.36 The outflows reflect the higher order retail warehouse offer (Festival Park etc.) in Stoke.

TOTAL BULKY COMPARISON GOODS TURNOVER

11.37 Given that there are no inflows to the Biddulph catchment, the survey results identify that the total bulky comparison turnover of the town centre is c. £3.4m.

II) INDIVIDUAL (BULKY) COMPARISON GOODS MARKET SHARES

11.38 The town centre market share for bulky comparison goods is summarised below (Tables 5-9, Appendix 4b); there are no 2006 Study figures available to enable a comparative assessment to be completed.

	2013 STUDY
BULKY COMPARISON GOODS	BIDDULPH
FURNITURE & FLOORING	6.2% (£0.4m)
DIY GOODS	5.8% (£0.2m)
MAJOR HOUSEHOLD APPLIANCES	30.7% (£0.4m)
LARGE ELECTRICAL GOODS	31.8% (£1.8m)
GARDEN & PETS	31.8% (£0.7m)

11.39 As the table shows, the town centre has an extremely limited market share for DIY and Furniture goods in particular. The relatively positive market shares (c. 30%) for major household and large electrical goods are primarily due to the offer within Sainsbury's.

D) OVERALL COMPARISON GOODS MARKET SHARE

11.40 Drawing the individual non-bulky and bulky expenditure pots together, there is an overall total of c. £28.9 m of comparison expenditure arising within the immediate Biddulph catchment (survey zone 9).

11.41 The assessment (Appendix 5a) shows that Biddulph retains 21.2% (£11.3m) of the total comparison expenditure arising within its immediate catchment.

E) COMPARISON CAPACITY REVIEW

11.42 The baseline capacity modelling exercise (Table 3, Appendix 4c), assuming a constant market share and taking account of projected population and expenditure growth, as well as trading efficiency increases, generates the following floorspace requirement⁶³ over the emerging Local Plan period to 2031:

MAINSIREAM RETAIL ⁶⁴	2018	2023	2031
BIDDULPH - BASELINE	c. 790 m² (gross)	c. 2,085 m² (gross)	c. 4,315 m² (gross)

11.43 As the table highlights, there is substantive capacity for new comparison floorspace in the town in the latter phases of the emerging plan period in particular. However, this capacity is substantially below that identified in the 2006 Study which was based on significant market share uplift and was ultimately translated into a formal site allocation in the adopted Town Centre AAP (Bypass site) for c. 9,000 m² gross of comparison retail.

11.44 Whilst there remains a quantitative and qualitative need for new comparison retail provision in Biddulph, it is our view that the existing adopted AAP site allocation should be revisited given that:

- The town centre market share for comparison retail goods has significantly increased from c. 6% to 22.5% since the 2006 Study.
- The town centre comparison retail offer has improved due to the non-food offer within the Sainsbury's store and the conversion of the former Somerfield and Co-Op convenience stores to discount comparison outlets (B&M and Home Bargains).
- The economic and commercial reality is significantly different to 2006 with comparison retailers in particular continuing to rationalise their portfolio and concentrating on fewer stores which serve larger catchments. Biddulph is a small town within the catchment of larger, higher order retail destinations in the Stoke-on-Trent conurbation.

⁶³ Rounded to nearest 5 metre floorspace increments

⁶⁴ Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

- 11.45 It is recommended that the Council seek to revisit the Bypass site allocation and potentially look at alternative uses. Given that the original planning permission was not implemented on the site it is potentially suggesting that there is limited market demand at present for the quantum of comparison retail development initially proposed via the AAP.
- 11.46 As reported in the convenience capacity assessment, there is a need for a new deep discount foodstore in the Biddulph catchment and the bypass site could potentially be suitable to accommodate such a use as part of a wider mixed-use scheme.
- 11.47 There is no requirement for the Council to proactively identify any alternative sites for new comparison retail development over the early to mid-phases of the emerging Local Plan. A future update to this study should define quantitative need for the latter phase of the plan (post 2018).

