Executive
Summary

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Quantitative Retail Study Update

High Peak Borough Council &
Staffordshire Moorlands District Council

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EXECUTIVE SUMMARY

1.1 GVA was jointly appointed by High Peak and Staffordshire Moorlands Councils in June 2013 to prepare a quantitative retail study. The joint study updates the previous retail study work completed by GVA for both Councils[1]. The scope of the study is to establish current shopping and leisure patterns; town centre floorspace composition; assess future quantitative and qualitative needs; and provide strategic advice on appropriate development strategies for the town centres.

FLOORSPACE SURVEYS

1.2 The current floorspace composition of the main town centres has been established by utilising the latest Experian Goad survey data, updated by on-site GVA surveys to reflect existing adopted town centre (primary) shopping area boundaries. The main summary conclusions of the floorspace surveys are as follows:

HIGH PEAK

CENTRE	CONCLUSIONS
BUXTON	There has been little change in the convenience offer within the town centre since 2009. The number of units and amount of convenience floorspace is broadly comparable with GOAD regional average. The quantum of comparison retail floorspace within the town centre is slightly down on the 2009 Study findings; the number of units and total floorspace is broadly in line with the GOAD regional average. Vacancies have significantly increased since 2009 but the latest GVA survey suggests that the number of vacant units is beginning to decrease; this may in part be attributable to the ongoing regeneration of The Crescent. There are however a couple of vacant units within the Spring Gardens Shopping Centre. Overall, the centre is displaying signs of relative vitality and viability.
GLOSSOP	The convenience retail provision within the town centre has been further complemented by the opening of a new M&S Simply Food store at Howard Town Mill. The floorspace survey finds that the town has significantly more convenience floorspace than the GOAD regional average. The comparison retail offer within the town centre has been significantly enhanced by the Howard Town Mill scheme. If the concentration of provision at Wren Nest (outside of the adopted town centre boundary) is included then the town centre offer is broadly in line with the GOAD regional average in terms of units and floorspace quantum. The level of vacancies within the town centre has remained relatively constant since 2009; the current amount of vacancies within the town centre are actually increased by the Howard Town Mill scheme which has several units which are

[1] Peak Sub-Region Retail and Town Centres Study completed for High Peak BC in February 2009. District-wide Study for Staffs Moorlands completed in November 2006 (additional impact work completed in February 2008 to inform prospective allocations in the emerging Core Strategy and development management decisions).

	available to let at present. Overall, it is considered that the town is displaying signs of vitality and viability.
CHAPEL-EN-LE-FRITH	The convenience and comparison retail offer is relatively small-scale and orientated towards meeting top-up shopping needs. The edge-of-centre Morrison's store performs a notable main food shopping role and acts an anchor for the wider centre (car park etc.). There are limited vacant units within the defined town centre boundaries. The town centre is vital and viable.
NEW MILLS	The town centre performs a predominantly service and top-up based function given its limited retail offer at present (no mainstream foodstore anchor etc.). There are a limited number of vacancies. The town is relatively vital and viable although there are quantitative and qualitative deficiencies in its retail offer.
WHALEY BRIDGE	The town centre is extremely small and this is reflected in a relatively limited retail offer. There are only two vacant units at present and the centre is therefore vital and viable.

STAFFS MOORLANDS

CENTRE	CONCLUSIONS
LEEK	There has been little change in the convenience offer within the town centre since 2006 (significant changes out-of-centre). The number of units and amount of convenience floorspace is slightly below the GOAD regional average. The quantum of comparison retail floorspace within the town centre has decreased since the 2006 Study; the number of units and total floorspace does however remain above the GOAD regional average. Vacancies have remained relatively similar since the 2006 Study and may reflect difficulties in letting small units in secondary areas of the town centre. Overall, the centre is displaying signs of vitality and viability.
CHEADLE	The convenience retail provision within the town centre has decreased since 2006 with the closure of Kwik Save in particular. There does however remain more units and floorspace than the GOAD regional average. The comparison retail offer has been enhanced by the re-occupation of the former Kwik Save unit by B&M Bargains. The total number of units and quantum of comparison floorspace within the town centre has not significantly changed since the 2006 Study. The level of vacancies within the town centre has significantly increased from 7 units back in 2006 to 15 at present. The main vacant units are however relatively small as the quantum of vacant floorspace as a proportion of the overall town centre floorspace is below the GOAD regional average. Overall, notwithstanding the significant increase in vacancies, it is considered that the town is displaying signs of vitality and viability.
BIDDULPH	The town centre has undergone significant change in composition since the 2006 Study. A new Sainsbury's foodstore has opened in the northern part of the town centre. This has prompted the closure of the former Co-Op and Somerfield stores which have subsequently been re-occupied by non-food comparison retailers. The number of vacancies within the town centre has however increased since 2006 from 4 units to 11. The vacancies are however relatively small units as the quantum of vacant floorspace are slightly below the GOAD regional average. The town centre is vital and viable.