F) LEISURE

- 11.48 The expenditure capacity pot (2013) within the Biddulph catchment for specific leisure activities is set out below⁶⁵.

	Average Spend (£)	Available Expenditure (£)	UK Average Spend per person (£)
Restaurants / Cafes	£374	£7.9m	£440
Alcoholic Drinks	£227	£4.8m	£232
Cinema	£14	£0.3m	£18
Theatre / Concerts	£26	£0.5m	£33
Recreation and Sporting	£86	£1.8m	£117

- 11.49 The current limitations of the leisure offer in Biddulph are reflected in the survey results below, which highlight that most local residents travel to Congleton or destinations within the Stoke-on-Trent conurbation:

- **CINEMA:** Only 21.9% of residents in the catchment regularly visit the cinema, which is the lowest proportion of all catchments. The most popular cinema is Odeon, Festival

⁶⁵ Experian Retail Planner Reports; Expenditure Pot generated by applying spend per head figure to 2013 population

Park in Stoke-on-Trent (57.2%). Other notable destinations include the Vue at Newcastle-under-Lyme (28.2%) and Cinemas in Macclesfield (7.8%).

- **INDOOR SPORTS / HEALTH & FITNESS:** a total of 20.5% of local residents in the catchment regularly use gym facilities. The most popular destination is Biddulph Valley Leisure Centre (79.4%).
- **RESTAURANTS AND SOCIALISING:** a total of 65.5% of local residents regularly eat out in restaurants. Numerous destinations were recorded but Biddulph maintained the largest proportion of all locations (29.7%). Other locations include Congleton town centre (24.2%), Newcastle-under-Lyme (7.3%) and Leek (5.4%).
- **PUBS/CLUBS:** In terms of social drinking, 47.9% of residents regularly visit pubs and clubs. The majority remain within Biddulph (60.8%) and just over a fifth visit Congleton (22.3%).

11.50 The town centre leisure offer is extremely limited and given its proximity to Stoke-on-Trent (Festival Park and Hanley, it is unlikely in our view to attract the necessary critical mass to deliver a step change in offer. The new proposed cinema multiplexes as part of the City Central and Potteries shopping centre (extension) schemes would significantly constrain commercial demand.

11.51 As with Leek, it is our view that there is no need for the Council to proactively plan for new leisure development over the emerging plan period. However, if leisure-based proposals should come forward outside of the plan-making process then subject to appropriate NPPF assessment (sequential and impact) there is potential for the Council to support new provision in Biddulph.

12. CHEADLE

12.1 The town centre comprises a traditional High Street with local independent shops and services. A modern Iceland and B&M Bargains unit is located to the rear and is served by extensive surface car parking. To the east of Tape Street at the edge of the town centre is a Morrison's store (conversion from Somerfield). A small Asda store (former Netto) is located further south.

12.2 The leisure offer in the town centre is limited to traditional public houses and restaurants.

A) CONVENIENCE

12.3 The total convenience expenditure pot (Table 3, Appendix 2a) within the immediate Cheadle catchment (survey zone 10) is c. £20.7m (2013); this is projected to rise to £21.7m by 2018 and £25.3m in 2031 (£4.6m increase over emerging plan period). Over the same period, the expenditure pot in the Cheadle Outer catchment (survey zone 11) will rise from c. £47.5m to £55m (£7.5m increase to 2031).

D) MAIN FOOD

12.4 The main food expenditure pot (Table 4a, Appendix 2a) for the Cheadle catchment (zone 10) is c. £15.5m in 2013; this is projected to rise to c. £19m by 2031. The Cheadle Outer catchment (zone 11) will grow from c. £35.6m to c. £41.2m over the same period.

12.5 The main food shopping patterns (Table 5a, Appendix 2b) identified in the current household survey (2013) are summarised against the 2006 Study results below:

DESTINATION / FOODSTORE	2006 STUDY		2013 STUDY	
	CHEADLE	CHEADLE OUTER	CHEADLE	CHEADLE OUTER
ICELAND (TAPE STREET)	-	0.5%	3.5% (£0.5m)	0.8% (£0.2m)
LOCAL SHOPS TC	-	-	0.0% (£0.0m)	0.0% (£0.0m)
ASDA (ASHBOURNE ROAD) (formerly Netto)	3.0%	7.9%	5.9% (£0.9m)	2.8% (£0.9m)
MORRISONS (WELL STREET) (formerly Somerfield)	33.7%	-	55.3% (£8.6m)	24.1% (£8.6m)

12.6 The table shows that the conversion of the former Somerfield store to Morrison's has significantly increased main food expenditure retention in the town from both its

immediate (zone 10) and outer (zone 11) catchments. The Asda store (former Netto) performs a minor main food shopping role.

INFLOW

- 12.7 The edge-of-centre Morrison's store draws 4.1% (£1.8m) of main food expenditure from the Leek South catchment (to the north of Cheadle). There are no inflows from other catchment zones either within or outside of the district.

OVERALL MAIN FOOD RETENTION

- 12.8 The town as a whole retains 65.4% (£10.2m) of main food expenditure arising within its immediate catchment (zone 10). The retention level from the outer catchment (zone 11) decreases to only 27.7% (£9.9m).
- 12.9 There is subsequently notable main food leakage from the Cheadle catchment zones; the main destinations are the Tesco and Aldi stores in southern Stoke-on-Trent (26.1% / £4.1m from Cheadle; 41.7% / £14.9m from Cheadle Outer).

II) TOP-UP FOOD

- 12.10 The top-up food expenditure pot (Table 4b, Appendix 2a) for the Cheadle catchment (zone 10) is c. £5.2m in 2013; this is projected to rise to c. £6.3m by 2031. The Cheadle Outer catchment (zone 11) will grow from c. £11.9m to c. £13.7m over the same period.
- 12.11 The top-up shopping patterns (Table 6a, Appendix 2b) identified in the current household survey (2013) are summarised against the 2006 Study results below:

DESTINATION / FOODSTORE	2006 STUDY		2013 STUDY	
	CHEADLE	CHEADLE OUTER	CHEADLE	CHEADLE OUTER
ICELAND (TAPE STREET)	3.0%	-	7.8% (£0.4m)	4.9% (£0.5m)
LOCAL SHOPS TC	7%	1%	16.6% (£0.8m)	11.0% (£1.3m)
ASDA (ASHBURNER ROAD) (formerly Netto)	7.9%	-	11.7% (£0.6m)	3.8% (£0.4m)
MORRISONS (WELL STREET) (formerly Somerfield)	44.6%	8.8%	47.9% (£2.4m)	27.8% (£3.3m)

- 12.12 The survey results show that overall the town now retains more top-up expenditure from the Cheadle catchment zones than identified in 2006. The increase in the market share secured by local shops in the town centre is particularly positive.

12.13 Outside of the town itself, the survey results identify that 31.3% (£3.7m) of top-up expenditure arising within the Chedale Outer catchment (zone 11) is retained by local centres (Alton, Blythe Bridge, Ipstones and Tean).

INFLOW

12.14 There is extremely limited inflow (c. £0.3m) from the Leek South catchment to existing convenience provision in Chedale.

OVERALL TOP-UP RETENTION

12.15 The town as a whole retains 87.5% (£4.5m) of top-up expenditure arising within its immediate catchment (zone 10). The town's retention level drops to 43.7% (£5.2m) in the Chedale Outer catchment although the overall retention level is 78.9% (£9.4m) once the market share of local centres in the catchment is taken into account.

12.16 Given the relatively high retention levels, there is limited leakage outside of the district; the main destinations are foodstores in southern Stoke-on-Trent (Meir / Longton) and Uttoxeter; this is likely to reflect travel-to-work patterns.