RETAIL NEED ASSESSMENT

1.3 The study is informed by a detailed household telephone survey exercise (1,100 surveys across 11 catchment zones) and follows the PPS4 practice guidance[2] by adopting a step-by-step approach to quantify needs across the main centres.

1.4 All catchment zones are defined on the basis of individual postcode sectors, so as to generate population and expenditure data from the *Experian Micromarketer* system. The latest Experian Retail Planner briefing note (v. 10, September 2012) was utilised to provide estimates of expenditure growth, sales efficiency growth and deductions for non-store forms of trading (SFTs).

HIGH PEAK

CENTRE	CONVENIENCE	COMPARISON
BUXTON	The town retains c. 85% of main food spend arising within its immediate catchment; this is a slight increase on the 2009 Study (c. 80%). Whilst the out-of-centre Morrison's store remains the primary main food shopping destination (c. 40%), its market share has significantly decreased from c. 55% in 2009. The decrease is due to the edge-of-centre Aldi increasing its main food market share to c. 25%. The in-centre Waitrose store has also improved its performance and now trades close to benchmark. Whilst Aldi and Morrison's are identified to be overtrading (Morrison's has permission for an extension), the capacity assessment identifies a limited quantitative need for new provision in the early to mid-phase of the emerging Local Plan. Consequently, the study finds that there are no robust quantitative or qualitative grounds (no lack of choice or competition) for the Council to plan for new provision (this diverges from the 2009 Study findings which identified a need).	The town retains c. 45% of comparison (non-bulky) expenditure arising within its catchment; this is down from c. 55% in 2009. The main outflows are to Stockport and Manchester. The bulky retail market share is relatively unchanged (c. 50% retention compared to c. 55% in 2009). Drawing the comparison and bulky market shares together, Buxton retains c. c. 45% of total comparison expenditure arising within its catchment. In terms of forward capacity, there is a relatively limited need identified over the early to mid-phase of the emerging Local Plan. The short term priority should be on re-use of vacant units. The Spring Gardens extension site remains the sequentially preferable location for new retail development.
GLOSSOP	The town's main food market share has decreased from c. 80% in 2009 to c. 72%; this is primarily attributable to the new Tesco Hattersley store and slightly more leakage to mainstream foodstores in Tameside. Whilst the town's overall market share is down, the town centre market share has increased from c. 20% to c. 35% due to the significant improvement in the trading performance of Aldi and the new M&S Simply Food at Howard Town Mill. The improvement in Aldi's main food market share (c. 12% to 25%) has largely been at the expense of the out-of-centre Tesco Wren Nest store (market share down from c. 60% to 37%). Whereas the 2009 Study identified the need for a new	The town centre comparison (non-bulky) market share has increased from 23% in 2009 to 30% from its immediate catchment; the increase is attributable to enhancements in the retail offer at Howard Town Mill. However, there remains significant leakage to large sub-regional centres and retail park destinations in Greater Manchester. The town centre bulky comparison market share from its immediate catchment has also increased from c. 30% to 40% since 2009; this is again due to enhancements in provision in the intervening period. The town centre's overall comparison (non-bulky and bulky combined) market share is 30% with Wren Nest RP securing a further 10%.

[2] PPS4 practice guidance on need, impact and the sequential assessment published in December 2009. A total of 100 surveys per zone are recommended.