III) OVERALL MARKET SHARE [MAIN FOOD AND TOP-UP COMBINED]

12.17 The assessment (Table 7, Appendix 2b) identifies that Chedale town centre retains 70.9% (£14.7m) of all convenience expenditure arising within its immediate catchment (survey zone 10). The town's overall retention level from the Chedale Outer catchment (zone 11) is only 31.7% (£15.1m).

IV) FOODSTORE PERFORMANCE

12.18 The assessment (Table 8, Appendix 2b) identifies the following trading performance of the main foodstores in Chedale as follows:

DESTINATION / FOODSTORE	BENCHMARK	SURVEY TOTAL	DIFFERENCE
ICELAND (Tape Street)	£4.7m	£2.2m	-£2.4m
ASDA (Ashbourne Road)	£13.9m	£3m	-£10.9m
MORRISON'S (Well Street)	£16.4m	£24.9m	+£8.5m

12.19 As the survey shows, the edge-of-centre Morrison's store (former Somerfield) is performing strongly (c. £8.5m above benchmark). The other mainstream stores in the town are under-performing.

V) CAPACITY REVIEW

12.20 The baseline capacity modelling exercise (Table 18a, Appendix 2d), assuming a constant market share and taking account of projected population and expenditure growth, as well as trading efficiency increases, generates the following floorspace requirement⁶⁶ over the emerging Local Plan period to 2031:

MAINSIREAM RETAIL ⁶⁷	2018	2023	2031
CHEADLE - BASELINE	c. 80 m² (gross)	c. 200 m² (gross)	c. 405 m² (gross)

12.21 As the table highlights, the baseline capacity identified for Cheadle over the emerging plan period is insufficient to support any substantive new convenience retail. This capacity position does however assume that the existing overtrading (c. £8.5m) of the edge-of-centre Morrison's store is re-assigned as to support alternative provision. This alternative scenario generates the following enhanced capacity:

MAINSIREAM RETAIL ⁶⁸	2018	2023	2031
CHEADLE - OVERTRADING	c. 1,085 m² (gross)	c. 1,210 m² (gross)	c. 1,410 m² (gross)

12.22 Whilst quantitative capacity is identified under this hypothetical scenario, it is our view that there is no overriding requirement for the Council to proactively plan for new convenience retail provision in Cheadle during the emerging Local Plan process.

12.23 The conversion of the former Somerfield store to Morrison's on the edge of the town centre has generated a significant increase in main food expenditure retention in both the immediate Cheadle (survey zone 10) and Cheadle Outer (survey zone 11)

⁶⁶ Rounded to nearest 5 metre floorspace increments

⁶⁷ Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

⁶⁸ Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

catchments. The town now retains around two-thirds of main food expenditure arising within its immediate catchment and whilst there continues to be leakage to large foodstores in the south of Stoke-on-Trent (Tesco Meir), it is unlikely in our view that a significant further increase in market share is realistic.

- 12.24 Whilst the existing Morrison's store is identified as overtrading relative to benchmark, the town currently has a balanced convenience offer with the mainstream Morrison's offer complemented by the discount orientated Iceland store and also Asda (former Netto). As both the Iceland and Asda stores are identified to be under-performing relative to expected benchmark, any further new convenience provision in the town could adversely affect future trading potential (i.e. increased competition rather than increasing market share and choice).
- 12.25 Given that Iceland is centrally located and both Asda and Morrison's are accessible edge-of-centre sites which readily promote linked trips with the town centre, identifying an appropriate site in a sequentially inferior location (i.e. out-of-centre location) would generate economic and sustainability concerns (i.e. loss of potential linked trips and decrease in pedestrian activity in and around the town centre).

B) COMPARISON

- 12.26 There is a total of £18.8m of non-bulky comparison goods expenditure (Tables 4a-d, Appendix 3a) arising in the Cheadle catchment (zone 10). The expenditure pot is projected to rise to £25m in 2018 and £32.5m by 2031 (£13.7m increase over emerging Local Plan period). The non-bulky expenditure pot in the Cheadle Outer catchment (zone 11) is projected to rise from £43m in 2013 to £70.3m in 2031 (£27.3m increase).

D) COMBINED COMPARISON GOODS MARKET SHARE

- 12.27 The survey results (Table 13, Appendix 3b) are summarised below against the 2006 Study figures and shows that the town centre market share has actually increased in the intervening period; this may be attributable in part to B&M Bargains occupying the former Kwik Save unit on Tape Street.

DESTINATION / FOODSTORE	2006 STUDY		2013 STUDY	
	CHEADLE	CHEADLE OUTER	CHEADLE	CHEADLE OUTER
CHEADLE TOWN CENTRE	13.7%	4.4%	23% (£4.3m)	7.6% (£3.3m)

12.28 The survey results do however highlight that there is significant comparison expenditure leakage from the Chedale catchment zones to centres outside of the district, as follows:

DESTINATION / FOODSTORE	2013 STUDY	
	CHEADLE	CHEADLE OUTER
STOKE ON-TRENT CONURBATION	62% (£11.7m)	54.6% (£23.5m)
UTTOXETER TOWN CENTRE	4.5% (£0.8m)	6.3% (£2.7m)
DERBY CITY CENTRE	-	8.5% (£3.7m)

12.29 The results reflect the higher order offer within the sub-regional centres of Stoke and Derby which are both easily accessible via the A50.

INFLOW

12.30 Given the limitations of the existing comparison retail offer, the survey results identify that the town centre attracts negligible inflows from surrounding catchment zones.

TOTAL COMPARISON GOODS TURNOVER

12.31 Drawing together the market share which the town centre attracts from catchment zones both within and outside of the district, the study (Table 13, Appendix 3b) identifies that the overall (survey-derived) comparison turnover of the town centre is c. £8.5m.

II) INDIVIDUAL (NON-BULKY) COMPARISON GOODS MARKETSHARES

12.32 The market share which the town centre secures for individual (non-bulky) comparison goods is provided below (Tables 6-12, Appendix 3b).

COMPARISON GOODS	2013 STUDY	
	CHEADLE	CHEADLE OUTER
PERSONAL GOODS	15.8% (£0.3m)	1.1% (£0.1m)
SMALL DOMESTIC APPLIANCES	50.4% (£1.4m)	19.4% (£1.2m)
CDs / DVDs	39% (£0.3m)	12.5% (£0.2m)
BOOKS & STATIONARY	58.1% (£0.6m)	22.4% (£0.6m)
GLASSWARE/ TABLEWARE	40% (£0.3m)	9.3% (£0.1m)
MEDICAL GOODS	85.7% (£1m)	33.2% (£0.9m)
RECREATIONAL GOODS	7.2% (£0.2m)	-

12.33 The survey results show the town centre performs strongly on daily top-up orientated comparison shopping items but less well in terms of other goods given the limitations of its current retail offer.

III) CLOTHING

12.34 The town centre presently retains 5% (£0.4m) of clothing / fashion expenditure arising within its immediate catchment (survey zone 10); the market share in the Cheadle Outer catchment (zone 11) is only 0.9% (£0.1m); the extremely low market shares reflect the limited offer within the town centre.

12.35 The main outflows of clothing expenditure are to the Stoke-on-Trent conurbation (75.6% / £5.8m from Cheadle zone; 57% / £9.5m from Cheadle Outer zone).

C) BULKY COMPARISON

12.36 The assessment (Tables 4a-c, Appendix 4a) details that there is presently c. £10.1m of bulky comparison expenditure arising within the immediate Cheadle catchment (survey zone 10); this is projected to rise to c. £13.4m in 2018 and c. £17.4m by 2031 (£7.3m increase over emerging Local Plan period). The expenditure pot in the Cheadle Outer catchment (survey zone 11) is projected to rise from c. £23.4m to c. £38.2m by 2031 (£14.8m increase).