	mainstream foodstore in the town to enhance choice and competition, the retail justification is significantly less persuasive given the market share changes that have occurred in the intervening period. Whilst the in-centre Aldi store is identified to be significantly overtrading, the assessment finds that the other stores in the town are performing at or below benchmark. **Consequently, there is no overriding need identified for new convenience retail provision in the town over the emerging Local Plan period.**	**The capacity assessment (constant market share scenario) identifies a relatively limited quantitative need over the early to mid-phase of the emerging Local Plan.** **It is therefore recommended that there is no formal requirement for the Council to proactively plan for new comparison retail provision in Glossop until the latter phases of the emerging Local Plan. The town has recently been subject to substantial quantitative based expansion in terms of Howard Town Mill scheme and there are no overriding deficiencies in terms of retail warehouse provision in the town (Wren Nest RP).**
HIGH PEAK CENTRAL	**The overall main food market share which the main town centres in the catchment retain has decreased from 79% in 2009 to 67.5%.** **The edge-of-centre Morrison's store in Chapel-en-le-Frith has increased its market share from c. 16% to c. 22%. Likewise, the out-of-centre Tesco store in Whaley Bridge has increased from c. 16% to 22%. The Co-Op in New Mills has however fallen from 19% to 9%.** **The capacity assessment identifies, on a constant market share basis, that there is limited quantitative need for new provision across the wider catchment over the emerging plan period.** **However, as per the 2009 Study, this position ignores the spatial deficiency in mainstream foodstore provision in the New Mills locality. Appropriate new convenience provision in New Mills would balance the network of centres in the High Peak Central area and assist in reducing overriding of the existing mainstream foodstores in the catchment.** **Therefore, it is recommended in accordance with NPPF, that the Council should seek to develop / set an appropriate policy to accommodate a new foodstore in the town. If no suitable sites within or on the edge of the town centre can be identified then the Council should seek to establish an appropriate policy for provision to come forward in a well-connected and accessible out-of-centre (less sequentially preferable) location.** **Whilst New Mills should be the first priority for realising new convenience provision, it is recommended that the Council seeks to enhance competition and choice in the wider catchment by identifying an alternative location in the High Peak Central catchment to meet the need identified. In light of the overtrading of the existing Morrison's, Chapel-en-le-Frith is the next priority in locational terms.** **In both quantitative and qualitative terms, a deep discount foodstore would be appropriate. It will however be important to identify a site which can facilitate linked trips given the anchor function (shared car park etc.) of the edge-of-centre Morrison's.**	**The respective towns within the High Peak Central catchment predominantly meet day-to-day top-up shopping and service needs. There is an extremely limited comparison (non-bulky) retail offer with the respective towns all securing below 5% market share from the wider catchment; this is similar to 2009 Study findings. Most local residents visit centres and retail park destinations in Greater Manchester (primarily Stockport).** **The bulky comparison market share is slightly better with Whaley Bridge and New Mills town centres retaining c. 4% of catchment spend and Chapel retaining c. 8%. There is significant leakage to Stockport in particular.** **Drawing together the non-bulky and bulky comparison market shares, the main towns retain c. 15% of overall expenditure arising within the immediate catchment.** **Given that there are two major comparison retail commitments in the catchment (Tesco store extension at Whaley Bridge; and Hog's Yard scheme), the capacity assessment identifies no need for new retail provision over the emerging Local Plan period.**