D) COMBINED (BULKY) COMPARISON GOODS MARKET SHARE

12.37 The current survey (Table 10, Appendix 4b) and the previous 2006 market share analysis are summarised below.

DESTINATION / FOODSTORE	2006 STUDY		2013 STUDY	
	CHEADLE	CHEADLE OUTER	CHEADLE	CHEADLE OUTER
CHEADLE TOWN CENTRE	24%	6.8%	33% (£3.3m)	12.2% (£2.9m)

12.38 It is clear that the town centre market share from its catchment has increased since the 2006 study; this is likely to be attributable to the conversion of the former Kwik Save to B&M Bargain store.

12.39 Given the limitations of its bulky retail offer and the relatively discrete catchment which it serves, there is an extremely limited inflow of expenditure to Cheddle.

12.40 There is however significant comparison expenditure leakage from the Cheddle catchment zones to centres outside of the district, as follows:

DESTINATION / FOODSTORE	2013 STUDY	
	CHEADLE	CHEADLE OUTER
STOKE-ON-TRENT CONURBATION	53.5% (£5.4m)	61.4% (£14.4m)
UTTOXETER TOWN CENTRE	5.7% (£0.6m)	3.3% (£0.8m)
DERBY CITY CENTRE	0.3% (£0.1m)	6.4% (£1.5m)

12.41 The outflows are to be expected given the retail warehouse park offer in Stoke (e.g. B&Q Meir) and Derby in particular.

TOTAL BULKY COMPARISON GOODS TURNOVER

12.42 Drawing together the market share which the town centre attracts from catchment zones both within and outside of the district, the study (Table 10, Appendix 4b) identifies that the overall (survey-derived) comparison turnover of the town centre is c. £6.9m.

II) INDIVIDUAL (BULKY) COMPARISON GOODS MARKET SHARES

12.43 The town centre market share for specific bulky comparison goods from the respective Cheddle catchment zones is summarised below (Tables 5-9, Appendix 4b).

BULKY COMPARISON GOODS	2013 STUDY	
	CHEADLE	CHEADLE OUTER
FURNITURE & FLOORING	37.5% (£1.2m)	6.5% (£0.5m)
DIY GOODS	19.3% (£0.3m)	7.5% (£0.3m)
MAJOR HOUSEHOLD APPLIANCES	35.6% (£0.3m)	35.1% (£0.5m)
LARGE ELECTRICAL GOODS	30.5% (£1m)	16.4% (£1.2m)
GARDEN & PETS	47.5% (£0.5m)	11.4% (£0.4m)

12.44 The survey results show that the town centre performs a reasonable but relatively secondary role in market share terms. The out-of-centre retail warehouse provision in Stoke-on-Trent is the main destination for local residents in the wider Cheddle catchment.

D) OVERALL COMPARISON GOODS MARKET SHARE

- 12.45 Drawing the individual non-bulky and bulky expenditure pots together, there is an overall total of c. £28.9m of comparison expenditure arising within the immediate Cheadle catchment (survey zone 10). The total expenditure pot for the Cheadle Outer catchment (survey zone 11) is c. £66.4m.
- 12.46 The assessment (Appendix 4a) shows that Cheadle retains 26.5% (£7.7m) of the total comparison expenditure arising within its immediate catchment. The retention level is 9.2% (£6.1m) from the Cheadle Outer catchment.
- 12.47 The main comparison shopping destination for local residents is the Stoke-on-Trent conurbation which draws 59.1% (£17.1m) of expenditure arising within the immediate Cheadle catchment (zone 10).

E) COMPARISON CAPACITY REVIEW

- 12.48 On the basis of forward population and expenditure growth, assuming that the current market share of the town centre is projected forward on a constant basis (i.e. no improvement over time), the capacity assessment identifies the following floorspace requirement⁶⁹ over the emerging Local Plan period to 2031 (Table 5, Appendix 4c):

	2018	2023	2031
CHEADLE - BASELINE	235 m² (gross)	615 m² (gross)	1,275 m² (gross)

- 12.49 The assessment identifies that there is insufficient capacity generated over the plan period which requires the Council to proactively plan for new retail development.
- 12.50 Whilst the town centre comparison retail offer is relatively weak, the conversion of the former Kwik Save to B&M Bargains store has generated an improvement in town centre comparison market share from c. 14% in 2006 to 23% at present.
- 12.51 Consistent with the 2006 Study conclusions, it is our view that there is no need for the Council to proactively plan for new comparison retail development in the early to mid-period of the emerging Local Plan; a future update to this study should identify needs for

⁶⁹ Floorspace rounded to nearest 5 square metre increment

the latter period once committed schemes in the wider sub-region (Hanley City Centre and M&S at Wolstanton) have come forward.

F) LEISURE

12.52 The expenditure capacity pot (2013) within the respective Cheadle catchments for specific leisure activities is set out below⁷⁰.

	CHEADLE (ZONE 10)			CHEADLE OUTER (ZONE 11)		
	Av. Spend (£)	Av. Expenditure	UK Av. Spend (£)	Av. Spend (£)	Av. Expenditure	UK Av. Spend (£)
Restaurants/Cafes	£389	£4.2m	£440	£434	£10.6m	£440
Alcoholic Drinks	£235	£2.6m	£232	£245	£6m	£232
Cinema	£16	£0.2m	£18	£15	£0.4m	£18
Theatre / Concerts	£28	£0.3m	£33	£31	£0.8m	£33
Recreation	£93	£1m	£117	£110	£2.7m	£117

12.53 The household survey results identify the following:

- **CINEMA:** 39.9% of residents from the Cheadle catchment (zone 10) and 51% of residents from the Cheadle Outer catchment regularly visit the cinema.

The majority of residents in the immediate Cheadle catchment 10 (67.1%) visit the Cinebowl in Uttoxeter, followed by the Odeon at Festival Park (25.2%). The Odeon at Festival Park is visited by 39.9% of residents from the outer catchment, followed by the Cinebowl in Uttoxeter (37.8%).

- **INDOOR SPORTS / HEALTH & FITNESS:** 11.4% of Cheadle and 27.3% of Cheadle Outer residents frequently go to the gym.

All of the respondents in the Cheadle catchment go to the South Moorlands leisure centre in the town. Destinations in the outer catchment are more varied with 64.4% visiting South Moorlands, 12.4% visiting Moorville Hotel, Wernington and a further 12.4% to Pure Gym in Newcastle.

⁷⁰ Experian Retail Planner Reports; Expenditure Pot generated by applying spend per head figure to 2013 population

- **RESTAURANTS AND SOCIALISING:** 68.5% of residents in the Cheadle and 73.2% in the Cheadle Outer catchment regularly eat out in restaurants.
58.5% of respondents in the Cheadle catchment eat out in the town. Residents in the Cheadle Outer catchment eat out in a variety of towns including Uttoxeter (16.3%), Ashbourne (9.5%), Cheadle (9.4%) and Tean (8.1%).
- **PUBS/ CLUBS:** 56.2% of residents from the Cheadle catchment and 61.7% of residents from Cheadle Outer regularly visit pubs and clubs. Most residents in Cheadle (73.1%) visit the town with a further 11.8% visiting Hanley. Similarly to the restaurant offer, residents in the Cheadle Outer catchment visit a variety of destinations including Hanley (16.2%), Tean (13.1%) and Leek (5.4%).

12.54 The town centre leisure offer is extremely limited and given its proximity and accessibility to the larger centres of Stoke-on-Trent and Derby, it is unlikely in our view to attract the necessary critical mass (commercial demand) to deliver a step change in offer.