STAFFS MOORLANDS

CENTRE	CONVENIENCE	COMPARISON
LEEK	There have been significant changes in convenience retail provision in the town since the 2006 Study. A new large out-of-centre Sainsbury's store has opened to the north of the town, the existing out-of-centre Morrison's to the south has been extended whilst the former Netto store has been re-branded as Asda. In light of the changes, the town's main food market share from its surrounding catchment[3] has significantly increased; the market share from the immediate Leek catchment has increased from c. 85% to c. 96%. Whilst Morrison's market share has decreased from c. 55% to 45%, this has not been attributable to the new Sainsbury's store which is poorly performing at present. The main shift has been towards the in-centre Aldi store which has increased its market share from c. 4.5% to c. 19% since 2009. Overall, taking account of the existing convenience provision within the town as a whole (no genuine deficiency in choice and competition), the assessment identifies no need for the Council to proactively plan for new convenience provision in the town over the emerging Local Plan period.	The town centre comparison (non-bulky) market share from its immediate (Leek) catchment has increased from c. 30% in 2006 to c. 55% at present. This increase is not due to any significant change in the quantitative and qualitative offer of the town centre. The main leakage is to higher order destinations (city centre and retail parks) in the Stoke-on-Trent conurbation. The town centre bulky market share has also increased since 2006 from c. 35% to c. 50%. The closure of the out-of-centre Focus DIY unit, which has subsequently re-opened as a B&M Bargains Home store has actually had a minor positive impact on trade. The large retail warehouse parks in Stoke-on-Trent however remain the primary alternative location for local residents. The overall comparison market share (non-bulky and bulky combined) retained by the town centre from its immediate catchment is c. 55%; this is relatively positive given the limitations of the existing comparison retail offer and competition from Stoke-on-Trent. In terms of forward capacity, when the committed comparison (bulky) retail development at the Sainsbury's site is taken into account, the assessment identifies limited need for new comparison retail provision over the short to mid-phase of the emerging Local Plan. There is consequently no need for the Council to proactively identify any sites.
CHEADLE	There have not been any substantive quantitative changes in convenience provision in the town since 2006. The former Somerfield and Netto stores have however changed to Morrison's and Asda respectively. On the basis of the changes, the survey identifies that the town now retains c. 65% of main food expenditure arising within its immediate catchment; this represents a significant increase on the 2006 Study (c. 35%). The edge-of-centre Morrison's store is the main store destination (c. 55% main food market share). The capacity assessment, based on a constant market share basis and taking account of the Morrison's overtrading position, identifies no substantive quantitative capacity for new convenience provision in Cheadle over the emerging Local Plan period.	The town centre comparison retail offer has benefitted to a certain extent from the conversion of the former Kwik Save unit to B&M Bargains. The town centre comparison (non-bulky) market share has increased from c. 14% in 2006 to c. 23%. There does however remain significant leakage to higher order centres and retail park destinations in Stoke-on-Trent. The bulky comparison market share has also increased from 24% in 2006 to 33%. The overall comparison goods market share (non-bulky and bulky combined) is c. 26.5%. In terms of future strategy, the assessment identifies limited quantitative need for new comparison retail in Cheadle over the emerging Local Plan period.
BIDDULPH	The town centre convenience offer has significantly changed since 2006; a new Sainsbury's store has opened within the town centre whilst Co-Op and Somerfield stores have closed and been subsequently occupied by discount comparison retailers. The impact of the Sainsbury's store has been positive in that the town centre main food market share has increased by c. 40% since 2006 to c. 55% retention. This retention level however still generates significant leakage from the Biddulph catchment to centres and individual foodstores (mainstream and deep discounter)	The development of Sainsbury's allied to occupation of the former foodstore units by discount comparison retailers has resulted in significant improvements in the town centre's comparison (non-bulky) market share since 2006. The town centre now retains around a quarter of spend arising within its catchment compared to just c. 6% in 2006. Most local residents (c. 55%) continue to travel to centres and retail park destinations in the Stoke-on-Trent conurbation for their main comparison shopping needs. With respect to bulky goods, for the reasons set out

[3] Leek North, Leek and Leek South catchments

	in the Stoke-on-Trent conurbation. **Whilst the Sainsbury's has addressed the previous significant quantitative deficiencies in new provision, there is a qualitative need for additional competition and choice for local residents. A new deep discount foodstore would further enhance market share (reversing current leakage to such stores) and provide effective choice and competition.** **It is recommended that the Council plan for a new deep discount foodstore in the town. It will however be important that any new provision is well located relative to the town centre so as not to lose any of the linked trip benefits which Sainsbury's presently generates.**	**above, the town centre market share has also increased from c. 10% in 2006 to c. 19%.** **Overall, the town centre market share (non-bulky and bulky combined) retains c. 20% of total comparison retail expenditure arising within its catchment.** **On the basis of the above, the capacity assessment identifies the no significant quantitative need for new provision over the short to mid-phase of the emerging Local Plan. A more substantive capacity (c. 4,300 m² gross) is identified for the latter phase of the emerging Local Plan.** **However, it is recommended within this context that the Council revisits the existing Town Centre AAP allocation of the bypass site (c. 9,000 m² (gross)) in the town given the positive changes in market share since 2006. A mixed-use allocation with less employment use may be particularly appropriate.**

STRATEGIC RECOMMENDATIONS

1.5 The main recommendations are as follows:

- **TOWN CENTRE BOUNDARY DEFINITIONS**; significant changes are proposed for Buxton and Leek town centres in particular. It is also recommended that a primary shopping area (PSA) is specifically defined for Buxton town centre. Minor revisions are proposed for the other town centres to reflect new development or changes in provision.
- **FRONTAGE POLICIES**; taking account of recently published Government guidance on increasing the flexibility for changing uses, existing defined frontages have been reviewed and revisions proposed for each centre. It is recommended that secondary frontages are discontinued. Managing the concentration of evening economy uses (Classes A3 – A5) should be maintained and strengthened where necessary given the potential social (amenity), environmental and viability (blank day-time frontages) issues arising from such uses.
- **IMPACT THRESHOLD**; a minimum local floorspace threshold of 200 m² for assessment is proposed.
- **MONITORING AND MANAGING**; the respective Councils should continue to actively monitor its centres through (amongst others) regular on-site surveys and maintaining schedules of planning commitments.