12.55 As with the other centres in the district, it is our view that there is no need for the Council to proactively plan for new leisure development in the town over the emerging plan period. If leisure-based proposals should come forward outside of the plan making process then subject to appropriate NPPF compliant assessment (sequential and impact) there is potential for the Council to support new provision.

13. STRATEGIC RECOMMENDATIONS

13.1 The study has been commissioned to assess the future quantitative need for new retail and leisure provision within High Peak and Staffordshire Moorlands. The study is informed by a detailed floorspace survey of the main centres in the study area and a robust household survey exercise in order to provide a comprehensive evidence base for the respective Councils and its regeneration partners to proactively plan for future growth. Recommendations on future needs are provided for each specific centre in the preceding chapters. Strategic Council recommendations are set out below.

PROPOSED COUNCIL RETAIL HIERARCHIES

13.2 We would propose no changes to the hierarchy for Staffordshire Moorlands, as set out in the emerging Local Plan. With respect to High Peak, the emerging Local Plan (policies S2 and CF1) identify Hadfield as a small town centre in the borough-wide retail hierarchy. It is our view however, supported by the survey results, that Hadfield performs an extremely limited (top-up) retail function and is strictly ancillary to nearby Glossop in shopping and service terms. The centre should be identified as a local centre as this would enable the Council to continue to focus retail development within Glossop as the main town centre for the northern part of the borough.

DEVELOPMENT MANAGEMENT

TOWN CENTRE BOUNDARIES

13.3 On the basis of updated (floorspace / fascia) survey fieldwork of the main centres, a series of plans have been prepared (Appendix 6) which identify a series of potential changes (extensions and deletions) to the adopted / emerging Local Plan town centre and retail policy area boundaries for the respective Council to consider so as to consolidate the respective centres.

13.4 With particular respect to Buxton, a primary shopping area (PSA) is identified given that:

- The town centre is relatively large and has separate distinct areas of retailing activity and concentration (Spring Gardens and London Road / Market Place). Defining a geographically coherent primary shopping area (PSA) will enable the Council to apply the sequential approach to future proposals on a more appropriate basis.

- The Spring Gardens shopping centre provides modern retail floorplate configurations; it will be particularly important to protect these modern units for continued retail purposes where appropriate.

FRONTAGE POLICIES

- 13.5 Given that the Government has recently published new guidance supporting the temporary re-use of existing units within town centre locations to non-retailing activities (i.e. residential or wider commercial uses) it is recommended that the respective Councils review proposed frontage policies. Specifically, in light of the recent changes in policy, it is our view that secondary frontage definitions are not required.
- 13.6 However, any frontage policies relating to evening economy uses (Classes A3 – A5 in particular) should be maintained and strengthened where appropriate given the potential social and environmental issues arising from a concentration of these uses.

IMPACT THRESHOLD

- 13.7 NPPF (paragraph 26) confirms that local planning authorities (LPAs) should require an impact assessment for any town centre proposals which are outside of a centre and not in accordance with an up-to-date Local Plan. The ‘default’ nationally set floorspace threshold of 2,500 m² should apply in the absence of any locally set floorspace threshold.
- 13.8 On the basis of our on-site surveys and the quantitative analysis of centre performance, we recommend that the respective Councils should adopt a **minimum local floorspace threshold of 200 m² for assessment**.
- 13.9 The proposed floorspace threshold would be appropriate given that existing retail units within the historic areas of the main town centres are relatively small. There are identified vacancies in prominent locations within the respective centres and it is our view that a larger locally set floorspace threshold would potentially undermine the re-occupation of existing units.
- 13.10 The Council should actively direct new retail uses towards the existing centres unless there is a defined spatial deficiency in provision (i.e. new local centre required to deliver a sustainable residential development). A lower floorspace threshold would therefore consequently enable the Council to make a balanced planning assessment of the likely trading impacts of new provision on smaller centres.